



**MINISTRY OF ROADS AND TRANSPORT  
STATE DEPARTMENT FOR TRANSPORT**

**HORN OF AFRICA GATEWAY DEVELOPMENT PROJECT  
(HoAGDP)**

**CONSULTANCY SERVICES FOR THE DEVELOPMENT OF A  
NATIONAL TAXI POLICY FOR KENYA**

**TENDER REF: KE-SDOT-228118-CS-CQS**

**TERMS OF REFERENCE**

**1.0 BACKGROUND**

The Government of the Republic of Kenya (GOK) has received financing from the International Development Association (IDA) to finance the Horn of Africa Gateway Development Project (HoAGDP). The HoAGDP, a Regional Project, aims to enhance regional trade facilitation, improve transportation of people and goods and to achieve institutional strengthening of selected entities in the transport sector.

The GoK, through the State Department for Transport (SDoT) which is a designated implementing entity for HoAGDP and is part of the Ministry of Roads and Transport, intends to use a portion of the proceeds of the credit for consultancy services for ‘Development of a Sustainable National Taxi Policy for Kenya.

One of the key mandates of the Ministry of Roads and Transport is to develop an efficient, safe, integrated and seamless multimodal transport system. Transport is a key enabler in the achievement of enhanced economic growth as envisioned in the Vision 2030, the country’s long-term development blueprint that aims to make Kenya a newly industrialized economy. In this regard an effective and sustainable policy and regulatory framework is essential for optimal transport services.

Over the years, the modal share of taxis (four, three and two wheelers) as a means of public transport has risen significantly especially in major cities. With advancement of technology, the Transport Sector has seen innovations such as the digital/ride-hailing industry, which come with convenience, safety, reliability, flexibility and affordability that attracts many users. Since 2014, major urban centres such as Nairobi, have experienced a surge in Taxi-Ride Hailing Apps Operators or Transport Network Companies (TNC). This refers to entities or persons who connect passengers or goods with transportation network drivers for pre-arranged and/or arranged transportation exclusively through the offering, use or operation of a transportation network. The main players in the industry include both local and international companies.

The ride-hail taxi services have become one of the most reliable means of public transport, especially for residents in urban areas, who on a daily basis have to cope with the urban centers’ inadequately managed public transport system. The expansion of the city’s middle-class population, having access to smartphones and affordable internet connectivity, has enabled rapid growth in

this new industry. A number of the conventional taxis still operate but have significantly less market share compared to the ride-hail taxi operators.

The technological disruption of the local taxi industry has been accompanied by a price war and stiff competition, with some competitors and players coming close to skirting the regulations in order to remain afloat economically. To survive in the industry and be successful, investors have been forced to strengthen and reshape their operations including introduction of new products to attract customers.

For purposes of this assignment, the term "taxi" refers to both the conventional and the ride-hail taxi, covering four-wheeler (passenger vehicles) three-wheeler (*tuk-tuk*) and two-wheeler (*boda-boda* & e-bicycles).

## **2.0 RATIONALE FOR THE POLICY**

The absence of a clear taxi policy regime has led to various challenges including disputes, low earnings, opaque pricing formula, compromised service quality, unstable market dynamics and regulatory inconsistencies. Thus, a national taxi policy is needed to balance and ensure affordability for passengers, fair returns for drivers and vehicle owners, facilitate healthy competition, driver welfare, safety and security, and industry growth.

Further, the rapid emergence and expansion of ride-hailing services have left the regulatory framework unable to keep pace with fast technological advancement. This in turn has led to conflict between the ride-hailing app owners, drivers and vehicle owners, as has been evidenced by the grievances and strikes in the taxi industry.

The TNCs benefit consumers by providing low-cost on-demand services. It is estimated that approximately 35,000 drivers are enrolled on the ride-hailing platforms, with most drivers' cross-list with different apps. On average they collectively complete approximately 175,000 rides/trips per day across all network companies nationwide.

In the past few years, the taxi industry has been plagued with various conflicts including

Conventional taxis vs the ride-hailing taxis; ride-hailing app companies' vs drivers/vehicle owners; ride-hailing drivers/vehicle owners' vs passengers. This resulted to strikes, grievances and disorder in the industry. Some of the reasons include:

1. There are no taxi and/or TNC fare pricing formula and guidelines, this has caused conflict among rival companies/operators who blame one another for price undercutting;
2. Low earnings that often fail to cover key expenses such as insurance, maintenance, and wear and tear, raising concerns over fairness and sustainability;
3. Discriminatory treatment by county governments which obligates the conventional taxis to pay various fees such as parking fees;
4. Conventional taxis are subjected to designated spots thus limiting the service coverage;
5. Lack of clear policies and regulations lead to inconsistent service standards, fare disputes and licensing requirements, among others;
6. There are no clear guidelines to manage and support emerging innovations in the taxi industry. This is partly to inadequate capacity both by the operators (drivers and vehicle owners) and the regulator;
7. Market dominance by a few well-established ride-hail application companies and registered conventional taxi companies;
8. The taxi industry has been grappling with insecurity challenges because of fierce competition and odd working hours exposing the drivers and their vehicles to unscrupulous individuals;
9. Cut-throat competition between conventional taxi, the ride-hail taxis, boda boda/ tuktuk (two- and three wheelers) in major urban areas;
10. Many vehicles used in the industry are acquired on loan and because of the rising competition, tough operating environment and dwindling earnings, operators in the industry have been exposed to loan defaults with a number of the vehicles re-possessed and auctioned by the financing institutions thus reducing their quality of life;
11. A significant number of taxi and private car hire vehicles are owned by third parties who hire them to drivers and derive a rental fee from them – this arrangement often places a financial pressure on drivers, prioritizes profit over service quality and compromise safety of both the passenger and driver; and,
12. Alleged exploitation of the ride- hailing vehicle owners and drivers by the Transport Network Companies (TNC).

Following complaints by the transport network operators (drivers and owners), the Ministry through the National Transport and Safety Authority (“NTSA”) developed the NTSA (Transport Network Companies, Owners, Drivers and Passengers) Regulations 2022, which contained a raft of provisions including the capping of commissions charged by TNCs at 18% as detailed in Section 14 of the Regulations. The interpretations of the commissions has led to a conflict between the Transport Network Companies and the transport network operators.

The issue of capping commissions in the ride-hailing industry remains highly contentious - with some ride-hailing drivers and vehicle owners supporting the capping of commissions arguing that that the earnings are sustainable. Whilst others including ride-hailing app owners argue that, capping of commission will be an obstacle to a vibrant free market place, thereby reducing investment, discourage innovations and ultimately disadvantage Kenyan consumers.

Given the foregoing, the State Department for Transport (SDoT) intends to assess the taxi industry in Kenya and develop a national taxi policy.

### **3.0 OBJECTIVES OF THE CONSULTANCY**

The overall objective is to **develop a National Taxi Policy** that provides a coherent, sustainable and harmonized framework for regulating, managing, and promoting safe, efficient, inclusive, and sustainable taxi services in Kenya.

#### **3.1 Specific objectives**

- i.) Examine the existing taxi policy and regulatory and institutional framework for conventional taxi and ride-hail taxi covering *boda boda*, *tuk-tuk* and e-bicycles, including its market organization, business models, and role of key stakeholders;
- ii.) Explore the conventional taxi and ride-hail application companies' price setting mechanism and develop a pricing model;
- iii.) Develop a data-driven National Taxi Policy and Implementation Matrix for Kenya that focuses on service quality, operator viability, safety, and driver welfare.
- iv.) Prepare draft amendment to the NTSA (TNCs Owners, Drivers and Passengers) Regulations, 2022 governing taxi services.

### **4.0 SCOPE OF SERVICES**

To meet the objectives of the consultancy, the scope of services is as follows:

#### **4.1 Situational Analysis**

- Map existing taxi business and service models that is both conventional and ride-hail taxis including special-needs taxis, etc.

- Review national legislation, county regulations/bylaws, relevant to taxi operations including but not limited to NTSA Act, NTSA (TNC Owners, Drivers, and Passengers) Regulations, 2022, Traffic Act Cap 403, ICT-related laws.
- Review the institutional mandates within the taxi industry.
- Assess operational challenges, safety issues, pricing disputes, driver welfare matters, competition dynamics, and environmental impacts.
- Analyze economic (pricing, revenue etc.), social (gender & welfare, etc), safety & security, digital/ICT, and environmental aspects of the taxis.

## 4.2 Stakeholder Consultations

Undertake stakeholder mapping and engage key stakeholders including but not limited to:

- Ministry of Roads and Transport
- Ministry of ICT
- National Transport and Safety Authority (NTSA)
- Competition Authority of Kenya
- National Police Services
- Data Protection Commission
- County governments (all 47 counties)
- Digital ride-hailing companies/associations/Savings And Credit Cooperative Organization (SACCO)
- Conventional taxi companies/associations/SACCOs
- Consumer rights groups
- Labour organizations
- Security agencies
- Insurance and finance institutions
- Persons With Disabilities (PWDs) groups
- Environmental agencies

## 4.3 Benchmarking

- Study best practices from comparable jurisdictions (e.g., South Africa, EU, UK, Singapore, etc).
- Draw lessons on policy and regulation of the taxi industry covering both conventional and digital mobility platforms, labour rights, insurance, safety standards, fare-setting, and data-sharing.
- On-the-job training for six (6) counterpart personnel.

## 4.4 Policy Development

The consultant shall draft a National Taxi Policy addressing critical issues and Policy recommendations/measures of the following:

**a) Institutional and Governance Framework**

- Roles, responsibilities and coordination among various institutions including government and private involved in the management of taxi industry

**b) Regulatory framework**

- Licensing and permit structures
- Regulation and compliance requirements for both operators and drivers of conventional and ride hail taxis.
- Regulation and compliance requirements for ride hail taxi app companies.

**c) Operational Standards**

- Vehicle specifications and roadworthiness
- Driver qualification standards
- Safety and security protocols
- Insurance and liability provisions

**d) Fare Regulation and Competition**

- Pricing transparency
- Anti-competitive practices
- Revenue-sharing guidelines for digital platforms

**d) Labour and Social Protection**

- Terms of engagement between drivers, owners, and platforms
- Worker rights, benefits, and protections
- Dispute resolution mechanisms

**e) Digital & Data Governance**

- Data sharing between platforms and government
- Consumer protection and privacy safeguards
- Integration with national mobility data systems

**f) Inclusivity and Accessibility**

- Services for PWDs
- Security and Safety provisions
- Gender inclusion
- Non-discrimination principles
- User rights and dispute resolution mechanism

## **g) Environmental Sustainability**

- Emission standards and alignment with national climate and air quality policies
- Promotion of electric and low emission taxis
- Urban mobility integration

### **4.5 Policy Implementation Framework**

- Institutional responsibilities
- Implementation roadmap
- Budget estimates
- Monitoring and evaluation framework
- Risk analysis and mitigation measures

### **4.6 Stakeholder Validation**

- Present drafts to stakeholders in different parts of the country in line with the requirement of the Constitution of Kenya on public participation. Prepare reports for the workshop.
- Incorporate feedback into the final policy.
- Provide final validated National Taxi Policy for Kenya and Implementation Plan.

### **4.7 NTSA (TNCs Owners, Drivers and Passengers) Regulations 2022**

- Based on the policy recommendations, propose amendments to the NTSA (TNCs Owners, Drivers and Passengers) Regulations, 2022.

### **4.8 Taxi Pricing Model**

- Develop a taxi pricing model/mechanism for both conventional and ride hail taxis.
- The model(s) must achieve:
  - Revenue maximization vs. affordability
  - Fair driver earnings
  - Rider satisfaction and transparency
  - Regulatory constraints (fare caps, minimum fares, surge rules, promotion guidelines)
  - Competitive positioning (vs. conventional taxis, ride hailing taxis, public transport)
- In developing the taxi pricing model, the consultant will undertake the following:

#### **4.8.1 Market & Cost Analysis**

- Conduct benchmarking of comparable taxi and ride-hailing services
- Analyze demand patterns, rider behavior, and price sensitivity
- Assess driver and operator cost structures to determine minimum viable fares

#### **4.8.2 Data Review & Analytics**

- Review and validate available operational and trip data
- Identify data gaps and recommend data collection improvements
- Analyze demand–supply dynamics across time and geography (Kenya)

#### **4.8.3 Pricing Model Design**

- Design fare structure (base fare, distance/time rates, minimum fare, surcharges)
- Develop static and/or dynamic pricing logic, including surge mechanisms if applicable
- Define safeguards such as caps, floors, and fairness constraints

#### **4.8.4 Simulation & Impact Assessment**

- Simulate pricing scenarios under different demand and traffic conditions
- Assess impacts on rider prices, driver earnings, wait times, and revenues
- Refine model parameters based on simulation outcomes

#### **4.8.5 Pilot Support & Validation**

- Support pilot testing or phased rollout
- Define Key Performance Indicators KPIs and monitoring framework
- Incorporate pilot feedback and performance results into final model

#### **4.8.5 Implementation & Knowledge Transfer**

- Deliver final pricing model and technical documentation
- Provide implementation guidelines and governance recommendations
- Conduct training or knowledge transfer sessions for relevant stakeholders

### **5.0 DURATION AND LOCATION OF THE STUDY**

The assignment shall be completed within six (6) months. The Consultant will be required to participate in meetings with the Client to discuss the assignment at any stage.

### **6.0 REPORTING REQUIREMENTS**

The Consultant shall prepare and submit to the Client the following Reports. All reports shall be in English and prepared on A4 metric size paper. All reports will be submitted in five (5) hard copies and two (2) soft copies in flash disk pdf and MS

Word or Excel formats. In order to facilitate speedy review by the Client of Consultant's work, the Consultant is encouraged to organize parts of the main reports into working papers for prior discussion with the Client before compilation into deliverables.

<b>7.0 SCHEDULE OF DELIVERABLES</b>			
<b>S.No</b>	<b>Deliverables</b>	<b>Remarks</b>	<b>Date of Delivery to Client (Months after commencement)</b>
1.	Inception Report	Methodology, work plan and timeline. Stakeholder engagement plan Structure and final outputs	0.5
2.	Situational Analysis Report	Detailed assessment of the taxi ecosystem Regulatory and institutional mapping Problem and opportunity (SWOT) analysis	2.0
3.	Benchmarking Report	Global best practices and comparative analysis	2.5
4.	(i) Draft National Taxi Policy (ii) Draft Taxi Pricing Models	Including all thematic components. Policy rationale, principles, objectives and strategies Draft Taxi Pricing Model: <ul style="list-style-type: none"> <li>- Pricing model design and methodology document</li> <li>- Cost and market analysis report</li> <li>- Scenario simulation and impact assessment results</li> <li>- Draft recommended pricing structure and parameters</li> <li>- Implementation roadmap and monitoring framework</li> </ul>	3.5
5.	Proposed amendments on the NTSA (TNCs Owners, Drivers and Passengers) Regulations 2022	Proposed amendments including Taxi pricing model/ mechanism	4.0
6.	Stakeholder Consultation Report	Views from stakeholders on the Draft National Taxi Policy and proposed amendments on NTSA (TNCs Owners, Drivers and Passengers) Regulations 2022	4.5
8.	(i) Final National Taxi Policy	Key Performance Indicators, targets,	5.5

	(ii) Final Taxi Pricing Models (iii) Implementation Framework (iv) Monitoring and Evaluation (M&E) Plan	timelines, risk mitigation and budget (costed) implementation plan  <i>All the raw and processed data files, notebooks, source codes, configuration files, model artifacts, APIs, logs, passwords, and any other computer-generated files will be the sole property of the Employer and must be handed to the Employer upon completion of the assignment.</i>	
9.	Final amended NTSA (TNCs Owners, Drivers and Passengers) Regulations 2022	Final amendments on NTSA (TNCs Owners, Drivers and Passengers) Regulations 2022 Developed taxi pricing model	6.0

## 8.0 PROFESSIONAL QUALIFICATIONS

The assignment requires a mixture of skills and therefore the winning firm for the assignment will be expected to demonstrate the following qualifications and experience:

1. Substantial expertise in legal/regulatory, policy and institutional frameworks related to the road transport sub-sector;
2. In-depth knowledge that will enable the firm to undertake various scenario analyses to assess the impact of different policies and regulatory interventions;
3. Solid experience in economic evaluation of transport systems as well as undertaking baseline and feasibility studies;
4. Experience in conducting market research and working with policymakers/regulators;
5. Good knowledge and understanding in financial or economical modelling;
6. Good understanding of appraisal in the increasingly important public-private financing investment arrangements;
7. Familiarity with global digital taxi landscape will be an advantage; and,
8. Excellent command of spoken and written English.

### Key Experts and Roles

S.No	Key Expert	Core Role	Input
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			<b>(expert-months)</b>
1.	Lead Transport Policy Expert (Team Leader)	Provide overall direction, ensure policy coherence, manage stakeholder engagement, and lead drafting. Skills: Transport policy development, regulatory frameworks, mobility planning, and experience working with government.	6.0
2.	Transport Economist / Urban Mobility Economist	Conduct cost-benefit analyses. Evaluate fare structures, market competition, and revenue models. Assess economic impacts of regulatory options Integrate taxis into wider urban mobility systems (BRT, commuter rail, NMT). Recommend operational models, parking/stand spaces, access rules, and spatial planning considerations.	6.0
3.	Policy, Legal and Regulatory Expert (Transport & ICT Regulation)	Review and harmonize national laws, county regulations, and international obligations. Draft regulatory provisions for licensing, compliance, digital mobility, labour, safety, and data sharing. Ensure alignment with the Constitution, NTSA Act, Traffic Act, Data Protection Act, and County Governments Act.	6.0
4.	Digital Mobility / Intelligent Transport Systems (ITS) Specialist	Analyze digital ride-hailing platforms. Develop frameworks for data governance, Application Programming Interface (API)/data-sharing, App based fare algorithm, ensure algorithmic transparency & platform compliance and auditability of pricing model. Advise on emerging mobility technologies (apps, e-taxis, e-payment, and electrification).	5.0
5.	Public Transport Planner/Urban Transport Specialist	Integrate taxis into wider urban mobility systems (Mass Rapid Transit Systems, Non-Motorized Transport) Recommend operational models, parking/stand spaces, access rules, and spatial planning considerations	5.0

6.	Safety & Security Expert (Road Safety / Public Safety)	Set safety standards for vehicles, drivers, and operations. Advise on incident reporting, enforcement structures, surveillance, and emergency response Review passenger protection and security protocols.	3.0
7.	Finance and Investment Specialist	Conduct financial and economic assessments Develop taxi pricing models Develop financing and investment frameworks for the taxi industry Analyze the financial impact of policy options Propose partnership and investment options (modelling financing needs for EV taxis, fleet upgrades, and SME financing).	6.0
8.	Labour & Social Protection Expert	Address driver welfare, working conditions, earnings, social protection, and dispute resolution. Analyze employment arrangements (conventional taxis vs. digital platform gig workers). Develop guidelines on contracts, hours of service, deductions, and benefits.	3.0
9.	Gender, Inclusivity & Social Development Specialist	Ensure policy considerations for women, youth, persons with disabilities (PWDs), and marginalized groups. Create guidelines on safe ride environments, harassment prevention, and accessible taxis.	2.0
10.	Environmental & Climate Expert	Integrate environmental sustainability into policy (EV taxis, emissions reduction, green incentives) Conduct environmental impact analyses. Advise on national commitments (NDCs, climate action plans).	2.0
11.	Stakeholder Engagement & Public Participation Specialist	Lead national and county consultations. Manage dialogues with taxi associations, digital platforms, passengers, and local governments. Ensure inclusive and well-documented engagement.	3.0

12.	Data Analyst / Transport Researcher	Conduct surveys, user experience analysis, and market research. Support modelling of taxi demand, sector size, and operational trends. Compile evidence to inform policy options.	3.0
13.	Monitoring & Evaluation (M&E) Specialist	Develop implementation frameworks. Propose indicators, targets, and an M&E plan for policy rollout. Support risk assessment and mitigation measures.	2.0
<b>Total Key-Expert months</b>			<b>52.0</b>

**Non-Key Experts**

No.	Expert	Role	Input (person- months)
1.	Insurance and Risk Consultant	For taxi-specific risk assessment and insurance structures.	2.0
3.	ICT Cybersecurity/ Privacy Expert	For guidance on safeguarding passenger and driver data in digital platforms.	2.0
<b>Total Non-Expert months</b>			<b>4.0</b>

Non-key experts will not be evaluated but the CVs will be reviewed and confirmed at contract negotiation stage.

**Note:** The consultants should include a reimbursable cost item for research/data collection assistants as necessary.

The qualifications and experiences of the key personnel are as follows:

**9.1 Transport Policy Expert (Team Lead)**

**Qualifications**

- Master’s degree (or higher) in Transport Policy, Transport Planning, Urban Planning, Public Policy, Economics, or related field.
- Minimum **15 years’** experience in transport policy development.
- Proven experience leading national or sectoral policy/strategy development.

- Demonstrated knowledge of Kenyan (or similar) transport regulatory frameworks.
- Experience managing multi-disciplinary expert teams and stakeholder consultations.
- Proven record of similar transport policy studies in at least 2 similar projects in the last 10 years. He/she should have experience in conducting market research.

### **Inputs/Responsibilities**

- Overall project leadership, coordination, and quality assurance.
- Lead policy formulation process and drafting of main policy document.
- Provide methodological guidance and work plan oversight.
- Facilitate high-level stakeholder engagements (national and county).
- Consolidate all inputs to produce final policy and amended NTSA (TNC Owners, Drivers and Passengers).Regulations, 2022
- Deliver the Inception Report, Draft Policy, Final Policy and amended NTSA (TNC Owners, Drivers and Passengers) Regulations, 2022

## **9.2 Transport Economist/Urban Mobility Expert**

### **Qualifications**

- Master's degree in Transport Economics/Planning, Urban Planning, Civil Engineering with experience in transport planning or related field.
- Minimum **10 years'** experience in transport economic analysis, urban mobility, route planning, and public transport.
- Experience in fare regulation, cost-benefit analysis, and mobility sector market assessments.
- Knowledge of competition dynamics and pricing in digital mobility ecosystems.
- Knowledge of inter-modal transport integration (all modes - road, rail, aviation, NMTs, and urban traffic systems)

### **Inputs/Responsibilities**

- Assess operational challenges and spatial planning issues facing taxi services.
- Analyze sector economics, pricing models, and market structure.
- Conduct cost-benefit and financial viability assessments of policy options.
- Advise on economic impacts of regulatory reforms.
- Contribute content to the Situational Analysis and Policy Options sections.
- Develop recommendations for sustainable fare-setting and competition management.

- Transportation Demand Management (TDM) to advise on among others parking management (taxi ranks, pick-up/drop-off zones), and integration with other modes to maximize on the efficiency of the transportation system.
- Advise on fleet standards, operational models, and route/service design.
- Contribute to draft operational and safety standards within the policy.

### **9.3 Policy, Legal and Regulatory Expert (Transport & ICT Regulation)**

#### **Qualifications**

- Bachelor's degree in Law (LLB), Master's degree in Law/Public Policy is an added advantage.
- Advocate of the High Court of Kenya
- Minimum **8 years'** experience in transport and public regulatory law.
- Experience in drafting legislation, regulations, or policy frameworks.
- Expertise in national and county regulatory harmonization is an advantage.

#### **Inputs/Responsibilities**

- Review existing laws governing taxi services, digital platforms, labour, data protection, etc.
- Identify regulatory gaps and areas requiring reform.
- Draft legal and compliance provisions for the National Taxi Policy and NTSA (TNC Owners, Drivers and Passengers) Regulations, 2022.
- Ensure constitutional and legislative alignment.
- Draft proposals for governance structures, licensing models, enforcement, and dispute resolution.

### **9.4 Digital Mobility/ITS Specialist**

#### **Qualifications**

- Master's degree in ICT, Intelligent Transport Systems, Data Science, Software Engineering, or related field.
- Minimum **7 years'** experience in digital mobility, ride-hailing platforms, or ITS solutions.
- Experience with API/data-sharing frameworks, fleet management systems, and digital compliance tools.
- Understanding of data privacy, cybersecurity, and platform regulation.

#### **Inputs/Responsibilities**

- Assess Kenya's digital mobility ecosystem (ride-hailing platforms, apps, data systems).

- Develop policy guidance on data governance, algorithmic transparency, and platform licensing.
- Recommend digital compliance and monitoring systems (e.g., reporting dashboards).
- Advice on technology trends (EV taxis, e-payment, and automated enforcement).

## **9.5 Public Transport Planner/Urban Transport Specialist**

### **Qualifications**

- Master's degree in one of the following:
- Transport Planning, Urban and Regional Planning, civil engineering (Transport option), Sustainable Mobility, Public Policy (transport focus) or any related field
- Public transport systems planning (bus, BRT, rail, taxi, ride-hailing)
- Route planning and network design
- Paratransit and informal transport integration
- Competition and market structure
- Minimum 5 years' experience in transport economic analysis, urban mobility, route planning, and public transport.
- Experience in fare regulation, cost-benefit analysis, and mobility sector market assessments.
- Knowledge of inter-modal transport integration (all modes - road, rail, aviation, NMTs, and urban traffic systems)
- Demonstrated experience in national or metropolitan transport policy development.

### **Inputs/Responsibilities**

- Integrate taxis into wider urban mobility systems (Mass Rapid Transit Systems, Non-Motorized Transport)
- Recommend operational models, parking/stand spaces, access rules, and spatial planning considerations

## **9.6 Safety & Security Expert (Road Safety/Public Safety)**

### **Qualifications**

- Bachelor's or Master's degree in Public Safety, Road Safety, Traffic Engineering, Transport Safety Management, or related field.
- Minimum 7 years' experience in road/transport safety.
- Knowledge of regulatory enforcement, vehicle standards, and passenger safety protocols.

### **Inputs/Responsibilities**

- Identify safety challenges in the taxi sector and propose mitigation strategies.
- Develop safety and security standards for drivers, vehicles, and digital platforms.
- Advise on emergency response systems, monitoring, and enforcement mechanisms.
- Contribute to safety chapters and risk analysis in the policy.

## **9.7 Finance and Investment Specialist**

### **Qualifications**

- A Master's degree in Finance, Economics, Business Administration, Public Finance, Development Finance, or a closely related field.
- A Bachelor's degree in Finance, Economics, Accounting, or related discipline.  
(Both Master's and Bachelor's degrees listed above are mandatory)

### **Professional Certifications are a strong advantage (any):**

- CFA (Chartered Financial Analyst)
- CPA / ACCA
- Certified Investment and Financial Analyst (CIFA)
- Project Finance certification (e.g., PPP certification)

### **Inputs/Responsibilities**

#### **i. Conduct financial and economic assessments**

- Analyze cost structures for taxi operators (traditional and digital).
- Assess financial barriers to vehicle acquisition, operations, and compliance.
- Evaluate total cost of ownership for EV taxis and green mobility transitions.

#### **ii. Develop taxi pricing models**

#### **iii. Develop financing and investment frameworks**

- Propose viable financing schemes for:
  - Individual owned vehicles
  - Companies/Cooperative/association-owned fleets
  - Electric taxis and green mobility
  - Insurance and risk mitigation tools
  - County and national-level infrastructure investments

- Recommend incentives, subsidies, or tax instruments to promote sustainability.

**iii. Analyze the financial impact of policy options**

- Evaluate financial implications for drivers, operators, digital platforms, and regulators.
- Conduct scenario modelling for fare regulation, compliance costs, and operational standards.

**iv. Propose partnerships and investment structures**

- Identify PPP opportunities including acquisition of vehicles, parking management (taxi ranks), charging infrastructure, data systems, etc.
- Recommend collaboration models with banks, SACCOs, Micro-Finance Institutions, leasing companies, and asset financiers.

**v. Contribute to the Implementation Framework**

- Provide budget estimates for policy roll-out.
- Develop financing strategies for national and county governments.
- Support development of fiscal incentives, short, medium and long-term investment strategies.

**9.8 Labour & Social Protection Expert**

**Qualifications**

- Bachelor's/Master's degree in Labour Studies, Human Resources, Social Protection, Law, or related field.
- Minimum **7 years'** experience in labour relations, gig economy work, or transport-sector labour issues.
- Strong understanding of worker–platform relations.

**Inputs / Responsibilities**

- Assess driver welfare, employment conditions, earnings, and social protection gaps.
- Develop guidelines for fair contracts, hours of service, benefits, and worker rights.
- Propose dispute resolution and grievance-handling frameworks.
- Ensure policy alignment with labour laws and social protection systems.

**9.9. Gender, Inclusivity & Social Development Specialist**

**Qualifications**

- Bachelors or Master's degree in Sociology, Gender Studies, Development Studies, or related field.

- Minimum **7 years'** experience in gender mainstreaming, social inclusion, and transport sector assessments.
- Experience working with PWDs, women, youth, and vulnerable groups.

#### **Inputs/Responsibilities**

- Conduct gender and social impact analysis of the taxi sector.
- Propose guidelines for accessible taxis, safety for women, and inclusive service models.
- Provide recommendations for PWD-friendly vehicles and non-discriminatory policies.
- Ensure gender and inclusion mainstreaming throughout the policy.

### **9.10 Environmental & Climate Change Expert**

#### **Qualifications**

- Bachelor's/Master's degree in Environmental Science, Climate Change, Sustainability, or related field.
- Minimum **7 years'** experience in environmental impact assessments, emissions analysis, or sustainable mobility.
- Knowledge of Kenya's NDCs and green transport strategies.

#### **Inputs/Responsibilities**

- Evaluate environmental impacts of current taxi operations.
- Develop guidelines for EV taxis, emissions reduction, and green incentives.
- Advice on environmental compliance and climate-smart mobility practices.
- Contribute to sustainability and environmental sections of the policy.

### **9.11 Stakeholder Engagement & Public Participation Specialist**

#### **Qualifications**

- Bachelor's degree in Communications, Social Sciences, Public Relations, or related field.
- Minimum **7 years'** experience conducting participatory processes or public consultations.
- Experience facilitating engagements with government, industry, and community stakeholders.

#### **Inputs/Responsibilities**

- Develop and implement a stakeholder engagement plan.
- Facilitate national and county consultative meetings and validation workshops.

- Document stakeholder inputs and integrate feedback into policy development.
- Prepare the **Stakeholder Consultation Report**.

### 9.12 Data Analyst/Transport Researcher

#### Qualifications

- Bachelors or Master's degree in Statistics, Data Science, Engineering, Transport Studies, or related field.
- Minimum **10 years'** experience in transport sector analytics or market research.
- Proficiency in data collection tools, modelling software, and GIS is an advantage.

#### Inputs/Responsibilities

- Conduct surveys, data collection, and market assessment of the taxi industry.
- Analyze operational patterns, sector size, demand, user preferences, and safety data.
- Support evidence-based formulation of policy recommendations.
- Contribute to the **Situational Analysis Report**.

### 9.13 Monitoring & Evaluation (M&E) Specialist

#### Qualifications

- Bachelors or Master's degree in Monitoring & Evaluation, Economics, Public Policy, or related field.
- Minimum **7 years'** experience in M&E for policies, strategies, or public sector programmes.
- Experience developing results frameworks and performance indicators.

#### Inputs/Responsibilities

- Develop the M&E framework for policy implementation.
- Propose indicators, milestones, and monitoring systems.
- Advise on risk mitigation and adaptive implementation mechanisms.
- Contribute to the Implementation Plan.

### 9.13 Insurance & Risk Consultant

- Qualification: Experience in transport insurance and risk management.

### 8.14 ICT Cybersecurity/Privacy Expert

- Qualification: Experience in ICT security and digital platform compliance.

## 9.0 FIRM REQUIREMENTS

### 9.1 Shortlisting Criteria

#### **Core business and years in business:**

The firm shall be registered/incorporated as a consulting firm, for a period of at least fifteen

(15) Years, with core business in any of the following areas:

1. Transport, Mobility and Urban Planning Fields
  - Transport Planning
  - Urban Mobility
  - Urban & Regional Planning
  - Transport Economics
  - Civil Engineering (Transport/Highways)
  - Transport Geography
  - Public Policy, Governance and Institutional Reform

**Relevant Experience:** The firm shall demonstrate experience in the following areas:

1. Transport planning and transport economics
2. Law, regulation and public policy compliance
3. ICT, digital mobility and data governance
4. Safety, security and transport risk management
5. Research, statistics and data analytics
6. Monitoring and evaluation

The firm shall also demonstrate experience in any of the following areas:

1. Social protection, labour, gender and inclusion
2. Environment and climate change

**Technical and managerial capability of the firm:** The firm(s) shall demonstrate as having the requisite technical capability, which shall entail a description of relevant personnel, equipment, software, etc, and managerial capacity to undertake the assignment. Key experts will not be evaluated at the shortlisting stage.

**The maximum page limit for Expressions of Interest (EOI), including any annexes, is 20 pages. This limit applies for single entities as well as firms in associations.**

## 10.0 PAYMENT SCHEDULE

Payments will be milestone-based:

- 20% – Upon approval of Inception Report
- 30% – Upon approval of Situational Analysis & Benchmarking Reports
- 30% – Upon submission of Draft National Taxi Policy and proposed amendments of NTSA (TNC Owners, Drivers and Passengers) Regulations, 2022 and Taxi Pricing Model
- 20% – Upon acceptance of Final National Taxi Policy, Final Taxi Pricing Model, and Final amendments to the NTSA (TNC Owners, Drivers and Passengers) Regulations, 2022

#### **11.0 DATA, SERVICES, PERSONNEL, AND FACILITIES TO BE PROVIDED BY THE CLIENT/OBLIGATIONS OF THE CLIENT**

The Client will:

1. Provide the Consultant with any assistance that will enable the consultant to have access to relevant stakeholders;
2. Provide the Consultant with all documents, data and other information pertaining to the study that are available with the Government;
3. Provide six (6) counterpart personnel for on-the-job training;
4. Provide liaison with other Ministries and Departments;

#### **12.0 FACILITIES AND LOGISTICS**

The Consultant will be responsible for providing all the necessary resources to carry out the study including office, office equipment and other requisite logistics.

#### **13.0 CAPACITY BUILDING/TRAINING/TRANSFER OF TECHNOLOGY PROGRAM**

The Consultant shall provide and implement a training plan for counterpart personnel as approved by the Client to ensure that the assignment results in practical skills transfer, institutional learning, and knowledge retention beyond the consultancy period.

#### **14.0 OBLIGATIONS OF THE CONSULTANT**

The Consultant shall be fully responsible for:

1. Collecting data and information from the relevant institutions (public and private), including costs, as necessary;
2. All information, data and reports obtained from the Client in the execution of the services shall be properly reviewed and analyzed by the Consultant;
3. Correctness of using such data shall rest with the Consultant. All such information, data, and reports shall be treated as confidential and returned to the Client upon completion of the assignment;
4. Analysis, interpretation, and conclusion made from the data and information provided by the Client;
5. Arranging for all necessary office and living accommodation, transportation, equipment and supplies, data collection and secretarial services related to the performance of the works;
6. Printing of all reports, drawings, maps, etc.; and
7. Providing originals and copies of all documents both in hard and soft copies in acceptable electronic format.

After delivery of all final documentation, the originals of all paper documents and soft copies of any data are to be deposited with and become the property of the Client.