



REQUEST FOR PROPOSAL

Bid Number: **2021/20**

To Implement, Maintain and
Support the Guidewire
ProducerEngage and PolicyCenter
Modules

Closing Date: 2021-12-06

Closing Time: 12H00 PM

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1 Part 1 - Letter of Invitation

To the Service Provider:

Sasria SOC Limited (Sasria) hereby invites proposals from suitably qualified service providers to Design, Implement, Maintain and Support the Guidewire Producer Engage Portal and Policy Centre for the period of three (3) years.

The service provider will be selected under the procedures described in this Request for Proposal (RFP) document.

The RFP consists of the following documents:

- Part 1 – Letter of Invitation
- Part 2 – Instructions
- Part 3 – RFP Requirements
- Part 4 – Financial Proposal
- Part 5 – Pre-Qualification and Evaluation Criteria
- Part 6 - Required Documents
 - Confidentiality and Non-disclosure Agreement (Annexure A);
 - Acceptance of Bid Conditions (Annexure B);
 - Invitation to Bid (SBD 1);
 - Tax Clearance Certificate Requirements (SBD 2);
 - Pricing Schedule (SBD 3.3 Professional Service);
 - Declaration of Interest (SBD 4);
 - Preference Points Claims Form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1);
 - Declaration Certificate for Local Production and Content (SBD 6.2)
 - Contract Form – Rendering of Goods/ Works SBD 7.1 (or 7.2 for Services);
 - Declaration of Bidder's Past SCM Practices (SBD 8); and
 - Certificate of Independent Bid Determination (SBD 9).

Note: Failure to provide any one of the documents required in Part 6 may lead to an immediate disqualification of the service provider from the tender process.

In submitting any information or documentation requested above or any other information that may be requested pursuant to this RFP, you are consenting to the processing by Sasria or its stakeholders of your personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder ("POPI Act"). Further, you declare that you have obtained all consents required by the POPI Act or any other law applicable. Thus, you hereby indemnify Sasria against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information that you submit.

2 Part 2 - Instructions

2.1 Sasria

Sasria SOC Ltd (Sasria) is the only short-term insurer that provides special risk cover to all individuals, government entities and businesses that own assets in South Africa. This is a unique cover against risks such as civil commotion, public disorder, strikes, riots and terrorism, making South Africa one of the few countries in the world that provide this insurance, particularly at affordable premiums.

As a state-owned entity, Sasria has a legislative mandate that governs day-to-day business operations and a broader strategic mandate to make a positive contribution to transformation within the Insurance industry in South Africa. Sasria's core business is the provision of special risk short-term insurance cover to businesses, Government entities and individuals.

The Government of the Republic of South Africa, and specifically the National Treasury through the Minister of Finance, is the sole shareholder of Sasria. As such, the company must comply with several legal and regulatory requirements.

Bidders are encouraged to review Sasria's latest Integrated Report, available on the website, to get a better understanding of its business operations and functions.

2.2 Contractual commitment

No commitment of any kind, contractual or otherwise shall exist unless and until a formal written agreement has been executed by or on behalf of Sasria. Any notification of preferred bidder status by Sasria shall not give rise to any enforceable rights by the Bidder. Sasria may cancel this RFP any time prior to the formal written agreement being executed by or on behalf of Sasria.

Sasria reserves the right at its sole discretion, and at any time, to amend, deviate from, postpone, discontinue or terminate the transaction/procurement process without incurring any liability whatsoever to any other party.

Sasria reserves the right not to award this tender to the highest ranked or highest scoring Bidder, as it needs to align its procurement practices to governance practices that are in line with its own growth path. These may include but are not limited to: driving socio-economic development objectives that are enshrined in various government policies.

2.3 Confidentiality

All bidders to this RFP will be required to sign the confidentiality and non-disclosure agreement outlined on Annexure A in this document.

2.4 Submission Format (Returnable Schedules)

Bidders are required to submit a comprehensively detailed bid responses in accordance with the submission format specified below (each schedule must be clearly marked):2.4.1

2.4.1 Schedule 1:

- Executive Summary (explaining how you understand the requirements of this RFP, summary of your proposed solution and the summary of your experience relevant to the requirements of this RFP)
- Annexure B of this RFP document (See Part 6) (duly completed and signed)

2.4.2 Schedule 2

- All documents (except Annexure B) listed on Part 6 of this RFP Document (duly completed and signed);
CSD number to verify tax compliance Valid B-BBEE verification certificate indicating the contribution level of the bidding entity. An Exempted Micro Enterprises (EME) with an annual turnover less than R10 million, is only required to obtain a sworn affidavit confirming the annual total revenue and level of black ownership. A Qualifying Small Enterprise (QSE) that has 51% or more black beneficiaries may obtain a sworn affidavit confirming the annual total revenue and level of black ownership

Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).
- Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable).

2.4.3 Schedule 3:

- Technical Proposal in line with the Technical Evaluation Criteria in Part 5 of this RFP document.

2.4.4 Schedule 4:

- Financial/ Price Proposal in line with Part 4 of this RFP document.

2.5 Submission of Proposals

The closing date and time for the submission of bids is 06 December 2021 at 12h00 pm. Bidders should click on this link <https://procurement.sasria.co.za/> to be able to register on the Sasria' Online Tender Portal on or before the closing date and time in order to submit their proposals. Bidders should follow the system prompts and submit all schedules to the Online Tender Portal. All correspondence will be done via the Online Tender Portal. Should bidders not be able to register, they should send the email to Procurement@sasria.co.za for assistance.

Hand delivered, posted, emailed or faxed proposals will NOT be accepted.

Late bids will not be accepted or considered

2.6 Queries and clarifications

All communication and requests for information required of any kind must be addressed in writing to procurement@sasria.co.za by no later than 23 November 2021.

Additional information may be provided at Sasria's discretion, who reserves the right to provide the same information to all other interested parties, should this enhance the submission. The bidder acknowledges that it will have no claim against Sasria on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

The enquiries will be consolidated, and Sasria will issue one response and such response will be posted, within two days after the last day of enquiries, onto the Sasria website (www.sasria.co.za) under tenders i.e. next to the same RFP document.

2.7 Automatic Disqualification

Sasria reserves the right to disqualify any bidder which has done any one or more of the following, and such disqualification may take place without prior notice to the offending bidder:

- failed to provide proof that they are tax compliant with SARS;
- submitted incomplete information and documentation according to the requirements of this RFP document;
- submitted information that is fraudulent, factually untrue or inaccurate information;
- received information not available to other potential bidders through fraudulent means;
- failed to comply with mandatory requirements if stipulated in the RFP document;
- misrepresented or altered material information in whatever way or manner;
- promised, offered or made gifts, benefits to any Sasria employee;
- canvassed, lobbied in order to gain unfair advantage;
- committed fraudulent acts; and
- acted dishonestly and/or in bad faith etc.

2.8 Sasria's Rights

Sasria reserves the right to:

- Amend any bid conditions, bid validity period, RFP specifications, or extend the bid closing date, all before the bid closing date. Such amendments will be posted on the Sasria's website under the relevant tender information. All prospective bidders should therefore ensure that they visit the website regularly before they submit their bid

response to ensure that they are kept updated on any amendments in this regard.

- Award this bid as a whole or in part or not make an award at all.
- Award this bid to more than one bidder.
- Negotiate with all or some of the shortlisted bidders.
- Not accept the lowest priced bid or award the bid to a bidder other than the highest scoring bidder.
- Conduct site visits at bidder's offices and / or at client sites if so required.
- Request any relevant information and/ or documents to verify or clarify information supplied in the bid response in relation, but not limited, to the structure of the bidding entity, bidder's capacity, bidder's B-BBEE profile, proposed solution, proposed timelines etc.
- By submitting a bid, the bidder hereby gives consent to Sasria to conduct any form of vetting or due diligence on the bidding entity and/ or any of its directors / trustees / shareholders / members.

2.9 Proposal costs

All costs and expenses incurred by the bidder relating to their participation in, and preparation of this proposal process shall be borne by the bidder exclusively.

2.10 Validity period

The proposals should remain valid for at least 150 days after the closing date.

2.11 Important dates

Activity	Date
Release of RFP	16 November 2021
Last day of enquiries	23 November 2021
Responses to enquiries	24 November 2021
Closing date for submission of proposals	06 December 2021

Sasria reserves the right to amend any date specified above. Any changes will be communicated to the interested parties.

2.12 Transformation

Sasria promotes transformation within the financial services sector of the South African economy and as such, bidders are encouraged to partner with majority black owned entities (51% black owned and controlled). Such partnerships may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

3 Part 3 - RFP Requirements

3.1 Background Information

Sasria seeks to appoint a service provider to implement, maintain and support Guidewire Producer Engage portal and Policy Centre. Sasria have recently implemented Guidewire Claim Centre, ProducerEngage, Contact Manager and Vendor Engage modules in support of the claims processes and are now looking into supporting the underwriting processes in the customer (distribution channel) journey.

Sasria mainly manages the insurance process through a network of agent (insurance) companies that sell Sasria cover, administer the policy and play a major role when a claim is reported by facilitating the process until finalisation. This process is largely managed through the Customer Web Portal (CWP) and emails.

The current CWP tool is Sasria bespoke with a number of unresolvable issues and is unable to meet the emerging business and customer needs. The tool is utilising the aged and unupgradable operating system, with poor development standards, and incohesive architecture. Sasria has received several complaints from internal and external users highlighting their dissatisfaction with the functionality and usability of CWP and the Rate Calculator. The rates calculator is the vital component which is supposed to enable our agents and brokers with ease of calculating premium when selling our products.

It is important to note that Sasria is not heavy on policy management and underwriting as this function is delegated to agent companies. Business requires an underwriting solution that can support Sasria's business model and offer the Underwriting department capability to manage its operations.

The process seeks to introduce a scalable digital solution for the underwriting department and aid to resolve the current system challenges and improve our overall customer experience.

3.1.1 Business Driver

The driver for Sasria Agent Portal project comes from Sasria's five-year strategy for the period beyond 2020 – a renewed focus on **customer centricity**, digitalisation, sustainability, and social impact to provide superior service, relevant and appropriate products.

3.1.2 Business Problems

CWP	Rate Calculator
Unavailability of reports	Incorrect premium calculations.
Inefficient group scheme management.	The online calculator is not user friendly.
The mapping of coupon numbers not allocated to the correct Agent company.	The calculator does not save the calculations performed.
No workflow approval notifications	Incomplete quotations which do not include quotation numbers.

CWP was developed using C# in a 2007 environment, could not be migrated to 2013 environment and the two environments were not compatible with each other.	The current Rates Calculator does not keep quotation versions.
The underwriting capability is non-existent.	Premium volumes cannot be monitored.
System not integrating with any of the current applications.	Lack of integration between the current Rates Calculator and CWP, therefore users are forced to quote from one application and create coupons on the other.
Extensive requirement for access and password management.	No configuration access to change rates when needed.

3.1.3 Business Needs

Sasria requires an integrated management of insurance operations and a centralised point of technology contact with the distribution channel. There is critical need to effectively and efficiently manage Sasria rates, facilitate product development, underwriting Excess of Loss policies, facilitate group schemes management and issuing of coupons. The detailed business requirements are listed in Section 11 below.

3.1.4 Business Opportunities

By implementing Guidewire Policy Centre and Producer Engage, the organisation stands to benefit from the following:

- Ease the administration of Sasria coupon/ policies.
- Ensure the entire market applies the same rates.
- Ensure that policy rules and regulation are adhered to when issuing Sasria cover.
- Sasria departments will no longer rely on agent companies for reports.
- Minimise premium leakage.
- Integration of policy administration and calculation of rates.
- Provide capability to support business strategy for new products.

3.2 Scope

3.2.1 Integration Requirements

Integration Requirements		
FRI1	SharePoint	Integration with SharePoint Online for creation, storage, and control of documents.
FRI2	Sasria Website	Agent Companies should be able to access the solution by clicking on the link provided on Sasria website.

FRI3	Claim Centre	The solution should be able to integrate with Claim Centre for claims tracking.
FRI4	Policy Centre	The solution should be able to integrate with Policy Centre for management of policies.
FRI5	Billing Centre	The solution should be able to integrate with Billing Centre for billing management. The issued coupons for the month must filter on the annexure 1 report for billing purposes. The solution must include all classes of business and remove applicable commissions.
FRI6	Microsoft Dynamics 365: Customer Engagement	The solution should be able to integrate with D365: CE for Agent Company onboarding. These includes getting requests via Sasria website from potential Agent Companies to become Sasria Agents and responding to the requests via the website.
		The solution should be able to integrate with D365: CE for Agent company details/information.
FRI7	Microsoft Dynamics 365: Finance and Operations	The solution should integrate with Microsoft D365: F&O for Excess of Loss management and any new product requirements from the new distribution channel.
FRI8	Microsoft Outlook	The solution should integrate with Microsoft Outlook for inbound and outbound email communication.
FRI9	Single Sign-on	System user identities must automatically be linked to Active Directory to allow single sign on to the system.
FRI10	Power BI	The solution should integrate with Power BI for reporting purposes. Reporting requirements will be provided by Sasria.
FRI11	Azure Data Warehouse	The system should be able to ingest data into the Datawarehouse
FRI11	Telephony system	The linking of call recordings to customer correspondence profile

The Guidewire Producer Engage and Policy Centre High Level Requirements (refer to Annexure E for detailed requirements)

- a. Issuing of coupons
- b. Registration of group schemes
- c. Submission of annexures and
- d. Submission of claims
- e. Sasria rate calculation

- f. Onboarding portal
- g. Workflow management
- h. Integration with internal systems
- i. Customised reporting and analytics

3.3 Scope of Work

While Sasria recognises that bidders may propose their own development lifecycle methodologies, Sasria expects that the work described in this RFP will include, but not be limited to, the following basic services:

Objective 1 Develop System Design	
Deliverable 1.1	System Design
Purpose	To document how the Guidewire ProducerEngage and PolicyCenter modules will be designed to meet the functional and technical requirements.
Content	A document that effectively describes the entire system design, including decisions made and the logic behind those decisions including: • System Security Plan • Information Security Plan • Integration Plan • Software and Hardware requirements

Objective 2: Configure and Program Guidewire ProducerEngage and PolicyCenter	
Deliverable 2.1	Configured Guidewire Producer Engage and Policy Centre modules
Purpose	To match the products as closely as possible to the design specified in the System Design developed above.
Content	A fully functioning integrated system that leverages the functions and features of the selected software products to the fullest extent possible.
Deliverable 2.2	Customised Guidewire Producer Engage and Policy Centre modules
Purpose	To extend through software programming the functions and features of the native Guidewire software products in order to fully implement the design specified in the System Design developed above.
Content	A completed Guidewire Producer Engage and Policy Centre modules ready for productive use.

Objective 3: Perform testing	
Deliverable 3.1	Test Plan and Scripts
Purpose	To define the approach for testing of the Guidewire Producer Engage and Policy Centre modules.
Content	A document that: a. Defines the overall testing process, including unit, system integration, system acceptance, field, and performance testing b. Includes all necessary test scripts – these will be developed by the Contractor c. Defines a mechanism for tracking test performance and completion d. Defines procedures for managing the test environment, including change control e. Defines entrance and exit criteria for each round of testing
Deliverable 3.2	Tested Software
Purpose	To ensure the modules configured are ready for business use. Sasria will participate in user acceptance testing sufficient to ensure that all major functions and components of the system are performing acceptably.
Content	Software certified by Sasria as functionally ready for use.
Deliverable 3.3	Volume/Stress Testing Report
Purpose	To conduct volume/stress testing and document the results of performance testing.
Content	Completed volume/stress testing and a document that: a. Describes the overall volume/stress testing process. b. Documents the volume/stress testing results. c. Identifies recommendations for optimising system performance. d. Documents improvements made to tune the system for optimal performance

Objective 4: Develop Reports, Queries, and Analytics	
Deliverable 4.1	Standard Reports
Purpose	To develop a set of standard reports to meet business needs.
Content	Tested reports to be generated in production.
Deliverable 4.2	Standard Queries
Purpose	To develop a set of standard queries, including analytics, which can be invoked to meet business requirements.
Content	Tested queries to be used in production.
Deliverable 4.3	Dashboards

Purpose	To create a set of dashboards, tailored to role, level, or individual, which provide easy access to appropriate standard reports and queries.
Content	Dashboards with reports and queries

Objective 5: Conduct training	
Deliverable 5.1	Training Strategy
Purpose	To define the approach and schedule for end-user and technical systems operation/configuration/administration training.
Content	A document that: - Identifies Sasria attendees - Provides a training schedule - Provides a mechanism for tracking completion of training - Number of sessions
Deliverable 5.2	Training
Purpose	To train Sasria employees on system use and to train technical staff on Guidewire Producer Engage and Policy Centre modules administration and configuration for completion of knowledge transfer. Trained users must be assessed to evaluate understanding.
Content	The delivery of user and technical systems operation training Training assessment

Objective 6: Provide go-live support and stabilisation services	
Deliverable 6.1	Go-Live and Stabilisation Plan
Purpose	To define the steps necessary for a successful launch and subsequent stabilisation of the platform.
Content	A detailed task plan, including a readiness checklist and resource assignments, to support moving the modules into production.
Deliverable 6.2	Business User Manual
Purpose	To guide Sasria employees with the functionality and contents of the platform
Content	Online documentation that supports Sasria-specific business use of the system and provides guidance to end users in correct execution of user-performed application maintenance and configuration activities. Includes site-specific customisations and usage considerations.
Deliverable 6.3	Production Support Plan

Purpose	To guide Sasria technical and operations staff in supporting the Guidewire Producer Engage and Policy Centre analytics platform in production.
Content	Online documentation that provides complete, detailed, accurate specifications for the modules and supports Sasria technical and operations staff in operating and maintaining the platform, including routine system maintenance activities and schedules and techniques for trouble-shooting problems.
Deliverable 6.4	Stabilisation Services
Purpose	To provide Sasria with support services for a defined period of time subsequent to Go-Live, including the identification and resolution of malfunctions and operational issues.
Content	Stabilisation services, commencing at Go-Live and terminating at Services Final Acceptance.
Deliverable 6.5	System Support
Purpose	To provide Sasria ongoing system support for the first three years the Guidewire Producer Engage and Policy Centre modules are in production. Services are to include troubleshooting and problem resolution; assisting with software and hardware upgrades; and developing and implementing enhancements as requested by Sasria.
Content	Support services as defined in a Service Level Agreement.

3.4 Expected inputs from bidder

- Full solution architecture
- Infrastructure requirements - the appointed bidder will be responsible for all activities required including the preparations, installations, configurations, and all set ups to ensure infrastructures' operational state.
- High level profiles of the implementation team.
- Implementation methodology and required resources (the technical and support project team).

Note: All the Guidewire product are on-premise (Nutanix platform).

Below is the current Guidewire claims centre collaboration diagram

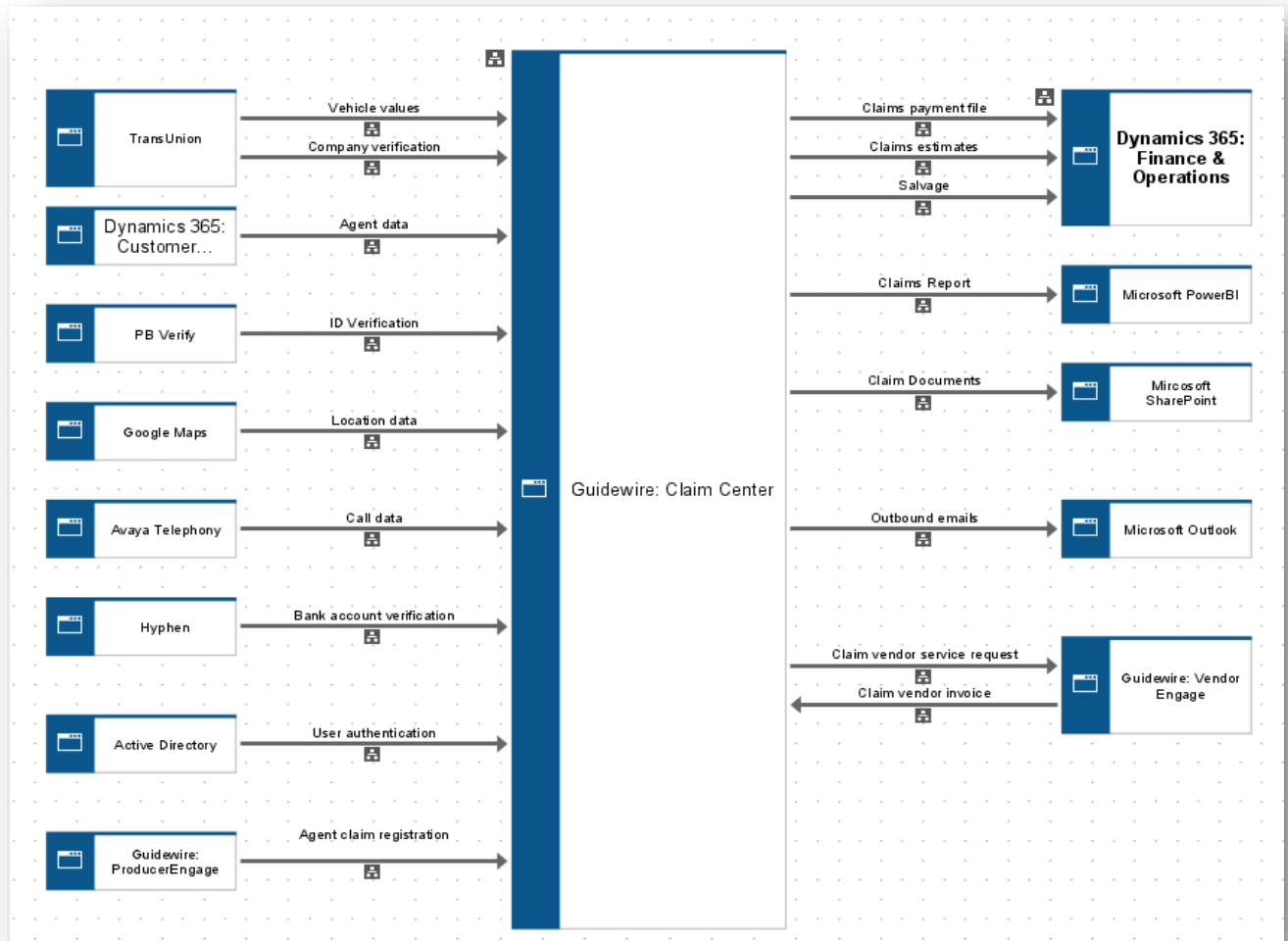


FIGURE 1: GUIDEWIRE COLLABORATION DIAGRAM

3.5 Contract Duration

The appointed service providers will be required to start immediately, after signing the contract, with the implementation of the system. The appointed bidder will be required to provide system maintenance and support for a period of three (3) years.

4 Part 4 - Financial Proposal

- 1 Bidders are required to provide a detailed and comprehensive price proposal i.e., all costs associated with the Bidder's proposal must be clearly specified and included in the Total Bid Price.
- 2 All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).

Is the proposed bid price linked to the exchange rate?	Yes	No
<i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i>		

3

Payments will be linked to specified deliverables after such deliverables have been approved by Sasria.	Comply	Not Comply
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4

Sasria reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 03 of 2017/2018: Cost Containment Measures which took effect from 15 May 2017, where relevant.	Comply	Not Comply
The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.		
Substantiate / Comments		

5 PRICING MODEL

5.1 Software Licences

Description	Qty	Unit Price (VAT Excl.)	Annual Cost			Total Cost (VAT Excl.)
			Year 1	Year 2	Year 3	
Software License	8 users					
Sub-total (5.1) (VAT Excl.)						

Note: The price proposal must be inclusive of all software related costs. The bidder must provide a detailed breakdown of all elements which make up the cost of the proposed software e.g. software license structure, services included in the license, number licenses etc.

5.2 Implementation Costs

Activity/ Deliverable	Resource(s)	Rate/ Hour per resource	Number of hours	Total Cost (VAT Excl.)
System Design				
Customisation - development/ configuration				
Testing				
Integration				
Go-Live Support				
Training (5 end users and 3 admin users)				
Other Costs (if applicable)				

Activity/ Deliverable	Resource(s)	Rate/ Hour per resource	Number of hours	Total Cost (VAT Excl.)
Disbursements				
Sub-Total (5.2) (VAT Excl.)				

5.3 Post-Implementation Support

Sasria requires a cost on system support and maintenance.

Activity/ Deliverable		Estimated Number of hours	Rate per hour (VAT Excl.)	Annual Cost (VAT Excl.)
Post-implementation support	Year 1	1200		
	Year 2	1200		
	Year 3	1200		
Sub-Total (5.3) (VAT Excl.)				

5.4 Total Bid Price

Activity/ Deliverable	Amount
Sub-Total (5.1) (VAT Excl.)	
Sub-Total (5.2) (VAT Excl.)	
Sub-Total (5.3) (VAT Excl.)	
Total Bid Price (VAT Excl.)	

Price Declaration Form

Dear Sir,

Having read through and examined the requirements of this RFP No. **2021/20**, and its related conditions, we offer to Design, Implement, Maintain and Support the Guidewire Producer Engage and Policy Centre Modules as outlined in the scope of work, for the following total amount:

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

We confirm that this price covers all activities associated with the scope of work, as called for in the RFP document. We confirm that Sasria will incur no additional costs whatsoever, over and above this amount in connection with the delivery of the required services.

We undertake to hold this offer open for acceptance for a period of 150 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence the scope of work when required to do so by the Sasria.

We understand that you are not bound to accept the lowest or any offer, and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance, not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF:

COMPANY NAME

Tel No

Fax No

Cell No

5 Part 5: Qualification and Evaluation Criteria

5.1 Evaluation of proposals

The purpose of the RFP is to obtain a complete set of salient information pertaining to the bidding parties. The proposals will accordingly be used to evaluate whether, at Sasria's discretion, an interested party qualifies to proceed to the next stage of this procurement process. All bidding parties will be advised in writing of Sasria's decision, which will be final. No correspondence will be entered into pertaining to the evaluation process, the decisions taken and reasons thereof.

5.2 Prequalifying Criteria

In terms of Regulation 4 of the 2017 PPPFA Regulations, Sasria requires that bidders meet the following pre-qualification criteria:

- The bidder must have a minimum B-BBEE contributor status level of 4 or better.

Note: Sasria will only consider a bid if the bidder meets these pre-qualification criteria. Where a bidder fails to meet these pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation. The bidder must have a valid B-BBEE verification document (Affidavit or Certificate) in order to be considered in this regard.

5.3 Evaluation Criteria

5.1.1 Level 1- Governance Verification

The evaluation during this stage is to review bid responses for purposes of assessing compliance with RFP requirements, which requirements include the following:

- Proof of registration with CSD confirming tax compliance status as referenced in Part 2 above;
- Valid B-BBEE verification as referenced in Part 2 above;
- Duly completed Standard Bidding Documents and other requirements, in line with Part 6 of this RFP;
- Technical Proposal in line with the Technical Evaluation Criteria in Part 5 of this RFP document
- Financial/ Price Proposal in line with Part 4 of this RFP document

Note: Failure to comply with the requirements assessed in Level 1 (governance), may lead to disqualification of bids.

5.1.2 Level 2- Technical Evaluation

The evaluation during this level is based on technical criteria (Functionality). The technical evaluation will be conducted in 2 phases, as stipulated below:

As part of the submissions, all bidders are requested to include the hardware requirements to assist Sasria to prepare for the proposed solution.

Phase 1: Mandatory Technical Requirements

The below table consist of the technical requirements and the bidders are required to respond by YES/NO on the supplied column. All bid responses that do not meet the Mandatory Technical Requirements will be disqualified and will not be considered for further evaluation on the Technical Requirements. The Mandatory Technical Requirements are as follows:

Requirement		Response YES/NO
Lead Service Provider		
a.	The bidder must have provided lead services in designing and implementing the Guidewire Producer Engage and Policy Centre modules for at least 1 organisation of comparable size and complexity to the Sasria within the last three years? Complete Annexure D (Bidder's Experience)	
License		
b.	The bidder must be accredited or licensed to supply, implement, and support the Guidewire? NB: The bidder must submit documentary proof from the product owner that the bidder is an accredited or licensed Guidewire supplier.	
Solution Architecture		
c.	The bidder must provide the Solution Architecture for the proposed solution indicating the physical solution interface, component software and infrastructure graphics.	

Phase 2 –Technical Evaluation Criteria

Only bidders achieving a minimum score of 70 points will be evaluated further in the next stage. The bidder's proposal should respond comprehensively to the technical evaluation criteria. The technical evaluation criteria is set out below:

Item	Criteria	Points
1	The bidder must specify how Sasria's business requirements will be met in Annexure E (Requirements List). The proposal must also include the full details of the solution capabilities. The points will be allocated as follows: 5 = 40 points equivalent to (100 %) 4 = 32 points equivalent to (80 %) 3= 28 points equivalent to (70%) 2= 12 points equivalent to (30 %) 1= 0 points equivalent to (0%)	40
2	The bidder must provide the detailed project approach document clarifying the implementation approach and specify the below. Complete Annexure F	30

Item	Criteria	Points
	(Guidewire Producer Engage and Policy Centre Modules Project Approach Document - PAD) - Detailed PAD completed, bidder demonstrates understanding of the project deliverables and provided a practical project plan and management strategies above expectation = 30 points - Detailed PAD completed, bidder demonstrates understanding of the project deliverables and provided a practical project plan and management strategies = 24 points - Detailed PAD completed, bidder demonstrates limited understanding of the project deliverables and provided a practical project plan and management strategies = 21 points - PAD partially completed, bidder demonstrates limited understanding of the project deliverables and provided a practical project plan = 9 points - Project approach document not submitted = 0 points	
3	The bidder must have proven experience in the implementation of the Guidewire Producer Engage and Policy Centre Modules. The bidder must provide reference letters from clients where they have implemented Guidewire Producer Engage and Policy Centre Modules. Letters must be on the client's letterhead, signed and include a contactable telephone number and Sasria will contact these companies for reference. - More than 3 letters = 30 points 3 letters = 24 points 2 letters = 21 points 1 letter = 9 points - No letter = 0 points	30
Total		100

Note: Bidders that achieved a minimum score of 70 points in technical evaluation (Level 2), will be considered for the next level (Level 3) of the evaluation process i.e. Price and BEE.

5.1.3 Level 3 – Preference Point System

Bidders that achieved a minimum score of 70 points in phase 2 will progress to this level (level 3) and will be evaluated in accordance with the preference point system.

The following preference points system will be used for this tender: 80/20

CRITERIA	POINTS
Price	80
B-BBEE	20
TOTAL	100 points

6 Part 6 – Required Documents

STANDARD BIDDING DOCUMENTS

In addition to the Annexures listed below, the following documents must be completed, signed and submitted together with the bid response:

- Invitation to Bid (SBD 1);
- Declaration of Interest (SBD 4);
- Preference Points Claims Form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1);
- Declaration of Bidder's Past SCM Practices (SBD 8); and
- Certificate of Independent Bid Determination (SBD 9).

Note: Failure to submit these documents may lead to disqualification of the bid.

7 ANNEXURE A: NON-DISCLOSURE AGREEMENT

MEMORANDUM OF AGREEMENT

Entered into between:

Sasria SOC Ltd

A company duly incorporated under the laws of *Republic of South Africa*, having its main place of business at 36 Fricker Road, Illovo, Sandton Johannesburg, with registration number: 1979/000287/06

(Hereinafter referred to as “the Discloser”)

And

.....

A company duly incorporated under the laws of Republic of South Africa, having its main place of business at....., with

registration number:.....

(Hereinafter referred to as “the Recipient”)

PREAMBLE

Whereas the Discloser will disclose certain confidential information to the Recipient, for purposes of _____;

And whereas the Recipient wishes to receive confidential information on the condition that the Recipient will not disclose the same to any third party or make use thereof in any manner except as set out below.

The Discloser and the Recipient hereby agree to the following:

1. Definitions

Unless the contrary is clearly indicated, the following words and/or phrases, when used in this Agreement, shall have the following meaning:

- **“Agreement”** shall mean this written document together with all written appendices, annexures, exhibits or amendments attached to it from time to time;
- **“Commencement Date”** shall mean the date of last signature of this agreement;
- **“Confidential Information”** shall mean all information which:
 - pertains to the Disclosing Purpose, disclosed, revealed or exchanged by the Discloser to the Recipient, and which pertains to, but is not limited to all intellectual property rights, all trade secrets, all agreements (whether in writing or not) which exist at the time of revealing the content thereof to the Recipient, the content of all possible future agreements which the Discloser intends to enter into with any other party, all knowledge obtained by way of research and development, irrespective of whether the aforementioned information that is revealed is applicable to technical, business or financial aspects of the Discloser; and/or
 - any information of whatever nature, which has been or may be submitted by the Discloser to the Recipient, whether in writing or in electronic form or pursuant to discussions between the Parties, or which can be obtained by examination, testing, visual inspection or analysis, including, without limitation, business or financial data, know-how, formulae, processes, specifications, sample reports, models, customer lists, computer software, inventions or ideas; and/or
 - Any dispute between the Parties resulting from this Agreement; and/or
 - Any fault or defect in any aspect of the business of the Discloser, irrespective of whether the Discloser knows about such a fault or defect;
- **“Notice”** shall mean a written document;
- **“Parties”** shall mean both the Discloser (**Sasria SOC Ltd**) and the Recipient.
- **“Board”** shall mean Board of Directors of the Discloser.
- Obligations of the Recipient

The Recipient shall:

- use the confidential information disclosed to it solely for the purposes of
.....
.....and for no other purpose whatsoever

("Disclosing Purpose");

- treat and safeguard the Confidential Information as private and confidential;
- ensure proper and secure storage of all Confidential Information;
- not at any time without the prior written consent of the Discloser or another employee of the disclosure from which he received the information,
- disclose or reveal to any person or party either the fact that discussions or negotiations are taking, or have taken place between the Board, employee and another employee or the content of any such discussions or other facts relating to the Disclosing Purpose, except where required by law or any governmental, or regulatory body;
- not create the impression with or lead any third party to interpret or construe any
- condition contained in this Agreement, that this Agreement is an Agency Agreement and/or Partnership Agreement and/or a Joint Venture and/or any other similar arrangement;
- not allege that this Agreement grants it, either directly, or by implication, or by estoppel or otherwise a license under any patent or patent application, or that it is entitled to utilize the Confidential Information in any way contrary to the stipulations contained in this Agreement;
- on termination of this Agreement act with the Confidential Information in accordance with a Notice delivered to it by the Discloser and if no such Notice was delivered, the Recipient shall destroy the Confidential Information in a similar manner to which it would destroy information that it would consider to be its own Confidential Information.
- Obligations of the Discloser

Subject to clause 2, the Discloser shall:

- disclose to the Recipient, in writing any relevant information in their possession or under their care; and
- furnish the Recipient at least 7 (seven) calendar days prior to this Agreement being terminated, for whatever reason, with a Notice instructing the Recipient about what it should do with the Confidential Information once the Agreement has been terminated.
- Exclusions

The provisions of **Clause 3** above will not apply to any Confidential Information which:

- is at the time of disclosure to the Recipient, within the public domain and could be obtained by any person with no more than reasonable diligence;
- come into the public domain and could be obtained after such disclosure, otherwise than by reason of a breach of any of the undertakings contained in this Agreement;
- is subsequently provided to the Recipient by a person who has not obtained such information from the Discloser, provided that, in any such case, such information was not obtained illegally or disclosed by any person in breach of any undertaking or duty as to confidentiality whether expressed or implied;
- is disclosed with the written approval of the Discloser;
- is or becomes available to a third party from the Discloser on an unrestricted basis;
- is obliged to be reproduced under an order of court or government agency of

competent jurisdiction.

- Commencement
- This Agreement shall commence on the Commencement Date.
- Cancellation
- The Agreement shall not terminate automatically. Either party must be able to terminate on written notice to the other party once the Disclosing Purpose is completed. The obligations of confidentiality under this Agreement shall continue to apply after assignment or termination of this Agreement.
- The Parties further agree that either Party shall have the right at any time to give notice in writing to terminate this Agreement forthwith in the event of a material breach of any of the terms and conditions of the Agreement. If the breach in question is one which can effectively be remedied, the Parties shall endeavour to jointly try to remedy such breach, failing which, the Agreement shall be terminated.
- Interpretation
- The clause headings in this Agreement have been inserted for convenience only and will not be taken into consideration in the interpretation of this Agreement;
- Any reference in this Agreement to the singular includes the plural and *vice versa*;
- Any reference in this Agreement to natural persons includes legal persons and references to any gender include references to the other genders and *vice versa*.
- Dispute Resolution
- A dispute concerning or arising out of this Agreement exists once a party notifies the others in writing of the nature of the dispute and requires it to be resolved under this clause. The parties must refer any dispute to be resolved by -
 - negotiation; failing which
 - mediation; failing which
 - arbitration
- Within ten (10) Business Days of notification, the parties must seek an amicable resolution to the dispute by referring it to designated and authorized representatives of each of the parties to negotiate and resolve it by the parties signing an agreement resolving it within fifteen (15) Business Days
- If negotiation fails, the parties must refer the dispute for resolution by mediation under the rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead) ("AFSA").
- If mediation fails, the parties must refer the dispute within fifteen (15) Business Days for resolution by arbitration (including any appeal against the arbitrator's decision) by one arbitrator (appointed by agreement between the parties) as an expedited arbitration in Sandton under the then current rules for expedited arbitration of AFSA.
- If the parties cannot agree on any arbitrator within a period of ten Business Days after the referral, the arbitrator will be appointed by the Secretariat of AFSA.
- The periods for negotiation or mediation may be shortened or lengthened by written agreement between the parties.
- This clause will not preclude any party from access to an appropriate court of law for interim relief in respect of urgent matters by way of an interdict, or mandamus pending finalisation of this dispute resolution process, for which purpose the parties irrevocably submit to the jurisdiction of a division of the High Court of the Republic of South Africa.
- This clause is a separate, divisible agreement from the rest of this Agreement and must remain in effect even if the Agreement terminates, is nullified, or cancelled for

any reason or cause.

- Domicilium and Notices

The Parties elect the following addresses as their respective *domicilium citandi et executandi*, at which all notices and other communications must be delivered for the purposes of this Agreement:

- Discloser:
 - by hand at 36 Fricker Road, Illovo, Sandton, Johannesburg
 - Marked for the attention of:
by post at: P.O. Box 653367, Benmore, 2010
Marked for the attention of:
- by telefax at (011) 447 8624
Marked for the attention of:
- Recipient:
 - by hand at
Marked for the attention of:
 - by post to:
Marked for the attention of:
 - by telefax atMarked for the attention of:
- Any notice or communication required or permitted to be given in terms of this agreement shall only be valid and effective if it is in writing.
- Any notice addressed to either of the Parties and contained in a correctly addressed envelope and sent by registered post to it at its chosen address or delivered by hand at its chosen address to a responsible person on any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, shall be deemed to have been received, unless the contrary is proved, if sent by registered post, on the 14th (fourteenth) calendar day after posting and, in the case of hand delivery, on the day of delivery.
- Any notice sent by telefax to either of the Parties at its telefax number shall be deemed, unless the contrary is proved, to have been received:
- if it is transmitted on any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, within 2 (two) hours of transmission;
- if it is transmitted outside of these times, within 2 (two) hours of the commencement any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, after it has been transmitted.
- Entire Agreement and Variations
- This Agreement constitutes the whole agreement between the Parties and supersedes all prior verbal or written agreements or understandings or representations by or between the Parties regarding the subject matter of this Agreement, and the Parties will not be entitled to rely, in any dispute regarding this Agreement, on any terms, conditions or representations not expressly contained in this Agreement.
- No variation of or addition to this Agreement will be of any force or effect unless

reduced to writing and signed by or on behalf of the Parties.

- Neither party to this Agreement has given any warranty or made any representation to the other party, other than any warranty or representation which may be expressly set out in this Agreement.
 - Data Security
 - The Recipient shall, at all times, ensure compliance with any local and international laws, regulations, policies or codes that may be enacted from time to time and put in place and maintain sufficient measures, policies and systems to manage and secure against all forms of risk to any information that may be shared or accessed through a computer or any other form of electronic communication pursuant to the Agreement. For purposes of this clause **Error! Reference source not found.**,
 - “Information” shall mean, but not be limited to:
 - all cyber related information, including data; a computer program; output of a computer program; a computer system; article; data message; a computer data storage medium; output of a computer program and output of data;
 - Personal Information as defined in section 1 of the Protection of Personal Information Act No. 4 OF 2013 (“**POPIA**”) read with Section 1 of the Promotion of Access to Information Act No. 2 of 2000; and
- 1.1.1. Any other information that may be shared or accessed pursuant to the Agreement.
- The Recipient shall notify the Discloser in writing of any cybercrimes or any suspected cybercrimes in its knowledge and to report such crimes or suspected crimes to the relevant authorities in accordance with applicable laws, within 10 days of becoming aware of such crime or suspected crime.
 - Protection of Personal Information
 - For purposes of this clause 1□ -
 - the following terms shall bear meanings contemplated in Section 1 of the POPIA: consent; data subject; electronic communication; information officer; operator; person; personal information; processing; record; Regulator; responsible party; special information; as well as any terms derived from these terms.
 - “**binding corporate rules**” means personal information processing policies, within a group of undertakings, which are adhered to by a responsible party or operator within that group of undertakings when transferring personal information to a responsible party or operator within that same group of undertakings in a foreign country; and “**group of undertakings**” means a controlling undertaking and its controlled undertakings.
 - The Parties acknowledge and agree that, in relation to personal information that may be processed pursuant to the Agreement, the Discloser is the responsible party and the
 - Recipient is the operator.
 - The Recipient must process such personal information only with the knowledge or authorisation of the Discloser and treat personal information which comes to its knowledge as confidential and must not disclose it, unless so required by law.
 - The Recipient must secure the integrity and confidentiality of personal information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss of, damage to or unauthorised destruction

- of personal information and unlawful access to or processing of personal information.
- In order to give effect to the obligations set out in this clause 1□, the Recipient must take reasonable measures to-
 - identify all reasonably foreseeable internal and external risks to personal information in its possession or under its control;
 - establish and maintain appropriate safeguards against the risks identified;
 - regularly verify that the safeguards are effectively implemented; and
 - ensure that the safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards.
 - The Recipient shall have due regard to generally accepted information security practices and procedures which may apply to it generally or be required in terms of specific industry or professional rules and regulations.
 - The Recipient shall notify the Discloser immediately where there are reasonable grounds to believe that the personal information of a data subject has been accessed or acquired by any unauthorised person.
 - The Recipient shall appoint an information officer and an appropriate number of deputy information officers as may be required by the POPIA, and must provide the Discloser with the details of such officers, whose responsibilities shall include-
 - the encouragement of compliance, by the Recipient, with the conditions for the lawful processing of personal information;
 - dealing with requests made to the Recipient pursuant to the POPIA;
 - working with the Regulator in relation to investigations conducted under the POPIA;
 - otherwise ensuring compliance by the Recipient with the provisions of the POPIA; and
 - as may be prescribed by the POPIA.
 - The Recipient shall not transfer personal information about a data subject to a third party who is in a foreign country without Prior written consent of the Discloser. The Discloser will not grant such consent unless-
 - the third party who is the recipient of the information is subject to a law, binding corporate rules or binding agreement which provide an adequate level of protection that-
 - effectively upholds principles for reasonable processing of the information that are substantially similar to the conditions for the lawful processing of personal information relating to a data subject who is a natural person and, where applicable, a juristic person; and
 - includes provisions, that are substantially similar to this section, relating to the further transfer of personal information from the recipient to third parties who are in a foreign country;
 - the data subject consents to the transfer;
 - the transfer is necessary for the performance of a contract between the data subject and the responsible party, or for the implementation of pre-contractual measures taken in response to the data subject's request;
 - the transfer is necessary for the conclusion or performance of a contract concluded in the interest of the data subject between the responsible party and a third party; or
 - the transfer is for the benefit of the data subject, and-
 - it is not reasonably practicable to obtain the consent of the data subject to that transfer; and
 - if it were reasonably practicable to obtain such consent, the data subject would be

likely to give it.

- The Recipient shall process personal information of data subjects in accordance with the conditions for the lawful processing of personal information as contemplated in the POPIA, and shall at all times put sufficient measures in place to ensure compliance with the POPIA, including compliance with any compliance notices and information notices served on the Recipient under the POPIA.

- Assignment, Cession and Delegation

Neither of the Parties shall be entitled to assign, cede, delegate or transfer any rights, obligations, share or interest acquired in terms of this Agreement, in whole or in part, to any other party or person without the prior written consent of the other, which consent shall not unreasonably be withheld or delayed.

- Relaxation

No indulgence, leniency or extension of a right, which either of the Parties may have in terms of this Agreement, and which either party ("the grantor") may grant or show to the other party, shall in any way prejudice the grantor, or preclude the grantor from exercising any of the rights that it has derived from this Agreement, or be construed as a waiver by the grantor of that right.

- Waiver

No waiver on the part of either party to this Agreement of any rights arising from a breach of any provision of this Agreement will constitute a waiver of rights in respect of any subsequent breach of the same or any other provision.

- Severability

In the event that any of the terms of this Agreement are found to be invalid, unlawful or unenforceable, such terms will be severable from the remaining terms, which will continue to be valid and enforceable.

- Governing Law

The validity and interpretation of this Agreement will be governed by the laws of the Republic of South Africa.

SIGNATURES

I, the undersigned, , herewith confirms that my position within the Recipient is that of and state that I am duly authorised to enter into this Agreement, which I herewith do, on this theday, of, for and on behalf of the Recipient.

I, the undersigned, herewith confirms that my position within the Discloser is that of Executive Manager: and state that I am duly authorised to enter into this Agreement, which I herewith do, on this the ____ day, of by

signing this Agreement, for and on behalf of the Discloser.

Signature for and on behalf of Discloser

Signature for and on behalf of Recipient

8 ANNEXURE B: ACCEPTANCE OF BID CONDITIONS AND BIDDER'S DETAILS

RFP No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised
Signatory _____

Position of Authorised
Signatory _____

By signing above the bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this RFP.

[Note to the bidder: The bidder must complete all relevant information set out below.]

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

Bidders are required to be registered on the Central Supplier Database (CSD) of National Treasury. Failure to submit the requested information may lead to disqualification. Bidders are therefore required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:

Supplier Number	
Unique registration reference number	

BIDDING STRUCTURE

Indicate the type of Bidding Structure by marking with an 'X':

Individual Bidder	
Joint Venture/ Consortium	
Prime Contractor with Sub Contractors	
Other	

REQUIRED INFORMATION

If Individual Bidder:	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

If Joint Venture or Consortium, indicate the following for each partner:	
Partner 1	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Fax Number	
Email address	
Postal Address	

Physical Address	
Scope of work and the value as a % of the total value of the contract	
Partner 2	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	

If Bidder is a Prime Contractor using Sub-contractors, indicate the following:	
Prime Contractor	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Fax Number	

Email address	
Postal Address	
Physical Address	
Sub-contractors	
Name of Company	
Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Subcontracted work as a % of the total value of the contract	

ANNEXURE C: SHAREHOLDER INFORMATION

[Note: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

1 Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% shares

Note: The bidder must also attach the detailed Company/ Group Structure where relevant.

2 Black Shareholders/ Members as per the B-BBEE Certificate

Name of the shareholder	ID Number	Race	Gender	% shares
Total Black Shareholding % as per the current and valid B-BBEE Certificate				

ANNEXURE D: BIDDER'S EXPERIENCE AND PROPOSED PROJECT TEAM

[Note: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 3.]

Table (a): Details of the bidder's current and past experience to Design, Implement, Maintain and Support the Guidewire ProducerEngage and PolicyCenter Modules

Client's Name	Client Company size (number of employees)	Project description	Project Cost	Project period (Start and End Dates)	Description of service performed and extent of Bidder's responsibilities	Indicate whether the Bidder was the principal or sub-contractor	Name, title and telephone contact of client

Table (b): Details of the key personnel of the bidders' proposed team:

Name	Position	Role / Duties in this Project	Relevant Project Experience	
			Project description, Client, Project period	Project Cost

