



**REQUEST FOR PROPOSAL**

**RFP FOR EMAIL SECURITY SOLUTION DEPLOYMENT**

**RFP-2025-002/004**

**RELEASE DATE: 28<sup>th</sup> February 2025**

**CLOSING DATE: 19<sup>th</sup> March 2025**

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**EXPRESSSION OF INTENT TO PARTICIPATE IN TENDER**

This form is to be completed on receipt of the tender document from Britam Holding PLC.

This page is to be completed immediately and scan copy in PDF format e-mailed to Procurement [tenders@britam.com](mailto:tenders@britam.com). The data contained in this form will be used to send out any addenda that may arise. Firms that do not register their interest by completing this form may not be sent addenda that may arise.

Name of the firm's representative completing this form:

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Firm's

Name:

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Address:

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Tel

No:

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Email

Address:

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Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signed by (Name): \_\_\_\_\_

Position

in

Firm:

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## 1 INTRODUCTION

### 1.0 Purpose of the Tender

The Britam Holding Company Limited ("Britam") invites qualified firms to submit their proposals for Email Security Solution Deployment.

This Request for Proposal (RFP) is being made available to interested service providers on a restricted tender basis. This document is intended to provide vendors with sufficient understanding of the Britam's requirements to enable them to respond.

For the purposes of the RFP, it is necessary to disclose information in this document, and its schedules, which is considered confidential and should therefore not be used (otherwise other than in furtherance of this tender) or disclosed to any third party without explicit prior written consent of Britam.

Britam on its part also acknowledges that it is requesting through this RFP for information that is confidential and therefore commits in equal terms to reciprocal confidentiality.

### 1.1 Acknowledgement of Bidding Documents

Britam invites proposals for **RFP for Email Security Solution Deployment** in accordance with the requirements set out in this document.

Within **three (3) working days** of receipt of the RFP, the Bidder is required to acknowledge receipt of the RFP and notify his intention to submit a bid by email to Britam at [tenders@britam.com](mailto:tenders@britam.com). The mail will include the signed registration template on Page 4 of this document.

Working days are defined as being any day of the week between Monday and Friday (0800 – 1700 Hrs) excluding weekends and gazetted public holidays in the Republic of Kenya).

Failure to do so shall be perceived as an intention not to submit a bid and the Bidder will be eliminated from the bid process and required to destroy the RFP document in keeping with confidentiality requirements.

## **1.2 Point of Contact**

All enquiries or correspondence concerning the details of this tender should be addressed, in the first instance by e-mail to: [tenders@britam.com](mailto:tenders@britam.com) . The subject on the email should be **"CLARIFICATION ON THE RFP FOR EMAIL SECURITY SOLUTION DEPLOYMENT"**.

- All responses from Britam to the Bidder shall be channelled through the Procurement Officer.
- It is the responsibility of the Bidder to obtain any further information required to complete this RFP.
- Any clarification request and their associated response will be circulated to all Bidders.
- All clarifications must be sought at the latest 5 days prior to the close of the RFP.

## **2 ABOUT BRITAM HOLDINGS PLC**

### **2.0 Organization Profile**

**Britam Holdings PLC** ("Britam") is a leading diversified financial services group, listed on the Nairobi Securities Exchange. The group has interests across the Eastern and Southern Africa region, with operations in Kenya, Uganda, Tanzania, Rwanda, South Sudan, Mozambique, and Malawi. The group offers a wide range of financial products and services in Insurance, Asset management, Banking and Property. For more information, please visit <http://www.britam.com>.

The Group offers a wide range of products and services to individuals, small businesses, corporations, and government entities. The range of products includes life insurance, pensions, health insurance, and general insurance through its insurance businesses in the region. The financial solutions which include, unit trusts, investment planning, wealth management, offshore investments, retirement planning and discretionary portfolio management which are offered through its asset management business. In addition, the company carries out property development and has substantial investments in the banking sector. For More information, please visit <http://www.britam.com>

### **2.1 Britam's Vision**

To be LEADING diversified financial services company in our chosen markets across Africa.

### **2.2 Britam's Mission**

Providing you with financial security EVERY STEP OF THE WAY.

**RFP for EMAIL SECURITY SOLUTION DEPLOYMENT.**



## 3 OVERVIEW OF THE PROPOSAL

### 3.0 Overview

#### 3.1 Objective of the RFP

The objective of this RFP is to acquire and deploy an advanced Email Security Solution that will provide protection from email-based threats, ensure secure email communication, and mitigate risks associated with phishing, BEC, spam, malware, and data leakage. The solution must be designed to integrate with Britam's existing email infrastructure and provide comprehensive coverage for both internal and external communications.

The solution must offer cloud-based or hybrid deployment options to ensure scalability and flexibility and support continuous threat intelligence updates.

The Email Security Solution must meet the following objectives:

#### 1. **Protection Against Email-Based Threats:**

- Mitigate the risk of **Business Email Compromise (BEC)**, phishing, spear-phishing, malware, and spam.
- Prevent **email spoofing** and **impersonation** attacks.
- Block malicious attachments and links embedded within emails.

#### 2. **Data Loss Prevention (DLP) and Compliance:**

- Protect sensitive information in email communications.
- Ensure compliance with data protection regulations by preventing unauthorized sharing of sensitive data.

#### 3. **Enhanced Email Authentication and Encryption:**

- Implement **email encryption** for secure communication with both internal and external stakeholders.
- Support **DMARC (Domain-based Message Authentication, Reporting & Conformance)**, **DKIM (DomainKeys Identified Mail)**, and **SPF (Sender Policy Framework)** for email authentication.

#### 4. **Advanced Threat Intelligence and Detection:**

- Utilize advanced threat intelligence feeds to identify emerging email-based threats.
- Provide **real-time email traffic analysis** and **threat detection** to proactively identify and block suspicious emails.
- Enable **sandboxing** for attachments to detect unknown malware.

#### 5. **Reporting and Analytics:**

- Provide comprehensive **reporting and analytics** capabilities to monitor email security status and user activity.



- Generate **detailed incident reports** and **alert notifications** for administrators to take immediate action.

## 6. Scalability and Futureproofing:

- The solution should be scalable to support the growing number of email users and threats.
- Support for both **on-premises and cloud-based email systems** (e.g., Microsoft 365, Google Workspace).

## 7. End-User Education and Support:

- Provide **user training** to raise awareness of email threats, including phishing simulations.
- Offer ongoing **support** and **maintenance** of the deployed solution.

## 3.2 Scope of Work

The proposed solution must address the following use cases and functionalities:

Use Case	Description
<b>Business Email Compromise (BEC)</b>	Prevent email-based impersonation attacks, such as CEO fraud, and detect suspicious behaviour.
<b>Phishing and Malware Protection</b>	Block phishing attempts, malicious attachments, and links that could lead to malware infections.
<b>Spam Filtering</b>	Detect and filter out unwanted and unsolicited emails to protect against spam.
<b>Data Loss Prevention (DLP)</b>	Protect sensitive data in email messages from accidental or malicious leakage.
<b>Email Encryption</b>	Secure email communication with encryption, ensuring confidentiality of sensitive content.
<b>Advanced Threat Intelligence</b>	Integrate with threat intelligence services to detect and respond to emerging threats.
<b>Reporting and Auditing</b>	Generate detailed reports on email activity and incidents for auditing purposes.
<b>Regulatory Compliance</b>	Ensure compliance with regulations such as Kenya Data Protection Act, Regional Data Protection Acts, GDPR, HIPAA, PCI-DSS, and others for email communication.
<b>Integration with other DLP solutions</b>	The solution should integrate with DLP solutions classify sensitive data in emails.

### 3.2.1 Solutions to Consider

The following email security solutions are recommended for consideration:

1. Mimecast Email Security
2. Proofpoint Email Security
3. Microsoft Defender for Office 365

Vendors should propose how their solutions meet the outlined requirements and use cases.

### 3.2.2 Quantity

Seats Required: 1250 users across Britam's email system.

### 3.3 Qualifying Criteria and Requirements:

The proposed solution must meet the following criteria:

- **Vendor Partnership:** Must be a recognized partner with leading email security providers.
- **Capability to Install and Maintain Solution:** The vendor must demonstrate the ability to install, configure, and maintain the email security solution.
- **Regional Coverage:** Vendor must be capable of supporting regional operations and providing localized support.
- **Hybrid Deployment Support:** The email security solution should support cloud and on-premises email infrastructures.
- **Training and Support:** Vendor must offer post-deployment user training and provide comprehensive support, including 24/7 helpdesk services.
- **Scalability and Integration:** The solution should scale easily as the organization grows and be compatible with existing platforms, including Microsoft 365 and Google Workspace.

### 3.4 Technical Proposal

Potential respondents to provide the following **mandatory** information.

- I. Company Profile:** Document detailing the company including its background, products & services, clients, and expertise.
- II. Functional documentation:** Comprehensive product/system documentation detailing the systems functional capabilities.
- III. Technical documentation:** Comprehensive system technical documentation detailing the following
  - Detailed System architecture and proposed deployment architecture and Deployment specification (e.g. server and storage specifications)
  - Security overview of the system
  - System dependencies and accompanying products.
  - API catalogue for out of the box APIs
  - Integration Capabilities: Demonstrate how the email security solution integrates with Britam's email platforms (e.g., Microsoft Exchange, Microsoft 365, Google Workspace).
  - Threat Intelligence Integration: Specify how the solution leverages threat intelligence feeds for detecting and responding to emerging email threats.
  - Compliance Features: Detailed explanation of how the solution supports regulatory compliance (e.g., Kenya Data Protection Act, GDPR, HIPAA).
- IV. Product roadmap:** Comprehensive Product/System roadmap detailing past and future releases
- V. Project execution Plan and Methodology:** Comprehensive and clear project execution plan with timelines for each activity.
- VI. Project Team:** Documentation detailing the proposed project team including the Professional qualifications, experience, and role. Briefly highlight the profiles and technical qualifications of the staff to be involved in the project. This could include the numbers of years of experience in a role; level of professional qualification with reputable bodies; and any other relevant qualification.
- VII. References:** Potential vendor to provide references and summary of similar jobs undertaken in last 3 years. To include the following details project baseline and actual timelines, project scope, project outcomes.

**VIII. Project governance structure:** document detailing the Respondent project governance structure detailing the escalation matrix, risk management and problem management policy.

**IX. Support & Maintenance**

- 24/7 support availability and escalation process
- SLAs for response and resolution times
- Ongoing updates, patching, and system upgrades

**3.5 Financial Proposal**

Provide a competitive financial proposal inclusive of all cost (taxes and disbursements).

- Detailed pricing structure (setup fees, recurring costs, licensing fees, customization costs).

## 4 FORMAT OF RESPONSE TO TENDER

### 4.0 MANDATORY Information to be provided by bidders.

All bids should contain **ALL INFORMATION REQUESTED IN SECTIONS 4.1 to 4.5**. The information should be in the following order.

#### 4.1 General Information about the firm

Provide the following documentation in respect of your company.

- (i) **Certificate of registration** (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (ii) **Tax compliance certificate** (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (iii) Current County **Trade license/Business permit**
- (iv) **Accreditations** or a licence where applicable
- (v) **OEM Partnership Letter/Authorization letter**
- (vi) **Company Profile**, with a clear **organogram** and area of speciality
- (vii) List of **Directors** (Name, ID Number/passport number, Nationality, Telephone, and physical address)
- (viii) Britam **Non-Disclosure Agreement** (document to be provided to accompany this RFP)
- (ix) Britam **Supplier Code of Conduct** (document to be provided to accompany this RFP)
- (x) Britam Business Litigation and Probity; and Lead Time and Credit Period Declaration Form (document to be provided to accompany this RFP).

## 4.2 Bid Preparation and Submission

### **RFP For EMAIL SECURITY SOLUTION DEPLOYMENT RFP-2025-002-004**

All Tenders may also be posted/ delivered earlier than the deadline to the below email:

[tenders@britam.com](mailto:tenders@britam.com)

with a clear subject line "*RFP FOR EMAIL SECURITY SOLUTION DEPLOYMENT RFP-2025-002/004*"

Offers must be submitted in two separate documents, 1(one) technical- and 1 (one) commercial bid, **password protected** and clearly identified as:

- The file with the technical proposal should be identified as follows:

**NAME OF THE COMPANY, TECHNICAL PROPOSAL FOR EMAIL SECURITY SOLUTION DEPLOYMENT.**

- The file with commercial proposal should be identified as follows:

**NAME OF THE COMPANY, COMMERCIAL / FINANCIAL PROPOSAL**

## **5 GENERAL CONDITIONS OF CONTRACT**

### **5.1. Introduction**

Specific terms of contract shall be discussed with the bidder whose proposal will be accepted by the Company. The resulting contract shall include but not be limited to the general terms of contract as stated below from 5.2 to 5.14.

### **5.2. Award of Contract**

Following the opening and evaluation of proposals, the Company will award the Contract to the successful bidder whose bid has been determined to be substantially responsive and has been determined as the best evaluated bid. Britam will communicate to the selected bidder its intention to finalize the draft conditions engagement in consultation with the bidder.

### **5.3. Application of General Conditions of Contract**

These General Conditions (sections 5.2 to 5.14) shall apply to the extent that they are not superseded by provisions in other parts of the Contract that shall be signed.

### **5.4. Bid Validity Period**

Bidders are requested to hold their proposals valid for ninety (90) days from the closing date for the submission.

### **5.5. Non-variation of Costs**

The prices quoted for the service and subsequently agreed and into the contract shall be held fixed for the contract period.

### **5.6. Delays in the Bidder's Performance**

- 5.6.1. Delivery and performance of the Transaction shall be made by the successful Bidder in accordance with the time schedule as per Agreement.
- 5.6.2. If at any time during the performance of the Contract, the Bidder should encounter conditions impeding timely delivery and performance of the Services, the Bidder shall promptly notify the Company in writing of the fact of the delay, its likely duration and its

cause(s). As soon as practicable after receipt of the Bidder's notice, the Company shall evaluate the situation and may at its discretion extend the Bidder's time for performance, with or without liquidated damages, in which case the extension shall be ratified by the parties by amendment of the Contract.

- 5.6.3. Except in the case of "force majeure" as provided in Clause 5.14, a delay by the Bidder in the performance of its delivery obligations shall render the Bidder liable to the imposition of liquidated damages pursuant to Clause 5.7.

### **5.7. Liquidated damages for delay**

The contract resulting out of this RFP shall incorporate suitable provisions for the payment of liquidated damages by the bidders in case of delays in performance of contract.

### **5.8. Governing Language**

The Contract shall be written in the English Language. All correspondence and other documents pertaining to the Contract which are exchanged by the parties shall also be in English language.

### **5.9. Applicable Law**

This agreement arising out of this RFP shall be governed by and construed in accordance with the laws of Kenya and the parties submit to the exclusive jurisdiction of the Kenyan Courts.

### **5.10. Successful Bidder's Obligations**

The successful bidder:

- 5.10.1. Is obliged to work closely with Britam staff, act within its own authority, and abide by directives issued by the Company that are consistent with the terms of the Contract.
- 5.10.2. Will abide by the job safety measures and will indemnify the Company from all demands or responsibilities arising from accidents or loss of life, the cause of which is the Bidder's negligence. The Bidder will pay all indemnities arising from such incidents and will not hold the Company responsible or obligated.



- 5.10.3. Will be responsible for managing the activities of its personnel, or subcontracted personnel, and will hold itself responsible for any misdemeanours.
- 5.10.4. Will not disclose the Company`s information it has access to, during the course of the work, to any other third parties without the prior written authorization of the Company. This clause shall survive the expiry or earlier termination of the contract.

## **6 BRITAM SUPPLIER CODE OF CONDUCT**

### **6.1 GENERAL**

This Code is applicable to all Britam suppliers (hereinafter "Supplier" or "Suppliers") and their employees (be they temporary, casual or permanent) and sub-contractors throughout the world. Britam requires all Suppliers to conduct their business dealings with Britam in compliance with this Code and in compliance with all laws applicable to the Supplier's business, wherever conducted. By entering business transactions with Britam, the Supplier agrees to abide by the terms of this Code and acknowledge that compliance with this Code is required to maintain the Supplier's status as a Britam Supplier. Britam shall have the right to terminate any Supplier's contract for failure to comply with the provisions of this Code. Britam recognizes that local laws may in some instances be less restrictive than the provisions of this Code. In such instances Suppliers are expected to comply with the Code. If local laws are more restrictive than the Code, then Suppliers are expected to comply with applicable local laws.

### **6.2 PROVISIONS**

In particular, Suppliers must comply with the following:

#### **6.2.1 Relations with competitors**

Suppliers will be required to comply with applicable antitrust or competition laws and will not engage in any restrictive trade practices. Suppliers will at all times act in a manner that will uphold and encourage healthy competition.

#### **6.2.2 Bribes, Conflicts of Interest, Gifts and other Courtesies**

##### **6.2.2.1 Bribes**

Suppliers shall not make or offer bribes or payments of money or anything of value to any Britam employee or any other person including officials, employees, or representatives of any government or public or international organisation, or to any other third party for the purpose of obtaining or retaining business with Britam. For the avoidance of doubt Britam considers an act of bribery to include the giving of money or anything of value to anyone where there is belief that it will be passed on to a government official or Britam employee for this purpose. Suppliers are required to comply with all applicable local anti-bribery laws.

#### 6.2.2.2 *Gifts and other business courtesies*

Suppliers shall ensure that any expenditure incurred in relation to any particular Britam employee or government official is in the ordinary and proper course of business and cannot reasonably be construed as a bribe or so as to secure unfair preferential treatment. A general guideline for evaluating whether a business courtesy is appropriate is whether public disclosure would be embarrassing to the Supplier or Britam.

Britam employees may accept unsolicited gifts from Suppliers provided:

- they are items of nominal value – Kes1500 or less, or
- they are advertising or promotional materials having wide distribution e.g. calendars, stationaries, diaries, etc.; and
- Acceptance of the gift does not violate any applicable law.

#### 6.2.2.3 *Conflicts of Interest*

No supplier shall enter into a financial or any other relationship with a Britam employee that creates a conflict of interest for Britam. A conflict of interest arises when the material personal interests of the Britam employee are inconsistent with the responsibilities of his/her position with the company. All such conflicts must be disclosed and approval to the transaction given.

### **6.2.3 Compliance and implementation**

#### 6.2.3.1 *Licenses and Returns*

The Supplier will be required to obtain and renew, in accordance with any law or regulations all permits, licenses and authorizations required for it to carry out its business. In addition, the Supplier will be required to prepare and file any returns that it may be required to file under its incorporation statute, the Companies Act.

#### 6.2.3.2 *Taxation, Financial Integrity and Retention of Records*

- The Supplier will comply with all revenue laws and will not evade tax.
- Suppliers will be required to maintain accurate and reliable financial and business records and shall not have any false or inaccurate accounting books or records related to Britam for any reason. Suppliers shall maintain all business records at the minimum in

compliance with the provisions outlined by the Kenya Revenue Authority or local revenue authorities from time to time.

- When any government investigation or audit is pending or ongoing then Suppliers will not destroy any relevant records until the matter has been investigated and closed.

#### **6.2.4 Violations**

If a Supplier becomes aware of any known or suspected improper behaviour by another Supplier in relation to their dealings with Britam or if a bribe or other inducement is requested from a Supplier by any Britam employee or any other person with the promise of influencing Britam's position as far as that Supplier is concerned or if the Supplier feels that a conflict of interests exists with one of Britam's employees then all pertinent details should be reported in confidence to the following Contact Address

Procurement [procurement@britam.com](mailto:procurement@britam.com)

#### **6.2.5 Variations**

Britam reserves the right to vary this Code at any time.