



**PROVISION OF STAFF PENSION SCHEME THROUGH AN UMBRELLA
ARRANGEMENT FOR A PERIOD OF THREE (3) YEARS**

This **Addendum No.1** forms part of the Tender Document already issued to prospective bidders. The Addendum is issued to make amendment on the summary sections on the eligibility and mandatory criteria.

REVISED ELIGIBILITY AND MANDATORY CRITERIA

S/No.	PARTICULARS	REQUIREMENTS
M1	A copy of Certificate of Incorporation of the Founder of the Umbrella Scheme and/or change of name	MANDATORY
M2	A copy of valid and up to date tax compliance certificate from Kenya Revenue Authority for the Umbrella Scheme	MANDATORY
M3	A copy of valid PIN registration certificate of the Umbrella Scheme from Kenya Revenue Authority	MANDATORY
M4	A copy of a valid Retirement Benefits Authority registration Certificate of the Umbrella Scheme.	MANDATORY
M5	A copy of the Reference Scheme Certificate from the Retirement Benefits Authority to demonstrate that the scheme qualifies to receive NSSF Tier II.	MANDATORY
M6	A copy of the CR12 from the Registrar of Companies showing particulars of Directors issued within the last 6 months to the tender opening date.	MANDATORY
M7	A copy of audited accounts for the last 3 years duly signed and Stamped by Auditors and Trustees of the Scheme.	MANDATORY
M8	Professional Indemnity of not less than Kshs. 300,000,000	MANDATORY
M9	A copy of a valid Data Controller registration certificate from the Office of the Data Protection Commissioner.	MANDATORY
M10	The Umbrella Scheme must be a pension scheme; or has a pension scheme component. Bidders are to attach a certified copy of the Trust Deed and Rules of the scheme.	MANDATORY

M11	Provide a sample Deed of Adherence of the Umbrella Scheme	MANDATORY
M12	Duly filled and signed Self Declaration that the Person/Tenderer Is Not Debarred in the Matter of the Public Procurement and Asset Disposal Act 2015.	MANDATORY
M13	Duly filled and signed Self Declaration that the Person / Tenderer Will Not Engage in Any Corrupt or Fraudulent Practice.	MANDATORY
M14	Duly filled and signed Declaration and Commitment to the Code of Ethics.	MANDATORY
M15	Dully filled, signed and stamped confidential business questionnaire in the format provided in the tender documents.	MANDATORY
M16	Submission of 1 original & 1 copy of tender document properly PAGINATED in the correct sequence and all pages MUST BE INITIALIZED and well bound	MANDATORY

All other sections of the Tender document remain the same.

The Tender can be downloaded from the PPIP website www.tender.go.ke or the Open University of Kenya website <https://ouk.ac.ke/tenders>

OPEN UNIVERSITY OF KENYA

2ND APRIL 2025