



Empowering the future

Infrastructural investment, construction trends
& TVET initiatives in **Kenya**

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Bonn, February 2024

WORK IN PROGRESS: THE GROWING GLOBAL INFRASTRUCTURE DEMAND

What's driving the construction industry in Kenya today? What's holding it back? The construction sector worldwide is volatile and affected by a variety of factors – and Kenya is no exception.

Generally, **construction in Kenya has huge potential for growth**. One of the greatest factors limiting growth and profitability is a skills gap in the labour force and the need for more advanced and tailored training.

This study provides valuable **insights into the construction industry in Kenya, its trends, challenges and the role of Technical and Vocational Education and Training (TVET)** in shaping the workforce to meet sector demands.

The construction sector in Kenya has been a major contributor to the country's GDP, **driven by investments in infrastructure development and projects**. Other growth factors have been an emphasis on green practices, public-private partnerships (PPPs), and the adoption of digital tools for project management. A 9% growth is expected in the construction industry from 2022 to 2025.

At the same time, **legislative measures are being introduced to regulate construction and improve professional practices**, with Competency Based Education and Training (CBET) programmes enhancing the quality of TVET in the sector.

Challenges in the construction industry in Kenya include a reliance on external funding for public projects, but also **labour shortages and skills gaps affecting competitiveness**. Additionally, significant **gender disparities** in the sector exist, with less than 3% representation of women.

TVET programmes will be vital for equipping the workforce with the required skills needed to move the sector into the future – and Kenya's legislative efforts aim to revamp TVET, emphasising industry collaboration and new technology integration.

ENTER BUILD4SKILLS

The German Federal Ministry for Economic Cooperation and Development (BMZ), the Asian Development Bank (ADB) and the African Development Bank (AfDB) jointly implement the global Build4Skills project in Kenya, Mongolia, Pakistan, Senegal and South Africa.

Build4Skills operates on a simple yet practical premise: why not utilise the untapped potential of ongoing infrastructure projects to train TVET students on-site? Workplace-based and nationally accredited training on the construction sites of infrastructure projects won't only enhance the employability of the local workforce but improve TVET graduates' prospects for securing decent work and higher incomes. The long-term aim is to make TVET a prerequisite in tendering processes for infrastructure projects – akin to social and environmental standards.



BACKGROUND OF CONSTRUCTION IN KENYA

The construction sector's remarkable growth, combined with government investments and evolving practices, is significantly impacting Kenya's development and employment opportunities. **The sector has a well-established status in the country.**

Kenya's construction industry played a significant role in 2015, accounting for 7% of the country's GDP. By 2021, the growth rate was 6.6% and Global Data's projections indicate that **Kenya's construction industry will continue to grow by 9%, followed by a steady average annual growth rate of 6.1% from 2022 to 2025.**

This **growth is supported by larger infrastructure projects** like the expansion of the national road network, the development of the Standard Gauge Railway (SGR) and a focus on affordable housing. The **government is also investing in the promotion of Special Economic Zones (SEZs)**, the development of industrial parks and clusters, and the support of small and medium-sized manufacturing enterprises.

In Kenya, **external funding plays a crucial role in financing public infrastructure projects, with China being a prominent contributor**, accounting for 20.9% of project funding in East Africa. The major players in the construction industry in Kenya include a mix of local and foreign companies.



CURRENT TRENDS

Kenya's infrastructure sector is undergoing a major overhaul, with more than USD 20 billion being invested in infrastructure development through PPPs.¹

Modular construction techniques are gaining popularity, saving time and minimising waste, with applications in mobile offices, prefabricated shelters and portable buildings. New techniques are also increasingly being used to improve project management, design and construction processes, with technologies such as Naivera playing a key role in improving efficiency and competitiveness in the market.²

Kenya's Affordable Housing Programme (AHP), launched in 2017, has made significant progress, with both government and private developers launching numerous projects. Approximately 9,000 units were completed in 2022, and approvals have been granted for a further 353,640 units across the country since 2017.³ The sector is well placed to address Kenya's housing deficit of 2 million units and meet the annual demand for 200,000 housing units.

The construction industry in Kenya is seeing a **notable emphasis on green building practices** which aim to reduce environmental impact by focusing on materials, energy, water and health.

Although some innovative construction technologies have been adopted, the **construction industry faces challenges related to its culture and openness to change**. The adoption of innovative technologies is also strongly influenced by building codes and key industry stakeholders.⁴

Additionally, **several legislative measures now regulate aspects of the construction industry**, from the selection of initial construction sites to the de-commissioning of structures. Kenya has also introduced **regulatory frameworks** to improve professional standards in areas such as engineering, architecture, quantity surveying and construction. The aim is to ensure safety.

¹ Kenya Embassy. (2021). Invest in Kenya [PDF file]. Kenya Embassy. [hEps://kenyaembassy.nl/wpcontent/uploads/2021/07/Invest-in-Kenya-Compressed.pdf](https://kenyaembassy.nl/wpcontent/uploads/2021/07/Invest-in-Kenya-Compressed.pdf) [hEps://salvonafrica.co.ke/top-3-construction-industry-trends-in-kenya/](https://salvonafrica.co.ke/top-3-construction-industry-trends-in-kenya/)

² Estate Intel. (n.d.). Top Affordable Housing Developers in Kenya based on the number of units on E1 Edition. Estate Intel. <https://estateintel.com/insights/top-affordable-housing-developers-in-kenya-based-on-the-number-of-units-on-E1-Edition>.

³ Sagini, N. A. (2020). Investigating Factors That Affect Adoption of Innovative Construction Technologies in Nairobi. Master's thesis, Jomo Kenyatta University of Agriculture and Technology.

MAJOR INFRASTRUCTURAL INVESTMENTS

Kenya is undergoing significant infrastructural development with major investments across various projects, reflecting **Kenya's commitment to advancing its infrastructure for economic growth and improved connectivity**. Major endeavours include:



KONZA TECHNOLOGY CITY,
A MASSIVE IT HUB IN
MACHAKOS COUNTY



ETHIOPIA TRANSPORT
CORRIDOR AND THE STAN-
DARD GAUGE RAILWAY
CONNECTING MOMBASA
AND NAIROBI



NAIROBI-THIKA SUPERHIGHWAY,
THE 2ND NYALI BRIDGE AND THE
DUALLING OF THE MOMBASA-NAI-
ROBI AND NAIROBI-NAKURU-MAU
SUMMIT HIGHWAYS



THE MOMBASA PORT
DEVELOPMENT PROJECT
WITH A NEW CONTAINER
TERMINAL



LIKONI CHANNEL BRIDGE
AND MULTI-STORY TERMI-
NAL IN MOMBASA WITH A
MODERN FERRY TERMINAL
AND COMMERCIAL SER-
VICES

OVERVIEW OF THE LABOUR MARKET

In Kenya's construction industry, the labour pool is made up of trained, semi-trained and untrained workers. A shortage of skilled workers has led to an increased reliance on expatriates and thus high recruitment and labour costs. These **skills gaps negatively affect the competitiveness of the industry.**

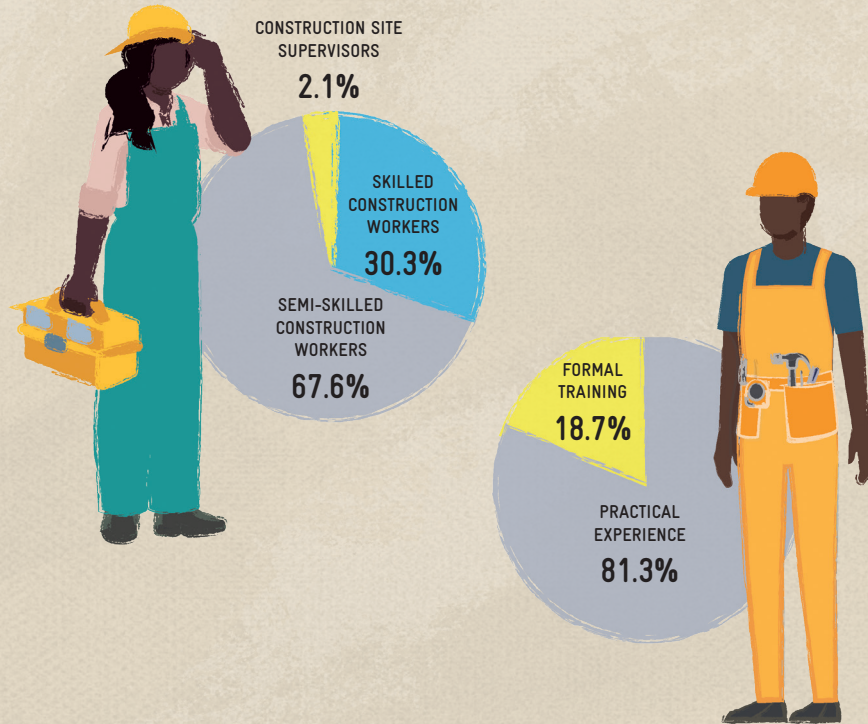
The representation of women in the workforce is less than 3%, a figure that falls below the global average. A study shed light on how the construction industry's dynamics contribute to income inequality and economic disparities in Kenya, emphasising the need for policies that address these issues and promote more equitable growth and development.⁵

Additionally, there is an **aging workforce** in the construction industry. **Insufficient training and apprenticeship programmes** have further contributed to the shortage.

The study revealed that most **construction workers are employed in precarious, temporary arrangements devoid of formal contracts**, leaving them vulnerable to exploitation. They lack legal safeguards against dismissal or any social protection mechanisms to provide for illness, old age or incapacity to work.

In Kenya, the National Construction Authority's survey reveals that **skilled construction workers constitute 30.3% of the workforce**, while **67.6% are considered semi-skilled**. A mere 2.1% have received formal technical training to become construction site supervisors. Among the skilled workers, **81.3% acquired their expertise through practical experience, while 18.7% underwent formal training.**

⁵ Osolo, Z. O. (2021). Culture and Practice Within the Construction Industry in Kenya and Its Contribution to Income Inequality. Syracuse University.



There are new skills requirements for the Kenyan labour force due to changes in employment practices or introduction of new technologies. The construction industry in Kenya has significant potential for employment. However, to fully realise this potential, **it will be essential to address challenges such as skills gaps in working with new technologies and narrowing the gap between training offers and industry needs.**⁶

Kenya's recent legislative initiatives include a wider effort to **revitalise TVET and broaden its influence in shaping the country's labour force.** Plus, the introduction of **CBET programmes** will help to improve quality, as CBET focuses on those practical skills that are in high demand. Both programmes can **strengthen relationships with industry partners by tailoring training programmes to the specific needs of the construction sector,** ensuring that graduates and the labour force are better prepared.

⁶ Though not explicitly mentioned, technology likely contributes to these changing skill demands. Wachira, N., Root, D., Bowen, P., & Olima, W. (2008). Changing Craft Skills in the Kenyan Construction Sector

LABOUR MARKET DEMAND

Based on the findings from the Kenya National Bureau of Statistics (KNBS) Survey in 2020, the construction industry in Kenya employed 222,000 individuals. **The Covid-19 pandemic resulted in a decrease in the sector's labour force.**⁷

The construction industry is now experiencing a surge in labour demand due to several key drivers: the government's investment in affordable housing projects, the development of SEZ and industrial parks, as well as ambitious infrastructure initiatives.

Company surveys indicate a demand for a diverse range of jobs, including engineers (electrical, civil, mechanical), surveyors, welders, masons, carpenters, HR personnel, draftsmen, and skilled workers in fields such as Information and Communications Technology (ICT). Additionally, there is a clear need for well-rounded foremen with a combination of technical and training skills.



⁷ D. K. Lagat et al. (2023). Labor Market Effects of COVID-19 on the Construction Industry in Kenya. American Journal of Industrial and Business Management, 13, 735-750

The construction sector in Kenya looks promising for job opportunities. The analysis of employment trends in Kenya's formal sector from 2012 to 2021 reveals a **significant upswing in the construction sector, with a 95% increase in overall job opportunities.** This data, sourced from the Kenya National Bureau of Statistics, underscores that over the past decade, the construction industry, along with the education sector, has seen the most substantial growth in jobs.⁸

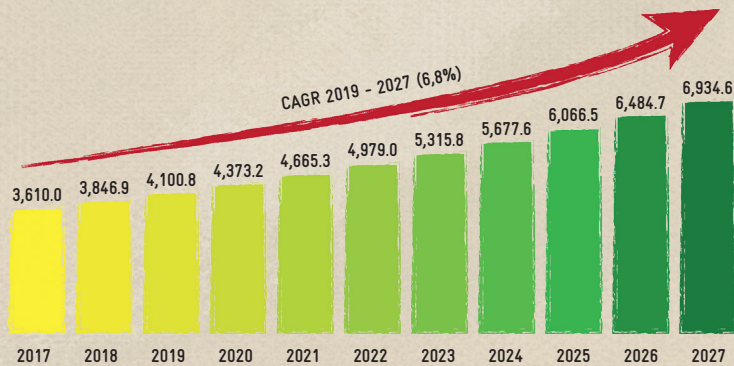


Figure: Known and projected Kenya construction market value (USD million), 2017 - 2027
Source: Kenya Construction Market Report. Transparency market research (2020)

⁸ Mburu, P. (n.d.). Where to Find a Job: Here Are Sectors Employing Most Kenyans. Nation.
<https://nation.africa/kenya/news/where-to-find-a-job-here-are-sectors-employing-most-kenyans-4147304>

CONSTRUCTION TRENDS AND ELEVATED SKILLS REQUIREMENTS

Kenya has experienced a notable **shift in construction from the public sector to the private sector**, indicating a change in projects and a corresponding shift in labour demand.⁹ Furthermore, the industry has witnessed a trend in informal construction systems that rely on labour-intensive and artisanal methods, leading to a higher demand for labour in these non-formalised construction roles.¹⁰

The construction industry is further propelled by rapid urbanisation, the construction of manufacturing facilities, and the implementation of the country's Vision 2030 strategy. During this pivotal economic phase, **the construction sector not only requires a skilled labour force but also highly skilled and competent professionals capable of adapting to the evolving landscape.**

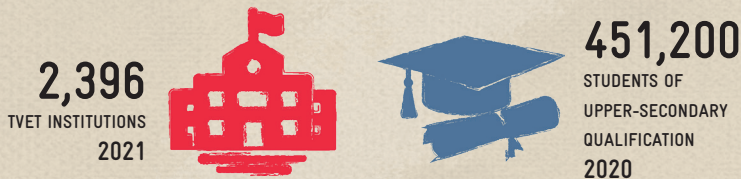
The growing construction trends in Kenya underscore **the need for an elevated training programme to deliver the skills requirements necessary to meet the rising demands** as well as ensure the quality and cost-effectiveness of projects.

⁹ The Big 5 Construct Kenya. (2020). Kenya Construction Market Report

¹⁰Wells, J., & Wall, D. (2003). The expansion of employment opportunities in the building construction sector in the context of structural adjustment: some evidence from Kenya and Tanzania. Habitat International, 27(3), 325–337.

OVERVIEW OF TRAINING PROVISION AND TVET

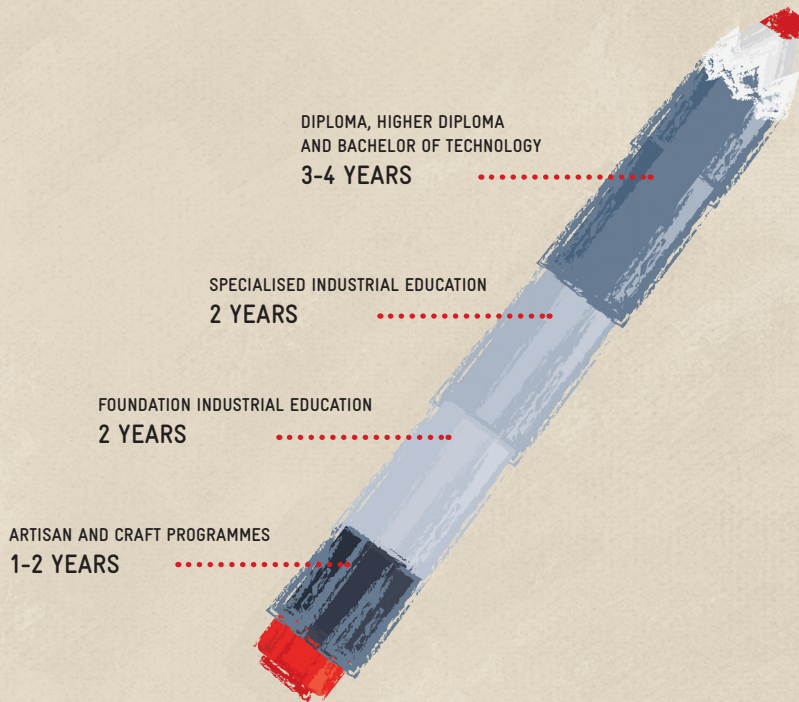
The TVET sector in Kenya plays a **crucial role in supplying mid-level skilled workers and enhancing the nation's economy**. In 2021, there was a **notable increase in the number of TVET institutions**, totalling 2,396. This marked a significant upward trend, especially when compared to the 753 TVET institutes in 2013 when the initiative was first introduced. Concurrently, there has been a substantial rise in student enrolment in the upper-secondary qualification programme, with the figure reaching 451,200 in 2020.¹¹



TVET encompasses technical, industrial, vocational and entrepreneurship training, providing learners with versatile technical skills applicable across various fields. These programmes aim to **prepare individuals for roles in both industry and the informal sector**. The main institutions offering TVET programmes include National Polytechnics, Institutes of Science and Technology (IST), Technical Training Institutes (TTIs), and Youth Polytechnics, where students can pursue diplomas, higher national diplomas and certificates.

The TVET system in Kenya encompasses various educational stages, starting from lower secondary education up to tertiary levels, including Foundation Industrial Education (2 years), Specialised Industrial Education (2 years), artisan and craft programmes (1-2 years) as well as Diploma, Higher Diploma and Bachelor of Technology (3-4 years).

¹¹Cowling, N. (2023, September 22). Technical and Vocational Education Training (TVET) institutions in Kenya 2013-2021



Graduates have the option to either enter the workforce or pursue further education based on their qualifications. This diverse structure provides opportunities for skills development and career progression within the TVET framework.¹² Apprenticeship contracts are designed for training young people with a minimum duration of four years. They have the same rights and obligations as regular employees, with the provision that their full employment depends on the successful completion of their training.

¹² „TVET Country Profiles | Kenya, November 2018.“ (Ministry of Education / Directorate of Technical and Vocational Education and Training [DTVET], Kenya).

A SURVEY OF SHARED THEMES AMONG TVET AND COMPANIES

In interviews conducted by Build4Skills in Kenya between September and November 2023, it was learnt that **TVET institutions in Kenya are committed to continue offering diverse programmes**, including diploma, craft certificate, artisan and trade tests. The institutions prioritise enrolling an average of over 500 students in every intake, aligning courses with community interests and needs, often with input from National Industrial Training Authority (NITA) officers.

Key TVET programmes include electrical and civil engineering, building technology and mechanical engineering, among others. Challenges exist in the surveying courses due to shortages in equipment, materials and personnel. Despite a recognised skills gap, especially in surveying, **TVET construction graduates receive high ratings for employability, entrepreneurship, work ethics and soft skills such as creativity and hands-on skills.**

The TVET institutions face **challenges**, such as **delayed response to training needs from companies and only an average rate of absorption/employment for students after training.** To strengthen relationships, TVET institutions seek both technical and financial support. Recommendations include class-industrial training to bridge skills gaps and familiarise learners with modern equipment.

- All interviewed companies provided a comprehensive breakdown of their workforce, highlighting the **diversity of roles**, including engineers, foremen, surveyors, welders, masons, carpenters and HR.
- **Female employees** are present in all companies, with varying degrees of satisfaction expressed by the respondents regarding the availability of female employees and their skill sets.
- All companies recognise **the importance of training and development.** Initiatives include in-house training, research, attending boot camps and hosting work-study trainees.
- **Specific needs related to training vary**, including the need for expert welders, carpenters and well-rounded foremen. Desired construction trainee skills include welding, computer-aided design software, masonry and carpentry.

- The companies express awareness of dual training and interest in **work-study training schemes**.
- Challenges related to hosting work-study trainees include a lack of interest, financial support requirements for interns and occasional challenges with trainee engagement and enthusiasm.
- **Companies** are in partnerships with schools or training institutes, showcasing a willingness to **collaborate on training initiatives**.
- Corban Construction Limited and Sajucy Company Limited explicitly mention **their financial investment in training**, with Corban allocating approximately 30% of its investment towards training.
- Companies express recognition of the **importance of government policies and external programmes**, such as dual training and International Development Cooperation programmes, in addressing skill development and employment challenges.

In summary, the common themes across TVET institutions and companies underscore **a shared commitment to diverse programmes, workforce development and collaborative training initiatives**. Challenges persist in areas like surveying courses and recruiting skilled workers. Both sectors recognise the importance of training, with companies expressing interest in work-study schemes and partnerships with educational institutes. The need for financial investment in training has been acknowledged.

CHALLENGES OF TRAINING PROVISION AND TVET

The current TVET system in Kenya predominantly focuses on supply, resulting in a **workforce lacking the skills required by the labour market**. Going forward, it will be essential to align TVET with broader growth, employment and development strategies.

The lack of precise and timely data poses a significant challenge for effective TVET implementation, hindering decision-making and policy development. Specifically, **obtaining accurate information on the placement of TVET trainees in the job market is problematic**. Additionally, there is a dearth of data regarding the number of TVET graduates engaged in entrepreneurship, with existing information primarily gathered through surveys like the World Bank Step-wise Survey conducted from 2016 to 2017.¹⁴

With a mismatch between the skills required by the construction labour market and those being produced by educational institutions, companies face challenges in executing their projects. Research indicates that around 55.9% of companies in the architecture and building sectors are struggling to find the precise technical skills they need.¹⁵

The primary skills gaps in Kenya's construction industry are in trades such as electrical, carpentry, painting, welding, masonry, plumbing and fabrication. A high number of Kenya's youth face unemployment due to lacking the necessary skills.



¹⁴ Zizi Afrique Foundation. (2022). Vocational and Technical Training Mapping TVET Data in Kenya - TVET Data Ecosystem.

¹⁵ LSLillianMwai1. (2023, March 28). Kenyan youths take market-driven route to construction jobs. Data Hub

MEASURES TO IMPROVE TRAINING PROVISION AND TVET

To bolster the effectiveness of TVET, a study suggested **the development of occupational training standards that align with industry requirements and market-driven curricula.**¹⁶ This strategy would also focus on improving trainers' skills, promoting gender inclusivity and strengthening the overall TVET system to meet labour needs in the construction sector.

The Housing Finance Foundation's training programme was introduced to address this skill deficit by providing **comprehensive training in these critical trade disciplines, aiming to align with the construction industry's requirements.**¹⁷ These challenges highlight the need for training and development programmes to bridge the skills gap and meet the growing demands of the construction sector.¹⁸

The government has taken steps to enhance technical and vocational education for over 80% of yearly non-degree course qualifiers. This includes the establishment of a technical and vocational college in each constituency. Additionally, students admitted to TVET institutions receive an annual capitation grant of KSh. 30,000 (approx. USD 273), and those facing financial challenges can apply for higher education loans to cover fees beyond the capitation limit.¹⁹

In-company training is on the rise, boosting employee skills and productivity. Efforts to increase the number of professionals with training skills include promoting continuous development, offering incentives and providing access to training resources. **Established Training-of-Trainer (ToT) programmes improve in-company training** by equipping individuals to become effective trainers.

¹⁶Technical and Vocational Education and Training Authority. (2020). National TVET Standards Kenya Report.

¹⁷Williams, S. (2015, July 2). Banking on skills

¹⁸Nguthuri, D. (n.d.). 'Fundis' shortage spoils party for construction sector. The Standard. Retrieved from <https://www.standardmedia.co.ke/business/article/2000219529/fundis-shortage-spoils-party-for-construction-sector>

¹⁹Omondi, J. (2022, May 19). Why the uptake of TVET courses is still low in Kenya. UNESCO Blogs.

<https://unevoc.unesco.org/home/UNEVOC-in+action/tvet-watch/blog?sk=44>

Kenya's **TVET teachers** are classified by educational level. Secondary educators require a Diploma or Craft Certificate, while tertiary-level trainers need a Higher Diploma or a Bachelor of Technology. Training programmes last two to four years. **Quality assurance is supervised by the Technical Vocational Education and Training Authority (TVETA).** Efforts are ongoing to enhance the quality of TVET teacher training institutions, streamlining administration under the Directorate of Technical and Vocational Education and Training (DTVET).²⁰



²⁰ „TVET Country Profiles | Kenya, November 2018.“ (Ministry of Education / Directorate of Technical and Vocational Education and Training [DTVET], Kenya).

ONGOING REFORMS

A report on Kenya's TVET sector highlights significant trends. Enrolment has increased to 476,202 by 2020, but gender disparities persist. Special needs education has expanded. Over 372 curricula, including CBET courses, are in place, with licenced trainers. **The report stresses the need to align skills with job opportunities and enhance infrastructure.**²¹

Some of the key TVET reforms and initiatives in Kenya include:

- Establishment of the Technical and Vocational Education and Training Authority (TVETA) to oversee and improve the quality and relevance of TVET programmes
- The National Skills Strategy (NSS) 2009-2013 which introduced CBET to make TVET more job oriented
- TVET Reform Support Program (RSP) was launched in 2010, aiming to implement the NSS, supported by the EU and European governments
- Second Phase of TVET Sector Support Programme in 2017, with EU and German/Norwegian support, focusing on long-term vision and industry collaboration
- Recognition of Prior Learning (RPL): implemented as part of a Competency Based Training & Assessment to certify professionals with informal training

These initiatives collectively strive to enhance the quality, relevance and efficiency of Kenya's TVET system.

TVETA, the governing body for technical and vocational education in Kenya, has made substantial progress in various areas. **TVETA's commitment to quality and relevance is evident through the development of quality assurance frameworks, accreditation of institutions and approval of competency-based curricula.** They have also strived for inclusivity, promoting access to TVET through partnerships, awareness campaigns and engagement with county governments.

²¹Zizi Afrique Foundation. (2022). TVET Knowledge and Key Highlights Report: Mapping Technical and Vocational Educational and Training Data in Kenya.

The New Higher Education Funding (NHEF) model in Kenya focuses on equitable **financial support for students based on programme choice**, household income, academic performance and priority areas. Funding levels range from 100% government **support for the most vulnerable** to 93% for students in need. The government has increased budget allocations to facilitate this model, replacing the outdated Differentiated Unit Cost (DUC) approach. This change aims to **provide fair and targeted financial assistance to underprivileged students in higher education**.

Centralised enrolment through Kenya Universities and Colleges Central Placement Service (KUCCPS) has had limited impact on TVET institutions, with **many students still preferring diploma programmes at universities**. **Despite government incentives, interest in TVET remains low**. Some TVET students find jobs before completing their studies, while university graduates often struggle to secure employment.²²

NEW APPROACHES TOWARDS THE SKILLS GAP

Progress has been seen in the establishment of a quality assurance framework. It aims to bridge skills gaps in TVET and the construction industry by ensuring that training programmes meet high standards. **Effectively addressing challenges while capitalising on opportunities will be crucial for the institution's success** in enhancing construction sector training.

New approaches focus on curricular alignment, industry collaboration and equipment access. Moreover, the drive to enhance TVET has been catalysed by the implementation of the Big Four Agenda (2018–2022), which has the potential to elevate the need for technical skills.

²²Ndunda, J. (2017, January 27). Students despise TVET courses, says KUCCPS. The Star. <https://www.the-star.co.ke/news/2017-01-27-students-despise-tvet-courses-says-kuccps/>

GOVERNANCE AND FINANCE OF TVET

Originally created in 1968 to provide technical and entrepreneurial skills and curb rural-urban migration, the TVET system was later decentralised, with some functions devolved to counties. The national government still retains oversight of various technical education institutions.

In addition to the World Bank, various other international organisations and institutions have provided financial support to TVET institutions in Kenya. Some of these organisations include:

- African Development Bank (AfDB): projects for improving TVET in Kenya, focusing on infrastructure development and skills training
- United Nations Development Programme (UNDP): TVET programmes in Kenya, aiming to enhance youth employability and entrepreneurship skills
- European Union (EU): TVET projects in Kenya, with a focus on promoting technical and vocational skills development
- German Development Cooperation (GIZ): collaboration with the Kenyan government to enhance TVET institutions and improve the quality of TVET programmes
- United States Agency for International Development (USAID): support for various TVET initiatives in Kenya, aiming to strengthen skills training and workforce development.



Several factors affect the sustainability of funding models for TVET institutions in Kenya. These include the financing policy's structure and allocation of resources, financial accountability to prevent fraud and increase efficiency, and the impact of financial diversity on existing institutions. Additionally, graduates' attitudes towards government loans and their employability play a crucial role in sustainability. Graduates' loan default due to unemployment or other financial strains can lead to a lack of sustainability in financing. It is essential to address these factors to ensure the continued effectiveness of TVET funding models in Kenya.



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