



**TEST DATA MANAGEMENT SOLUTION**

<b>RFP Release date:</b>	<b>31-March-2026</b>
<b>Response from Bidders</b>	<b>17-April-2026</b>



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## DEFINITIONS

For purposes of this document, the following definitions shall apply:

The Group	KCB Group Plc
Bid	The Quotation or Response to this RFP submitted by prospective Suppliers for fulfilment of the Contract.
Supplier	The Company awarded the task of supplying all the items described in this document installing and commissioning them.
Contract	Supply, installation, implementation, and commissioning of all the works, equipment and/or services that are described in this document, which will contribute towards meeting the objective of the RFP.
Warranty	Period from the time installation and testing is completed, during which the Contractor undertakes to replace/rectify equipment and/or installation failures at no cost to the Bank.



## SECTION 1 – REQUEST FOR PROPOSALS

### 1.1 Background

KCB Group (hereinafter referred to as “the Group”) is a leading Commercial Banking Group in the East African region renowned for its diversity and growth.

The Group’s vision is to be the preferred financial solutions provider in Africa with global reach. The Group has 10 subsidiary companies across the East African Region in KCB Kenya, Uganda, Rwanda, Tanzania, Burundi, DRC and South Sudan.

The information in this document and its appendices and attachments is confidential and is subject to the provisions of our non-disclosure agreement and should not be disclosed to any external party without explicit prior written consent of the Group.

This document constitutes the formal **Request for Proposals (RFP) for Test Data Management Solution** and is being availed on Open tender basis.

### 1.2 Important Notes to Suppliers

- a) The purpose of this document is to assist KCB Group Plc in the identification and evaluation of potential service providers who may subsequently be shortlisted.
- b) **ALL Correspondences relating to this RFP MUST be through the KCB SUPPLIER PORTAL accessible on the [www.kcbgroup.com](http://www.kcbgroup.com) website.**
- c) Prospective Service Providers must have experience of offering similar solution to firms listed in the stock exchange/financial institutions comparable to The Bank and complexity and must demonstrate the willingness and commitment to meet the criteria as per the questionnaire provided.
- d) In order to simplify this process, you need to provide copies (through the portal) of all supporting documents requested.
- e) You may also be asked to clarify your answers or provide more details. Please answer every question. If the question does not apply to you, please write N/A; if you don’t know the answer, please write N/A.
- f) Failure to complete this questionnaire and/or provide written answers to any further questions or requests for additional information or requests for clarification will result in the supplier's elimination from further consideration.
- g) Please note that by responding to this questionnaire you accept that all answers provided in this questionnaire are legally binding on the supplier and should the need arise, may be used as evidence in any court of law, which has jurisdiction. Further, KCB Bank Kenya Limited



reserves the right without further recourse to verify at its own cost the accuracy of any answers provided herein.

- h) All expenses and costs incurred by a respondent in connection with this RFP for preparation and lodging for submission (without limitation) shall be the sole responsibility of the respondent.
- i) Without limiting its right at law or otherwise KCB Bank Kenya Limited, may at its absolute discretion, suspend or defer this RFP.
- j) Where necessary and if insufficient space has been provided on the questionnaire for the answers, please provide the answers as supplements on separate sheets.
- k) Canvassing for the tender shall lead to automatic disqualification and subsequent elimination of the applicant.

### 1.2.1 KCB Bank Establishment

This section provides a brief overview of KCB establishment that is relevant to the proposed solution.

The Group has the following establishments:

#### Kenya

1. KCB Bank Kenya

#### East Africa

2. KCB Burundi
3. BPR Bank Rwanda Plc
4. KCB Tanzania
5. KCB Uganda
6. KCB South Sudan
7. KCB Bancassurance Intermediary Ltd.
8. KCB Capital
9. KCB Foundation
10. TMB Democratic Republic of Congo

The Head Office for the Group is located at Kencom house Nairobi, Kenya.

Further information about the bank can be obtained from the Group's website - <https://www.kcbgroup.com>

The Group hereby solicits proposals from eligible and competent companies for **Provision of Test Data Management Solution.**



### 1.3 Overview, Aims and Objectives

One of the key enablers of the KCB Bank three years strategy is the rollout of modern digital bank and products to ensure our customers get the best experience while ensuring that the development and testing of these services are done in compliance with the Data Protection Acts of the various jurisdictions that the Bank operates to ensure customer data is well protected.

Over time, there has been significant growth in the non-production databases sizes due to the requirement to have several instances of such test and development environments leading to exponential growth in storage which subsequently requires higher compute for the environment to function properly because of lack of a data sub-setting tool that can be used to create minimized database versions for non-production applications.

The recent past has also witnessed drive by various Governments to implement Data Protection Policies that have implemented a myriad of controls on the rights of the data subjects warranting need for generation of synthetic data for development and testing activities.

Currently, KCB has a data masking and sub-setting solution that has the following limitations:

- Inability to do deterministic masking across various systems and maintain referential integrity.
- Inability to do comprehensive Data sub-setting.
- Lack of functions to mask XML data.
- No synthetic data generation capabilities.
- No functionality to detect potential sensitive information.
- Lack of automated data provisioning and refresh capabilities.
- Lack of integration with KCB CI/CD pipelines.



The envisaged end-state is to have an enterprise Test Data Management solution that can obfuscate customer data in non-production environments during the process of creating them from production environment for use in the Software Development Life Cycle activities which will also provide flexibility to select whether full dataset or data sub-sets are to be created in these environments.

This document therefore constitutes the formal request for the proposal for Test Data Management solution and is being availed on a restricted tender basis to companies or organizations, which have the expertise in this area.

#### **1.4 Format of RFP Response and Other Information for Bidders**

**1.4.1** The overall technical summary information regarding this tender is given in section 2 - Scope of Work and supplier portal. The bidder shall include in their offer, any additional services considered necessary for the successful implementation of their proposal.

Proposals from bidders should be submitted in two distinct parts, namely Technical Proposal and Financial Proposal.

The Technical Proposal should contain all the relevant technical details in response to the bank requirements as outlined in Section 2.

**Bids that do not have this information may be disqualified from further evaluation**

#### **1.4.2 The Technical Proposal should contain the following:**

Bidders, willing to be considered for **this RFP** are expected to furnish the Bank with among others the following vital information, which will be treated in strict confidence by the Bank. All these will be filled in the KCB SUPPLIER portal:

- Preliminary Work plan or project plan with a clear breakdown of phases or work streams.
- Demonstrate capability and capacity to meet the functional and technical requirements as per requirements.
- The Supplier shall provide a minimum of three (3) reference sites for the System(s) where they have been implemented successfully.
- Understanding of the KCB Test Data Management solution requirements
- Manufacturer Authorization Form, from the proposed solution's Vendor.



- System Implementation & Technical Support Enquiry
- Provide a company profile.
- Approval licenses, by the various bodies for compliance, MUST be included where applicable.
- Audited financial statements of the company submitting the RFP bid, for the last two years.
- Any other requirement as specified in the portal

**1.4.3 The Financial proposal shall clearly indicate the total cost of acquiring and implementing the solution as follows:**

- a. The Supplier shall provide a **firm, fixed price for the Original Contract Period**. All costs associated with the required IT System shall be included in the prices. Kindly note that the cost should include supply, installation, training, and commissioning of the IT System inclusive of all freight charges and applicable duties and taxes (VAT and withholding Tax).

Provide an itemized list of all items included and summarize your costs as shown in the table below:

**a) Pricing for perpetual license model**

No	Description	Qty	Unit price (KES)	Total cost-Year 1 (KES)	Total cost-Year 2 (KES)	Total cost-Year 3 (KES)
1	Software/Licensing- perpetual licensing model	20 databases				
2	Implementation, installation and configuration costs					
3	Training Cost (Refer to Table 1: Training BoM)	40				
4	Logistics costs -provide a clear breakdown for logistics cost where applicable					
5	Annual Maintenance/Support Costs-Year 2 -Applicable for perpetual license model only.					



5	Annual Maintenance/Support Costs-Year 3-Applicable for perpetual license model only .					
7	Other Costs-please describe					
<b>Net total</b>						
Taxes						
<b>Grand total</b>						

**Note:**

- For perpetual license model, the 1<sup>st</sup> year maintenance should be included under warranty

**b) Pricing for subscription license model**

No	Description	Qty	Unit price (KES)	Total cost-Year 1 (KES)	Total cost-Year 2 (KES)	Total cost-Year 3 (KES)
1	Software/Licensing- perpetual licensing model	20 databases				
2	Implementation, installation and configuration costs					
3	Training Cost (Refer to Table 1: Training BoM)	40				
4	Logistics costs -provide a clear breakdown for logistics cost where applicable					
5	Other Costs-please describe					
<b>Net total</b>						
Taxes						
<b>Grand total</b>						

**Additional Cost to Complete.** Provide an itemized list of any items not included above by the Bank and related costs that the Supplier deems necessary to provide the information to meet the requirements specified in proposal. Failure to provide said list shall not relieve the Supplier from providing such items as necessary to meet all of the requirements specified in proposal at the Fixed Price Purchase Costs proposed. Ensure to provide your tax assumptions.



- 1.4.4 Bidders are requested to hold their proposals **valid for ninety (90) days** from the closing date for the submission. The Bank will make its best efforts to arrive at a decision within this period.
- 1.4.5 Assuming that the Contract will be satisfactorily concluded, the bidders shall be expected to commence the assignment after the final agreement is reached.
- 1.4.6 The contracting arrangements shall clearly define the responsibilities and the services to be provided by each firm in the case of a joint venture.
- 1.4.7 The Bank reserves the right to accept or to reject any bid, and to annul the bidding process and reject all bids at any time prior to the award of the contract, without thereby incurring any liability to any Bidder or any obligation to inform the Bidder of the grounds for its action.

The vendor’s terms and conditions will not form part of any contract with KCB in relation to this tender.

Canvassing is prohibited and will lead to automatic disqualification.

**1.4.8 Cost of bidding**

The Bidder shall bear all costs associated with the preparation and submission of its bid, and the Bank will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the bidding process.

**1.4.9 Clarification of Bidding Document**

All correspondence related to the contract shall be made in English. Bidders should submit the request for clarification via the message section of the KCB Supplier’s portal on or before **9<sup>th</sup> April 2026 at 3pmEAT**. Any clarification sought by the bidder in respect of the project shall be addressed **at least three (3) calendar days** before the deadline for submission of bids.

The queries and replies thereto shall then be circulated to all other prospective bidders (without divulging the name of the bidder raising the queries) in the form of an addendum. Enquiries for clarifications should be sent via the procurement sourcing system on the **message menu, by use of the following template;**

#	Date	Section / Paragraph (2)	Question
1			
2			



#	Date	Section / Paragraph (2)	Question
3			

#### 1.4.10 Amendment of Bidding Document

At any time prior to the deadline for submission of bids, the Bank, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, may modify the bidding documents by amendment. All prospective Bidders that have received the bidding documents will be notified of the amendment in writing, and it will be binding on them. To allow prospective bidders reasonable time to take any amendments into account in preparing their bids, the Bank may at its sole discretion extend the deadline for the submission of bids based on the nature of the amendments.

#### 1.4.11 Deadline for Submission of Bids

The bid submission deadline is **17<sup>th</sup> April 2026 at 5pm EAT**, as clearly indicated on the sourcing portal.

#### 1.4.12 Responsiveness of Proposals

The responsiveness of the proposals to the requirements of this RFP will be determined. A responsive proposal is deemed to contain all documents or information specifically called for in this RFP document. A bid determined not responsive will be rejected by the Bank and may not subsequently be made responsive by the Bidder by correction of the non-conforming item(s).

#### 1.4.13 Bid Evaluation and Comparison of Bids

Technical proposals will be evaluated and will form the basis for bids comparison. All tender responses will be evaluated in three phases:

- a. Preliminary evaluation that will determine administrative compliance.
- b. Detailed technical evaluation to determine technical compliance and support responsiveness of the vendor (This may include presentations and reference checks)
- c. Financial evaluation to consider pricing competitiveness and the financial capability of the vendors



Once the bids are opened, bid evaluation will commence. In the event that the bank may need to visit client site, vendors will be notified in writing. The bank may also make surprise unannounced visits to the vendors offices to verify any information contained in the bid document. All visits are at the discretion of the bank. Vendors may also be called upon to make brief and short presentations and/or demos on their technical solutions before a panel constituted by the bank.

## SECTION 2 – SCOPE OF WORK

### 2.1 Technical specification

The bank seeks to implement a Test Data Management solution. The scope is as summarized below:

- 1) **Non-Production Databases Analysis** - Undertake complete analysis of the current non-production databases ecosystem architecture with a view to understanding how the various data objects integrate with each other across systems. Contextually the high-level design shall encompass:
  - a. Data Entity relationship diagrams across various non-production environments
  - b. Database platforms hosting the environments.
  - c. Data dictionary for candidate systems
  - d. Discovery of potential sensitive data within the ecosystem.
- 2) **Development of Deterministic Data Masking Functions** – Develop algorithms to mask sensitive data using deterministic algorithms across systems while ensuring referential integrity is maintained within related tables as well as across related systems running various database platforms and ensure that masked data is usable by the application systems.
- 3) **Development of Data Sub-setting Functions** – Develop scripts for data sub-setting for various database platforms driven by either a percentage threshold, date range or any other strategies that will be cascaded to all candidate related child tables.
- 4) **Development of Synthetic Data Generation Functions** – Develop algorithms to generate synthetic data as per the datatype and precision defined on the Data Definition of the candidate table and referential constraints for various database platforms and ensure that synthetic data is usable by the application systems.



- 5) **Development of Tokenization Functions** – Develop algorithms to tokenize sensitive data based on the access levels granted where accounts that are allowed to view real data and those restricted to tokenized data work seamlessly on the same application.
- 6) **Automated Data provisioning configuration**– Configure capability to automate database provision requests invoked by either a user or a CI/CD pipeline provisioning or refreshing a database either as per schedule or on demand.
- 7) **Performance optimization & tuning** - Optimize and tune data masking and sub-setting functions for voluminous databases.
- 8) **Discovery and Reporting** – Develop capability to perform compliance scans against database servers' catalog that can be used to identify any potential sensitive information to generate compliance reports, identify any data drifts between source and destination environments as well as metrics on data usage and refresh history.



## **2.2 Project Management**

The bidder to respond to the specific requirements as outlined below.



AREA	DESCRIPTION
VENDOR EXPERIENCE	<ul style="list-style-type: none"> <li>• Provide details of experience in similar implementations:               <ul style="list-style-type: none"> <li>○ Experience in Implementation of enterprise Test Data Management Tool for various enterprise database platforms.</li> <li>○ Test Data Management tool of choice for implementation is certified to be compliant to PCI/DSS, GDPR, etc.</li> </ul> </li> <li>• Kindly attach details of similar implementations, indicating the solution building blocks, scope and capabilities/modules implemented, and the status of the implementations.</li> <li>• The bidder should have had a prior experience NOT less than five years.</li> <li>• The bidder should indicate the site, duration of the project, the database size, number of data sources/data marts, the structure of the data sources integrated (structured/semi-structured/unstructured) and the data masking and sub-setting algorithms used.</li> </ul>
REFERENCE SITES	<p>Provide details of <b>at least three references</b> where similar implementations have been successfully implemented in large organizations/banking/ financial institutions within the last five years (attach evidence for the respective area of interest). Additionally, provide contact details for each reference site.</p>

AREA	DESCRIPTION
TEAM CAPACITY	<p>The bidder should demonstrate the team’s capability by indicating the number and times similar projects were undertaken by individual members of the teams and the roles undertaken. The bidder is required to provide a resource matrix highlighting critical roles which include but not limited to:</p> <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Analyst</li> <li>• Data Analyst</li> <li>• Data Architect</li> <li>• Data Engineer/ Data Scientist</li> <li>• Database Administrator</li> <li>• Quality Assurance Engineer/Analyst</li> <li>• DevOps Engineer</li> </ul>
PROJECT RESOURCES TESTIMONIALS	<p>The bidder <b>MUST</b> attach testimonials citing relevant experience of successful implementations undertaken by the proposed project resources and the roles played. (Attach evidence for the respective area of interest). Attach detailed resumes of the all the listed resources. It is expected that the resources will not change until the project is fully implemented.</p>
PROJECT RESOURCES CERTIFICATIONS	<p>Provide evidence of certifications and registration by professional bodies for the proposed team to be involved in similar design, implementation, and support of enterprise Test Data Management tool.</p>

AREA	DESCRIPTION
HARDWARE & SOFTWARE SPECIFICATIONS	<ul style="list-style-type: none"> <li>The bidder <b>MUST</b> provide detailed listing hardware and software requirements/specifications for all the necessary solution building blocks including the storage, compute requirements, applicable licenses and the rationale for the solution to enable successful implementation of a complete solution. For each module /component - please indicate the functionalities it will deliver.</li> <li>The bidder <b>MUST</b> indicate which of the components/solution building blocks are preferred to be hosted on a physical, virtualized, or containerized environments and provide sufficient reasons to support that. For containerized option, the bidder <b>MUST</b> provide which container infrastructure is preferred with supporting reasons.</li> </ul>
COSTING	<p>The partner should indicate the expected costing of the solution when fully implemented.</p> <p><b>Note:</b> The pricing should be included in the financial bid document</p>
TRAINING	<p>The vendor <b>MUST</b> provide requisite training for all the solutions deployed to enable the KCB team to support &amp; operate the solution post implementation without reliance on the vendor.</p> <p>The vendor <b>MUST</b> provide a training plan for both technical and non-technical training, including the methodology and location where applicable.</p> <p>The technical training shall include but not limited to system administration for all the deployed solutions and the developer training the Test Data Management tool.</p>
RESOURCE MOBILIZATION LEAD TIME	<p>The bidder shall confirm ability to mobilize resources to commence the project within 2 weeks of award letter by KCB.</p>
PROJECT PLAN	<p>The bidder to provide a detailed project plan should be included clearly indicating expected deliverables, resources required, milestones, outcomes, and time schedules. The bank expects the project to take maximum of <b>6 months</b> from initiation to commissioning.</p>
AGILE IMPLEMENTATION METHODOLOGY	<p>The bidder to have the ability to deliver the solution through agile approach and deliver the full scope within the project timelines. This <b>MUST</b> be reflected in the overall project plan.</p>



AREA	DESCRIPTION
DEPENDENCIES AND PRE-REQUISITES	The bidder <b>MUST</b> clearly indicate any dependencies and pre-requisites necessary for successful implementation and the rationale thereof.
POST IMPLEMENTATION SUPPORT	The bidder <b>MUST</b> include post implementation support & structure (on warranty basis) for ALL the ecosystem components capturing key service offerings. The expected post implementation support period should NOT be less than 12 months.
QUALITY ASSURANCE & TESTING	<p>The bidder shall provide the Testing Strategy, the test plan &amp; approach, indicate the tools for conducting such tests and resources required. KCB expects the following tests to be conducted at the QA &amp; testing phases of the project:</p> <ul style="list-style-type: none"> <li>• User Acceptance testing (UAT) is to be conducted by the end-user of the data to validate whether to accept the project deliverables.</li> <li>• Load testing the data masking, sub-setting and synthetic data generation processes by plugging on all the data sources and executing concurrently (using production-sized infrastructure and production-sized data sets).</li> <li>• Security Testing - The bidder will be required to work closely with the bank resources to carry out and sort out all security related issues. The bidder will be responsible for the resolution of all issues raised.</li> </ul>

### Technical Specification

To fulfil the requirement, the bank is looking for a suitable vendor who meets the requisite technical criteria and qualifications as below.



TECHNICAL AREA	DESCRIPTION
THE DEPLOYMENT ARCHITECTURE	A comprehensive schematic diagram <b>MUST</b> be provided including details for high availability & resiliency, fault tolerance & redundancy, scalability & elasticity, and Disaster Recovery & Business Continuity mechanisms.
SUPPORTED DATABASE PLATFORMS	The implementation <b>MUST</b> deliver test data management to data sources across all KCB Subsidiaries. The data sources include relational databases – Oracle, Microsoft SQL, Postgres, NoSQL databases like MongoDB, Redis and unstructured data sources including but not limited to delimited text files, excel sheets and XMLs and any other file-based data-feed.
DATA MASKING	<p>The bidder <b>MUST</b> demonstrate the ability of the solution to perform comprehensive data masking functions out of box without further customization.</p> <p>The bidder <b>MUST</b> demonstrate the ability of the solution run concurrent data masking and sub-setting jobs to multiple destination environments or multiple data sources.</p>
DETERMINISTIC DATA MASKING/TOKENIZATION	<p>The bidder <b>MUST</b> demonstrate the ability of the solution to produce similar masked data across various database platforms on application of deterministic masking functions.</p> <p>The bidder <b>MUST</b> demonstrate the ability of the solution to support Temenos T24 data masking.</p>
SUB-SETTING	The bidder <b>MUST</b> demonstrate the ability of the solution to produce functional data sub-sets by limiting the resulting data sub-set using either time, percentage or any other strategy as metrics that will apply to all the related child tables.
SYNTHETIC DATA GENERATION	<p>The bidder <b>MUST</b> demonstrate the ability of the solution to produce synthetic data based on Data Definition and constraints defined on the destination database.</p> <p>The bidder <b>MUST</b> demonstrate ability to generate synthetic data for message brokers such as RabbitMQ, Redis, Kafka etc</p>
DATA QUALITY	The bidder <b>MUST</b> demonstrate the resultant data from masking or synthetic data generation can still be used by the application systems.



TECHNICAL AREA	DESCRIPTION
UNSTRUCTURED DATA MASKING	The bidder <b>MUST</b> demonstrate the solution is able to perform masking on unstructured data like documents, images, pdf, files etc.
REFERENTIAL INTEGRITY	The bidder <b>MUST</b> demonstrate the resultant data from masking, sub-setting or synthetic data generation will maintain referential integrity both within the other related tables in the database or on corresponding external systems.
DATA VERSIONING	The bidder <b>MUST</b> demonstrate capability of the system to track versions of data and have capability to revert to a known version.
CONFORMANCE TO DATA PROTECTION LAWS	<p>The bidder <b>MUST</b> demonstrate how the solution enforces compliance to data protection laws and how it implements the following data subject rights:</p> <ol style="list-style-type: none"> <li>1. Right to be forgotten</li> <li>2. Data purging and retention policies</li> </ol> <p>The bidder <b>MUST</b> be registered as a data processor in Kenya.</p>
AUTOMATED DATA PROVISIONING	The bidder <b>MUST</b> demonstrate the solution is able to automate provision and request of data that is compliant to the non-production data controls in place by users through a UI portal or scheduler.
REPORTING	<p>The bidder <b>MUST</b> demonstrate the capability of the system to scan through data sources and identify potential PII data that is unmasked and track compliance.</p> <p>The bidder <b>MUST</b> demonstrate capability of the system to identify data drifts between source and destination data sources</p>
PERFORMANCE & THROUGHPUT	The bidder <b>MUST</b> demonstrate the ability of the solution to execute data masking, sub-setting and synthetic data generation tasks within reasonable time.
SCALABILITY	The bidder <b>MUST</b> demonstrate ability to design and architect a robust Test Data Management platform that is capable of rapid scalability into several terabytes or even petabytes of data and accommodate concurrent users without service disruption or degradation.

TECHNICAL AREA	DESCRIPTION
DATA SECURITY & INTEGRITY	The bidder <b>MUST</b> demonstrate how the system will handle security on data at rest and in transit; State any encryption schemes/algorithms and or masking mechanisms to be implemented. The security protocols implemented <b>MUST</b> be able to prevent unauthorized access, addition or modification data in the data warehouse or the data marts.
LOGGING AND AUDIT TRAIL	The system <b>MUST</b> support the following logging and audit trail features: <ul style="list-style-type: none"> <li>○ Activity &amp; event logging mechanism indicating what is being logged and in which formats.</li> <li>○ Ability to record audit trails that meet standards for all users' activities.</li> <li>○ Ability to generate tamper proof logs and store files, database, publish to a logging service, rotating logs</li> <li>○ Ability to generate audit trail reports</li> <li>○ Ability to manage log levels</li> </ul>
CONFIGURABILITY & EXTENSIBILITY	The system <b>MUST</b> provide at minimum low code capability to add any new data sources and define rules for masking, sub-setting or synthetic data generation through GUI based configuration panel.
HIGH AVAILABILITY & RESILIENCY	The deployment architecture for the Test Data Management solution <b>MUST</b> support high availability and fault tolerance.

TECHNICAL AREA	DESCRIPTION
DISASTER RECOVERY & BUSINESS CONTINUITY	<p>The system <b>MUST</b> support the following but not limited to:</p> <ul style="list-style-type: none"> <li>• Ability to do complete and partial failover the solution and other related components to Disaster Recovery (DR) site within agreed Recovery Time Objective (RTO) of 10 minutes. This should conform to KCB Business Continuity Management (BCM) policy.</li> <li>• The Data warehouse event driven mirroring/streaming should conform to the banks Recovery Point Objective (RPO) of 10mins</li> <li>• Detailed failover runbook <b><u>MUST</u></b> be provided.</li> </ul>
STORAGE & BACKUPS	<p>The system <b>MUST</b> support the following:</p> <ul style="list-style-type: none"> <li>○ Ability to manage data lifecycle for the platform. This should be configuration based on the banks data life cycle and retention policy.</li> <li>○ Ability to support internal and external archival mechanism.</li> <li>○ Ability to integrate the ecosystem with existing bank's backup platforms.</li> <li>○ Ability to take online backups on the platform without performance degradation.</li> <li>○ It should be possible to fully recover/ restore the system from the backup within one hour.</li> </ul>
ENVIRONMENTS	<p>The bidder shall provide specifications of the environments to host the ecosystem to be provision by the bank and will be responsible for their setup.</p> <ul style="list-style-type: none"> <li>○ Development environment</li> <li>○ System integration test (SIT) environment</li> <li>○ User acceptance testing (UAT) environment.</li> <li>○ Production environment.</li> </ul>
LICENSING MODEL	<p>The bidder shall provide the licensing models supported including the costing for each model.</p>

TECHNICAL AREA	DESCRIPTION
MONITORING & ALERTS	<p>THE BIDDER SHOULD PROVIDE:</p> <ul style="list-style-type: none"> <li>• Tools for real time monitoring of system components.</li> <li>• Tools &amp; capability for log monitoring</li> <li>• Integration capabilities for SMS and email alerts &amp; notifications for specific events for instance of process errors, exception, thresholds, statuses etc.</li> <li>• Ability to integrate with existing monitoring tools within the bank.</li> </ul>
SYSTEM AVAILABILITY	<p>The system <b>MUST</b> be available 99.9999%. Confirm adherence to carrier grade standards and provide evidence of the same.</p>
SUPPORT STRUCTURE & MODEL	<p>The bidder should provide the following information with costing where applicable:</p> <ul style="list-style-type: none"> <li>○ Support structure</li> <li>○ Support models</li> <li>○ Escalation matrix</li> <li>○ Service Level Agreement (SLA) template</li> <li>○ Onsite and offsite support</li> <li>○ Where onsite support is provided, the bidder should avail competent resources to support the system.</li> </ul>
VERSIONING AND PATCH MANAGEMENT	<p>The bidder <b>MUST</b> provide details of the version upgrades required and frequency of the same to ensure that such version upgrade is in line with bidder's support model.</p> <p>The bidder shall provide different patches required to be implemented from time to time. Sufficient notice should be provided to the bank before such patches are deployed.</p>
SYSTEM DOCUMENTATION	<p>The bidder shall be required to maintain up to date technical documentation for all technical work done on the system over time. They should be documented and shared with the bank prior to final test cycles preceding go live. The bidder will also be required to develop user &amp; operations manual as part of the exit criteria for go live. Additionally, the platform should provide online context-specific documentation/help and dictionary.</p>



**Table 1: Training BoM**

<b>Training BOM</b>	<b>PAX</b>
OEM Instructor Data Masking and Sub setting classroom training	40

### **2.1.1 Documentation Requirements**

All documentation and training materials (both in hardcopy as well as a softcopy in PDF format) must be available in order to complete the process, business, technical/system, operations, and support acceptance activities.

Supplier’s suggestions for documentation and training materials to support the implementation, use and maintenance of the Solution and any supporting technology components that will be provided as part of this project are to be included in the Supplier’s proposal.

Documentation must be in English and French.

### **2.2 Training**

It is expected that formal training will be given to all stakeholders of the solution. However, the solution must be intuitive and help text must be available and presented in a manner that encourages users to try to find information. Training of technical support team will be to such an extent that they will be reasonably able to handle their duties competently. Where appropriate, the supplier will be expected to discuss the technical aspects of the system to enable, for example, creation of ad-hoc reports and integration to other systems

Training will be provided in English language at a convenient mutually agreed location. If additional expenses will be incurred for offsite training, this will be borne by the supplier and must be included in the financial proposal.

### **2.3 Testing and Acceptance**

The bank will test the proposed system in a test environment to ascertain that all the functionalities as put forward by the supplier are met. Incorrect information discovered at this time will constitute grounds for disqualification. It is the responsibility of the supplier to ensure the requirements defined in the proposal are achieved.



The signed proposal will be the sole reference document for any discussion issues arising, related to acceptance.

Acceptance Criteria: The Bank will accept the proposed deliverable after they have been fully tested by the bank and confirmed to meet the requirements as specified in the original RFP and signed RFP response.

## 2.4 Proof of Concept

The bank **may require proof of concept** of the proposed solution as evidence that it is viable and capable of achieving requirements. All costs related to the Proof of Concept will be borne by the bidder.

## 2.5 Overall Responsibility

- The Bidder is obliged to work closely with the Bank's staff, act within its own authority, and abide by directives issued by the Bank that are consistent with the terms of the Contract.
- The Bidder will abide by the job safety measures and will indemnify the Bank 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 Bank responsible or obligated.
- The Bidder is responsible for managing the activities of its personnel, or subcontracted personnel, and will hold itself responsible for any misdemeanors.
- The Bidder shall appoint an experienced counterpart resource to handle this requirement for the duration of the Contract. The Bank may also demand a replacement of the manager if it is not satisfied with the manager's work or for any other reason.
- The Bidder shall take the lead role and be jointly responsible with the Bank for producing a finalized project plan and schedule, including identification of all major milestones and specific resources that the Bank is required to provide.
- The Bidder will not disclose the Bank's information it has access to, during the engagement, to any other third parties without the prior written authorization of the Bank. This clause shall survive the expiry or earlier termination of the contract

## 2.6 Pricing

Costs (in KES currency should be inclusive of all applicable taxes where necessary) and Man/Day estimates, where applicable. The costs for foreign firms should be inclusive of all applicable taxes as well. Proposals in USD currency may be accepted for foreign entities.



All taxes and VAT amount **must** be clearly stipulated and separated from the base costs and should be valid for a minimum of 90 days. **NB: Any incomplete commercials lacking all the applicable taxes will be disqualified/rejected.**

## 2.7 Delivery

Delivery and performance of the Services shall be made by the successful Bidder in accordance with the time schedule as per Proposal and subsequent Agreement.

## 2.8 Delayed Delivery and Installation Caused by the Supplier

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 Bank 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 Bank 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.

## 2.9 Warranty

The successful bidder shall provide at least **36 months** Warranty for the software and ensure it is free from any sort of defects and shall perform as per expectations. The successful bidder shall provide an option for on-going warranty support beyond the warranty period. Failure to this the supplier will pay damages to the tune of the cost of the solution.

## 2.10 Support Requirements

The Supplier should provide and sign an Annual Maintenance Contract and provide support for the solution for the first year at no cost.

The Supplier should provide updates, upgrades toll-free technical assistance 24/7/365.

The Supplier should provide a summary of the resources (support personnel and otherwise) devoted specifically to technical issues, involving notification technology, as well as support procedures.

The technical support resource(s) should ideally be physically located / based in Kenya

The Supplier should offer various modes of communication channels for support and be available preferably 24/7/365. The methods of support include:

- i. Online chat
- ii. Phone and



- iii. E-mail

The Supplier support website should offer the following various support specific tools:

- i. Video tutorials
- ii. Online user manual
- iii. Archive data search
- iv. FAQs

### **2.11 Bid Effectiveness**

It is a condition of the bank that the vendor guarantees the sufficiency, and effectiveness of the solution proposed to meet the bank requirements as outlined in this document. The Bank will hold the vendor solely responsible for the accuracy and completeness of the solution proposed and information supplied in response to this tender, and were the vendor to be awarded the tender, they would implement the solution without any additional requirements from the bank.

### **2.12 Payment Terms**

**The bank will NOT make any payments in advance and will pay based on deliverables.** The Bank will issue an LPO for all the equipment and/or services ordered. **Payment will be done within 45 days after receipt of undisputed invoice(s) and upon delivery completion, that is, after delivery, testing installation and acceptance of the equipment and/or services supplied.**

The bank will not accept partial deliveries, and neither will the bank make partial payments unless agreed by both parties. Payment for equipment and/or services will only be made once the entire ordered equipment and/or services are delivered, installed, and commissioned.

### **2.13 Staffing**

The Supplier will provide the relevant staff and tools to carry out all the required work under this tender. At least two certified experts (2 in general certification and specialized) and a back-up person are required in the technical areas.

A project/account manager is also required to coordinate and account for all the Supplier's activities throughout the contract period.

### **2.14 Responsibility as an Independent Contractor**

The Supplier agrees to take overall responsibility for any services rendered regardless of whether third parties engaged by the Supplier or the Supplier themselves carry them out.



## **SECTION 3 – GENERAL CONDITIONS OF CONTRACT**

### **3.1. Introduction**

Specific terms of contract shall be discussed with the bidder whose proposal will be accepted by the Bank. The resulting contract shall include but not be limited to the general terms of contract as stated below from 3.2 to 3.23.

### **3.2. Award of Contract**

Following the opening and evaluation of proposals, the Bank will award the Contract to the successful bidder or multiple bidders whose bids have been determined to be substantially responsive. The Bank will communicate to the selected bidder its intention to finalize the draft conditions of engagement submitted earlier with his proposals. After agreement will have been reached, the successful Bidder shall be invited for agreement and signing of the Contract Agreement to be prepared by the Bank in consultation with the Bidder.

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

These General Conditions (sections 3.2 to 3.23) shall apply to the extent that they are not superseded by provisions in other parts of the Contract that shall be signed.

### **3.4. Bid Validity Period**

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

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

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

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

Delivery and performance of the solution shall be made by the successful Bidder in accordance with the time schedule as per Agreement.



If at any time during the performance of the Contract, the Bidder should encounter conditions impeding timely delivery and performance of the Solution, the Bidder shall promptly notify the Bank 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 Bank 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.

Except in the case of "force majeure" as provided in Clause 3.14, 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 3.8.

### **3.7. 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.

All services must be delivered and implemented within agreed timelines after the bank issues a purchase order. Any delayed in commencement of the execution of the contract will attract a penalty which will be specified in the agreement signed by both parties.

Notwithstanding the provisions detailed in this section above, the bank reserves the right to terminate the award at any time and take corrective measures as necessary to protect the bank interests, which interest are solely determined by the bank.

### **3.8. 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.

### **3.9. Applicable Law**

This agreement arising out of this Request for Proposal 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.

### **3.10. Bidder's Obligations**

The Bidder is obliged to work closely with the Bank's staff, act within its own authority, and abide by directives issued by the Bank that are consistent with the terms of the Contract.



The Bidder will abide by the job safety measures and will indemnify the Bank 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 Bank responsible or obligated.

The Bidder is responsible for managing the activities of its personnel, or subcontracted personnel, and will hold itself responsible for any misdemeanors. The Bidder will not disclose the Bank's information it has access to, during the work, to any other third parties without the prior written authorization of the Bank. This clause shall survive the expiry or earlier termination of the contract.

### **3.11. The Bank's Obligations**

In addition to providing Bidder with such information as may be required by the bidder to complete the project, the Bank shall,

- a) Provide the Bidder with specific and detailed relevant information concerning the contract.
- b) In general, provide all information and access to Bank's personnel:

### **3.12. Confidentiality**

The parties undertake on behalf of themselves and their employees, agents and permitted subcontractors that they will keep confidential and will not use for their own purposes (other than fulfilling their obligations under the contemplated contract) nor without the prior written consent of the other disclose to any third party any information of a confidential nature relating to the other (including, without limitation, any trade secrets, confidential or proprietary technical information, trading and financial details and any other information of commercial value) which may become known to them under or in connection with the contemplated contract. The terms of this Clause shall survive the expiry or earlier termination of the contract.

### **3.13. Force Majeure**

- a. Neither Bidder nor Bank shall be liable for failure to meet contractual obligations due to Force Majeure.
- b. Force Majeure impediment is taken to mean unforeseen events, which occur after signing the contract with the successful bidder, including but not limited to strikes, blockade, war, mobilization, revolution or riots, natural disaster, acts of God, refusal of license by Authorities or other stipulations or restrictions by authorities, in so far as such an event prevents or delays the contractual party from fulfilling its obligations, without its being able to prevent or remove the impediment at reasonable cost.
- c. The party involved in a case of Force Majeure shall immediately take reasonable steps to limit consequence of such an event.



- d. The party who wishes to plead Force Majeure is under obligation to inform in writing the other party without delay of the event, of the time it began and its probable duration. The moment of cessation of the event shall also be reported in writing.
- e. The party who has pleaded a Force Majeure event is under obligation, when requested, to prove its effect on the fulfilling of the contemplated contract.

### **3.14. Payments**

The Bank's standard payment terms is **forty-five (45) days** after receipt of undisputed invoice(s) and upon delivery completion. Please note that **KCB shall only make payments through a KCB Account** and thus you are encouraged to open a KCB account in case you do not have one.

### **3.15. Way Forward**

Once the bids are opened, bid analysis will commence and vendors may be informed when their bid has been short-listed. Short listed vendors will be invited to demonstrate their proposal if need be and to plan for site visits. If the bank may need to visit client site, vendors will be notified in writing. The bank may also make surprise unannounced visits to the vendors offices to verify any information contained in the bid document. All visits are at the discretion of the bank.

### **3.16. Bid Effectiveness**

It is a condition of the bank that the vendor guarantees the sufficiency, and effectiveness of the service model proposed to meet the bank requirements as outlined in this document. The Bank will hold the vendor solely responsible for the accuracy and completeness of information supplied in response to this tender. The bank will hold the vendor responsible for the completeness of the service model proposed and that were the vendor to be awarded the tender, they would implement the service model without any additional requirements from the bank.

### **3.17. Contract Provision**

The bank will not make any payments in advance. The Bank will issue a Purchase Order for all the services ordered. The Purchase Order will be paid within 45 days after as agreed upon aforesaid herein. Any payments for the maintenance services will be subject to a contract to be agreed with the vendor. The bank will not accept partial deliveries, and neither will the bank make partial payments.

### **3.18. Buyer's Rights**

The Bank reserves the right to reject any or all the tender bids without giving any reasons and the Bank has no obligation to accept any offer made. The Bank also reserves the right to keep its selection and selection criteria confidential. Bids not strictly adhering to tender document conditions may not be considered by the Bank whose decision on the matter shall be final. The



vendor’s terms and conditions will not form part of any contract with the Bank in relation to this tender. Bids not strictly adhering to RFP conditions may not be considered by KCB whose decision on the matter shall be final.

**Canvassing is prohibited and will lead to automatic disqualification.**

**3.19. Responsibility as an independent contractor**

The vendor agrees to take overall responsibility for any services rendered; regardless of whether third parties engaged by the vendor or the vendor himself carry them out

**3.20. Delivery**

The delivery timelines shall be as specified in the scope of work, bank will not accept any partial deliveries.

**3.21. Risk of Loss**

The supplier covers all risks of loss and damage to any equipment for the implementation of the solution, until the equipment has been delivered to the premises of KCB. Once the equipment /solution has been installed and tested the responsibility is transferred to KCB.

**ANNEXURES**

**ANNEX 1 – REFERENCES**

References of similar services

**Note:**

The Firms should submit the references in this format.

No	Name of Firm/Company	Contract reference and brief description:	Date contract awarded /Period	Date contract Completed / in progress	Customer contact name and phone number	Value of Contract: (KES/USD )
1						
2						



3						
4						
5						
6						
7						
8						
9						
10						

**ANNEX 2 – COMPANY BRIEF SUMMARY**

<b>Company</b>	
<b>Years of experience</b>	
<b>Core Business</b>	
<b>Key Contact</b>	
<b>Geographical Spread in operation</b>	
<b>No. of Staff</b>	
<b>No. of Support Staff based in Kenya</b>	
<b>Area of Specialization</b>	
<b>List of Directors and shareholdings</b>	
<b>Customer Base</b>	

**ANNEX 3: VENDOR CONFLICT OF INTEREST DISCLOSURE FORM**

All vendors interested in conducting business with the bank must complete and return the Vendor Conflict of Interest Disclosure Form in order to be eligible to be awarded a contract. Please note that all vendors are subject to comply with the Bank’s Code of Ethical Conduct and conflict of interest policies as are applicable as stated within the certification section below.

Any vendor who does not provide or provides misleading or incorrect information on the disclosure form shall be disqualified from participation. The contract shall be voidable by the Bank if the misleading or incorrect information on the form is discovered by the Bank subsequent to execution of a contract.



If a vendor has a relationship with a bank official or employee, an immediate family member (*spouse, children, parents & siblings*) of a bank official or employee, the vendor shall disclose the information required below.

**Certification:** I hereby certify that to my knowledge, there is no conflict of interest involving the vendor named below: -

1. No Bank official or employee or Bank employee's immediate family member has an ownership interest in vendor's company or is deriving personal financial gain from this contract.
2. No retired or separated Bank official or employee who has been retired or separated from the Bank for less than one (1) year has an ownership interest in vendor's Company.
3. No Bank employee is currently employed or prospectively to be employed by the vendor.
4. Please note any exceptions below:-

Vendor Name	Vendor Phone Number
Conflict of Interest Disclosure*	
Name of Bank employees, ex-employees, elected officials or immediate family members with whom there may be a potential conflict of interest _____	<input type="checkbox"/> Relationship to employee _____ <input type="checkbox"/> Interest in vendor's company _____ <input type="checkbox"/> Other _____

\*Disclosing a potential conflict of interest does not disqualify vendors. In the event vendors do not disclose potential Conflicts of interest and they are detected by the Bank; vendor will be disqualified from doing business with the Bank.

I certify that the information provided is true and correct by my signature below:

Signature of Vendor Authorized Representative	Date	Printed Name of Vendor Authorized Representative
---	------	--

## **DECLARATION**

Please complete the declaration below and attach this document in its entirety to your response. Also ensure that you have indicated the areas of interest and that you have answered all questions in the same order and numbering as given in this document.

I/we certify that the information provided in response to this Questionnaire is accurate and complete as at the date set out below.

I/we understand that the provision of false information in response to this Questionnaire could result in the Company being excluded from the list of those who may be invited to tender for a contract with KCB Bank Kenya Limited.

I/we undertake to inform KCB Bank Kenya Limited Ltd promptly following any matter which would alter or add to any of the information given in response to this Questionnaire.

I/we make this declaration for and on behalf of the Company.

**Signed:** .....

**Name:** .....

**Position:** .....

**Date:** .....

Company stamp