



REPUBLIC OF KENYA  
THE NATIONAL TREASURY AND PLANNING

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When Replying Please Quote  
Ref: TNT/001/2022-2023 (24)

THE NATIONAL TREASURY  
P.O. BOX 30007 – 00100  
NAIROBI

22<sup>nd</sup> July, 2022

To All Bidders

**REF: REQUEST FOR PROPOSALS FOR PROVISION OF INDIVIDUAL CONSULTANCY SERVICES FOR DEVELOPMENT OF POLICY REFORMS FOR PUBLIC SECTOR RETIREMENT BENEFIT SCHEMES  
TENDER NO. TNT/001/2022-2023: ADDENDUM I**

The National Treasury has issued the following addendum for Request for Proposals for Provision of Individual Consultancy Services for Development of Policy Reforms for Public Sector Retirement Benefit Schemes following a pre – proposal virtual conference meeting held on 20<sup>th</sup> July, 2022 at 10.00 a.m.

| No | Reference in the Tender Document  | Response  |
|----|---|---|
| 1. | <p>The consultancy services envisaged cuts across a number of skills which an individual consultant may not possess.</p> <p>In your response you indicated you have a team comprising various skills which the consultant shall work with.</p> <p>Kindly confirm if you will have in the team an actuary, an accountant and an investment expert.</p> | <p>The consultant will be expected to possess expert knowledge in the field of pensions. The consultancy services shall be offered with guidance from an oversight select lead-team from the National Treasury, with capacity to deal with the issues outlined in the Terms of Reference and the tender document.</p> <p>The individual consultant should be an expert in the pensions industry with capacity to harness the necessary support to enable him/her realize the expected effective role in the consultancy services. The individual consultant should have a 360° understanding of the pensions environment.</p> |
| 2. | <p>Kindly delineate the scope of the work in terms of the retirement benefits schemes which will be the subject of this consultancy because</p>   | <p>The coverage entails the public sector pension arrangements in the manner set out in the Request for Proposal document on page</p>   |

| No | Reference in the Tender Document   | Response   |
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|    | public sector retirement benefit schemes can be broad.   |  |
| 3. | <p>On the DATA Sheet page 27 – Clause 22.2 (3): Qualifications and Competences of the Individual Consultant, you have indicated the required qualifications and competences of the Consultant as holders of a degree in Commerce, Finance or other related business.</p> <p>Kindly confirm if this excludes from bidding a holder of a degree in Law with a vast experience in pension policy, regulation and reforms.</p> | A degree in Law shall be acceptable as other related degree.   |
| 4. | Is it okay if we send a scanned copy of the Pre-Bid Conference Attendance Form for your signing.   | <p>The Pre-Bid Conference form <b>Must</b> be submitted for signature to the Head, Supply Chain Management Services, The National Treasury, Harambee Avenue, Treasury Building, 6<sup>th</sup> Floor, Room 619 via e-mail: <a href="mailto:procurement@treasury.go.ke">procurement@treasury.go.ke</a> or physically. which will be signed, stamped and returned to the Tenderer.</p> <p>See page 98 of the Request for Proposal document</p> |
| 5. | As per the criteria for evaluation of the technical proposal, among the qualifications of the individual consultant is a “professional qualification in finance” e.g., CPA, ICIFA, CFA or equivalent. For the sake of clarity does this qualification include the Fellow of the Institute & Faculty of Actuaries?  | Fellow of the Institute & Faculty of Actuaries shall be accepted as other equivalent qualifications  |
| 6. | For the case of an individual consultant bearing a foreign passport and he is a resident in Kenya and having an alien identity card, can the alien ID be classified within the category of a “National Identity Card” as per bullet point #1 of the mandatory evaluation criteria?   | This is an Open National Competitive Tender for an Individual registered in Kenya with a Kenyan National identification Documents  |



| No  | Reference in the Tender Document   | Response   |
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| 7.  | Is the proposal open to Kenyans only or other qualified foreign consultants can apply?   | The Proposal is opened to Kenyans only.  |
| 8.  | Given the necessity to provide a multiskilled team (legal, actuarial, investment) would you consider extending the deadline so that the consultant can provide a quality proposal?   | The Tender Opening date has been extended.<br>The Tender shall close on <b>Tuesday 2<sup>nd</sup> August, 2022 at 11.00 am.</b>  |
| 9.  | I feel Section 1(A) Clause #5 (on page 4) of the RFP and confirmed by Clause #6.2 of the Data Sheet (page 22) allows a joint venture, please clarify.  | Clause 6.2 on page 22 of the Request for Proposal Document indicates that;<br><br>Maximum number of members in the Joint Venture (JV) shall be: <b>N/A</b><br><br>Hence Joint Venture is <b>Not Applicable</b> . Consultants must bid as an individual and not a group of individuals                |
| 10. | Clause 20.2 page 25 of the Request for Proposal Document states that;<br><br>In addition, the following information will be read aloud at the opening of the Technical Proposals: <b>Name of Consultants and Bid Security Amount and Bank Name</b><br><br>Please clarify what shall be read aloud at the opening of the Technical Proposals. | Clause 20.2 page 25 of the Request for Proposal Document is changed to read as follows;<br><br>In addition, the following information will be read aloud at the opening of the Technical Proposals: <b>Names of the Consultant</b>   |
| 11. | Is the Request for Proposal for an individual or a firm may also apply?  | The Request for Proposal is for an Individual and not a Consultancy Firm.  |
| 12. | The standard forms refer to firms rather than individuals. Can this lead to disqualification?  | This shall not lead to disqualification.<br><br>The individual consultant is expected to align the forms and respond accordingly.  |
| 13. | Page 43 item d - Similar Consulting Assignments Experience. Are the individual consultants required to attach copies of the form of contract, purchase order, service order, and performance certificate or similar evidence of similar assignments as mandatory requirements?   | The individual consultant shall be evaluated based on the evaluation criteria specified in the Request for Proposal Document on:<br><br>a. Page 25 Clause 22.1 - Mandatory Evaluation Criteria – Technical Proposals<br>b. Page 26 Clause 22.1 - Mandatory Evaluation Criteria – Financial Proposals |

| No | Reference in the Tender Document | Response  |
|----|----------------------------------|---|
|    |                                  | c. Page 26 Clause 22.2 - The Criteria, sub-criteria, and point system for the evaluation of the Technical Proposals |

All the other terms and conditions remain the same.



**HEAD, SUPPLY CHAIN MANAGEMENT SERVICES  
FOR: PRINCIPAL SECRETARY / NATIONAL TREASURY**