BITHELINE COMMUNICATIONS

WORLD WATER DAY

"Water and Gender"

2026

Where Water Flows, Equality Grows



THE WIDEST RANGE OF SOLUTIONS FOR THE WATER INDUSTRY







OFFICIAL DISTRIBUTOR calpeda caprari

FIRST MACHINERIES

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www.firstmachineries.com



ABOUT US

At First Machineries, water is at the core of everything we do. Based at our facility in Embakasi, Nairobi, we have a highly professional and dynamic team with extensive experience in all the products we handle. We provide bespoke water pumping solutions for a diverse range of sectors, including agriculture, power generation, and wastewater management, where performance and reliability must go hand in hand in the most cost-effective way.

We understand that selecting and installing the right product can be complex, which is why we offer premium engineering support for all our products, along with comprehensive after-sales services. Our objective is to build lasting partnerships founded on trust and satisfaction, fostering shared growth and success.

All products offered by First Machineries Ltd are designed and manufactured to comply with industry specifications and meet the ISO 9001 quality assurance standard.

OFFICIAL DISTRIBUTOR calpeda caprari

FIRST MACHINERIES

WATER AND SANITATION PROVIDERS ASSOCIATION



Mr. Anthony Njaramba
Chief Executive Officer & Secretary

Water is at the heart of national development, yet less than one percent of the world's water is readily accessible for human use a sobering reality that underscores the urgent need for sustainable water management. In Kenya, this challenge is particularly pronounced. An estimated 15 million people still lack access to safe water, while 22 million do not have access to safely managed sanitation. These gaps highlight the scale of the task ahead and call for bold leadership, strong collaboration, and long-term commitment.

Over the past two decades, the Water and Sanitation Providers Association (WASPA) has worked to respond to this need by strengthening the capacity and resilience of Water Service Providers (WSPs). From its inception in November 2002, WASPA was established to support WSPs through capacity building, knowledge exchange, policy advocacy, and technical assistance ensuring that service providers are better equipped to deliver reliable and sustainable services.

What began as a small network of three founding members has grown into a robust association of 155 members. This membership now includes water utilities, manufacturers and suppliers of WASH products, financial institutions, and WASH consultants. This growth is a clear testament to the trust and confidence that stakeholders have placed in WASPA over the years. It is a responsibility the Association continues to uphold with dedication and purpose.

MISSION:
To facilitate an enabling environment for Water Services Providers through capacity building, advocacy, networking, partnerships, and promotion of best practices for the provision of efficient, effective, and sustainable water and sanitation services.

WASPANATIONAL BENCHMARKING PLATFORM:
WASPA has continued to host the National Benchmark Platform which continues to play a great role in performance enhancement and improvement in WSPs. The platform envisions improvement and performance enhancement of both the technical and financial aspects of the WSPs through continuous and peer-to-peer learning. The platform is anchored on four thematic areas namely; Pro-Poor, Cost Recovery, Services Level, Non-Revenue Water
Non-Revenue Water Management
This thematic area centers on efforts to minimize water losses, encompassing both real and apparent losses.

Services Level:
Within this thematic area, Water and Sanitation Providers (WSPs) engage in dialogues concerning the quality of services they deliver.

Pro Poor:
Water and Sanitation Providers (WSPs) place particular emphasis on enhancing services in areas that are currently without or lacking adequate access. This involves mapping out low-income areas, leading initiatives to instigate behavior change through engaging consumers and prioritizing sustainability by adopting established business models.

Cost Recovery:
This theme pertains the capacity of Water and Sanitation Providers (WSPs) to recuperate operational and maintenance Costs while enhancing efficiency levels.

In collaboration with the Water and Sanitation for Urban Populations, we have kickstarted a Sanitation Thematic Group; a milestone that marks the start of a journey to nurture sanitation champions and experts driving sustainable change.

WASPA CONFERENCE:
The Water and Sanitation Providers Association (WASPA) in collaboration with the Ministry of Water, Sanitation & Irrigation the Council of Governors, County Government of Nakuru and Kenya Water Institute will be hosting the **Kenya Water Conference on Non-Revenue Water Management either on 23rd-26th , June 2026 or June 30th-July 3rd , 2026.**

Overall Goal:
The overarching goal of the conference will be to convene experts, policymakers, Regulators, Water Service Providers, Industry leaders, researchers, community organizations and other relevant stakeholders to share best practices, showcase Financial, technical and technology innoVations, foster partnerships and make decisions to accelerate NRW reduction in Kenya.

Proposed Conference Theme
The conference will focus on integrated solutions combining **technology, financing, governance, and capacity development** to accelerate the reduction of Non-Revenue Water in Kenya**.**

REPUBLIC OF KENYA

Ministry of Water, Sanitation & Irrigation

MARCH 22, 2026

WORLD WATER DAY

On this Day, we stand for a simple but powerful truth: access to safe water is power. It restores dignity, creates opportunity, and builds a better future - especially for women and girls.

When water is accessible, girls stay in school, women pursue livelihoods, and communities thrive. Water is not just a resource; it is a foundation for equality and progress.

As we mark this day, let us commit to expanding access, protecting our water resources, and ensuring no one is left behind.

Eng. Eric Murithi Mugaa

Cabinet Secretary Ministry of Water, Sanitation and Irrigation



EMBU WATER AND SANITATION COMPANY LTD

Quality in every drop



MANAGING DIRECTOR'S MESSAGE

As we join the world in commemorating World Water Day 2026 under the theme "Water and Gender – Where Water Flows, Equality Grows," EWASCO reaffirms its commitment to delivering safe, reliable and sustainable water and sanitation services to the people of Embu County.

Access to water is more than a basic need it is a driver of dignity, equality, health and economic empowerment. When water systems function effectively, women and girls are freed from the burden of long-distance water collection, children stay in school and communities thrive.

Through strategic investments in infrastructure development, environmental conservation initiatives such as tree planting and strengthened service delivery standards in line with the regulatory framework of Water Services Regulatory Board (WASREB), EWASCO continues to build resilience for present and future generations.
We remain guided by innovation, accountability and community partnership as we work towards securing water today for a sustainable tomorrow.

Eng.James N. Njeru
ManagingDirector
EWASCO

ABOUT US

Embu Water and Sanitation Company (EWASCO) was incorporated as a private company limited by ordinary share capital by Embu Municipal Council in March 2003. The Company became operational in March 2005 and the financial operations of the Company were separated from those of the Municipal Council in July 2005. The company is wholly owned by the Embu County Government (ECG). The Company's mandate is to provide water and sanitation services within Embu County serving four constituencies namely Manyatta, Runyenjes, Mbeere South and Mbeere North. As a Water Service Provider (WSP), EWASCO operates under a service provision license and in line with the Water Act, 2016, the company operations fall under the Tana Water Works Development Agency (TWWDA). EWASCO's area of jurisdiction covers about 2025 km2 with an estimated population of 302,275 people in 2020 as per projections based on 2019 population census. EWASCO has two main water sources: Rupingazi and Thuci intake works for the Kanyuambora supply. The Company relies on gravitational flow for water distribution.
EWASCO has a Board of Directors which is responsible for overall leadership through provision of oversight and policy guidance. The board has the responsibility of establishing and maintaining full and effective control over the strategic, financial and operational direction of the company as well as ensuring compliance to policies and procedures.

Vision
Safe Water and Sanitation Services to the satisfaction of our customers.

Mission
To provide quality, reliable, and affordable water and sanitation services through environmentally friendly technologies

Our Core Values
- Customer Focus
- Integrity
- Innovativeness
- Teamwork
- Environmental Stewardship

Our Services
- Water supply.
- Sewerage connections
- Leak detection & repair
- Meter replacement.
- Water quality testing (Lab Services)
- Exhauster & bowser services



Pictorial (Tree Planting)

A total of 6,000 trees were planted in the year 2025 at Irangi Forest, Schools and EWASCO's satellite offices, as part of the Company's Environmental Sustainability and Corporate Social Investment (CSI). The tree planting initiative has achieved a commendable 88.2% survival rate, demonstrating EWASCO's strong commitment to environmental sustainability, watershed protection and climate resilience. The performance positions the Company as a responsible environmental steward while providing lessons for improving outcomes in environmentally vulnerable sites.





Tree Planting at Irangi Forest During World Water Day 2025



Eng. James EWASCO MD Planting trees at Irangi Forest



Board of Directors planting trees at Irangi Forest



Members of staff planting trees at Gachoka Office



Head of Corporate Service planting trees at Kamiu Primary school Embu, During World Water Day 2025



Tree Planting at Lions Primary School- Embu, During World Water Day 2025



New Sewage Treatment Plant- Dallas



Mukangu treatment plant



EWASCO's Water Bowser

Beyond service provision, EWASCO remains committed to Corporate Social Investment that uplifts vulnerable communities and strengthens water security at the grassroots level.



CSI Activity- Tank Donation to Ngiori Secondary





CSI Donations to Support Teenage Mothers And HIV-Affected Families i



H.E Cecily Mbarire- Governor Embu County gracing the Red Cross event. EWASCO Tank Donation for the Jomo Kenyatta Children's Home for Physically Disabled Children.

PROPOSED DAM PROJECT AT MOUNT KENYA

The proposed project is expected to:
1. Enhance climate resilience
2. Address recurring water shortages
3. Secure sustainable water supply for the growing population of Embu
4. Safeguard future generations against prolonged dry spells

The project is currently at the feasibility and detailed design stage, with various financing models, including blended financing, grants and Public-Private Partnerships under consideration.

This initiative underscores EWASCO's commitment to proactive planning, innovation and long-term water sustainability for Embu County.

Recognizing this urgency, EWASCO has incorporated the dam project into its five-year strategic plan. The target is to have the project either implemented or at an advanced stage of implementation within this planning period. Over the next two years, the Company aims to complete:

- Comprehensive feasibility studies
- Detailed engineering designs
- Environmental and geotechnical investigations
- Financial structuring and resource mobilization

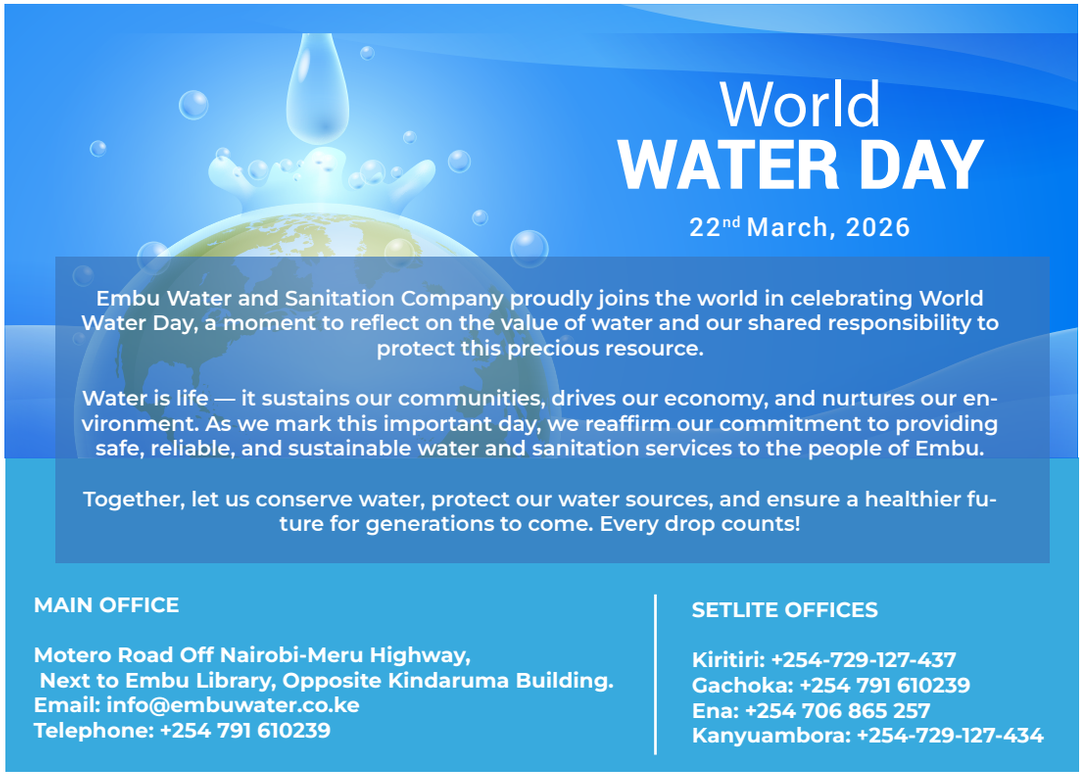


Eng. James, the MD at the proposed Dam site



River Thuci





ZORA PIPING LTD

Driving Africa's Infrastructure with Innovation and Quality

East Africa's trusted manufacturer of premium PVC, HDPE, PPR and Pressure Pipe Solutions

Zora Piping Ltd. is a leading manufacturer and supplier of high-quality PVC waste pipes, renowned for our commitment to excellence and innovation in the piping industry. Established in 2022, we have grown into a prominent player in the market, delivering reliable and durable piping solutions to a diverse range of clients. Our state-of-the-art manufacturing facilities, equipped with the latest technology, enable us to produce PVC waste pipes that meet the highest standards of performance and sustainability. At Zora Piping Ltd, we prioritize quality, efficiency, and customer satisfaction, ensuring that every product we deliver exceeds industry standards.

OUR VALUES:

Our Vision
To be the leading provider of PVC waste pipes globally, renowned for our quality, innovation, commitment to environmental sustainability.

Our Mission:
To deliver exceptional piping solutions that exceed industry standards, foster long-term relationships with our clients, and contribute positively to the environment.

Careers:
We are always looking for talented individuals to join our team. If you are passionate about the piping industry and eager to make a difference, visit our Careers page on our website to learn more about current opportunities.

Our Products & Services:

Leading PVC Pipes Manufacturing Industry;

(a); PVC Waste Pipes
We manufacture high-quality PVC waste pipes for residential, commercial, and industrial applcations. Available in various sizes and lengths, our pipes are designed for efficient and reliable waste management.

(b); Pressure Pipes
Our pressure pipes are ideal for water distributions industrial processes, and infrastructure projects. They are available in different sizes, pressure ratings, and materials, including PVC and CPVC.

(c); PPR Pipes
PPR pipes are heat-resistant, durable, and ideal for hot and cold-water systems, heating, and industrial use. Their smooth interior ensures efficient flow, while their long lifespan and leak proof joints guarantee reliability.

(d); HDPE Pipes
HDPE pipes are flexible, corrosion-resistant, and suitable for water supply, sewage, gas distribution, and irrigation systems. Lightweight and durable, they provide long-lasting performance and eco-friendly solutions.

(e); Custom Solutions
We provide tailored piping solutions designed to meet specific project requirements and industry standards.

(f); Technical Support
Our expert team offers professional guidance on product selection, installation, and technical support to ensure smooth project execution.

Why Choose us:

At Zora Piping Ltd., quality is our top priority. Our products undergo rigorous testing to ensure they meet and exceed international standards.

. Industry Expertise- Decades of experience in the PVC piping industry
. Innovative Technology- Cutting-edge manufacturing processes
. Customer-Centric Approach -Personalized service and tailored solutions to meet client needs
. Sustainability Commitment - Eco-friendly practices and materials for a sustainable future.

Contact Us

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Website: https://zorapipingltd.co.ke

Opening Hours:

Mon - Fri: 8:30 am to 5:00 pm
Saturday: 9:30 am to 1:00 pm
Sunday: Closed

Pictorial (Products & Services)

PVC waste pipes



Pressure Pipes



PPR Pipes



HDPE pipes



Technical Support



Other Products:
(electrical appliances & equipment)

Power Factor Cabinets



Single Electric Cable





Electric Motors



Kibwezi-Makindu Water & Sanitation Company Ltd (KIBMAWASCO)

Kibwezi-Makindu Water & Sanitation Company Ltd (KIBMAWASCO) is a private company limited by shares and incorporated on August 16, 2011, in a merger of the Kibwezi-Mtito Andei Water Company and the Makindu Water Company. The company provides water services within the towns of Kibwezi, Makindu, Kambu, and Mtito Andei and their environs.

Water sources:

Current water demand 13,607 m^3/Day; water production 7,238 m^3/Day; and water deficit of 6,369 m^3/Day

¨ Umani Springs – 4,902 m^3/day

¨ Kwa Venge Spring – 906 m^3/day

¨ Kambu Springs (Kambu town supply) - 160 m^3/day

¨ Kambu springs (Kambu – Kiteng'ei water supply) 432 m^3/day

¨ DWA dam (DWA – Kyumani & Kithokoosyo water supply) – 480m^3/day.

¨ Makindu Borehole – 18.0m^3/hour (324m^3/day).

¨ UYI Dam, with CFU treatment component- 10m^3/day

¨ Kiambani Borehole, with Purification component (Reverse Osmosis)- 4m^3/hr. (24M^3/day).

Water coverage:

¨ Service area span is 2,450 Km^2

¨ Population in the area is 400,000 and currently 286,000 people are served representing 71.5% of population

¨ Water coverage is about 41.5%

We expect to increase the area water coverage and population served once the ongoing ward water projects are complete

REDUCTION OF NON-REVENUE WATER: Improving Efficiency and Service Delivery to our Customers.

INTRODUCTION: Kibwezi - Makindu Water and Sanitation Company Limited has implemented several measures to reduce NRW, improve water supply, water reliability and increase in operational efficiency.

CHALLENGES :

· Multiple small service lines from the supply main causing high leakage points and maintenance difficulties.

· Old and dilapidated water infrastructure.

· Vandalism and theft of pipes and fittings leading to water loss and service provision interruption.

· High water pumping costs in our 5No. pumping stations.

OBJECTIVES:

i) Reduce water losses,

ii) increase revenue collection,

iii) ensure sustainable water supply

iv) improve system monitoring.

MEASURES IMPLEMENTED:

i) **Elimination of spaghetti lines, installing of new service lines meter clustering to a common chamber.** Most of the streets in Kibwezi town had spaghetti customer lines which contributed to a lot of physical water losses. The tapping points from the main supply lines were contributing to low pressures hence affecting some customers who were not well served.

ii) **Automation of the water buzor points and some company kiosks**. . These water dispensing points have been fitted with pre-paid water dispensing ATMs and they operate day and night since no operator is required to operate the water points. The automation of water bowser point has enhanced accountability and transparency in bulk water dispensing by ensuring accurate metering, controlled access, real-time monitoring, efficient revenue that will help in reduction of non-revenue water. These water dispensing points have been fitted with pre-paid water dispensing ATMs and they operate day and night since no operator is required to operate the water points. The automation of water bowser point has enhanced accountability and transparency in bulk water dispensing by ensuring accurate metering, controlled access, real-time monitoring, efficient revenue that will help in reduction of non-revenue water.

iii) **Acquired Enterprise Resource Planning (ERP) system.** This has improved billing and customer relations management, staff performance management and asset management.

iv) **Improved metering efficiency by buying and installation of high quality customer water meters.**

v) **Bought and installed of prepaid water meters to our 15 big customers (consuming >300m3 per month) and 40 No. company water kiosks.**

vi) **Carried out GIS mapping of all the 6,800 No. active customer connections and water infrastructure.**

PARTNERSHIPS;

KIBMAWASCO through the county Government of Makueni has partnered with different agencies to improve on water and sanitation infrastructure and sustainable water and sanitation service delivery to the people within its service area. They include;

The World Bank – Through the K-WASH program the WSP has qualified for funding of Kesh. 39,500,000 which will help the company maintain its compliance status and solarize all the 5No.pumping stations in order to reduce electricity cost and increase its operational cost coverage ratio.

World Vision – Through partnership with the County Government of Makueni, World Vision has implemented a solar powered Kiboko – Twaandu water project which will serve the people of Kiboko Twaandu and Makindu Wards. This project will be handed over to KIBMAWASCO for management and maintenance.

Water Mission Kenya – Water mission Kenya through the partnership with the county Government of Makueni has implemented the Kambu Water supply system which is operated using modern billing and revenue collection technology.

PICTORIALS



Clustered customers in one chamber



Newly installed service line replacing spaghetti lines



Installed pre-paid meter for the draw point



One of the automated water draw points



One of the company water kiosks



Athi-Tunguni water treatment works



We Were Awarded the FiRE Award for Being the Best Company in Financial Reporting 2024/2025 .

WATER 2026

BUILDING A RESILIENT WATER FUTURE: STRONGER WSPs, STRONGER KENYA.

Efficiency. Sustainability, Equity. Every Drop Counts.

As we look ahead to 2026, the future of Kenya's Water Service Providers (WSPs) depends on how well we manage today's challenges and embrace tomorrow's opportunities.

REDUCING NON-REVENUE WATER (NRW)
A top priority for WSPs. Every drop saved improves operational efficiency, financial sustainability, and water availability for all.

OPERATIONAL EXCELLENCE
Investing in infrastructure, skilled people, and strong governance to deliver reliable, safe, and affordable water services.

DIGITAL TRANSFORMATION
Smart solutions, real-time data, and automation drive transparency, accountability, and better decision-making.

CUSTOMER AT THE CENTRE
Happy customers build strong communities. Improving communication, responsiveness, and service delivery builds trust and loyalty.

SUSTAINABILITY & CLIMATE RESILIENCE
Protecting our water sources, promoting conservation, and building systems that withstand climate impacts.



> Water is life. Our commitment in 2026 is to support WSPs in delivering sustainable, inclusive, and efficient water services that transform lives and power Kenya's development.

Every Drop Matters | Every Customer Counts | Every Partnership Strengthens | Every Investment Transforms

Miss . Caroline Peter
Managing Director.
Bitheline Communication

NYERI WATER AND SANITATION COMPANY LIMITED

MESSAGE FROM THE MANAGING DIRECTOR



Eng. Peter G. Kahuthu

As we celebrate World Water Day 2026 under the theme Water and Gender, we at NYEWASCO reaffirm our commitment to delivering reliable water and sanitation services that empower communities and strengthen equality. Access to water is more than a service; it is an enabler of opportunity, health, and resilience.

We recognize the dedication of our staff, partners, and communities who make this possible, and we call on everyone to continue conserving and protecting this precious resource. Together, we can build a future where water sustains life, drives opportunity, and ensures that equality grows in every household and community across Nyeri.

Looking ahead, we remain committed to innovation, sustainability, and inclusion. By embracing technology, protecting our water sources, and working hand in hand with communities, we will continue to ensure that every drop counts and every initiative contributes to a stronger, more equitable Nyeri.

BEYOND THE TAP: HOW WE ARE ADVANCING GENDER EQUALITY THROUGH WATER

As the world marks World Water Day 2026 under the theme Water and Gender, with the slogan "Where Water Flows, Equality Grows," we at Nyeri Water and Sanitation Company (NYEWASCO) celebrate the transformative role of water in improving lives and creating opportunities for women, girls, boys and entire communities across Nyeri County.

For 16 years, we have ranked as Kenya's best water service provider. Beyond this recognition, our focus remains on delivering services that improve livelihoods, restore dignity, and promote equality within the communities we serve. Our commitment to quality and excellence is further demonstrated through our ISO 9001:2015 certification and KENAS ISO/IEC 17025:2017 accreditation, which affirm that our systems and laboratory processes meet internationally recognized standards.

Our water coverage now exceeds 100 percent, ensuring that more households than ever before have access to reliable, clean water. This improved access benefits the entire community, while significantly easing the burden that has traditionally fallen on women and children in the search for water. With reliable services in place, women are better able to engage in entrepreneurship, farming, and community initiatives, while children can attend school more consistently, participate in skills-building activities, and focus on their personal development.

Reliable water supply is complemented by our sanitation and hygiene initiatives. Through the Urban Basic Sanitation for the Urban Poor Programme (UBSUP III), we support low-income communities in adopting safe sanitation practices and proper hygiene standards. Community-based sanitation champions lead educational campaigns, teach safe hygiene practices, and work with residents to improve local sanitation facilities. These programs not only improve



NYEWASCO receives the Best Overall Utility in Kenya award at the launch of the WASREB IMPACT 17 Report, marking the company's return to the top of utility ranking

public health outcomes but also empower women, who are often the primary caregivers in their households, to take leadership in maintaining healthy environments.

Infrastructure maintenance and sustainability remain at the core of our operations. While Nyeri enjoys high water coverage, challenges such as infrastructure vandalism, illegal connections, and occasional water losses require constant vigilance. We address these challenges by encouraging community ownership of water systems. Residents are increasingly involved in safeguarding pipelines, reservoirs, and meters, ensuring that services remain uninterrupted and that everyone benefits from shared resources.

Innovation is a key pillar in our approach to water delivery and management. NYEWASCO has invested in smart metering and rapid leak detection technologies to minimize water losses and ensure efficient distribution. These technologies allow our teams to identify issues in real time, respond promptly, and maintain reliable services across all areas. By reducing non-revenue water and improving operational efficiency, we are able to provide affordable, high-quality water to our customers while promoting sustainability.

Climate resilience is another critical aspect of our work. Our Strategic Plan for 2021 to 2027 prioritizes the protection of key water sources, including the Chania River catchment, through tree planting and catchment conservation projects. These efforts help mitigate the effects of climate variability and ensure long-term availability of clean water. NYEWASCO also engages with local farmers and community groups to encourage water conservation and responsible land use, strengthening the connection between water supply, environmental protection, and community livelihoods.



Tree planting at the old Mweiga pumping station



NYEWASCO staff, partners, and community members during a bamboo tree-planting exercise at Zaina Forest.

Partnerships remain vital in achieving our goals. NYEWASCO collaborates with national and county government agencies, non-governmental organizations, development partners, and community groups to implement programs that improve water and sanitation services. By leveraging resources, expertise, and local knowledge, these partnerships enhance the impact of our initiatives and ensure that programs are inclusive, sustainable, and responsive to community needs.

Our commitment extends to education and outreach. Through school programs, community workshops, and awareness campaigns, we inform residents about water conservation, hygiene, and the importance of protecting water infrastructure. These initiatives not only improve knowledge and behavior but also create a culture of shared responsibility, where communities actively participate in safeguarding water resources for present and future generations.

World Water Day 2026 reminds us that water is more than a utility; it is a driver of equality, opportunity, and prosperity. Our work in Nyeri demonstrates how reliable water supply, modern sanitation, and community engagement empower women and girls, strengthen households, and build resilient communities. Every improvement in water access and every initiative in sanitation translates into better education, greater economic participation, and enhanced well-being.

As we look to the future, NYEWASCO remains committed to excellence, sustainability, and inclusion. We will continue to expand coverage, improve services, adopt innovative technologies, and invest in environmental conservation. We aim to ensure that all residents of Nyeri have access to reliable water, modern sanitation, and the opportunities that come with them. The progress we have made shows that where water flows, communities thrive and equality grows. Water strengthens livelihoods, empowers women and girls, fosters education, and builds a foundation for inclusive economic development. NYEWASCO's journey is a testament to the power of water to transform lives and create a more equal, prosperous, and resilient Nyeri.

Where water flows, equality truly grows.



Leak Detectives at Work- Where skill meets sustainability— NYEWASCO's NRW Heroes!



Nyeri Hill Tank



Kamakwa Water Treat Plant



Kangemi Sewer Treatment Plant

SK-KAWANISHI AFRICA LIMITED

SK-Kawanishi Africa Limited was incorporated under the Companies Act, 2015 as a Private Limited Company in 2024 as a Kenyan local subsidiary of the parent company SK-Kawanishi Co.,Ltd of Japan.

The parent company is a leading pipe fittings manufacturer in Japan. As a local subsidiary's S-Kawanishi Africa Limited is authorized to do business involving the parent company's products in Kenya.

We have a wide range of product line up to solve every conceivable need in the water distribution works, that is sockets, flange adaptors, tees, end caps, male and female adaptors, flanged tees for air valve connection, etc.

All our products meet ISO standards and are made of ductile cast iron, internally and externally epoxy resin powder coated and are well known for high quality, durability, flexibility, adaptability, effectiveness and ease of installation.

Additionally, the design technology of our mechanical joints is outstanding as there is no need for disassembly, lubrication, pipe chamfering, stiffeners and can easily slide over the pipe.

Our Products' Specifications:

- **Manufacturer :** SK-KAWANISHI CO.,LTD
- **Material :** Cast Iron, FCD420-10
- **Coating Exterior :** Epoxy Powder Coating.
- **Coating Interior :** Epoxy Powder Coating.
- **Anticorrosion bolt & nut :** FCD600-3, Epoxy Powder Coating
- **Gasket :** Styrene-Butadiene Rubber(SBR)
- **Pressure Rating :** PN 16
- **Application :** HDPE, PVC, PPR & Steel Pipes
- Available diameter sizes;
- **Suppon Series :** OD63, OD90, OD110, OD125,
- OD160, OD180, OD200, OD250 & OD315.
- **Neo SK+SB series :** OD32, OD50, OD63, OD90 & OD110.
- **Neo SK series :** OD20, OD25 & OD32.

Our Products' Unique Properties :

- Ability to slide over pipe. Easy installation requiring less excavations/ working space.
- No pipe chamfering, no stiffener, no lubricant, no threading, no disassembling and no torque controlling needed.
- Ability to connect different pipe materials serving as a transition joint.
- External pull-out restraints (Holding/Watertightness)–stop rings. (Flexible pipe receivers – up to deflection)
- Ribbed and tapered gasket – Water tightness.
- Interior and exterior epoxy powder coated. (Resistant to corrosion with lifespan of over 50 years).
- No special tools nor skills needed for installation.
- Flange adaptors can slide along the pipeline making it very easy to install and uninstall other fittings like Gate Valves, Water Meters, Pressure Release Valves etc.

Our Solutions:

1) **SK-Kawanishi Joints as a Transitional Joint;** SK-Kawanishi Pipe Joint can connect different pipe material types making it useful as a transitional joint and a convenient repair joint.
2) **SK-Kawanishi Flange Adaptor as a Dismantling Joint;** SK-Kawanishi Flange Adaptor can slide on the pipe making it very easy to install and uninstall other flanged fittings like gate valves, Pressure Release Valves for servicing. Although the joint doesn't need disassembling, it serves well as a Dismantling Joint without necessarily dismantling it.
3) **SK-Kawanishi Flanged Tee for Air Valve Connection.**

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Our Products



Socket



Tees



Reducer socket



Male adaptor



Female adaptor



Elbow



Elbow



Pipe end



Neo SK socket

Our Products



Straight Socket



Reducer Sockets



Flanged Tees



Flange Adaptors



Equal/Reducer Tees



End Caps/Pipe Ends



Elbows/Bends 90°



Elbows/Bends 45°

WHEN WATER WORKS, KENYA WINS.

Advancing Equality, Efficiency and Sustainable Prosperity.

The true measure of a nation's progress is not only in the water it produces, but in how equitably, efficiently and sustainably it delivers that water to its people.

As we commemorated World Water Day 2026 under the global theme **"Water and Gender,"** we are reminded that access to safe water and sanitation is not merely a service delivery issue but a fundamental human right, a driver of socio-economic development, and a catalyst for gender equality.

Water remains at the Centre of Kenya's development agenda. It supports public health, food security, industrial growth, environmental sustainability and the realization of **Vision 2030**. Yet the burden of water insecurity continues to fall disproportionately on women and girls.

The Kenyan water sector has continued to make remarkable progress in expanding access to water and sanitation services through sustained investments in infrastructure, regulatory reforms, digital transformation and institutional strengthening.

However, one of the most pressing challenges facing the sector remains **Non-Revenue Water (NRW)**. High NRW levels continue to constrain the financial sustainability of many utilities and undermine efforts to achieve **Sustainable Development Goal 6.**

Together, we can create a future where every Kenyan has access to safe water and sanitation, where women and men participate equally in shaping water solutions, and where efficient water management supports economic growth, environmental stewardship and social prosperity.

As we look to the future, let us commit to a water sector that wastes less, serves more, empowers all and leaves no one behind—because when water works, Kenya wins.



> "Water is not just a resource; it is the foundation of life, equality and sustainable development.

Focused. Driven. Determined

Mr. Nickson Musyoka

Executive Director,
Bitheline Communication

LINIA PIPES
Piping Excellence

MESSAGE FROM THE MANGING DIRECTOR.

ENGINEERING SUSTAINABLE WATER INFRASTRUCTURE FOR KENYA AND BEYOND.

At LINIA PIPES LIMITED, we recognize that reliable water infrastructure is fundamental to public health, economic growth, environmental sustainability, and national prosperity. Every pipe we manufacture represents our commitment to delivering safe water, improving sanitation, and supporting resilient communities. As Kenya advances toward universal access to clean water and sanitation, we remain proud to partner with water sector stakeholders in delivering infrastructure that transforms lives. Our continued investment in innovation, manufacturing excellence, and quality assurance enables us to provide piping systems that meet the evolving demands of modern infrastructure while promoting efficiency, durability, and environmental responsibility. We are honoured to contribute to Kenya's water sector and remain committed to supporting the country's journey toword achieving Sustainable Development.

COMPANY OVERVIEW.

LINIA PIPES LIMITED is a leading Kenyan manufacturer and supplier of high-quality plastic piping systems, serving the water, sanitation, irrigation, construction, industrial and infrastructure sectors. Through advanced manufacturing technologies, rigorous quality control, and a customer-centric approach, we deliver innovative, durable, and cost-effective piping solutions that support national development and improve access to safe water. We are a trusted partner to Water Service Providers (WSPs), Water Works Development Agencies (WWDAs), county governments. contractors, consultants, developers, and private enterprises across Kenya and the region.

VISION

To lead globally with innovative, sustainable piping solutions, synonymous with reliability and cutting-edge technology, meeting evolving global needs.

MISSION

To commit to enhancing products for evolving needs, prioritizing sustainability, and delivering customer-centric solutions that exceed expectations.

Supporting Water Infrastructure & Reducing Non-Revenue Water (NRW).

Reducing Non-Revenue Water (NRW) remains one of the greatest priorities within Kenya's water sector. LINIA PIPES contributes to NRW reduction by providing durable, leak-resistant piping systems that minimize water losses, improve network reliability, and enhance operational efficiency.

The company's high-performance products enable Water Service Providers to:

- Reduce pipeline leakages
- Improve system efficiency
- Lower maintenance costs
- Enhance service delivery
- Extend infrastructure lifespan

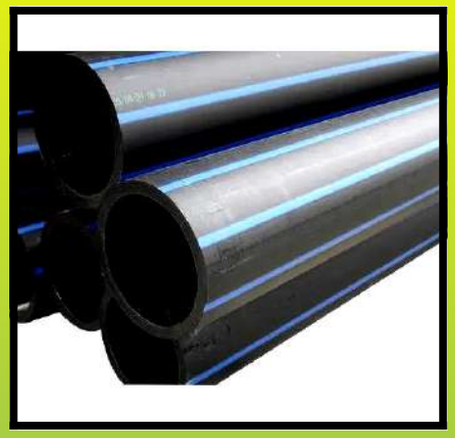
These solutions directly support national efforts to improve water security and operational sustainability.



Sustainability & Corporate Social Responsibility.

LINIA PIPES is committed to responsible manufacturing and sustainable business practices that promote environmental stewardship and long-term community well-being. The company embraces the efficient use of resources, environmentally responsible production processes, and the development of durable piping solutions that conserve water and support sustainable infrastructure. Through investments in employee development, the provision of safe and inclusive workplaces, and support for community water initiatives, LINIA PIPES continues to create lasting value. By working closely with stakeholders across the water sector, the company contributes to healthier communities, enhanced water security, and sustainable socio-economic development.

Water Solutions



HDPE Pipes.



Aqua Pump.



HDPE Compression Fittings.



PPR Pipes

Telecommunication

Telecommunication Ducts



For safe-guarding and routing optical fiber cables and electrical wiring in tel-ecommunica tion infra-structures

PVC Manholes



For modern sewage and drainage sys-tems, offering excellent re-sistance to en-vironmental stress and chemical corro-sion

At LINIA PIPES we take pride in being a leading provider specializing in the manufacturing and trading of PPR pipes, HDPE pipes, elec-trofusion machines, and telecom ducts. Our commitment is unwavering as we strive to deliver high-quality solutions catering to a di-verse range of industrial and infrastructure needs.

PICTORIALS





























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Piping Excellence

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WORLD WATER DAY
PICTORIALS


NAIROBI CITY COUNTY
WORLD WATER DAY
Theme: Water & Gender Equality




WATER RESOURCES AUTHORITY


World Water Day


DANCO






World Water Day 2026






NATIONAL








DANCO


NATIONAL CELEBRAT








Mwerongundu Primary Schoo
Borehole
Eng. Eric Mugaa
22nd March 2026


Galaxy Z Fold3 5G


This tank was donated by
NORTHERN WATER WORKS
DEVELOPMENT AGENCY
(NWWDA)




Fold3 5G


DANCO


NYERI WATER AND
SANITATION COMPANY LTD






WATER &
GENDER
EQUALITY





IMPACT 18
2024-2025

WASREB
Water Services Regulatory Board



FOREWORD

The Final Stretch to 2030: Delivering Water and Sanitation for All

As we enter the final stretch toward 2030, the imperative to deliver universal access to water and sanitation for all Kenyans has never been more urgent. Importantly, the foundational principles of water management—equity, efficiency, and sustainability require no alteration. These principles must continue to guide the sector as we accelerate efforts toward achieving Sustainable Development Goal 6 (SDG 6). Reflecting the findings of the IMPACT 18 Report, it is clear that while the sector has made significant progress through reforms aligned with the best global practices, key challenges remain.

One of the most persistent challenges remains with Non-Revenue Water (NRW). Despite ongoing interventions, NRW levels have gone higher, undermining operational efficiency, financial sustainability, and water resource conservation. Addressing NRW is not only a technical and operational priority but also an economic and environmental necessity. While emerging innovations are beginning to transform utility operations, they will have a limited impact unless sustained and coordinated action decisively reduces NRW.

This report serves both as a reflection of current performance and a roadmap for the work ahead. Reducing NRW will require a multi-faceted approach that integrates technology, strengthened regulatory enforcement, and active community participation. The path to universal access is clear. We have the regulatory frameworks, the data, and the solutions required to deliver water and sanitation services for all. We now need to accelerate implementation, strengthen collaboration among all stakeholders, and commit unwavering compliance and accountability.

We must confront the reality that gaps in compliance continue to hinder universal access. These gaps result in inequitable service distribution, inconsistent quality, and ultimately, the exclusion of vulnerable populations. However, evidence from the sector demonstrates that WSPs that achieve full compliance consistently outperform their peers. They record higher consumer satisfaction, improved financial viability, and greater resilience to climate-related shocks.

I warmly congratulate those Water Services Providers that have shown real improvement through dedication, discipline, and focus. Your progress proves that excellence is possible. As we reflect on these findings, we must collectively commit to transforming equitable access from a policy aspiration into a measurable reality for every Kenyan.

Job Chirchir
Chairman



PREFACE

"High-performing utilities prove that regulatory compliance delivers tangible results."

The global community stands at a critical juncture in our collective pursuit of Sustainable Development Goal 6 — ensuring the availability and sustainable management of water and sanitation for all. Recent United Nations reports clearly show that while meaningful progress has occurred, with safely managed drinking water coverage rising from 68% in 2015 to 74% in 2024 and safely managed sanitation increasing from 48% to 58%, billions of people still lack these fundamental services. Globally, 2.2 billion people remain without safely managed drinking water, 3.4 billion without safely managed sanitation, and 1.7 billion without basic hygiene facilities at home. The pace of change is simply not fast enough.

Our water sector mirrors this global reality, a story of steady gains tempered by persistent challenges. Through progressive reforms, we have expanded access to improved water services and seen incremental improvements in water coverage at 72.1% and infrastructure development. Yet, as detailed in this Impact 18 Report, critical bottlenecks remain. NRW continues to go up, now at 48%, representing not only massive economic losses but also wasted precious resources that could serve millions more Kenyans. Sewer coverage lags significantly behind our ambitions, while inequities between urban and rural areas, and across counties, persist, leaving the most vulnerable behind.

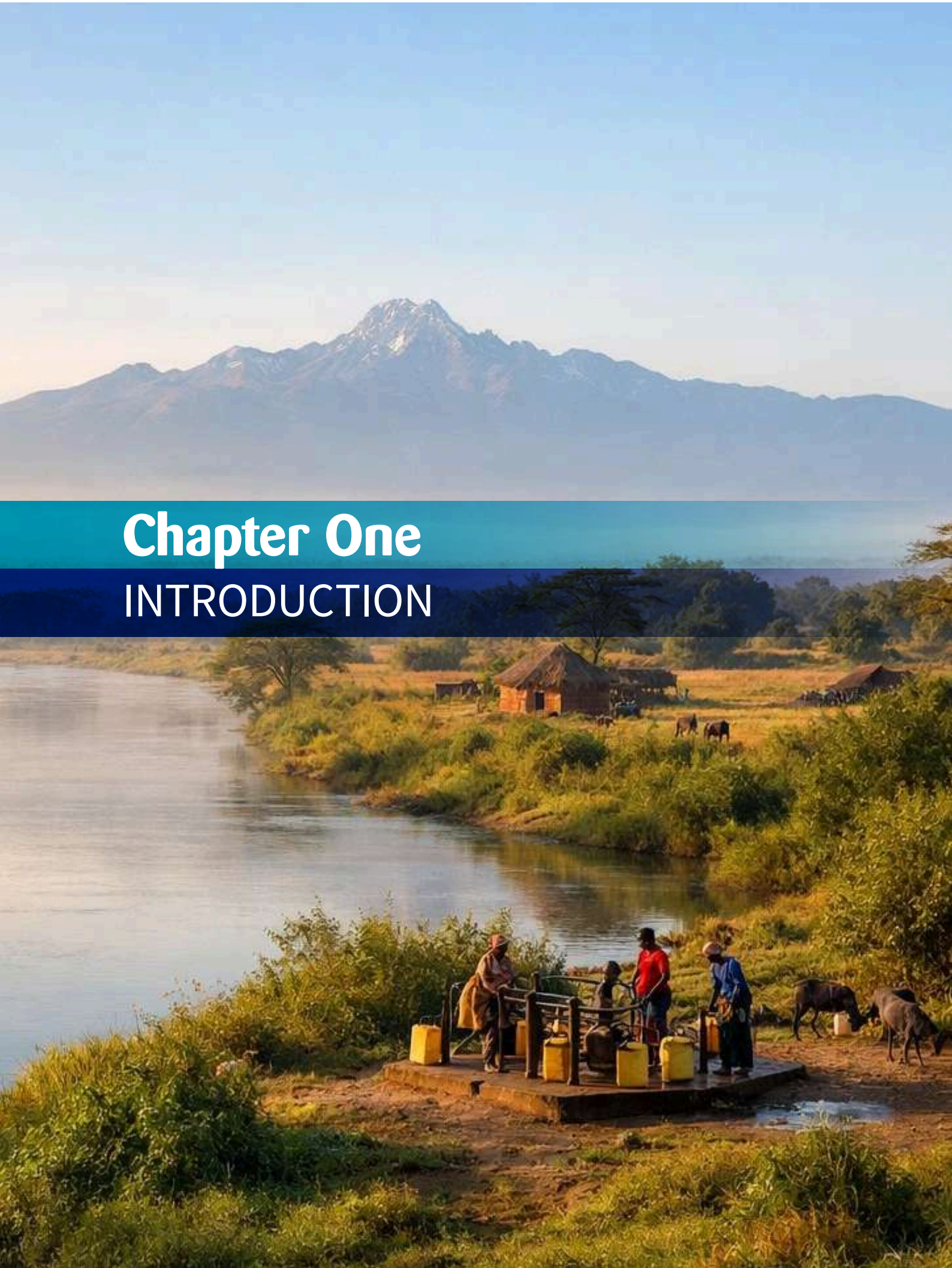
This Report offers both a candid diagnosis of where we stand and a practical roadmap for the accelerated action required in the final stretch. It highlights performance improvements by many Water Services Providers (WSPs) that have demonstrated commitment, innovation, and discipline. These high-performing utilities prove that full regulatory compliance delivers tangible results: higher consumer satisfaction, stronger financial viability, and greater resilience to climate shocks and variability.

At the same time, the report underscores that persistent gaps in compliance, operational inefficiencies, and inadequate investment continue to undermine universal access. Addressing NRW aggressively — through technology, smart infrastructure, regulatory enforcement, and active community engagement, is no longer optional; it is an economic, environmental, and moral imperative. The solutions are within our reach. We have policy frameworks, innovations in metering, leakage detection, and wastewater management, and a growing body of evidence on what works. What we now need is unprecedented levels of cooperation, creativity, and commitment across national and county governments, Water Services Providers, regulators, development partners, and communities.

To every Water Service Provider that has shown improvement through sheer determination and focus, I extend my sincere congratulations. As we present the Impact 18 Report, let us shift our collective focus from planning to delivery. Together, through unwavering commitment, innovation, and collaboration between national and county governments, Water Services Providers, regulators, development partners, and communities, we can ensure that by 2030, every Kenyan has access to safe, reliable, and sustainable water and sanitation services.

Richard Cheruyiot

Ag. Chief Executive Officer



Chapter One
INTRODUCTION

1.1 Background and Regulatory Context

The year 2026 marks the beginning of the final four-year stretch to 2030. This period represents a decisive window for achieving universal access to water and sanitation. Although gains have been recorded, significant gaps remain in service coverage, affordability, and service reliability. These gaps disproportionately affect rural communities, informal settlements, low-income households, and vulnerable populations.
Without accelerated implementation, universal access targets may remain out of reach. The past decade has delivered substantial progress in developing policies, strategies, and institutional frameworks; the remaining years must focus on implementation, monitoring, and compliance. Since the sector has sufficient policy direction, the priority is to operationalise existing commitments, strengthen compliance, and accelerate service delivery. The remaining four years, therefore, demand deliberate prioritization of underserved populations to ensure that progress is inclusive and that no one is left behind. his requires targeted investments, strengthened regulatory oversight, and improved accountability across institutions. Progress in this final stretch will therefore be measured not by new policies, but by tangible improvements in access, quality, and sustainability of services.

The final stretch to 2030 calls for results-driven regulation anchored in implementation, monitoring, and enforcement. Existing commitments must now translate into measurable outcomes. Performance must be tracked, gaps identified, and corrective action taken in real time. This requires sustained coordination across national and county governments, the regulator, Water Services Providers, development partners, and communities.

This is a decisive moment. The narrowing window demands urgent collective action. Only by accelerating implementation, improving efficiency, and enforcing accountability can universal access become a reality and national, regional, and global commitments be fulfilled.

1.2 The Human Right to Water and Sanitation

Access to safe water and sanitation underpins life, dignity, health, education, gender equality, and economic productivity, and therefore forms a foundation for sustainable development. Therefore, WASH as a human right reinforces that universal access is not only a policy aspiration, but a development obligation requiring coordinated action by governments, regulators, utilities, and partners.

This recognition was formalized by the United Nations General Assembly through Resolution 64/292 (2010), which acknowledged access to safe drinking water and sanitation as a human right essential for the realization of all other human rights.1 Subsequent resolutions further strengthened this normative framework. Resolution 76/153 (2021) reaffirmed that water and sanitation are integral to the right to an adequate standard of living and closely linked to the rights to health, life, and human dignity, while emphasizing progressive realization and prioritization of vulnerable and marginalized populations.2 In 2023, additional resolutions reinforced the urgency of accelerating progress. Resolution 77/334 (2023) emphasized the need to strengthen global cooperation and accelerate implementation under the Water Action Decade toward Sustainable Development Goal 6.3

Continuing this progression, Resolution 78/130 (2023) further highlighted the importance of universal access to WASH services in health-care facilities. It recognized their role in infection prevention, maternal and newborn health, gender equality, and resilient health systems.

In this context, the final stretch to 2030 requires assessing current levels of access, identifying institutions responsible for delivery, reviewing progress achieved, understanding remaining gaps and risks, and defining priority actions needed to accelerate service expansion.

1.3 Normative Standards of the Human Rights to Water and Sanitation

Human rights standards for WASH require that water be available in sufficient quantities. Water must also be affordable, safe, physically accessible, and of acceptable quality for drinking, hygiene, and all domestic uses. Sanitation facilities must be adequate, affordable, safe, and accessible. They must also be culturally acceptable, with special protection for groups such as women, children, persons with disabilities, and those in vulnerable situations. Hygiene services must ensure the availability, affordability, accessibility, and safety of essential items. These items include soap, sanitary products, and handwashing facilities.

Equally important is accountability. Clear roles, responsibilities, and performance standards must guide all institutions and service providers. There must be strong systems for compliance, enforcement, transparency, and public participation. Communities and affected populations must be empowered to demand accountability, raise complaints, and obtain remedies when their rights are violated.

1.4 SDG 6 within the 2030 Agenda for Sustainable Development



The 2030 Agenda for Sustainable Development positions water and sanitation at the core of global development efforts, recognizing them as essential enablers of health, education, gender equality, food security, climate resilience, and economic growth. Sustainable Development Goal 6 (SDG 6) seeks to ensure availability and sustainable management of water and sanitation for all by 2030, while reinforcing interlinkages with other goals across the development agenda.

SDG 6 goes beyond access and takes a comprehensive approach, targeting water quality, wastewater management, water-use efficiency, integrated water resources management, and ecosystem protection. It emphasizes community participation, international cooperation, and capacity building for lasting results. These goals show that water and sanitation systems shape environmental, social, and economic outcomes.

1.5 Leaving No One Behind: Inclusive, Climate-Resilient and Locally Responsive Service Delivery





In the final stretch to 2030, achieving universal access requires deliberate efforts to ensure that progress reaches populations that remain underserved. Although the human right to water and sanitation is universal, its realization is influenced by intersecting factors including poverty, gender, disability, age, geographic location, and environmental vulnerability.

These overlapping challenges create compounded barriers that limit equitable access to safe and reliable services.



International human rights instruments reinforce the need for inclusive service delivery. The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) calls for eliminating barriers to women's access to water and sanitation services. The Convention on the Rights of the Child (CRC) recognizes children's right to health, including access to safe drinking water and sanitation. The Convention on the Rights of Persons with Disabilities (CRPD) requires that water and sanitation facilities and services be accessible and inclusive. The United Nations Declaration on the Rights of Peasants and Other People Working in Rural Areas (UNDROP) further recognizes the rights of rural populations to water, sanitation, and healthy living conditions. These commitments emphasize that service delivery must intentionally address inequalities and prioritize vulnerable populations.

In practice, these inequalities manifest in multiple ways. Women and girls often bear the burden of water collection and face safety risks where sanitation services are inadequate. Children in underserved communities are more exposed to waterborne diseases and experience school absenteeism linked to inadequate water and sanitation facilities. Persons with disabilities face accessibility challenges where infrastructure is not designed to meet diverse needs. Rural populations and informal settlements frequently experience lower service coverage, limited infrastructure investment, and higher service delivery costs. Addressing these challenges requires targeted investments, inclusive infrastructure design, and affordability mechanisms to remove barriers to access.

Climate change further compounds these inequalities by affecting water availability, infrastructure resilience, and long-term service reliability. Droughts reduce water supply; floods damage sanitation systems, and environmental degradation threatens water sources. These pressures disproportionately affect already vulnerable populations, particularly rural communities, arid and semi-arid areas, and informal settlements. The broader triple planetary crisis of climate change, biodiversity loss, and pollution further emphasizes the need for sustainable and resilient water and sanitation services.

Global frameworks highlight the urgency of climate-resilient approaches. The Paris Agreement calls for strengthening adaptive capacity and resilience to climate-related hazards, including water stress and extreme weather events.1 The International Decade for Action "Water for Sustainable Development" (2018–2028)

emphasizes integrated water resources management, ecosystem protection, and investment in climate-resilient infrastructure. These commitments reinforce the need to embed climate resilience into planning, financing, and service delivery in the final stretch to 2030.

Recognizing indigenous and community knowledge is also critical for inclusive and sustainable service delivery. Many communities have long-standing water management practices, local governance systems, and climate adaptation strategies that support sustainable resource use. Traditional water harvesting, catchment protection practices, and community-led management models provide locally appropriate solutions, particularly in rural and climate-vulnerable areas. Integrating these approaches with formal service delivery systems can enhance sustainability, improve resilience, and strengthen community ownership.

Leaving no one behind, therefore, requires a combined focus on equity, climate resilience, and locally responsive approaches. This includes prioritizing underserved populations, designing inclusive infrastructure, strengthening climate-resilient service delivery, and recognizing indigenous knowledge systems. In the final stretch to 2030, deliberate and targeted implementation will be essential to ensure that universal access to water and sanitation is achieved in a manner that is inclusive, sustainable, and resilient.

1.6 Global Progress Toward SDG 6

Global progress toward SDG 6 reflects steady improvements in access to safely managed drinking water and sanitation services, alongside strengthened policy frameworks and increasing integration of climate considerations into WASH planning. Between 2015 and 2024, access to safely managed drinking water increased from 69% to 73%, with approximately 961 million people gaining access. Over the same period, safely managed sanitation coverage increased from 48% to 58%, benefiting about 1.2 billion people. Policy and institutional progress have also been recorded, with nearly 90% of countries adopting WASH policies and many incorporating safely managed service targets.

Building on these gains, approximately 80% of countries now address climate risks within WASH policies, while women's participation in the sector continues to improve, although leadership representation remains limited. However, despite these advances, substantial gaps remain. Approximately 2.1 billion people still lack safely managed drinking water services, 3.4 billion lack safely managed sanitation, and 1.7 billion lack basic hygiene services.

Furthermore, fewer than 13% of countries report sufficient financial and human resources to implement WASH plans, while institutional fragmentation and limited monitoring of equity and affordability continue to affect service delivery. Together, these factors highlight the need for accelerated action during the final stretch to 2030. Overall, while notable progress has been made in strengthening policies and expanding access, the current trajectory indicates that accelerated implementation, strengthened governance, increased investments, and inclusive, climate-resilient approaches will be required to achieve universal access to water and sanitation by 2030.

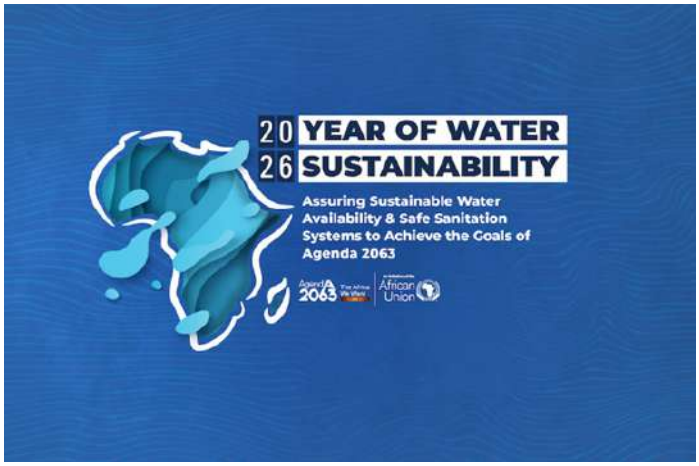
Table 1.1: Global WASH Progress Dashboard

Thematic Area	Progress	Current Situation	2030 Target	Required Action
Policy Frameworks		Most countries have WASH policies but lack financing, implementation and enforcement mechanisms	Fully resourced and implemented policy frameworks	Move from policy development to implementation, budgeting and accountability
Climate Integration		Climate risks increasingly integrated into planning, but implementation remains limited	Climate-resilient WASH systems	Implement drought-resilient, flood-proof and adaptive WASH infrastructure

Thematic Area	Progress	Current Situation	2030 Target	Required Action
Drinking Water Access	🟡	73% of the global population uses safely managed drinking water; gaps remain in rural areas and informal settlements	Universal safely managed drinking water services	Expand services to underserved areas and improve reliability, quality and continuity
Sanitation Access	🟡	Only 58% of the population uses safely managed sanitation; unsafe on-site systems remain widespread	Universal safely managed sanitation	Scale non-sewered sanitation, faecal sludge management and safely managed on-site solutions
Institutional Coordination	🟡	Overlapping mandates across ministries, regulators and service providers affect sector performance	Clear governance structures with defined roles	Clarify institutional responsibilities and strengthen inter-agency coordination
Monitoring & Data	🟡	Monitoring systems lack disaggregated data on equity, service quality and reliability	Comprehensive SDG 6-aligned monitoring systems	Strengthen data systems to support evidence-based planning and track inequalities
Gender Inclusion	🟡	Women's participation improving but leadership roles remain limited	Gender-responsive WASH governance	Increase women's representation in leadership and decision-making structures
Equity / Inclusion	🟡	Vulnerable groups recognized but service gaps persist for rural, poor and marginalized populations	Inclusive universal coverage leaving no one behind	Target investments to underserved populations and remove access and affordability barriers
Hygiene Services	🔴	1.7 billion people lack basic handwashing facilities with soap and water	Universal access to hygiene services	Scale up handwashing infrastructure, behaviour change programmes and menstrual hygiene management
Financing	🔴	Less than 13% of countries report adequate WASH financing; heavy reliance on donor funding persists	Sustainable and predictable WASH financing	Increase domestic investment, strengthen cost recovery and leverage blended financing
Human Resources	🔴	Shortages of technical, managerial and regulatory staff limit service delivery and oversight	Adequate skilled workforce across the sector	Invest in workforce development, capacity building and retention strategies

Source: *UN-W ater GLAAS 2025; WHO/UNICEF Joint Monitoring Programme.*

1.6.1 Regional Perspective: Africa - Trends, Gaps and Commitments



Africa has made important commitments toward achieving universal access to water and sanitation, supported by strong continental policy frameworks and human rights instruments. However, progress remains uneven, and the continent is not yet on track to achieve Sustainable Development Goal 6 by 2030. While access to basic drinking water services has improved, advancement toward safely managed water and sanitation-SDG 6-benchmark remains slow. Significant disparities persist between urban and rural populations, across income groups, and among vulnerable communities. Rapid population growth, climate variability, infrastructure deficits, and financing gaps continue to constrain progress, making the period to 2030 a decisive phase requiring accelerated implementation and improved operational performance.

Regional action on water and sanitation in Africa relies on continental declarations and human rights instruments. These frameworks treat water and sanitation as development priorities and fundamental rights. The African Charter on Human and Peoples' Rights (1981) recognizes the right to a satisfactory environment and makes a clear link between environmental protection, health, and human dignity. The Protocol to the African Charter on the Rights of Women in Africa (Maputo Protocol) builds on this. It emphasizes women's

rights to healthy living conditions, including access to water and sanitation. The African Charter on the Rights and Welfare of the Child (1990) highlights protection of children's health and well-being through access to basic services. Collectively, these instruments establish a rights-based foundation for water, sanitation, and environmental protection across the continent.

These rights-based commitments are complemented by sector-specific continental declarations. Such declarations have progressively elevated water and sanitation on Africa's development agenda. The Sharm El-Sheikh Commitments on Accelerating the Achievement of Water and Sanitation Goals in Africa (2008) called for stronger governance, increased financing, and greater accountability for water and sanitation. In the same year, the eThekwini Declaration on Sanitation and Hygiene (2008) emphasized making sanitation a priority, allocating dedicated budgets, and promoting hygiene services. These declarations marked a shift. They recognized sanitation as a core development priority alongside water supply.[1]

The African Union further elevated this priority through the AU Theme of the Year 2026: Ensuring sustainable water availability and safe sanitation systems to achieve the goals of Agenda 2063. This theme underscores the centrality of water security and safely managed sanitation in achieving inclusive growth, climate resilience, and sustainable development across the continent.[2]

Africa has made significant commitments toward universal access to water and sanitation. These efforts are supported by continental policy frameworks and human rights instruments. However, progress is uneven. The continent is not on track to achieve Sustainable Development Goal 6 (SDG 6) by 2030. Access to basic drinking water services has improved. Still, movement toward safely managed water and sanitation—the SDG 6 benchmark—remains slow. Urban and rural populations, income groups, and vulnerable communities still face disparities. Rapid population growth, climate variability, infrastructure deficits, and financing gaps continue to constrain progress. The period to 2030 is decisive and requires faster implementation and better operational performance.

Current estimates show that only about one-third of Sub-Saharan Africa's population uses safely managed drinking water services. Access to safely managed sanitation is even lower. Hundreds of millions across the continent still lack basic water and sanitation services, especially in rural areas and informal settlements. At current progress rates, achieving universal access by 2030 would require a major acceleration. This is especially needed in sanitation coverage, wastewater management, service reliability, and sustainability of water resources. These trends show infrastructure expansion alone is not enough. It must be paired with better governance, operational efficiency, and protection of ecosystems.

Table 1.2: Africa SDG 6 Progress

Thematic Area	Progress	Current Situation	2030 Target	Required Action
a. Policy Frameworks	🟢	Most countries have WASH policies, but implementation and financing remain limited	Fully implemented policy frameworks	Shift from policy development to implementation and accountability
b. Climate Integration	🟡	Climate risks recognized but limited adaptation investments	Climate-resilient WASH systems	Invest in resilient infrastructure and diversified sources
c. Drinking Water Access	🟡	Basic access improving but safely managed services remain low	Universal safely managed water	Expand piped systems and improve reliability
d. Sanitation Access	🔴	Slow progress; reliance on on-site systems with limited sludge management	Universal safely managed sanitation	Scale non-sewered sanitation and FSM
e. Institutional Coordination	🟡	Fragmented mandates affect performance	Coordinated governance	Strengthen inter-agency coordination

[1] African Union, *Sharm El-Sheikh Commitments for Accelerating the Achievement of Water and Sanitation Goals in Africa (2008);* AfricanSan and African Ministers' Council on Water, *eThekwini Declaration and AfricaSan Action Plan (2008);* African Union, *AU Theme of the Year 2026: Ensuring Sustainable Water Availability and Safe Sanitation Systems to Achieve the Goals of Agenda 2063 (African Union 2026).* African Union Commission, Agenda 2063: *The Africa We Want (African Union 2015).*

[2] African Ministers' Council on Water (AMCOW), *Africa Water and Sanitation Sector Monitoring and Reporting Framework (AMCOW 2014).*

Thematic Area	Progress	Current Situation	2030 Target	Required Action
f. Monitoring & Data	🟡	Limited disaggregated data and service quality tracking	SDG-aligned monitoring	Improve data systems and reporting
g. Equity & Inclusion	🟡	Rural and vulnerable populations underserved	Universal inclusive access	Target underserved communities
h. Hygiene Services	🔴	Large population lacks handwashing facilities	Universal hygiene access	Scale hygiene infrastructure
i. Financing	🔴	Significant financing gap	Sustainable financing	Increase domestic investment and private sector financing
j. Operational Efficiency	🔴	High NRW, high energy costs, weak asset management	Efficient utilities	Improve efficiency and reduce losses
k. Human Resources	🔴	Capacity gaps across sector institutions	Skilled workforce	Strengthen capacity building

Source: *UN-Water GLAAS 2025; WHO/UNICEF Joint Monitoring Programme.*

Regional bodies provide platforms for tracking progress and strengthening accountability. Agenda 2063 sets continental targets for universal access to safe water and sanitation, sustainable water resources management, and climate-resilient infrastructure. The African Ministers' Council on Water (AMCOW) supports implementation through continental coordination, knowledge sharing, and monitoring aligned to SDG 6.

Monitoring of WASH progress in Africa is undertaken through complementary frameworks, including the WHO/UNICEF Joint Monitoring Program (JMP), UN-Water Global Analysis and Assessment of Sanitation and Drinking-Water (GLAAS), AMCOW SDG 6 regional reporting, Agenda 2063 continental monitoring, and national Voluntary National Reviews (VNRs).

1.6.2 Eastern Africa Status



INDICATORS	NAIROBI	ELDORET	MOMBASA	NAKURU	KISUMU
Total Population Served	4,382,875	442,288	911,791	576,097	470,118
Total Population in Service Area	5,571,159	527,196	1,386,568	616,509	503,846
Population Served with Sewer Connections	2,572,725	397,403	230,870	164,481	74,311
Population Served with Sanitation Services	5,364,392	527,196	1,336,030	611,010	483,819
Water connections	242,294	71,707	28,075	45,825	49,168
Sewer connections	198,759	32,300	14,785	19,725	16,529

East Africa reflects similar continental trends, with improvements in basic access but slower progress toward safely managed services. Countries across the region continue to face challenges related to rapid population growth, climate variability, infrastructure deficits, and financing constraints. Kenya has made progress in expanding access to water services, particularly in urban areas, but gaps remain in safely managed sanitation, rural service delivery, and sustainability of water sources. Uganda has relatively high access to basic water services, largely through rural point sources, though safely managed services remain limited due to reliability challenges and inadequate sanitation systems. Tanzania has expanded infrastructure coverage, but utilities face operational efficiency constraints, limited wastewater treatment, and service continuity challenges.

Rwanda has made notable progress in expanding basic access to drinking water, supported by strong governance and sector reforms, although safely managed services remain limited. By contrast, fragile and conflict-affected contexts such as South Sudan and parts of the Democratic Republic of Congo continue to face significant infrastructure deficits, reliance on humanitarian service delivery models, and weak institutional

capacity. More broadly, across East Africa, common challenges include reliance on groundwater abstraction, energy-intensive pumping, high non-revenue water, limited sanitation investment, and weak faecal sludge management systems.

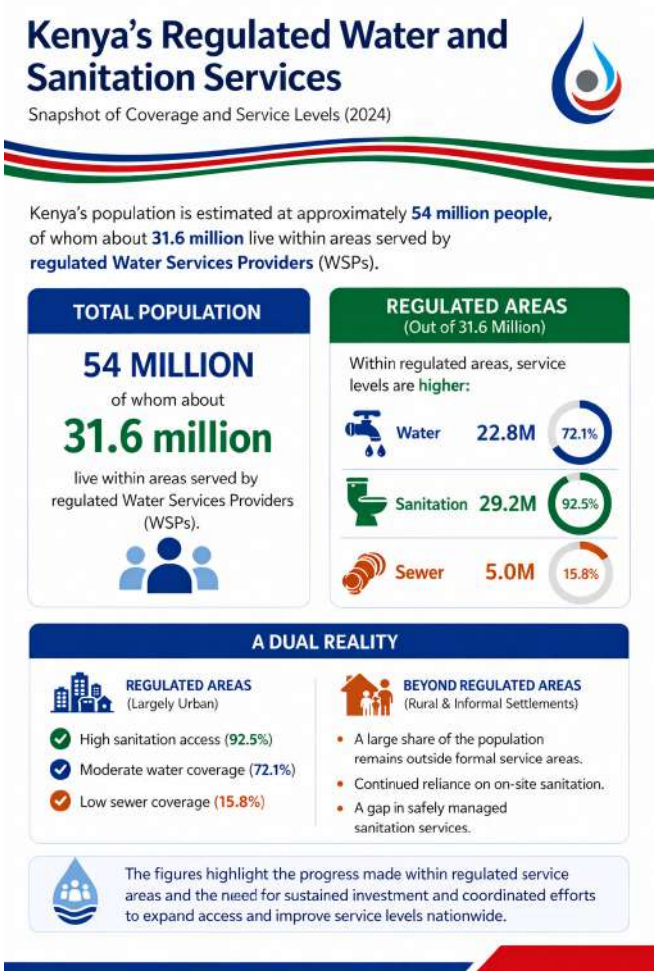
1.6.3 Kenya Water and Sanitation Outlook

Kenya's population is estimated at approximately 54 million people, of whom about 31.6 million live within areas served by regulated Water Services Providers (WSPs). Within these regulated areas, approximately 22.8 million people receive water services, 29.2 million receive sanitation services, and about 5.0 million are connected to sewer systems. At the national level, this corresponds to roughly 42% water coverage, 54% sanitation coverage, and 9% sewer coverage. These figures provide a broad national context while underscoring the importance of continued expansion of services, particularly beyond existing formal service areas.

Service levels are notably higher within regulated areas compared to non-regulated areas. In regulated areas—in contrast with non-regulated, predominantly rural or informal areas—coverage reaches approximately 72.1% for water, 92.5% for sanitation, and 15.8% for sewer services. These figures reflect stronger performance for water, sanitation, and sewer services in regulated, predominantly urban locations, relative to similar indicators in less regulated regions. This highlights the key role of regulated WSPs in advancing access to water and sanitation services.

In comparison to regulated areas, overall data points to a differentiated service landscape across the entire service territory. While regulated areas demonstrate relatively high sanitation access and moderate water coverage, sewer connectivity in these areas remains limited, indicating continued reliance on on-site sanitation solutions even where services are regulated. Meanwhile, a significant share of the population remains outside regulated service areas altogether. This reinforces the need for sustained investments and coordinated approaches to progressively expand access and improve levels of service for both regulated and non-regulated populations.

The major urban centres account for a significant share of the regulated population. Nairobi WSP serves the largest population but still has a service gap of approximately 1.2 million people receiving unregulated water access. Sewer connectivity is relatively higher than in other cities, but it remains below half the population. Mombasa WSP records the largest water service gap, with nearly 475,000 people within its service area not receiving regulated water services. Nakuru and Kisumu WSPs demonstrate high water coverage, but sewer connectivity remains low, indicating reliance on onsite sanitation systems. Eldoret shows strong performance across all indicators, including relatively high sewer coverage, suggesting more advanced wastewater infrastructure.



1.6.4 Legal, Policy and Regulatory Framework Supporting Universal Access to Water and Sanitation

Kenya's journey toward universal access to water and sanitation is guided by a structured constitutional, legal, and policy framework that defines rights, clarifies institutional roles, and supports implementation from the national to the service delivery level.

Table 1.3: Sector Legal and Regulatory Frameworks

Instrument	Year	Details
a. Kenya Vision 2030	2008–2030	Positions water and sanitation as enablers of socio-economic transformation and targets universal access Bottom-Up Economic Transformation Agenda (BETA) aligns with this by prioritizing inclusive water and sanitation investments and climate-resilient infrastructure
b. Constitution of Kenya	2010	Guarantees the human right to water and sanitation and promotes equitable, inclusive and sustainable service delivery
c. National Water Master Plan 2030	2014–2030	Defines long-term water infrastructure priorities and water security planning
d. Water Act	2016	Operationalizes the right through regulated service delivery, licensing of WSPs and WASREB oversight
e. National Water Policy	2021	Guides sustainable water resources management and infrastructure expansion
f. National Water & Sanitation Investment Plan (NAWASIP)	2023	Mobilizes blended financing and prioritizes underserved areas
g. Water Act Amendment	2024	Promotes alternative financing including PPPs for bulk water and sanitation infrastructure
h. Water (Services) Regulations	2025	Strengthen governance, ring-fence revenues and improve accountability and service reliability
National Sanitation Management Policy**15	2026	Supports safely managed sanitation, sewerage expansion and faecal sludge management
i. Kenya Vision 2030	2008–2030	Positions water and sanitation as enablers of socio-economic transformation and targets universal access
j. State Department for Water & Sanitation Strategic Plan	2023–2027	Focuses on infrastructure expansion, partnerships and governance strengthening
k. WASREB Strategic Plan	2023–2027	Strengthens regulatory oversight, service quality and access expansion

Table 1.4: Supporting Cross-Sector Legal and Regulatory Frameworks

Instrument	Year	Details
a. Environmental Management & Coordination Act (EMCA) – NEMA	1999 (Rev. 2015)	Provides environmental safeguards, EIA requirements and pollution control
b. Public Health Act	Cap 242 (Rev. 2012)	Sets sanitation, wastewater management and hygiene standards
c. Public Finance Management Act (PFMA)	2012	Provides budgeting and financial accountability for sector investments
d. Public Procurement & Asset Disposal Act (PPDA)	2015 (Rev. 2022)	Guides transparent procurement of water and sanitation infrastructure
e. Public Private Partnership (PPP) Act	2021	Enables private sector financing for water and sanitation projects
f. Climate Change Act	2016	Promotes climate-resilient water and sanitation infrastructure
g. County Governments Act	2012	Assigns counties responsibility for water service delivery
h. Urban Areas & Cities Act	2011 (Rev. 2019)	Supports urban water and sanitation planning and management

1.7 Stakeholder Engagement and Multi-Sector Collaboration in Water Sector

Collaboration with stakeholders remains central to WASREB's mandate and is a key Pillar in its strategic plan. This has enabled the Regulator to strengthen its oversight functions, improve governance at the WSP level, and improve the quality of services in the sector. Through these engagements, WASREB continues to leverage partnerships to attain sector priorities, align the regulatory framework to the environment, and promote operational efficiency.

1.7.1 Consumer Engagement Initiatives

I. Consumer Clinics

WASREB operationalized Citizen Engagement Standards, providing a structured framework for Water Services Providers (WSPs) to engage consumers through various public participation mechanisms. Consumer clinics have emerged as one of the most effective tools in improving service delivery, with sessions conducted in more than 20 Counties across the country in the year.

Consumer clinics jointly organized by WSPs and WASREB delivered tangible benefits;

- Enhanced Awareness and Empowerment: Consumers gained a clearer understanding of service processes, their rights, and how to engage with WSPs. Feedback received by WASREB showed increased use of formal complaint channels.
- In addition, improved complaint resolution was noted. Direct dialogue strengthened the complaints-handling
  framework, leading to higher resolution rates within defined Turn-Around Times (TAT) and full compliance (100%) under CAJ complaints handling reporting.
- This, in turn, drove higher consumer satisfaction, as the active implementation of clinics contributed to notable improvements in satisfaction scores based on feedback provided from consumers.
- Moreover, the promotion of equity and participation was evident, as these clinics aligned with devolution and subsidiarity principles by bringing services and accountability closer to the people.
- Finally, utilities that consistently implemented consumer clinics, alongside barazas and door-to-door sensitizations, recorded stronger overall performance in governance and service delivery.

II. Public Participation

Public participation is a constitutional requirement anchored in Article 10 and Article 174(c) of the Constitution of Kenya, which emphasizes democracy and the participation of the people in decision-making. This requirement is further operationalized under Section 139 of the Water Act, 2016, which requires stakeholder consultation before approval of licenses and tariffs.

Before any license or tariff is approved, WASREB conducts a structured public participation process for 30 days, which is published in newspapers of national circulation, includes physical public meetings, provides opportunities for written submissions, and ensures stakeholder engagement. WASREB has further strengthened this requirement by making zonal/regional meetings mandatory, allowing consumers to participate closer to their areas of service.

The consultations supported licence approvals, tariff reviews, and, in some cases, joint processes recognizing the interlinked nature of licensing and tariff determination. Going forward, WASREB has adopted joint public participation for license and tariff approvals, given the related nature of the two decisions in influencing service delivery outcomes.

During the consultations, it was observed that consumer awareness is improving with stakeholders increasingly understanding their rights, the tariff-setting process, and expected service obligations. Participants were more engaged, asked informed questions, and sought clarification on service levels, cost drivers, and implementation timelines. The regional and zonal meetings were particularly valuable, as they enabled communities to provide views closer to their homes and improved inclusivity in the process.

Public participation explained the sanitation levy proposed in the tariff reviews for Nanyuki and Nakuru. Initially, many stakeholders did not understand why the levy was needed, but the process provided an opportunity to explain its purpose, address concerns, and demonstrate how the levy would support better sanitation services. The consultations highlighted context-specific tariff issues. This was especially true in ASAL counties such as Mandera and Marsabit, where unique consumption patterns exist. These include livestock water use tariffs. Public engagement clarified these differentiated tariffs and made sure local economic and livelihood needs were included in tariff design.

Some challenges were observed. These included initial resistance to tariff adjustments, logistical constraints in remote areas, and misconceptions about cost-reflective tariffs. However, the engagement, widely publicized and held via regional or zonal consultations, helped address these concerns. This built confidence in the regulatory process.



Consumer engagements during a public forum

1.7.2 Stakeholders Engagements

WASREB continued to strengthen its engagement with key actors across the water and sanitation ecosystem—including advocacy bodies, civil society networks, private sector associations, development partners, and regional regulators. These collaborations advance good governance, gender inclusion, innovation, and improved service delivery, ensuring the sector remains responsive to citizens' needs while aligned with national and international commitments.

I. Championing Gender Inclusion in collaboration with WIWAS

The water sector has taken concrete steps toward gender inclusion as a key enabler of equitable, sustainable, and efficient services. This aligns with the national constitution requiring at least two-thirds (33%) gender representation in leadership and WASREB's guidelines for at least 33% female representation on Water Service Provider (WSP) boards and management.



Women in Water and Sanitation (WIWAS) members

A key driver of this progress is the Women in Water and Sanitation Association (WIWAS), a professional group formed in 2016 that empowers women in the sector. WIWAS strengthens women's roles in management, decision-making, and technical jobs while promoting gender-responsive policies. Several WSPs saw more women on boards, in senior management, and technical roles such as engineering and meter reading.

Through mentorship, leadership training, and advocacy, WIWAS encouraged qualified women to seek roles traditionally dominated by men. Its work with WASREB, WSPs, and others shifted mindsets from viewing gender inclusion as a box-ticking exercise to seeing it as vital to resilience, efficiency, and service excellence. As Kenya accelerates efforts toward 2030, sustained gender inclusion, led by groups like WIWAS, will be vital. Empowering women as professionals, leaders, and change agents will help the sector deliver fair, efficient, and resilient water and sanitation services to all Kenyans.

II. Strengthening Governance & Citizen Participation

WASREB deepened its collaboration with civil society, promoting transparency, accountability, and community-centered approaches. The dialogue with civil society reaffirmed their shared commitment to safeguarding consumer rights under the Water Act, 2016, and ensuring that sector reforms translate into improved service delivery for households nationwide.

III. Advancing Private-Sector Sanitation Solutions

To strengthen non-sewered sanitation services, WASREB deepened its collaboration with the Association of Private Sector Sanitation Players (APSSA). Discussions addressed specific sanitation value chain challenges and opportunities, such as behaviour change, stakeholder mapping, technology selection, and lobbying for increased investment in sanitation infrastructure. This partnership improves coordination and regulatory oversight and fosters innovation, establishing the private sector as a critical partner in scaling safe and inclusive sanitation solutions.

IV. Supporting Investment & Regulatory Strengthening

WASREB collaborated closely with development partners to strengthen regulatory expertise and facilitate investment readiness.
This partnership underscored the value of development alliances in advancing inclusive sanitation and improving urban service delivery. WASREB's active engagement with national, regional, and global stakeholders strengthens regulatory impact and drives sector innovation.

V. Strengthening Water Governance in ASAL Counties

WASREB, in collaboration with UNICEF, convened a high-level Water Governance Dialogue for leaders from Arid and Semi-Arid Lands (ASAL) counties. The Water Governance Scale-Up Programme supported this dialogue.
The initiative was set to roll out across ten priority ASAL counties, starting with Garissa, Wajir, Mandera, Marsabit, Samburu, and Turkana.

- The dialogue sought to raise participants' awareness of key water governance performance issues and existing gaps within ASAL counties.
- The dialogue aimed to build consensus among county leadership on the most urgent water governance improvements needed.
- The program intended to secure concrete commitments from county leaders to advance water service delivery improvements.

By engaging leadership and enhancing capacity, the program aims to address persistent water service challenges in ASAL counties and support equitable access as Kenya advances.

VI. Regional and International Collaboration

WASREB strengthened its regional and international engagements by participating in the inaugural ESAWAS Regulators Association training program—a four day course on WSS regulation that explored foundational regulatory principles, inclusive service delivery, and practical case studies. WASREB hosted benchmarking exchanges with delegations from Lilongwe Water Board (Malawi), Uganda's Umbrella Authorities, and the Ministry of Water and Environment. These engagements fostered knowledge sharing on economic regulation, creditworthiness assessment, regulatory tools, performance improvement planning, and gender mainstreaming. Together, these interactions reinforce regional cooperation, build regulatory capacity, and drive continental progress in WSS regulation.

1.7.3 Environment and Climate Resilience

Adopting climate-resilient approaches is essential for safeguarding water resources. The Mau Forest Complex, a critical water tower in Kenya, underpins major river catchments that serve millions of people. Protecting and restoring this ecosystem is necessary for reliable, equitable, and climate-resilient water services amid increasing climate variability and water stress.

The 2025 Mau Forest Complex Integrated Conservation Program, a 10-year multi-stakeholder initiative across Nakuru, Kericho, Narok, and Bomet counties, targets restoration and protection of the Mau ecosystem. By focusing on forest, wetland, and riverine restoration and sustainable livelihoods, these actions aim to strengthen catchment protection, improve water availability, and bolster the resilience of vital water resources.

WASREB is supporting the programme by adopting and restoring 30 hectares of forest cover, in line with its objective to promote sustainable water resource management and climate resilience. Catchment restoration contributes to better water availability, reduced sedimentation, and the durability of water infrastructure investments.

Collaboration among the Kenya Forest Service, county governments, WASREB, and local communities anchors the programme's success. This coordinated strategy enhances conservation, strengthens water security, and delivers environmental and socio-economic benefits, underlining the need to integrate ecosystem protection, climate resilience, and resource management to achieve universal access by 2030.

1.8 Technology Adoption

1.8.1 Strengthening Utility Data & Digital Systems in Kenya - Africa Utility Data Collaborative (AUDC)

The Africa Utility Data Collaborative (AUDC), spearheaded by WASREB—which is driving sector-wide improvements in data standards and utility reporting in partnership with Athena Infonomics and hosted by AfWASA—is an emerging regional platform designed to transform how water utilities generate, manage, and use data.

The main purpose was to establish a regional data visualization and analytics platform to improve utility performance, which will enable affordable, high quality analytics for utilities, regulators, and sector professionals.

Building on insights from international models and extensive consultations, AUDC aims to provide affordable, high quality analytics. These analytics strengthen digital systems, improve operational decision making, and enable utilities to address persistent sector challenges. Such challenges include high non revenue water, fragmented data systems, weak infrastructure monitoring, and limited customer analytics.

A pilot conducted with eight Kenyan utilities—Malindi, Kisumu, Eldoret, Thika, Nakuru, Nyeri, Isiolo, and Nairobi—confirmed demand for improved data governance, enhanced business intelligence capabilities, and practical digital tools that can translate raw data into actionable insights. As AUDC evolves, it will offer shared digital assets, single source of truth dashboards, an insight as a service desk, targeted training, technology reviews, and peer learning opportunities. The initiative's forward strategy emphasizes strengthening data management and sharing practices, building institutional capacity across both WASREB and utilities, and embedding a culture of evidence based decision making through regular utilities performance reporting. Together, these efforts position AUDC as a catalytic, scalable model for accelerating digital transformation and supporting more efficient, transparent, and customer focused water and sanitation services across the region.

1.8.2 Electricity Costs and Energy Efficiency

Electricity costs continue to exert significant pressure on utility operating budgets, particularly for systems reliant on pumping for abstraction, treatment and distribution. During the reporting period, the average

1.9 The Kenya National Water and Sanitation Investment and Financing Plan 2022 – 2030 (NAWASIP)

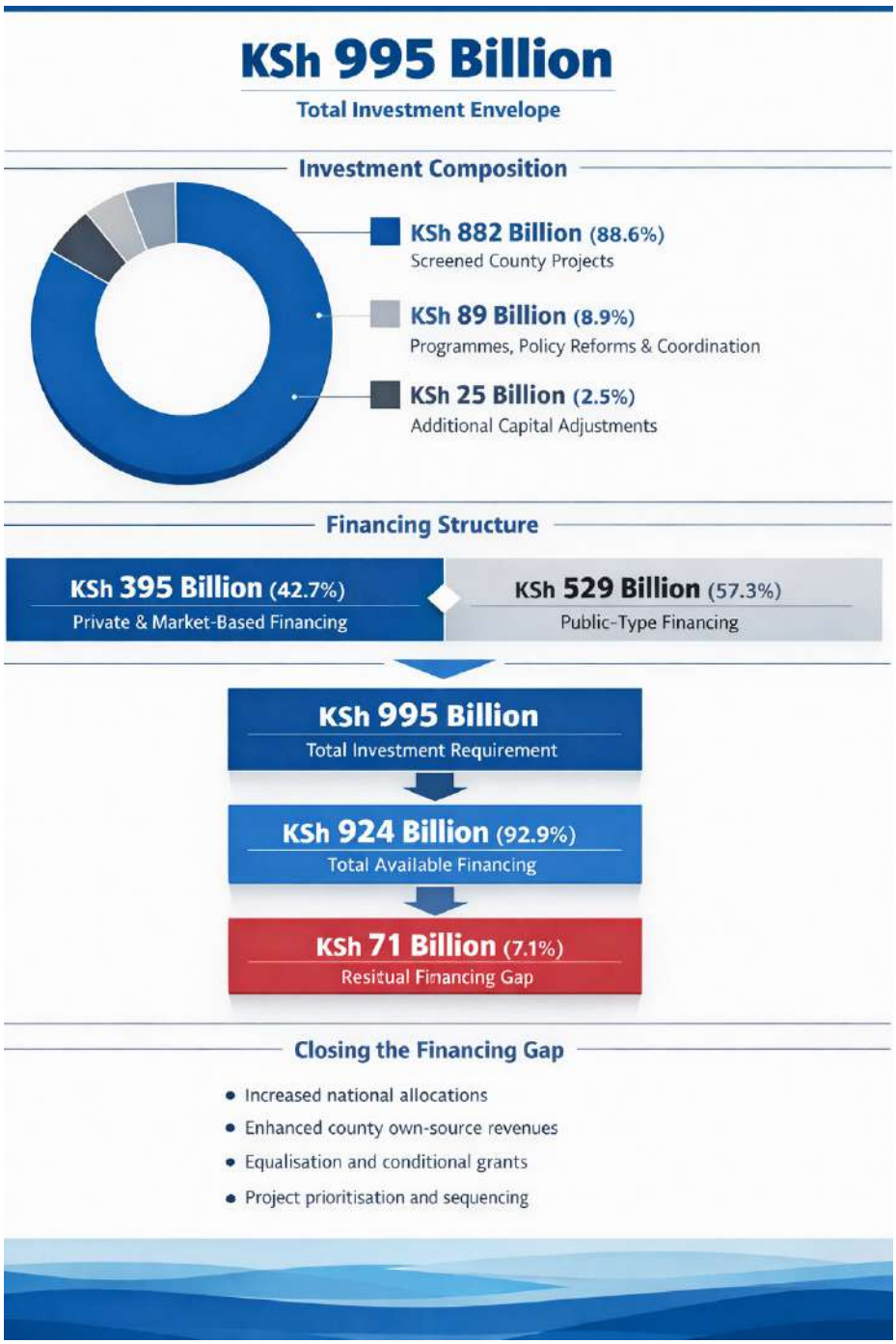
NAWASIP is structured to support implementation through screened county investments, targeted capital adjustments and sector reform programmes.
Despite the structured financing framework, several gaps remain that could slow implementation of NAWASIP and achievement of universal access by 2030. These include the absence of a dedicated NAWASIP budget line to anchor predictable public financing, weak intergovernmental coordination between national and county governments, and limited operationalization of the Water Sector Inter-Governmental Consultation and Co-operation Framework (WSIGCCF). In addition, many projects lack adequate preparation, feasibility studies and bankability assessments, constraining mobilisation of private and concessional financing. Monitoring systems for tracking financing mobilisation, project implementation and service delivery outcomes also remain fragmented. Addressing these gaps will require strengthening structured government financing mechanisms, operationalising WSIGCCF institutional arrangements, improving project readiness and packaging, enhancing results-based monitoring, and aligning financing, coordination and implementation within an integrated delivery framework to accelerate progress toward universal water and sanitation access by 2030.

Kenya's total investment requirement to achieve universal access to water supply and sanitation by 2030 is estimated at KShs 1,271 billion, representing the full cost of meeting access targets across urban and rural areas. However, the Kenya National Water and Sanitation Investment and Financing Plan (NAWASIP) translates the universal access ambition into a prioritized and structured investment programme of KShs 995 billion, based on screened county projects, targeted adjustments and sector reform programmes.
The KShs 995 billion comprises:

- KShs 882 billion in screened projects submitted by counties
- KShs 25 billion in additional capital adjustments to help counties meet universal WSS targets
- KShs 89 billion for programmes, policy reforms, coordination and capacity building

Financing is expected from a mix of private and public-type sources. Private and market-based financing, including Public–Private Partnerships (KShs 313 billion) and commercial borrowing (KShs 82 billion), is projected to mobilise approximately KShs 395 billion. Public-type financing, comprising tax-funded contributions, concessional lending and donor grants, is estimated at approximately KShs 529 billion based on projected fiscal space. Together, these sources amount to about KShs 924 billion, leaving a residual financing requirement of approximately KShs 71 billion.

This balance is expected to be addressed through increased national allocations, enhanced county own-source revenues, utilisation of equalisation and conditional grant mechanisms, and reprioritisation by sequencing and funding the highest-impact projects first.


KSh 995 Billion
Total Investment Envelope
Investment Composition
KSh 882 Billion (88.6%)
Screened County Projects
KSh 89 Billion (8.9%)
Programmes, Policy Reforms & Coordination
KSh 25 Billion (2.5%)
Additional Capital Adjustments
Financing Structure
KSh 395 Billion (42.7%)
Private & Market-Based Financing
KSh 529 Billion (57.3%)
Public-Type Financing
KSh 995 Billion
Total Investment Requirement
KSh 924 Billion (92.9%)
Total Available Financing
KSh 71 Billion (7.1%)
Resitual Financing Gap
Closing the Financing Gap
Increased national allocations
Enhanced county own-source revenues
Equalisation and conditional grants
Project prioritisation and sequencing



Chapter Two

SECTOR DEVELOPMENT AND PROGRESS

2.1 Introduction

The water services sub-sector is responsible for ensuring equitable access to safe, reliable, and sustainable water supply and sanitation services. It is guided by national policies, regulatory frameworks, and the constitutional right to water. Over the years, the sub-sector has achieved notable progress in policy reforms, infrastructure expansion, and service delivery, while continuing to face challenges in financing, governance, and equitable distribution. This chapter outlines the key focus areas, achievements, challenges, and strategic priorities for the sub-sector.

2.2 Policy and Regulation

The water services sub-sector is anchored in the Water Act 2016, which provides the legal framework for the sub-sector. The Water Services Regulatory Board (WASREB) is established to protect consumer rights, including setting service standards and monitoring performance. Regulatory oversight ensures fair tariffs, quality service, and grievance redress mechanisms. However, the effectiveness of accountability, transparency, and coordination mechanisms between national and county governments still requires significant improvement.

2.3 Infrastructure Development

Significant investments have been made in expanding water supply networks to underserved rural and peri-urban areas. Climate-resilient infrastructure has become a priority, with initiatives such as rainwater harvesting, solar-powered pumping systems, and drought-resistant technologies being implemented to address climate variability. Treatment plants are being upgraded, and storage capacity is being expanded to meet the growing demand in urban centers. Despite these achievements, the maintenance and sustainability of infrastructure remain pressing concerns.

2.4 Service Delivery and Equity

The sub-sector is committed to the progressive realization of universal access to water and sanitation, as enshrined in the Constitution. While urban areas have seen improved coverage, rural communities and informal settlements continue to face inadequate service provision. To address this, efforts are being made to balance urban and rural access with targeted programs for marginalized regions. In addition, a reliable water supply also supports economic uses such as agriculture, industry, and tourism, underscoring the sector's role in national development. Nevertheless, inequities persist, with vulnerable groups often paying higher costs for water from vendors compared to households with piped connections.

2.5 Financing and Sustainability

Financing remains a critical challenge for the sub-sector. To address this, innovative financing approaches, including climate funds and blended finance models, are being explored to support infrastructure expansion and resilience projects. Ultimately, closing the funding gap will be essential to achieving universal access.

2.6 Performance Monitoring and Accountability

The sub-sector has strengthened monitoring through the Water Regulation Information System (WARIS), which enables reporting and performance tracking of Water Services Providers. In addition, regular inspections and reviews ensure compliance with standards and promote efficiency. As a result, these systems have enhanced accountability, though challenges remain in ensuring that all providers consistently adhere to regulatory requirements.

2.7 Consumer Protection and Engagement

Consumer protection is central to water services, and communities are increasingly empowered to participate in decision-making and demand accountability from service providers. To facilitate this, WASREB has established complaint resolution mechanisms. In addition, awareness campaigns promote water conservation, hygiene, and responsible usage. Together, these initiatives foster trust between providers and consumers. Nonetheless, more needs to be done to strengthen engagement in marginalized areas.

2.8 Alignment with the Bottom-Up Economic Transformation Agenda (BETA)

From a regulatory perspective, the Implementation Matrix under the Fourth Medium Term Plan signals a significant scale-up in investments in water supply, sanitation infrastructure, drought resilience, and utility efficiency for FY 2024/2025 and FY 2025/2026. The allocations increased from KShs 30.2 billion in 2024/2025 to KShs 33.5 billion in 2025/2026, bringing the total investment for the two financial years to KShs 63.7 billion. These investments are expected to expand urban water access, enhance water storage capacity, improve rural water availability, upgrade sanitation infrastructure, extend services to underserved areas, and reduce non-revenue water, thereby improving reliability, access, and sustainability of water and sanitation services.

Table 2.1: Water Sector Implementation Matrix Budget Summary

Intervention Area	2024/2025	2025/2026	Total
i. Water storage & drought resilience	6.5	7.2	13.7
ii. Rural water supply expansion	5.8	6.3	12.1
iii. Urban water supply projects	8.4	9.1	17.5
iv. Sewerage & sanitation infrastructure	4.9	5.6	10.5
v. Water for underserved areas	2.7	3.1	5.8
vi. NRW reduction & utility efficiency	1.9	2.2	4.1
TOTAL (KSh Billion)	**30.2**	**33.5**	**63.7**

2.9 Regulatory Implications for WASREB

From WASREB's perspective, the increased investments present both an opportunity and a regulatory responsibility. It is essential to ensure that the planned infrastructure leads to improved service delivery outcomes. The scale-up in urban water supply and storage investments will require enhanced monitoring of service coverage, reliability, and compliance with service standards. Increased sanitation investments will also require stronger regulation of sewerage services, wastewater management, and safely managed sanitation outcomes.

Investments targeting underserved areas align directly with WASREB's mandate on equitable access and pro-poor service provision. This alignment requires closer monitoring of service expansion in low-income and marginalized areas. Funding for non-revenue water reduction and utility efficiency highlights the need for performance benchmarking, financial sustainability oversight, and tariff compliance monitoring.
For WASREB, this calls for strengthened monitoring frameworks. It also requires enhanced governance oversight of WSPs. These steps will help ensure that infrastructure investments translate into improved performance and progress toward universal access to water and sanitation services.

Corporate Social Responsibility contributions by utilities

Water Services Providers (WSPs) have made tree planting a central part of their CSR initiatives. These efforts align with the National 15 Billion Tree Growing Campaign (2022–2032) and support the protection of water towers, catchment areas, and riparian zones, which are essential for sustainable water resource management. WSPs, collaborating with WASREB, county governments, the Kenya Forest Service (KFS), and development partners, organize annual tree-planting exercises during Mazingira Day, World Water Day, and national

Progress in sanitation service provision

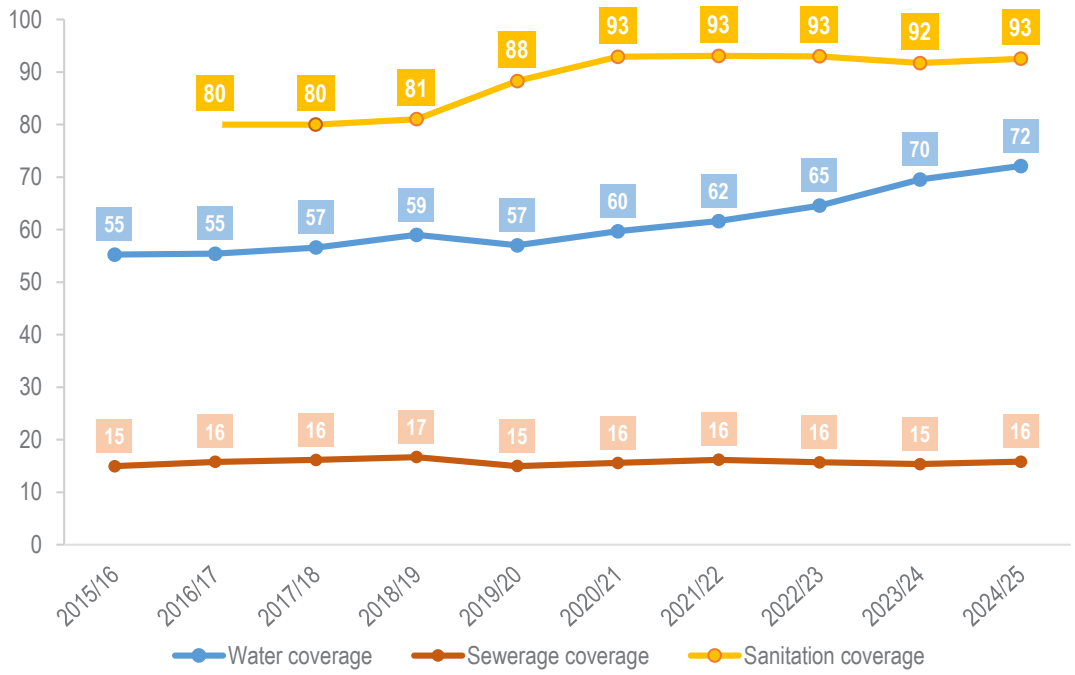
Out of the 32 million people within the service area, 29.2 million are served with basic sanitation services. WASREB has developed an indicator to evaluate utility performance in sanitation, which encompasses both on-site and off-site factors. Details on these are highlighted in Chapter 3 in the Sanitation KPI section. The proposed sanitation services key performance indicators framework for the water sector will be used to monitor the targets set for achieving universal sanitation coverage in Kenya. The framework aligns with the constitutional and existing frameworks for monitoring sanitation performance at the global, regional, national, and sector levels. This KPI incorporates sewered and non-sewered sanitation solutions to encourage greater utility engagement in comprehensive sanitation management.

2.11 Formalization of Small Service Providers (SSPs) and community schemes

Formalizing rural and small-scale water services is essential for shifting from fragmented community systems to structured, sustainable, and regulated service delivery. This requires coordinated institutional frameworks, stronger county oversight, minimum service standards, and appropriate financing mechanisms.

WASREB supports this transition by setting standards, licensing providers, and guiding counties in adopting corporatized rural models and delegated management arrangements. Counties are responsible for service area allocation, community engagement, capacity building, and operationalizing financing tools. Overall, formalized service delivery models strengthen governance, improve financial sustainability, and enhance reliability of services in rural and underserved areas.

Figure 2.2: Trend in Water and Sanitation Coverage



2.12 Financing the Water and Sanitation Sector

2.12.1 Budget Absorption and Project Implementation Performance

Budget absorption measures how much of allocated government funds are spent within a financial year. In FY 2024/2025, the National Government achieved a high overall absorption rate of 92%, spending Ksh. 4.03 trillion of the revised budgets. Recurrent expenditure performed strongest at 94%, development expenditure absorbed 89%, and Consolidated Fund Services reached 91%. However, some MDAs experienced over absorption due to supplementary budget adjustments, highlighting weaknesses in planning and forecasting.

2.12.2 Role of PPPs and private sector participation in infrastructure financing

Public–Private Partnerships (PPPs) provide an important mechanism for mobilizing private sector financing and improving delivery of water and sanitation infrastructure. Under PPP arrangements, a private party may design, finance, build, operate and maintain public infrastructure, and is compensated through user fees, government payments, or a combination of both, while assuming significant project risks. PPPs are particularly relevant in the context of shrinking fiscal space and growing infrastructure needs, enabling governments to accelerate project delivery, leverage private capital, and improve lifecycle management of infrastructure assets.

Kenya's PPP framework is supported by a comprehensive legal and institutional structure, including the PPP Act, PPP Directorate, PPP Committee, contracting authorities, and project implementation teams responsible for project preparation, procurement, negotiation, and monitoring of projects. The PPP Directorate serves as the Government's centre of expertise for structuring and delivering PPP projects. Its functions include project screening, technical and financial appraisal, legal advisory, procurement support, contract negotiation, and monitoring and evaluation.

Recent projects in the pipeline include the Sabaki Bulk Water Supply Project; a large-scale Public–Private Partnership (PPP) proposed as a Privately Initiated Proposal (PIP) to address supply deficits in Mombasa and Kilifi Counties. The project involves abstraction of bulk water from the Sabaki/Baricho aquifer, construction rehabilitation and maintenance of treatment facilities, power production, transmission pipelines, storage infrastructure and associated bulk and retail distribution systems to augment supply to the coastal counties. The project is structured under a design–finance–build–operate model, where the private partner mobilises upfront capital, constructs the infrastructure, and operates the system over a long-term concession period to recover investment through bulk water purchase arrangements. The initiative is expected to deliver approximately 80,000 m^3/day of additional water, aimed at improving supply reliability, supporting population growth, tourism and industrial development, and reducing reliance on expensive alternative sources.

In expanding private sector participation in water infrastructure financing, the regulatory role of WASREB remains central in safeguarding consumer interests while ensuring sustainability of service and investments. As the sector regulator, WASREB is mandated to protect consumer interests and promote both intra- and inter-generational equity in water service delivery. This requires balancing the need to attract private sector investment with the obligation to ensure that water, as a basic human need, remains affordable and accessible to all present and future users.

Under Public–Private Partnership (PPP) arrangements, Section 85(1) requires that no person may provide water services without a licence issued by WASREB. This necessitates balancing the existing licensing regime with a suitable framework for private proponents, particularly regarding licence duration, performance monitoring arrangements, and clearly defined Key Performance Indicators (KPIs) to ensure compliance, service quality, and protection of consumer interests.

Further, under private financing arrangements, tariffs and pricing structures become a critical regulatory consideration. While private investors require predictable revenue streams and reasonable returns to finance, construct, and operate infrastructure, tariff setting must also ensure affordability, minimum service levels, and protection of vulnerable populations. WASREB thus plays a key role in reviewing tariff proposals, approving cost-reflective but socially acceptable tariffs, and ensuring that efficiency gains from private participation are passed on to consumers.

In this light, the regulatory framework is progressing to strike a balance between financial viability and social equity. On one hand, tariffs should support investment recovery, operational sustainability, and appropriate risk allocation for private partners. On the other hand, water services must remain affordable, particularly for low-income households, and aligned with the human right to water, which emphasizes availability, accessibility, quality and affordability.

2.13 Operational Efficiency and Service Sustainability

Operational performance trends among utilities

As a key institution in advancing the right to water and sanitation, the regulator is responsible for ensuring that utilities operate efficiently and that the sector continues to grow. This requires utilities to possess sufficient financial capacity to run their operations, comply with established standards, improve efficiency, and avoid placing unwarranted financial burdens on consumers.

While the sector has introduced performance-based financing to help utilities enhance service delivery, this approach must be supported by strong regulatory oversight. Utilities function within a framework that obligates them to remain accountable to multiple stakeholders. Effectively balancing these expectations promotes transparency and strengthens their operational independence. The established link between accountability and good governance underscores the need for all actors from both levels of government, regulators, financiers, and consumers, to fully execute their respective responsibilities. Ultimately, the degree of accountability depends on stakeholders' ability to enforce both positive and corrective actions.

2.13.1 Energy efficiency improvements and cost reduction initiatives

During the reporting period, utilities recorded an average electricity cost ratio of 12.94% and a median of 8.14%, with only 51 of 94 WSPs operating within the recommended ≤10% benchmark as per the CWI assessment guide. This variation highlights the significant impact of electricity costs on WSP operating budgets.

WASREB notes the relevance of the recently enacted Energy (Energy Management) Regulations, 2025, which require large energy users—including water utilities—to appoint energy managers, conduct periodic audits, implement identified efficiency measures, and strengthen monitoring of energy performance. These regulatory provisions complement ongoing sector efforts aimed at enhancing cost efficiency and establishing more structured approaches to energy management. Several practical measures remain viable for utilities seeking to reduce electricity expenditure. These include pump optimisation, motor upgrades, power factor correction, and improvements in system design. Solarisation also offers a useful complement by diversifying energy supply and reducing reliance on grid electricity, particularly in rural or remote schemes.

Given the sector's continued dependence on grid power in the interim, WASPA—working with other sector stakeholders—will need to maintain advocacy for preferential electricity tariffs as more sustainable and efficient energy solutions are pursued.

2.13.2 Operations and Maintenance (O&M) cost recovery trends

Operation & Maintenance Cost Coverage measure a utility's ability to meet its operational and maintenance expenses using its own internally generated revenue from water, sewer and other billed services. It is calculated as total revenue (excluding grants and subsidies) divided by total operation and maintenance costs. Revenue includes water and sewer billing, other service billing and other income, while O&M costs cover staff, administration, maintenance, levies, fees and direct operational expenses, excluding non-cash items such as depreciation.

Performance thresholds indicate that 100% reflects recovery of O&M costs, 101%–149% indicates coverage of O&M plus debt service and capital investments, while ≥150% represents full cost recovery.

In FY 2024/25, the average O&M Cost Coverage across WSPs improved to 103%, up from 98% in the previous year. This improvement was linked to increased adoption of cost-recovery tariffs (average tariff rising from Ksh 110/m^3 to Ksh 118/m^3) and support from donor programmes such as K-WASH and WSDP-CLSGI II. However, the median coverage was 98%, indicating that more than half of utilities are still not fully covering O&M costs, and that stronger performance by a few utilities is raising the overall average.

Performance varied by utility size. Very large utilities improved from 105% to 108%, while large utilities recorded the most significant improvement from 87% to 100%. Small utilities posted a marginal 2% increase, whereas medium utilities experienced a 3% decline.

Out of 94 WSPs assessed, 44 utilities (47%) achieved O&M cost coverage of at least 100%, demonstrating financial sustainability, while 50 utilities (53%) remained below full cost recovery, indicating continued reliance on subsidies. Further distribution shows 9% of utilities above 120%, 38% between 100%–120%, 30% between 80%–100%, and 23% below 80%, highlighting persistent financial sustainability challenges across the sector.

2.14 Utility Performance Evaluation

2.14.1 Analysis of key performance indicators across utilities

Utilities were assessed and ranked based on nine Key Performance Indicators (KPIs) as shown in Table 2.6.

Table 2.6: Progress on Key Performance Indicators

KEY PERFORMANCE INDICATORS	2022/23	2023/24	Trend	2024/25	Trend
Water Coverage, %	65	70	↑	72	↑
Drinking Water Quality, %	90	89	↓	96	↑
Hours of Supply, hrs/day	17	18	↑	18	→
Non- Revenue Water, %	43	44	↓	48	↓
Metering Ratio, %	97	97	→	97	→
Staff Productivity, No. per 1000 Connections	7	7	→	7	→
Personnel Expenditure as % of O+M Costs, %	48	47	↑	44	↑
Revenue Collection Efficiency, %	93	95	↑	94	↓
O+M Cost Coverage, %	95	98	↑	103	↑
Sewered Sanitation Coverage, % *	16	15	↓	16	↑
Sanitation Coverage, % *	93	92	↓	93	↑

** not used for ranking*

Good | Acceptable | Not Acceptable | Benchmark Varies

In the current period, six indicators showed improvement- these are Water Coverage, Drinking Water Quality, Personnel Expenditure as % of O&M Costs, O&M Coverage, Sewerage and Sanitation Coverage. Hours of Supply, Metering Ratio and Staff Productivity remained stagnant. Non- Revenue Water and Revenue Collection Efficiency declined.

Sector-wide trends and improvements

Water Services Providers play a vital role in delivering safe, reliable, and sustainable services. While annual reporting offers a snapshot of utility performance, tracking performance over time provides a deeper and more strategic view of sector progress. It enables stakeholders to assess the effectiveness of interventions, identify persistent challenges, and adjust approaches accordingly.

Long-term monitoring also strengthens accountability by highlighting both consistent performers and WSP's that may require regulatory intervention or targeted support. In recognition of these benefits, the regulator has institutionalized the assessment of utility performance over time. This approach is key to improving sector governance, driving service improvements, and advancing the goal of universal and sustainable access to water and sanitation.

In addition to showing an upward trajectory, the utility must attain a minimum performance score above 50% in both periods. This dual criterion ensures consistent improvements and meets a minimum service quality threshold. By setting these standards, the framework encourages long-term performance gains, reinforces accountability, and supports the broader policy objective of achieving reliable and sustainable water and sanitation services.

2.15 Utility Ranking and Regional Benchmarking

2.15.1 Comparative analysis of utility performance across regions

The performance framework outlined in Section 3 establishes the maximum attainable score for a utility at 200 points. According to this assessment, Nakuru emerged as the leading utility scoring 171 points, followed by Nyeri and Nanyuki with scores of 170 and 168, respectively. Oloitokitok attained the least points of 16, followed by Nol Turesh with 26 points. The average performance remained unchanged at 44% during the period. Further, the number of WSPs with a score exceeding 50% remained at 36. Table 2.7 displays the top and bottom 10 utilities' overall performance.

Table 2.7: Top and Bottom 10 Utilities

TOP TEN UTILITIES 2024/25		
Rank	**Utility**	**Score (Max 200)**
1	Nakuru Urban	171
2	Nyeri	170
3	Nanyuki	168
4	Isiolo	161
5	Kisumu	158
6	Ngandori Nginda	158
7	Embu	154
8	Naivasha	153
9	Thika	150
10	Eldoret	148

BOTTOM TEN UTILITIES 2024/25		
Rank	**Utility**	**Score (Max 200)**
81	Kyeni	38
82	Olkejuado	37
83	Marsabit	36
84	Samburu	36
85	Mandera	35
86	Kakamega Rural	35
87	Elwak	29
88	Kapenguria	28
89	Nol Turesh	26
90	Oloitokitok	16

Identification of top-performing and improved utilities

The evaluation of performance over time recognizes that utilities operate under diverse conditions, which can influence their performance. Consequently, this could hinder certain utilities from quickly ascending to the top. Conversely, despite operating in favourable environments, some utilities may not fully capitalize on this opportunity to enhance their performance. Comparing the current performance of the utility with that of the previous period aims to acknowledge efforts made towards improving performance. To ensure a continuous upward trend and maintain consistent performance improvement, positive changes must be observed for two consecutive years. In the present scenario, the periods under consideration are 2022/23 and 2023/24. Additionally, the utility must achieve a score of at least 50% in both reporting periods.

Table 2.8: Top Improvers and Bottom Losers

TOP IMPROVERS				
	WSP	**Score 2023/24**	**Score 2024/25**	**Variance**
1	Embe	105	123	18
2	Gatamathi	105	123	18
3	Eldoret	131	148	17
4	Limuru	107	123	16
5	Naivasha	139	153	14
6	Embu	140	154	14
7	Ngandori Nginda	145	158	13
8	Murang'a West	115	127	12
9	Kapsabet Nandi	110	122	12
10	Naromoru	111	120	9

BOTTOM LOSERS				
	WSP	**Score 2023/24**	**Score 2024/25**	**Variance**
81	Iten Tambach	88	78	-10
82	Karuri	72	63	-9
83	Kyeni	52	38	-14
84	Kilifi Mariakani	107	92	-15
85	Nyasare	116	101	-15
86	Murang'a Urban	155	138	-17
87	Gatundu	102	84	-18
89	Kiambere Mwingi	87	66	-21
90	Kakamega Rural	63	35	-28
91	Olkejuado	66	37	-29

Embe and Gatamathi recorded the most improvement, followed by Eldoret and Limuru, respectively. Conversely, Olkejuado and Kakamega Rural are the utilities experiencing the most significant declines.

The performance analysis of the ten largest utilities using the ten selected KPIs is summarized in Table 2.10

Table 2.10: Performance Summary of the Utilities in the Ten KPIs

	KPI	NCW &SC	LWSC	DAWASA	AdRMM	WASCO	WASAC	ZAWA	NWSC	LWB	EKWSC
Quality of Services	Water Coverage [10]	79%	94%	78%	42%	59%	80%	89%	81%	90%	2%
	Sewerage Coverage [5]	48%	15%	10%	-	4%	-	12%	15%	5%	-
	Water Quality [15]	95%	97%	85%	100%	75%	100%	92%	100%	99%	87%
	Hours of Supply [10]	7	12	17	15	18	21	14	18	21	8
Economic Efficiency	O&M Cost Coverage [10]	105%	86%	89%	103%	59%	104%	75%	128%	121%	36%
	Collection Efficiency [15]	98%	89%	94%	68%	115%	100%	87%	95%	85%	37%
	Staff Cost vs O&M Costs [5]	63%	45%	31%	33%	33%	24%	33%	42%	32%	72%
Operational Sustainability	Staff/1,000 W&S Connections [5]	7	4	5	4	3	4	2	5	3	16
	Metering Ratio [10]	100%	66%	100%	78%	100%	100%	39%	100%	100%	53%
	NRW [15]	48%	55%	40%	43%	56%	41%	44%	38%	43%	58%

The benchmarking exercise also included a comparative analysis of the best-performing WSP's within each participating country to promote continuous improvement and guard against complacency. The best utilities were assessed from Kenya, Zambia, Tanzania and Rwanda. This approach aims to highlight excellence at the national level and encourage peer learning among high-performing institutions.

Table 2.11: Performance of the best Utilities in the ten KPIs

Utility	Quality of Services				Economic Efficiency			Operational Sustainability		
	Water Coverage [10]	Sewerage Coverage [5]	Water Quality [15]	Hours of Supply [10]	O&M Cost Coverage [10]	Collection Efficiency [15]	Staff Cost as a % of O&M Cost [5]	Staff/1,000 W&S Connections [5]	NRW [15]	Metering ratio [10]
	%	%	%	Hours/ day	%	Ratio	%	Ratio	%	%
Nyeri WSP, Kenya	100%	40.4%	100%	24	120%	110%	55%	4	15.4%	100%
Eastern WSC, Zambia	91.7%	3.8%	98.8%	20	75%	95%	68.2%	5	43.1%	100%
Moshi Urban WSA, Tanzania	65.1%	9.6%	84.2%	24	99%	98%	38.3%	3	23.9%	100%
WASAC, Rwanda	80.4%	N/A	99.9%	21	104%	100%	24.4%	4	41.1%	100%

During the reporting period, Nyeri Water and Sanitation Services Company from Kenya emerged as the best-performing utility in the region.

Chapter Three

DETAILED PERFORMANCE REVIEW



3.1 Data Integrity and Reporting Compliance: A 20- year Journey

Data Submission Trends Among Water Services Providers (2005/06–2024/25)

The journey of data submission by Water Services Providers to WASREB began in FY 2005/06. During this time, data was fragmented and uncertain. Only 25 utilities provided complete data; 33 submitted incomplete information, and another 33 failed to submit anything at all. This showed just how difficult coordinated reporting was in those early years. The system was young; the processes unfamiliar, and a culture of structured reporting had not yet taken root. But over the next two decades, a quiet revolution unfolded.

The Early Struggles (2005/06 – 2008/09): Establishing a Reporting Culture

In the first four years, progress was slow but tangible. Complete submissions rose sharply, from 25 to 77, as utilities gradually appreciated the value of structured reporting. Yet non-submissions remained high, ranging between 34 and 50 utilities during this period. This period was mainly about learning the system, training staff, and improving reporting tools. Ultimately, this era marked a shift from a largely manual, inconsistent reporting environment to the beginnings of a more structured and performance driven framework.

Turning Point: Compliance Takes Root (2009/10–2011/12)

A notable compliance shift occurred beginning in 2009/10. Complete submissions increased from 90 to 102 within two years. Simultaneously, incomplete submissions dropped to zero by 2010/11, and non-submissions fell to four. This period marks the point at which reporting compliance became mainstream, supported by improved monitoring from WASREB and strengthened accountability among WSPs.

Stable and Mature System (2012/13–2019/20)

From 2012/13 onward, reporting became stable and reliable. Most years had over 85 complete submissions, often more than 90. Incomplete submissions were almost always zero, and non-submissions stayed low at between one and seven. This shows that WSPs were comfortable using digital tools like WARIS, WASREB's monitoring had improved, data was being used for planning, and reporting had become a routine part of utility operations.

Era of Excellence: Near Perfect Compliance (2020/21–2024/25)

During this period, reporting performance reached its highest levels of compliance. Complete submissions consistently remained between 90 and 95, while incomplete submissions were eliminated entirely each year. Non submissions stayed very low, fluctuating between zero and three utilities. A major milestone was achieved in 2023/24, when all 95 licensed WSPs submitted complete data. This strong performance was sustained in 2024/25, with 94 complete submissions recorded and only two cases of non submission.
A summary of the above trends is presented in Table 3.1 below.

Table 3.1: Data Submission over the years

Status of data submission	Impact 1	Impact 2	Impact 3		Impact 4	Impact 5	Impact 6	Impact 7	Impact 8
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities
Complete	25	55	72	77	90	100	102	100	91
Incomplete	33	13	12	13	6	0	0	0	0
Non-Submission	33	50	38	34	8	4	1	1	8
Total No. of WSPs	91	118	122	124	104	104	103	101	99

Status of data submission	Impact 9	Impact 10		Impact 11	Impact 12	Impact 13	Impact 14	Impact 15	Impact 16
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities	No. of Utilities
Complete	86	88	88	88	87	91	90	92	92
Incomplete	2	0	0	0	0	0	0	0	0
Non-Submission	6	6	4	5	7	2	3	2	2
Total No. of WSPs	94	94	92	93	94	93	93	94	94

Status of data submission	Impact 17	Impact 18
	2023/24	2024/25
	No. of Utilities	No. of Utilities
Complete	95	94
Incomplete	0	0
Non-Submission	0	2
Total No. of WSPs	95	96

3.2 Performance of Water Services Providers

A Sector Story Told Through Nine Key Indicators

3.2.1 Introduction

The FY2024/25 performance data submitted by Water Services Providers (WSPs) across Kenya tells a story of sharp contrasts. Some utilities are operating at exceptional standards, with potable and reliable water, strong commercial systems, and stable finances. Others face chronic operational difficulties: high water losses, low coverage, high costs, and financial instability.

To understand why these differences, exist, this chapter uses nine KPIs as a structured lens to interpret the FY2024/25 sector performance.

3.3 Sector Performance Based on FY2024/25 Data

3.3.1 Very Large Public Utilities

This category shows a clear performance divide, with a small group of utilities standing out as top performers. Nakuru Urban (171 points) leads as the best performing public utility in Kenya, followed closely by Nyeri (170 points), Kisumu (158 points), Embu (154 points), and Thika (150 points). These utilities consistently deliver high quality services, marked by full compliance with drinking water quality standards (with only slight exceptions), long daily supply hours of 20–24 hours, and have almost all customers metered. They also earn enough money to more than cover their operation and maintenance costs ranging from 113% to 145%.

Their main challenge remains moderate to high levels of non-revenue water, ranging between 26% and 51%. However, they are able to offset these losses because they collect revenue well, use their staff efficiently, and

maintain reliable water supply. As a result, they continue to perform strongly overall despite these challenges. Kirinyaga, Nairobi, Malindi, Kilifi Mariakani, Bungoma, Kericho, Mombasa show good DWQ but weaker coverage, supply hours, and high NRW of 76%.

With reference to the overall performance scoring, Mombasa (75) and Kericho (78) rank as the lowest performing Very Large utilities. Their weak scores are mainly due to short water supply hours of only 15–18 hours per day, very high-water losses of 59–61%, and high spending on personnel. In addition, their operation and maintenance cost coverage has remained largely stagnant, limiting their ability to improve service reliability and overall performance.

3.3.2 Large Public Utilities

This category shows a big difference in performance between utilities. A small group stands out at the top: Nanyuki (168 points), Isiolo (161 points), Ngandori Nginda (158), and Naivasha (153 points). These utilities performed very well because they supplied safe drinking water at all times, provided water for most of the day (between 20 and 24 hours), had most connections properly metered, and collected enough revenue to comfortably cover their operation and maintenance costs. Overall, they demonstrate strong management and reliable water services.
This group falls in the middle of the performance range. Meru, Nyahururu, Tetu, Kiambu, and Murang'a Urban show moderate results, with non-revenue water levels between 32% and 41%. While water supply remains generally reliable, their overall performance is slightly reduced by lower staff productivity compared to the top performers.

This group includes several utilities that are struggling due to serious service and financial challenges.
Githunguri (11% coverage), Amatsi (10% coverage), and Busia (13% coverage) serve only a very small portion of their population. Sibo, Gatanga, and Kibwezi Makindu face high water losses and weak financial performance, while Turkana Urban and Mavoko are affected by short water supply hours combined with high nonrevenue water. In addition, Kyeni and Bomet show major service failures, with drinking water quality dropping to between 0–50%, very low coverage, and high personnel costs. Together, these issues point to deep operational and management weaknesses that require urgent attention.

3.3.3 Medium Public Utilities

Performance in this category varies a lot, with only a few utilities doing well. Embe (123 points) and Kapsabet Nandi (122 points) stand out from the rest. They provide safe drinking water, serve more than 80% of their population, collect revenue effectively, and earn enough to cover their daytoday operation and maintenance costs. Overall, they perform much better than most other utilities in this group.

These utilities are among the weakest performers. The utilities show severe and persistent performance problems. Nol Turesh has extremely high-water losses of 80% and serves only 19% of its population. Kapenguria performs even worse, with zero compliance in drinking water quality and just 7% coverage. Kirandich also struggles, recording 54% non revenue water and only 29% coverage. Across all three, the challenges are similar: excessive water losses, very limited service coverage, unreliable hours of supply, and weak revenue collection, which together, point to serious operational and financial difficulties.

3.3.4 Small Public Utilities

This category has the widest disparities.
Rukanga (131 points), Naromoru (120 points), Muthambi 4K (117 points), and Tachasis (115 points) recorded relatively good performance overall. Their strengths lie in strong metering levels and the ability to generate enough revenue to cover their operation and maintenance costs. However, their performance is moderated by still noticeable levels of non revenue water, and Muthambi 4K in particular is constrained by zero compliance with drinking water quality standards despite its otherwise strong results.

Utilities in this category are in critical condition and include Namanga, Wajir, Oloitokitok, Mandera, Elwak, Samburu, Marsabit, and Mbooni. These utilities record low overall performance scores due to multiple weaknesses. These include very poor drinking water quality in several cases (e.g. Namanga 7%, Oloitokitok 0%), low service coverage (notably Oloitokitok at 21%), severe overstaffing (Wajir at 104 staff per 1,000 connections), and weak finances, highlighted by Elwak's low O&M cost coverage of 10%. Together, these poor scores across service, efficiency, and finance significantly limit their ability to deliver reliable and sustainable water services.

3.3.5 Private Utilities

Top Private Performers (Outperform All Public WSPs). The three licensed and only private providers assessed clearly outperform all public Water Services Providers. Tatu City (182 points) leads the group, followed by Kiamumbi (170 points) and Runda (166 points). Their strong performance is driven by very low water losses, full compliance with drinking water quality standards, long hours of water supply, high levels of metering, efficient revenue collection, and high staff productivity. Overall, their results demonstrate efficient management and provide a strong example of long-term financial sustainability in the sector.

3.4 Key Insights Across All Utilities in FY2024/25

High NRW is the biggest barrier to sector success
When NRW exceeds 50% as seen in Bungoma (BWASCO), Kericho, Mombasa, Kirandich, Kapenguria, Nol Turesh, operational and financial performance collapses.

Strong utilities excel across multiple KPIs, not just one
The best WSPs have balanced strengths: DWQ, low NRW, good hours of supply, strong collections, and high metering.

Regional disparities are rooted in the way the system is structured.
Urban utilities vastly outperform rural/ASAL WSPs due to stronger infrastructure, more stable customer bases, and better financing.

3.5 Recommendations for Sector Improvement

Cut NRW first. Prioritize leak reduction, district metered areas, meter replacement, and enforcement against illegal connections because NRW remains the single biggest drag on service, revenue, and system efficiency.

Fix commercial performance. Modernize billing, strengthen collections, and tighten debt recovery, so utilities convert more of what they produce and bill into actual cash.

3. Restore financial discipline. Push utilities toward sustained O&M cost coverage above 100%, align staffing to operational needs, and review weak cost-recovery structures where viability is at risk.

Target underserved areas with focused capital. Direct investment to rural, ASAL, and low-coverage service areas where infrastructure gaps, weak water quality, and low connectivity are most severe.

Strengthen accountability and scale efficiency. Embed KPIs in performance contracts, reward strong performers, and cluster smaller utilities where shared services can improve management and reduce costs.
Overall, the sector's priorities are clear: reduce losses, improve cash collection, strengthen financial sustainability, and concentrate investment where service gaps are deepest.

Table 3.2: General Data on WSPs

PARAMETER / UTILITY	Total Population in Service Area	Total Population Served	Total No. of Connections (active+inactive)	Total No. Active Connections	No. of towns served	Turnover (KSh million)	Total Water Produced in m^3 (000)	Domestic + Kiosks billed volume in m^3 (000)	Total billed volume in m^3 (000)	Non-Revenue Water (%)	Production per capita (l/c/d)	Consumption per capita (l/c/d)	No. of Total Staff	Overall Compliance
Very Large (≥35,000 connections)														
Nairobi	5,571,159	4,382,875	446,171	441,053	1	12,344	215,292	54,350	98,529	54	135	34	2,816	Non-Compliant
Eldoret	527,196	442,288	113,970	104,007	1	1,165	15,411	6,334	9,521	38	95	39	417	Compliant
Mombasa	1,386,568	911,791	92,781	42,860	1	1,116	13,124	3,472	5,080	61	39	10	313	Non-Compliant
Ruiru-Juja	612,388	553,734	75,934	69,644	2	1,910	24,195	9,974	11,927	51	120	49	317	Non-Compliant
Nyeri	159,023	192,125	72,486	55,773	1	705	7,850	4,505	6,410	18	112	64	238	Compliant
Nakuru Urban	616,509	576,097	69,999	65,550	1	1,198	12,458	7,220	9,229	26	59	34	153	Compliant
Kisumu	503,846	470,118	65,697	65,697	1	1,179	11,769	4,302	8,011	32	69	25	301	Non-Compliant
Thika	386,050	350,093	65,685	58,755	1	1,155	15,346	6,332	9,388	39	120	50	272	Compliant
Murang'a South	486,813	375,463	57,235	40,111	1	293	4,304	2,059	2,651	38	31	15	180	Non-Compliant
Kilifi Mariakani	1,081,097	672,010	51,604	38,111	3	618	9,711	3,737	4,829	50	40	15	273	Non-Compliant
Embu	245,211	210,460	50,782	45,802	1	511	6,937	3,377	4,591	34	90	44	218	Compliant
Gatundu	344,539	256,685	46,274	33,842	1	207	3,702	2,008	2,240	39	40	21	139	Non-Compliant
Malindi	596,905	440,375	43,938	27,698	1	771	9,540	4,217	5,562	42	59	26	224	Non-Compliant
Kakamega Urban	448,574	440,942	43,266	38,200	2	376	4,809	1,999	2,856	41	30	12	167	Non-Compliant
Kericho	437,846	164,929	42,000	29,841	2	246	5,138	1,462	2,123	59	85	24	184	Non-Compliant
Othaya Mukurweini	188,502	139,039	38,685	25,286	2	257	5,361	2,317	3,002	44	106	46	136	Non-Compliant
Bungoma (BWASCO)	725,000	414,622	36,980	25,991	1	281	7,501	1,367	1,833	76	50	9	162	Non-Compliant
Kirinyaga	535,563	291,906	36,505	34,335	9	188	5,192	2,017	2,652	49	49	19	159	Non-Compliant
Large (10,000-34,999 connections)														
Nakuru Rural	1,213,934	886,795	34,599	22,087	6	384	7,009	1,377	3,984	43	22	4	131	Non-Compliant
Tavevo	386,026	255,219	33,651	21,061	3	409	5,762	2,228	2,871	50	62	24	240	Non-Compliant
Murang'a Urban	121,223	104,326	33,317	26,520	1	324	4,110	1,901	2,872	30	108	50	176	Non-Compliant
Trans Nzoia	454,811	186,266	32,663	20,857	1	318	3,670	1,592	2,022	45	54	23	99	Non-Compliant
Mathira	158,385	98,997	30,997	17,606	1	186	2,054	1,096	1,348	34	57	30	78	Non-Compliant
Nanyuki	136,371	129,705	30,924	29,237	1	385	4,017	1,759	2,977	26	85	37	134	Non-Compliant
Murang'a West	159,553	100,268	29,794	18,635	1	116	2,954	1,224	1,729	41	81	33	87	Compliant
Garissa	154,830	100,199	25,456	16,075	1	307	4,683	2,866	3,183	32	128	78	140	Non-Compliant
Meru	175,270	135,372	24,703	21,046	1	255	3,383	2,020	2,738	19	68	41	113	Non-Compliant
Kwale	724,929	369,138	24,083	15,178	1	243	4,109	1,817	2,132	48	30	13	157	Non-Compliant
Nyahururu	126,409	116,461	23,902	21,978	2	271	2,952	1,055	1,875	36	69	25	115	Compliant
Gusii	881,231	487,260	22,266	21,227	7	267	3,334	961	1,386	58	19	5	141	Non-Compliant
Bomet	457,926	36,891	21,992	5,781	1	74	1,271	235	478	62	94	17	133	Non-Compliant
Sibo	593,624	368,306	20,570	16,692	5	189	2,079	846	1,068	49	15	6	133	Non-Compliant
Ngandori Nginda	89,700	82,271	20,106	16,481	1	101	2,394	1,415	1,684	30	80	47	74	Non-Compliant
Kitui	414,352	325,694	19,882	11,116	1	278	2,520	885	1,349	46	21	7	106	Non-Compliant
Kikuyu	475,491	331,797	18,752	10,737	1	275	2,941	1,341	1,912	35	24	11	87	Non-Compliant
Nithi	152,489	90,671	18,696	12,536	1	117	3,026	770	1,403	54	91	23	84	Non-Compliant
Gatamathi	134,046	118,973	18,682	13,129	1	80	3,209	1,186	1,510	53	74	27	66	Non-Compliant
Tetu Aberdare	84,530	78,711	18,161	13,540	1	80	2,302	1,426	1,517	34	80	50	69	Non-Compliant
Gatanga	192,755	90,204	15,864	11,045	1	77	1,985	933	1,299	35	60	28	85	Non-Compliant
Isiolo	89,300	81,320	15,353	14,602	1	117	2,216	1,117	1,586	28	75	38	63	Non-Compliant
Naivasha	414,235	405,551	15,225	13,120	1	249	2,526	1,372	1,914	24	17	9	65	Non-Compliant
Kiambu	166,505	138,312	15,191	12,309	1	350	3,536	1,908	2,388	32	70	38	78	Compliant
Limuru	316,481	255,549	14,870	14,263	1	211	2,139	980	1,369	36	23	11	91	Non-Compliant
Mavoko	372,777	205,585	18,504	16,199	1	319	1,774	710	1,116	37	24	9	130	Non-Compliant
Homabay	320,801	225,953	12,676	8,913	1	108	1,370	610	818	40	17	7	118	Non-Compliant
Machakos	259,690	178,438	12,629	9,789	1	107	1,012	510	694	31	16	8	73	Non-Compliant
Oloolaiser	473,212	363,285	12,491	7,059	5	173	1,920	869	940	51	14	7	112	Non-Compliant
Meru Rural	148,214	119,837	12,432	6,258	1	63	1,314	720	830	37	30	16	106	Non-Compliant
Ngagaka	86,627	85,331	12,353	8,970	1	57	1,442	820	953	34	46	26	41	Compliant
Karuri	280,250	205,410	12,150	8,831	1	138	1,784	773	1,028	42	24	10	63	Non-Compliant
Githunguri	242,287	26,678	11,804	3,563	1	48	1,410	436	582	59	145	45	47	Non-Compliant
Amatsi	546,741	56,794	11,393	6,009	1	114	2,523	647	1,414	44	122	31	101	Non-Compliant
Busia	375,345	49,980	11,354	6,788	3	51	459	234	262	43	25	13	74	Non-Compliant
Turkana Urban	48,874	40,993	11,166	10,931	1	79	2,301	712	1,114	52	154	48	76	Non-Compliant
Kyeni	97,629	13,871	11,007	4,246	1	16	676	201	321	52	133	40	24	Non-Compliant
Kibwezi Makindu	298,537	158,683	10,503	6,479	1	100	2,187	772	1,013	54	38	13	86	Non-Compliant
Nyandarua	116,385	70,218	10,486	5,661	1	58	791	401	449	43	31	16	58	Non-Compliant
Medium (5,000-9,999 connections)														
Migori	402,945	101,790	9,358	5,707	7	18	622	349	419	33	17	9	68	Non-Compliant
Chemususu	124,960	30,950	8,395	4,470	1	49	1,778	642	817	54	157	57	56	Compliant
Narok	146,099	112,319	8,390	8,189	1	146	1,292	456	861	33	32	11	100	Non-Compliant
Embe	48,419	40,140	8,156	3,953	1	34	1,053	373	502	52	72	25	38	Non-Compliant
Nol Turesh	168,233	32,065	7,838	5,958	1	47	3,024	549	603	80	258	47	60	Non-Compliant
Kapsabet Nandi	103,546	39,535	7,760	6,198	2	106	1,238	331	774	37	86	23	45	Non-Compliant
Tana	129,577	70,887	7,431	3,395	3	33	685	213	270	61	26	8	66	Non-Compliant
Kiambere Mwingi	184,792	83,621	7,409	3,718	2	46	204	102	160	22	7	3	41	Non-Compliant
Kirandich	54,312	15,645	6,050	4,082	1	29	1,209	475	551	54	212	83	34	Non-Compliant
Murugi Mugumango	34,143	22,194	5,836	5,232	1	19	3,625	1,370	1,496	59	447	169	22	Non-Compliant
Kakamega Rural	843,239	21,533	5,370	3,972	-	16	366	205	228	38	47	26	58	Non-Compliant
Kapenguria	176,146	12,506	5,192	1,935	1	18	1,190	200	275	77	261	44	63	Non-Compliant
Lamu	40,866	29,190	5,150	2,906	2	24	485	229	268	45	46	22	70	Non-Compliant
Small (<5,000 connections)														
Ol Kalou	138,987	78,644	4,573	4,295	1	59	595	286	387	35	21	10	44	Non-Compliant
Iten Tambach	90,837	10,525	4,559	2,397	1	39	731	259	391	47	190	67	39	Non-Compliant
Mandera	142,235	35,882	4,373	2,274	1	17	919	235	495	46	70	18	101	Non-Compliant
Samburu	375,027	24,751	4,348	3,552	6	20	421	247	262	38	47	27	81	Non-Compliant
Olkejuado	196,696	40,328	4,064	864	1	13	304	161	191	37	21	11	39	Non-Compliant
Muthambi 4K	19,441	11,001	3,468	3,191	1	15	729	491	540	26	182	122	14	Non-Compliant
Naromoru	20,166	13,937	3,046	2,792	1	22	359	180	256	29	70	35	25	Non-Compliant
Tatu City	1,737	4,232	2,802	2,802	-	192	655	192	645	2	424	124	9	Non-Compliant
Rukanga	9,431	6,123	2,777	2,144	1	14	310	195	227	27	139	87	15	Non-Compliant
Oloitokitok	79,374	16,284	2,714	1,809	1	8	153	54	60	60	26	9	37	Non-Compliant
Elwak	124,556	14,634	2,685	1,758	3	9	113	59	72	36	21	11	106	Non-Compliant
Wajir	195,638	14,357	2,363	2,120	1	25	192	115	126	34	37	22	220	Non-Compliant
Yatta	158,726	105,739	2,145	1,846	1	25	247	144	166	33	6	4	24	Non-Compliant
Matungulu Kangundo	87,124	6,637	2,058	934	3	13	155	55	93	40	64	23	11	Non-Compliant
Namanga	21,105	7,792	2,034	1,054	1	8	273	149	202	26	96	52	11	Non-Compliant
Kiamumbi	19,878	19,596	1,921	1,788	1	26	569	443	452	21	80	62	10	Non-Compliant
Mbooni	141,361	7,134	1,605	645	1	3	51	27	30	41	20	10	20	Non-Compliant
Wote	157,253	46,358	1,506	1,162	1	39	458	159	298	35	27	9	32	Non-Compliant
Nyasare	30,362	22,437	1,473	1,008	1	8	123	60	77	38	15	7	8	Non-Compliant
Tachasis	32,134	21,045	1,414	1,379	1	4	387	250	294	24	50	33	13	Non-Compliant
Kathiani	24,985	18,353	1,337	694	1	10	107	28	81	24	16	4	25	Non-Compliant
Runda	15,041	15,010	1,321	1,266	-	86	880	647	718	18	161	118	21	Non-Compliant
Mwala	65,648	22,761	1,198	414	4	5	31	16	23	26	4	2	9	Non-Compliant
Marsabit	189,777	23,518	684	510	1	24	109	28	53	52	13	3	46	Non-Compliant
Small Scale Service Providers														
SSSPs within the Service areas	-	3,116,348	-	-	-	-	-	-	-	-	-	-	-	-
Totals/Averages	**31,589,360**	**22,776,665**	**2,353,442**	**1,871,523**	**152**	**32,880**	**504,426**	**173,750**	**263,925**	**48**	**61**	**21**	**12,204**	**-**

3.5.1 Understanding the Nine KPIs

Each KPI reveals a specific dimension of utility health. Together, they define the full picture. Table 3.3 below represents the scoring regime, structured around the weighting assigned to each KPI.

Table 3.3: Performance Indicators, Sector Benchmarking and Scoring Regime

KPI CLUSTER		INDICATORS		Sector Benchmarks			Scoring Regime	
				Good	Satisfactory	Poor	Performance	Score
Quality of Service	1	Water Coverage, %		>90%	80-90%	<80%	≥90%	30
							≤50%	0
	2	Drinking Water Quality , %		>95%	90-95%	<90%	≥95%	30
							≤90%	0
	3	Hours of Supply, No.	Population >100,000	21-24	16-20	<16	≥20	20
							≤10	0
			Population <100,000	17-24	12-16	<12	≥16	20
							≤6	0
Economic Efficiency	4	Personnel Expenditure as Percentage of O&M Costs, %	Large and Very Large Companies	<20%	20-30%	>30%	≤25	15
							≥35	0
			Medium Companies	<30%	30-40%	>40%	≤30	15
							≥40	0
			Small Companies	<40%	40-45%	>45%	≤40	15
							≥45	0
	5	O&M Cost Coverage, %		≥150%	100-149%	≤99%	≥150%	25
							≤90%	0
	6	Revenue Collection Efficiency, %		>95%	95-85%	<85%	≥95	20
							≤85	0
Operational Sustainability	7	Non-Revenue Water, %		<20%	20-25%	>25%	≤20%	25
							≥40%	0
	8	Staff Productivity (Staff per 1000 Connections), No.	Large & Very Large Companies	<5	5-8	>8	≤5	20
							≥8	0
			Medium & Small (less than 3 towns)	<7	7-11	>11	≤7	20
							≥11	0
			Medium & Small (3 or more towns)	<9	9-14	>14	≤9	20
							≥14	0
	9	Metering Ratio, %		100%	95-99%	<95%	100%	15
							≤80%	0
Total Maximum Score								**200**

Table 3.4 (a): Overall Ranking and Ranking by Category for Publicly Owned WSPs

Indicator / Public Utilities	DWQ (%)	Non-Revenue Water (%)	Water Coverage (%)	Hours of Supply (hrs./d)	Staff Productivity (no. staff/K conns.)	Revenue Collection Efficiency (%)	Personnel expenditures as % of total O&M costs	O&M Cost Coverage (%)	Metering Ratio (%)	Total Score	Ranking by category	Overall Ranking
Very Large												
Nakuru Urban	100	26	93	21	2	97	29	112	100	171	1	1
Nyeri	100	18	100	24	4	100	48	113	100	170	2	2
Kisumu	100	32	93	24	5	100	30	105	100	158	3	5
Embu	100	34	86	23	5	100	49	124	100	154	4	7
Thika	100	39	91	21	5	96	36	123	100	150	5	9
Eldoret	96	38	84	23	4	91	51	145	99	148	6	10
Ruiru-Juja	100	51	90	22	5	83	21	130	100	147	7	12
Kakamega Urban	99	41	98	21	4	98	52	113	100	145	8	13
Murang'a South	100	38	77	20	4	100	47	105	100	134	9	17
Othaya Mukurweini	100	44	74	24	5	89	44	114	100	119	10	29
Kirinyaga	100	49	55	19	5	95	54	83	100	106	11	33
Nairobi	96	54	79	9	6	95	55	105	100	104	12	34
Malindi	100	42	74	24	8	92	31	88	100	104	13	35
Kilifi Mariakani	100	50	62	18	7	93	35	75	100	92	14	43
Gatundu	75	39	75	21	4	90	41	89	100	84	15	45
Bungoma (BWASCO)	93	76	57	21	6	84	31	107	95	84	16	47
Kericho	100	59	38	18	6	79	60	104	100	78	17	54
Mombasa	93	61	66	15	7	91	35	100	100	75	18	59
Large												
Nanyuki	100	26	95	23	5	99	54	126	100	168	1	3
Isiolo	100	28	91	20	4	100	56	117	100	161	2	4
Ngandori Nginda	100	30	92	24	4	100	52	114	100	158	3	6
Naivasha	93	24	98	24	5	98	38	107	100	153	4	8
Meru	100	19	77	20	5	93	44	109	93	147	5	11
Nyahururu	100	36	92	23	5	98	54	104	100	144	6	14
Tetu Aberdare	100	34	93	22	5	91	48	104	100	140	7	15
Murang'a Urban	100	30	86	24	7	100	52	101	100	138	8	16
Murang'a West	100	41	63	23	5	98	48	119	100	127	9	19
Kiambu	94	32	83	21	6	91	34	104	100	126	10	20
Ngagaka	91	34	99	24	5	91	60	130	99	125	11	21
Gatamathi	100	53	89	23	5	97	60	100	67	123	12	23
Limuru	97	36	81	17	6	96	32	92	100	123	13	24
Nakuru Rural	100	43	73	22	6	99	48	105	99	122	14	25
Mathira	93	34	63	24	4	93	40	117	100	120	15	27
Trans Nzoia	99	45	41	21	5	81	27	143	100	119	16	30
Nithi	100	54	59	20	7	100	42	112	100	110	17	32
Gusii	99	58	55	22	7	95	40	102	100	103	18	36
Kitui	100	46	79	16	10	90	27	96	100	102	19	37
Kwale	98	48	51	17	10	100	24	79	100	95	20	39
Nyandarua	100	43	60	20	10	97	41	86	100	93	21	41
Githunguri	98	59	11	16	13	92	31	54	100	84	22	44
Meru Rural	93	37	81	20	17	90	53	101	82	84	23	46
Homabay	100	40	70	22	13	85	35	90	100	82	24	49
Sibo	93	49	62	19	8	94	37	89	100	82	25	50
Gatanga	100	35	47	20	8	87	53	105	94	80	26	53
Kibwezi Makindu	100	54	53	15	13	100	48	85	100	77	27	57
Machakos	100	31	69	10	7	77	50	98	100	77	28	58
Amatsi	93	44	10	21	17	94	36	72	100	75	29	61
Oloolaiser	92	51	77	18	16	85	52	108	97	72	30	62
Tavevo	90	50	66	14	11	99	28	83	100	69	31	63
Garissa	93	32	65	22	9	65	37	103	61	67	32	66
Karuri	72	42	73	13	7	90	33	103	100	63	33	69
Kikuyu	89	35	70	12	8	87	34	115	100	56	34	71
Turkana Urban	33	52	84	8	7	68	49	82	98	50	35	74
Mavoko	93	37	55	8	8	92	35	107	50	50	36	75
Busia	93	43	13	15	11	44	60	89	68	39	37	80
Kyeni	0	52	14	18	6	69	73	95	29	38	38	81
Bomet	90	62	8	14	23	62	52	48	71	16	39	91
Medium												
Embe	100	52	83	16	10	96	56	106	100	123	1	22
Kapsabet Nandi	100	37	38	20	7	96	25	82	100	122	2	26
Lamu	97	45	71	12	24	100	49	43	100	93	3	40
Murugi Mugumango	20	59	65	24	4	100	56	87	95	82	4	48
Narok	93	33	77	11	12	89	36	81	100	81	5	51
Kirandich	64	54	29	16	8	89	26	35	97	69	6	64
Kiambere Mwingi	79	22	45	9	11	96	38	47	100	66	7	67
Migori	100	33	25	9	12	67	22	30	69	62	8	70
Tana	93	61	55	12	19	72	30	57	53	51	9	72
Chemususu	49	54	25	22	13	94	42	96	80	40	10	78
Kakamega Rural	65	38	3	18	15	84	32	51	78	35	11	86
Kapenguria	0	77	7	10	33	100	40	61	9	28	12	88
Nol Turesh	75	80	19	15	10	82	76	93	84	26	13	89
Small												
Rukanga	92	27	65	23	7	98	40	89	100	131	1	18
Naromoru	93	29	69	22	9	92	27	75	100	120	2	28
Muthambi 4K	0	26	57	24	4	84	36	n.c.d.	99	92	5	42
Tachasis	95	24	65	14	9	93	53	105	91	115	3	31
Nyasare	93	38	74	10	8	95	45	88	100	101	4	38
Kathiani	80	24	73	10	36	99	45	85	100	81	6	52
Iten Tambach	93	47	12	17	16	100	48	96	99	78	7	55
Matungulu Kangundo	24	40	8	15	12	100	26	82	100	78	8	56
Wote	100	35	29	7	28	89	40	84	100	75	9	60
Ol Kalou	67	35	57	19	10	91	45	101	100	67	10	65
Yatta	93	33	67	13	13	71	50	99	100	66	11	68
Mbooni	100	41	5	10	31	64	68	44	97	50	12	73
Namanga	7	26	37	8	10	100	52	98	15	48	13	76
Mwala	53	26	35	8	22	87	62	50	100	42	14	77
Wajir	78	34	7	17	104	75	53	11	97	40	15	79
Olkejuado	0	37	21	17	45	81	57	71	98	37	16	82
Marsabit	93	52	12	3	90	78	59	61	100	36	17	83
Samburu	98	38	7	7	23	53	69	48	72	36	18	84
Mandera	69	46	25	18	44	59	22	14	0	35	19	85
Elwak	37	36	12	14	60	78	51	10	91	29	20	87
Oloitokitok	0	60	21	8	20	58	56	29	96	16	21	90

Table 3.4 (c): Ranking by WWDA Area

Indicator / Public Utilities	DWQ (%)	Non-Revenue Water (%)	Water Coverage (%)	Hours of Supply (hrs./d)	Staff Productivity (no. staff/k comns.)	Revenue Collection Efficiency (%)	Personnel expenditures as % of total O&M costs	O&M Cost Coverage (%)	Metering Ratio (%)	Total Score	Ranking by WWDA	Overall Ranking
Athi Water Works Development Agency WSPs												
Thika	100	39	91	21	5	96	36	123	100	150	1	9
Ruiru-Juja	100	51	90	22	5	83	21	130	100	147	2	12
Murang'a Urban	100	30	86	24	7	100	52	101	100	138	3	16
Murang'a South	100	38	77	20	4	100	47	105	100	134	4	17
Murang'a West	100	41	63	23	5	98	48	119	100	127	5	19
Kiambu	94	32	83	21	6	91	34	104	100	126	6	20
Gatamathi	100	53	89	23	5	97	60	100	67	123	7	23
Limuru	97	36	81	17	6	96	32	92	100	123	8	24
Nairobi	96	54	79	9	6	95	55	105	100	104	9	34
Githunguri	98	59	11	16	13	92	31	54	100	84	10	44
Gatundu	75	39	75	21	4	90	41	89	100	84	11	45
Gatanga	100	35	47	20	8	87	53	105	94	80	12	53
Karuri	72	42	73	13	7	90	33	103	100	63	13	69
Kikuyu	89	35	70	12	8	87	34	115	100	56	14	71
Central Rift Water Works Development Agency WSPs												
Nakuru Urban	100	26	93	21	2	97	29	112	100	171	1	1
Nanyuki	100	26	95	23	5	99	54	126	100	168	2	3
Naivasha	93	24	98	24	5	98	38	107	100	153	3	8
Nyahururu	100	36	92	23	5	98	54	104	100	144	4	14
Nakuru Rural	100	43	73	22	6	99	48	105	99	122	5	25
Nyandarua	100	43	60	20	10	97	41	86	100	93	6	41
Narok	93	33	77	11	12	89	36	81	100	81	7	51
Kirandich	64	54	29	16	8	89	26	35	97	69	8	64
Ol Kalou	67	35	57	19	10	91	45	101	100	67	9	65
Chemususu	49	54	25	22	13	94	42	96	80	40	10	78
Coast Water Works Development Agency WSPs												
Malindi	100	42	74	24	8	92	31	88	100	104	1	35
Kwale	98	48	51	17	10	100	24	79	100	95	2	39
Lamu	97	45	71	12	24	100	49	43	100	93	3	40
Kilifi Mariakani	100	50	62	18	7	93	35	75	100	92	4	43
Mombasa	93	61	66	15	7	91	35	100	100	75	5	59
Tavevo	90	50	66	14	11	99	28	83	100	69	6	63
Tana	93	61	55	12	19	72	30	57	53	51	7	72
Lake Victoria North Water Works Development Agency WSPs												
Kakamega Urban	99	41	98	21	4	98	52	113	100	145	1	13
Kapsabet Nandi	100	37	38	20	7	96	25	82	100	122	2	26
Trans Nzoia	99	45	41	21	5	81	27	143	100	119	3	30
Tachasis	95	24	65	14	9	93	53	105	91	115	4	31
Bungoma (BWASCO)	93	76	57	21	6	84	31	107	95	84	5	47
Amatsi	93	44	10	21	17	94	36	72	100	75	6	61
Busia	93	43	13	15	11	44	60	89	68	39	7	80
Kakamega Rural	65	38	3	18	15	84	32	51	78	35	8	86
Lake Victoria South Water Works Development Agency WSPs												
Kisumu	100	32	93	24	5	100	30	105	100	158	1	5
Gusii	99	58	55	22	7	95	40	102	100	103	2	36
Nyasare	93	38	74	10	8	95	45	88	100	101	3	38
Homabay	100	40	70	22	13	85	35	90	100	82	4	49
Sibo	93	49	62	19	8	94	37	89	100	82	5	50
Kericho	100	59	38	18	6	79	60	104	100	78	6	54
Migori	100	33	25	9	12	67	22	30	69	62	7	70
Bomet	90	62	8	14	23	62	52	48	71	16	8	91
North Rift Water Works Development Agency WSPs												
Eldoret	96	38	84	23	4	91	51	145	99	148	1	10
Iten Tambach	93	47	12	17	16	100	48	96	99	78	2	55
Kapenguria	0	77	7	10	33	100	40	61	9	28	3	88
Northern Water Works Development Agency WSPs												
Isiolo	100	28	91	20	4	100	56	117	100	161	1	4
Garissa	93	32	65	22	9	65	37	103	61	67	2	66
Turkana Urban	33	52	84	8	7	68	49	82	98	50	3	74
Wajir	78	34	7	17	104	75	53	11	97	40	4	79
Marsabit	93	52	12	3	90	78	59	61	100	36	5	83
Samburu	98	38	7	7	23	53	69	48	72	36	6	84
Mandera	69	46	25	18	44	59	22	14	0	35	7	85
Elwak	37	36	12	14	60	78	51	10	91	29	8	87
Tana Water Works Development Agency WSPs												
Nyeri	100	18	100	24	4	100	48	113	100	170	1	2
Ngandori Nginda	100	30	92	24	4	100	52	114	100	158	2	6
Embu	100	34	86	23	5	100	49	124	100	154	3	7
Meru	100	19	77	20	5	93	44	109	93	147	4	11
Tetu Aberdare	100	34	93	22	5	91	48	104	100	140	5	15
Rukanga	92	27	65	23	7	98	40	89	100	131	6	18
Ngagaka	91	34	99	24	5	91	60	130	99	125	7	21
Embe	100	52	83	16	10	96	56	106	100	123	8	22
Mathira	93	34	63	24	4	93	40	117	100	120	9	27
Naromoru	93	29	69	22	9	92	27	75	100	120	10	28
Othaya Mukurweini	100	44	74	24	5	89	44	114	100	119	11	29
Muthambi 4K	0	26	57	24	4	84	36	n.c.d.	99	92	14	42
Nithi	100	54	59	20	7	100	42	112	100	110	12	32
Kirinyaga	100	49	55	19	5	95	54	83	100	106	13	33
Meru Rural	93	37	81	20	17	90	53	101	82	84	15	46
Murugi Mugumango	20	59	65	24	4	100	56	87	95	82	16	48
Kyeni	0	52	14	18	6	69	73	95	29	38	17	81
Tanathi Water Works Development Agency WSPs												
Kitui	100	46	79	16	10	90	27	96	100	102	1	37
Kathiani	80	24	73	10	36	99	45	85	100	81	2	52
Matungulu Kangundo	24	40	8	15	12	100	26	82	100	78	3	56
Kibwezi Makindu	100	54	53	15	13	100	48	85	100	77	4	57
Machakos	100	31	69	10	7	77	50	98	100	77	5	58
Wote	100	35	29	7	28	89	40	84	100	75	6	60
Oloolaiser	92	51	77	18	16	85	52	108	97	72	7	62
Kiambere Mwingi	79	22	45	9	11	96	38	47	100	66	8	67
Yatta	93	33	67	13	13	71	50	99	100	66	9	68
Mbooni	100	41	5	10	31	64	68	44	97	50	10	73
Mavoko	93	37	55	8	8	92	35	107	50	50	11	75
Namanga	7	26	37	8	10	100	52	98	15	48	12	76
Mwala	53	26	35	8	22	87	62	50	100	42	13	77
Olkejuado	0	37	21	17	45	81	57	71	98	37	14	82
Nol Turesh	75	80	19	15	10	82	76	93	84	26	15	89
Oloitokitok	0	60	21	8	20	58	56	29	96	16	16	90

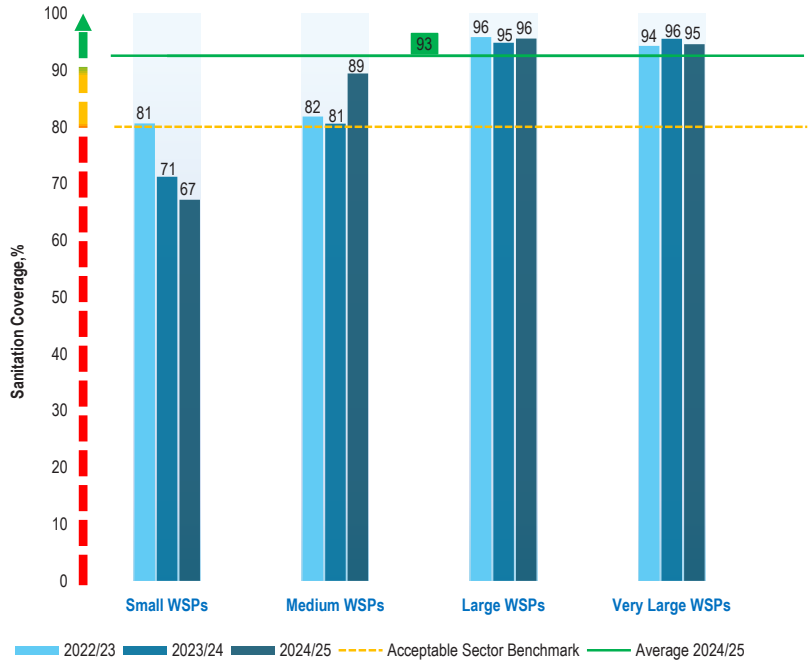
Table 3.5 (a): Performance Over Time of Publicly Owned Utilities

Rank	WSP	Score 2023/24	Score 2024/25
1	Nakuru Urban	167	171
2	Nyeri	168	170
3	Nanyuki	163	168
4	Isiolo	154	161
5	Kisumu	150	158
6	Ngandori Nginda	145	158
7	Embu	140	154
8	Naivasha	139	153
9	Thika	151	150
10	Eldoret	131	148
11	Meru	143	147
12	Ruiru-Juja	145	147
13	Kakamega Urban	141	145
14	Nyahururu	127	144
15	Tetu Aberdare	142	140
16	Murang'a Urban	155	138
17	Murang'a South	129	134
18	Rukanga	136	131
19	Murang'a West	115	127
20	Kiambu	133	126
21	Ngagaka	133	125
22	Embe	105	123
23	Gatamathi	105	123
24	Limuru	107	123
25	Nakuru Rural	120	122
26	Kapsabet Nandi	110	122
27	Mathira	112	120
28	Naromoru	111	120
29	Othaya Mukurweini	101	119
30	Trans Nzoia	-	119
42	Muthambi 4K	84	92
31	Tachasis	112	115
32	Nithi	105	110
33	Kirinyaga	110	106
34	Nairobi	101	104
35	Malindi	111	104
36	Gusii	101	103
37	Kitui	108	102
38	Nyasare	116	101
39	Kwale	94	95
40	Lamu	86	93
41	Nyandarua	61	93
43	Kilifi Mariakani	107	92
44	Githunguri	92	84
45	Gatundu	102	84
46	Meru Rural	91	84

Rank	WSP	Score 2023/24	Score 2024/25
47	Bungoma (BWASCO)	-	84
48	Murugi Mugumango	82	82
49	Homabay	87	82
50	Sibo	62	82
51	Narok	55	81
52	Kathiani	100	81
53	Gatanga	88	80
54	Kericho	71	78
55	Iten Tambach	88	78
56	Matungulu Kangundo	74	78
57	Kibwezi Makindu	54	77
58	Machakos	81	77
59	Mombasa	68	75
60	Wote	81	75
61	Amatsi	74	75
62	Oloolaiser	72	72
63	Tavevo	64	69
64	Kirandich	69	69
65	Ol Kalou	68	67
66	Garissa	45	67
67	Kiambere Mwingi	87	66
68	Yatta	50	66
69	Karuri	72	63
70	Migori	45	62
71	Kikuyu	64	56
72	Tana	8	51
73	Mbooni	49	50
74	Turkana Urban	22	50
75	Mavoko	58	50
76	Namanga	34	48
77	Mwala	42	42
78	Chemususu	47	40
79	Wajir	21	40
80	Busia	38	39
81	Kyeni	52	38
82	Olkejuado	66	37
83	Marsabit	36	36
84	Samburu	9	36
85	Mandera	35	35
86	Kakamega Rural	63	35
87	Elwak	12	29
88	Kapenguria	33	28
89	Nol Turesh	27	26
90	Oloitokitok	6	16
91	Bomet	15	16

b) Sanitation Coverage

Figure 3.3: Sanitation Coverage by WSP category, %

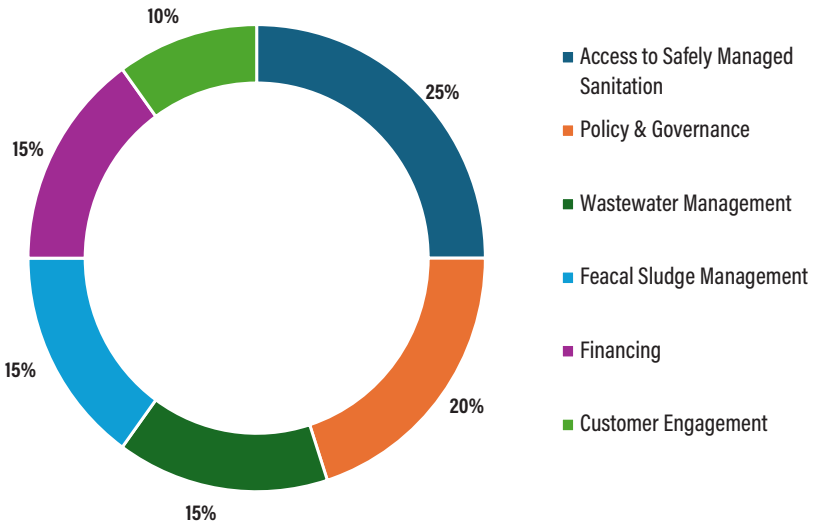


The indicator on sanitation coverage considers the proportion of population with access to basic sanitation. The sector registered a slight improvement moving from 92% in the previous report to 93% in 2024/25. In terms of people served, an additional 851,595 people got access to safely managed services.

The Sanitation KPI

Considering the objectives in the National Sanitation Management Policy, there is a fundamental need for the sector to move with speed and establish sanitation performance beyond just access. Subsequently, the regulator rolled out comprehensive assessment of sanitation across the entire sanitation chain.

Figure 3.4: Thematic Areas in the Sanitation KPI



This assessment was through administration of key sanitation performance indicator tools to allow reporting. The regulator envisages that sanitation KPI will harmonize both sewered and non-sewered sanitation services and strengthen the principles of citywide inclusive sanitation. The sanitation KPI also seeks to track the progressive realization of human rights to reasonable sanitation through various components including access to safely managed sanitation, wastewater management, faecal sludge management, policy and governance, financing and customer engagement on sanitation issues.

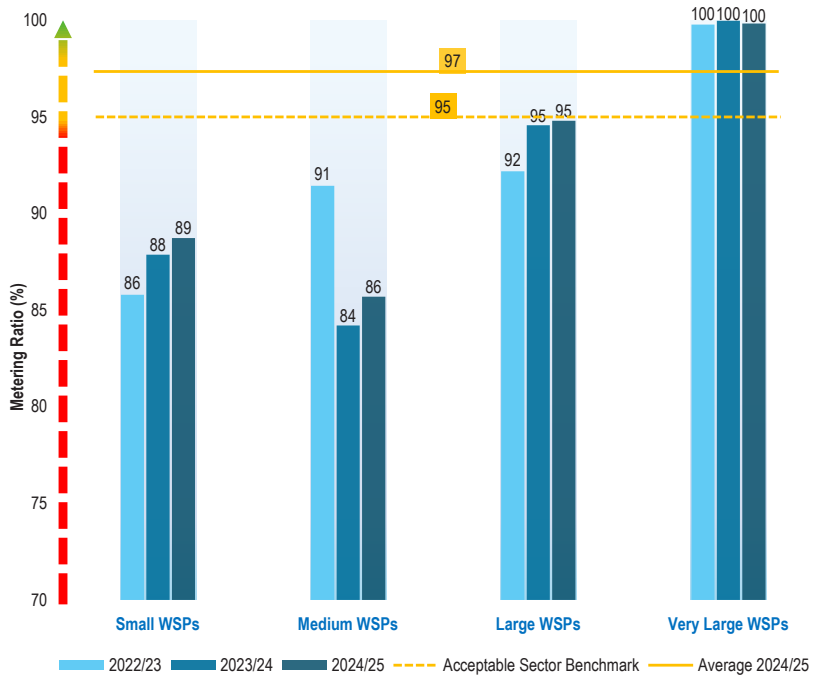
Initial Insights from Sanitation KPI

Data was compiled for 75 utilities whose sanitation datasets were sufficiently populated. This represented 80% of utilities in the reporting period. However, it was observed that most of the inputs to the dataset were modelled estimates especially for inputs domiciled outside the WSP operational data. To assess the outlook of safely managed sanitation, an initial level sanitation flow diagram (SFD) was modelled from the aggregated sanitation indicator data.

h) Metering Ratio

Shows what proportion of customers are metered. Benchmark: Good if 100%, poor if <95%. Low metering drives NRW and poor billing accuracy.

Figure 3.13: Metering Ratio, %



The chart shows that metering ratios improve steadily with system size and over time. Small systems have made gradual progress, increasing from the mid 80 percent range to about 89 percent, but remaining below the acceptable sector benchmark of 95 percent. Medium systems show some fluctuation, dropping in 2023/24 before recovering to around 86 percent in 2024/25, also remaining below the benchmark. Large systems perform better, improving to meet the 95 percent benchmark by 2023/24 and maintaining this level in 2024/25. Very large systems perform the strongest, achieving full or near full metering at 100 percent and exceeding both the acceptable benchmark and the 2024/25 sector average. Overall, the results indicate improving metering performance, with larger systems leading and smaller systems needing further improvement.

i) O&M Cost Coverage

Operation and maintenance costs measure the utility's ability to cover its operational and maintenance costs using its own generated revenue from water, sewer and billing for other services.
Operation and maintenance cost coverage is calculated as:

$$\text{OCCR} = \frac{\text{Total revenue which excludes grants and subsidies}}{\text{Total Operation and Maintenance Cost}}$$

Total Revenue includes Revenue from water billing, Revenue from sewer billing, Billing from other service and other incomes. To achieve financial sustainability, WSPs must exceed the threshold ratios as outlined in Table 3.8

Table 3.8: O&M Cost Coverage Components

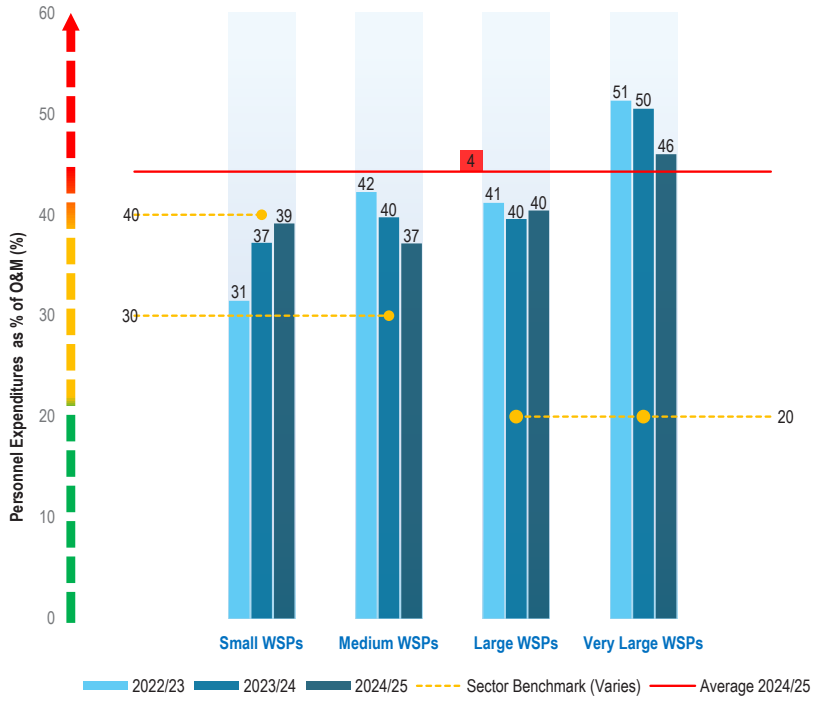
Cost Component	O&M Cost Coverage
O&M Cost	100%
O&M Cost + Debt Service + Capital Investments	101%-149%
Full cost Recovery	>= 150%

Total operation and maintenance costs include staff costs, Administration costs, Maintenance costs, levies and fees and direct operational costs. It excludes non-cash items such as depreciation and provisions. This indicator is a key benchmark for financial sustainability since its own revenue from water and sewer services are stable and predictable compared to grants and subsidies. Furthermore, a high OCCR is an indicator of high creditworthiness which could enable water utilities to obtain financing from the commercial banks.

j) Personnel Costs as a proportion of O&M costs

Personnel Costs as a proportion of O&M costs measures the share of operational expenditure that goes to salaries, wages, allowances, and contribution by the employer to statutory deductions. The sector benchmark guides what is considered an optimal balance for each size category.

Figure 3.15: Personnel Costs as a proportion of O&M Costs, %



Personnel costs remain one of the most dominant expenditures for water utilities, yet FY 2024/2025 brought encouraging signs of improvement. The average personnel cost ratio across 94 utilities dropped to 44%, down from 47% the previous year — a shift driven largely by efficiency gains among very large and medium utilities, which trimmed their ratios by 4% and 3% respectively. The large categories did not record a change. Small utilities saw an increment by 2%

Of the 94 utilities only 24 maintained personnel costs within the recommended benchmark as per the respective category size threshold. On the other hand, 70 utilities exceeded their respective benchmarks indicating constrained operating budgets or potential overstaffing.

Table 3.11: Proportion of WSPs meeting Personnel Cost Sector Benchmarks

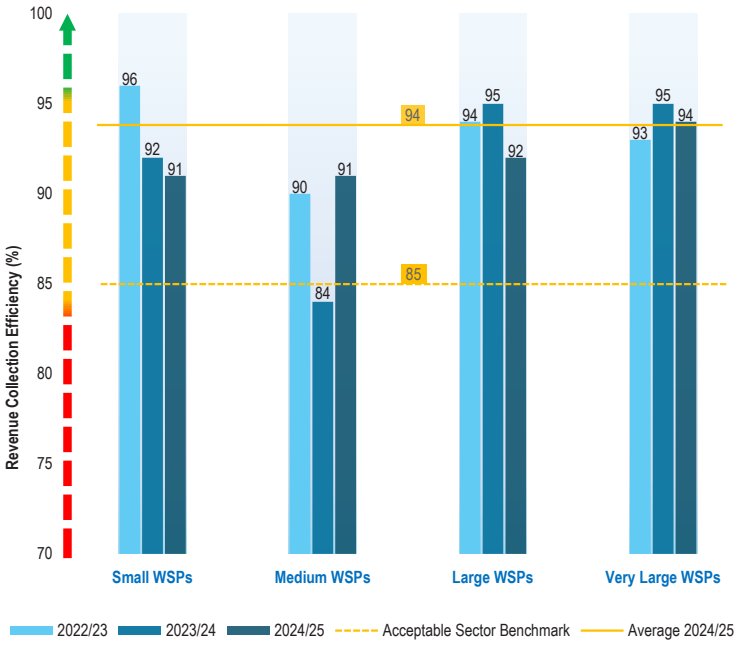
Utility Size Number	Average performance (%)	Sector benchmark (%)	Proportion of WSPs meeting Sector benchmarks
Very Large (18)	42	<30	11% (2 WSPs)
Large (39)	44	<30	10% (4WSPs)
Medium (13)	41	<40	54% (7WSPS)
Small (24)	45	<45	46% (11 WSPs)

Utilities that breach personnel cost benchmarks must carry out systematic workforce audits, enforce strict recruitment controls, and match staffing levels to actual service delivery demands. In parallel, utilities must restructure their spending to ensure adequate allocation toward essential non-staff expenditures such as maintenance, chemicals, and energy. Achieving this balance ultimately hinges on utilities' ability to grow their revenue streams through stronger billing practices, reduced non-revenue water, and tariff adjustments that accurately reflect the cost-of-service delivery.

k) Revenue Collection Efficiency

Revenue Collection Efficiency tracks how effectively a utility converts its billing into actual cash — measuring the share of invoiced revenue that is ultimately recovered from customers.

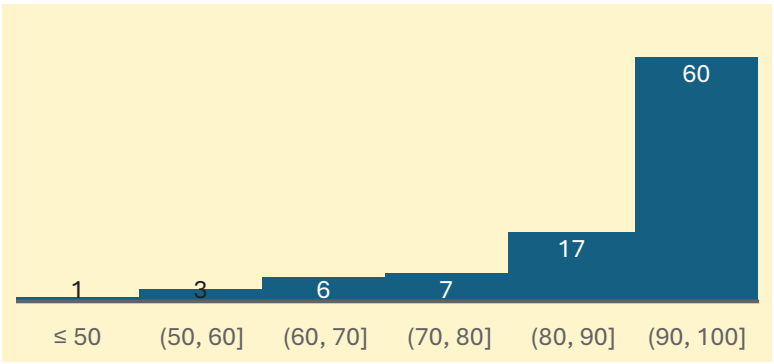
Figure 3.16: Revenue Collection Efficiency, %



Where a utility lands on this metric reveals more than just financial performance. A collection efficiency greater than 95% signals tight billing controls, disciplined enforcement, and a customer base that is both willing and able to pay. Sustained shortfalls on the other hand point to systemic billing inaccuracies, inadequate debt collection policies, and eroded customer satisfaction.

Average Revenue Collection Efficiency dropped slightly in 2024/25 to 93.82 from 94.57 in the previous period. Collection efficiency painted a mixed picture across utility categories in FY 2024/2025. While medium utilities stood out with a commendable 7% improvement, the gains were offset by declines across the remaining categories — large utilities recorded the steepest drop at 3%, while very large and small utilities each slipped by 1%.

Figure 3.17: Distribution of Revenue Collection Efficiency Performance



Low revenue collection efficiency points to systemic failures that erode customer trust and delay the realization of revenues billed. Utilities ought to enhance their billing efficiency and promptly address customer complaints to enhance the willingness of consumers to pay their bills on time. They should also adopt clear debt enforcement mechanisms.

l) Comparison of Average Tariff and Unit Costs

The comparison between the average tariff and the unit cost of service highlights two distinct scenarios: one in which the business is self-sustaining, and another in which it is not.

The comparison shows whether the tariff fully recovers the actual cost of producing and delivering each unit of water. When the average tariff exceeds the unit cost, the utility can cover operational costs, maintain assets, and service debts. If the unit cost remains high, the utility often relies on subsidies, experiences deteriorating infrastructure, and faces worsening service levels.

Grant dependency declined from 8% to 6% on the national average. All utility size categories recorded a reduction between FY 2023/24 and FY 2024/25, signaling encouraging progress toward financial self-sufficiency across the sector. Notably, smaller utilities continue to rely more on subsidies and grants than their medium and larger counterparts. This reflects the persistent funding gap that characterizes smaller service providers and highlights the need for targeted support mechanisms to accelerate their transition toward greater financial independence

3.5.3 Credit Worthiness Index

The drive toward universal water and sanitation access under SDG 6 is colliding with a stubborn fiscal reality. Public funding is tightening precisely as capital requirements are expanding. For water and sanitation providers, this tension makes diversification of financing no longer optional but existential. Commercial loans, blended finance structures, and public-private partnerships present credible pathways to bridging the sector's investment gap. Yet none of these doors open without a key: demonstrable creditworthiness, or a utility's proven capacity to meet its debt obligations consistently and reliably.

When lenders and investors evaluate a utility, they are not taking its word for it. They are running the numbers. They scrutinize historical financial performance, revenue stability, debt ratios, and cash flow adequacy to build a picture of lending risk. Utilities that present consistent revenue streams, disciplined financial controls, and lean operations are rewarded with favorable terms. Those carrying the weight of operational inefficiencies, weak financial governance, or grant dependency find themselves either shut out of credit markets or facing borrowing conditions that make financing counterproductive. In this context, creditworthiness is not merely a financial metric. It is the gateway to capital and a powerful internal reform catalyst. It compels utilities to sharpen governance and operational discipline in pursuit of investment readiness.

To add rigor and consistency to this assessment, a Creditworthiness Index has been created. It follows standard credit rating scales, from AAA to BB. The index uses 23 key financial and operational measures from verified WARIS data and audited financial statements for 2023/24. This gives a clear benchmark for comparing utilities. The tool shows exactly where utilities miss investment-grade status—and what they need to do to achieve it.

Table 3.13: CWI Scoring Parameters

Score	Indicative Credit Worthiness Level	Description
> 85	Creditworthy probably AAA category	Denotes the lowest expectation of default risk. Assigned only in cases of exceptionally strong capacity for payment of financial commitments. Highly unlikely to be adversely affected by foreseeable events.
71 to 85	Creditworthy probably AA category	Denotes expectations of very low default risk. Very strong capacity for payment of financial commitments. Not significantly vulnerable to foreseeable events.
61 to 70	Low-Creditworthy, probably in A category	Denotes expectations of low default risk. Capacity for payment of financial commitments is considered strong. Capacity may, nevertheless, be more vulnerable to adverse business or economic conditions than is the case for higher ratings. In a credit rating, this definition is equivalent to an A rating.
51 to 60	Low-Creditworthy, probably in BBB category	Indicates that expectations of default risk are currently low. Capacity for payment of financial commitments is considered adequate but adverse business or economic conditions are more likely to impair this capacity. In a credit rating, this definition is equivalent to a BBB rating.
41 to 50	Low-Creditworthy, probably in BB category	Indicates an elevated vulnerability to default risk, particularly in the event of adverse changes in business or economic conditions over time; however, business or financial flexibility exists which supports the servicing of financial commitments. In a credit rating, this definition is equivalent to BB rating.
31 to 40	Lower-Creditworthy, probably in B category	Indicates that material default risk is present, but a limited margin of safety remains. Financial commitments are currently being met; however, capacity for continued payment is vulnerable to deterioration in the business and economic environment. In a credit rating, this definition is equivalent to B rating.
≤ 30	No Rating awarded	Indicative of substantial to exceptionally high risk of default.

94 WSPs were assessed for creditworthiness in the financial year 2024/25. WSP and their performance are presented in Table 3.14.

Performance of creditworthiness improved for the second year in a row, recording an average of 39.3 from 37.2 in 2023/24 and 35.5 in FY 2022/2023. The improvement was primarily driven by better performance in economic efficiency indicators such as O&M coverage, personnel expenditure, and average tariff differential. The pace of improvement remains modest as the score of 39.3 still falls outside the threshold required to attract commercial financing. The gains would have been more pronounced had operational efficiency kept pace with financial discipline. Persistent weaknesses in service delivery metrics — including non-revenue water levels that average at 48% undermine the financial progress made.

Table 3.14: CWI Rating for WSPs

Rank	WSP	2023/24		2024/25		Variance
		Score	Rating	Score	Rating	
1	Isiolo	54	BBB	67	A	13.3
2	Thika	58	BBB	66	A	7.4
3	Nyeri	59	BBB	64	A	4.5
4	Nanyuki	61	BBB	63	A	2.9
5	Ngandori Nginda	48	BB	63	A	15.0
6	Ngagaka	56	BBB	62	A	6.7
7	Nakuru Urban	59	BBB	62	A	3.1
8	Othaya Mukurweini	39	B	62	A	22.5
9	Meru	61	A	62	A	0.6
10	Murang'a West	59	BBB	61	A	2.1
11	Naivasha	56	BBB	61	A	5.3
12	Nithi	47	BB	61	A	13.9
13	Mathira	63	A	61	A	-1.7
14	Eldoret	48	BB	61	BBB	12.8
15	Embu	53	BBB	60	BBB	7.5
16	Kakamega Urban	63	A	60	BBB	-3.0
17	Kisumu	51	BB	59	BBB	7.9
18	Kikuyu	34	B	57	BBB	23.1
19	Trans Nzoia			55	BBB	
20	Tachasis	49	BB	54	BBB	4.7
21	Ol kalou	41	BB	53	BBB	11.9
22	Ruiru-Juja	61	A	53	BBB	-8.1
23	Nyahururu	40	B	53	BBB	12.3
24	Kiamumbi	35	B	53	BBB	17.5
25	Nakuru Rural	50	BB	52	BBB	2.2
26	Murang'a Urban	55	BBB	51	BBB	-3.9
27	Runda	61	A	51	BB	-10.6
28	Tetu Aberdare	51	BB	49	BB	-1.4
29	Tatu City	61	A	49	BB	-11.9
30	Kiambu	46	BB	49	BB	3.6
31	Murang'a South	49	BB	49	BB	0.0
32	Gatamathi	31	B	48	BB	16.9
33	Nairobi	51	BB	48	BB	-3.5
34	Mavoko	36	B	47	BB	10.6
35	Gatanga	28	NO RATING	45	BB	16.9
36	Kapsabet Nandi	39	B	44	BB	5.3
37	Gusii	34	B	44	BB	10.1
38	Meru Rural	35	B	44	BB	8.9
39	Karuri	33	B	44	BB	10.6
40	Embe	29	NO RATING	43	BB	14.7
41	Kibwezi Makindu	36	B	39	B	3.5
42	Limuru	41	BB	39	B	-2.1
43	Namanga			39	B	
44	Rukanga	38	B	39	B	0.8
45	Gatundu	37	B	39	B	1.7
46	Kericho	37	B	39	B	1.7
47	Kirinyaga	32	B	38	B	5.8
48	Iten tambach	33	B	37	B	3.6
49	Oloolaiser	21	NO RATING	37	B	15.6
50	Bungoma (BWASCO)			36	B	
51	Chemususu	47	BB	35	B	-11.9
52	Garissa	51	BB	35	B	-15.8
53	Kathiani	50	BB	35	B	-15.3
54	Mombasa	42	BB	34	B	-8.2
55	Sibo	30	NO RATING	33	B	2.8
56	Kitui	22	NO RATING	32	B	9.7
57	Matungulu Kangundo	31	B	31	B	0.3
58	Kwale	32	B	31	B	-0.8
59	Turkana Urban	19	NO RATING	30	NO RATING	11.4
60	Kapenguria	36	B	30	NO RATING	-6.1
61	Wote	33	B	30	NO RATING	-3.6
62	Murugi Mugumango	30	NO RATING	29	NO RATING	-1.1
63	Amatsi	20	NO RATING	29	NO RATING	8.9
64	Machakos	32	B	29	NO RATING	-3.0
65	Narok	31	B	29	NO RATING	-2.8
66	Tavevo	38	B	28	NO RATING	-9.7
67	Kiambere Mwingi	26	NO RATING	28	NO RATING	2.8
68	Naromoru	35	B	27	NO RATING	-7.8
69	Homabay	23	NO RATING	27	NO RATING	3.9
70	Mwala	27	NO RATING	26	NO RATING	-0.6
71	Kyeni	43	BB	26	NO RATING	-17.3
72	Yatta	37	B	25	NO RATING	-11.9
73	Elwak	8	NO RATING	25	NO RATING	17.2
74	Nyasare	43	BB	24	NO RATING	-18.3
75	Nyandarua	25	NO RATING	24	NO RATING	-0.3
76	Marsabit	22	NO RATING	24	NO RATING	2.2
77	Busia	15	NO RATING	23	NO RATING	8.6
78	Malindi	41	B	23	NO RATING	-17.6
79	Olkejuado	37	B	23	NO RATING	-13.6
80	Githunguri	32	B	23	NO RATING	-9.4
81	Nol Turesh	20	NO RATING	22	NO RATING	2.0
82	Mandera	21	NO RATING	21	NO RATING	-0.6
83	Wajir	8	NO RATING	21	NO RATING	12.5
84	Kilifi Mariakani	27	NO RATING	20	NO RATING	-7.1
85	Tana River	24	NO RATING	18	NO RATING	-5.3
86	Samburu	28	NO RATING	17	NO RATING	-10.6
87	Migori	12	NO RATING	16	NO RATING	4.4
88	Lamu	18	NO RATING	16	NO RATING	-1.6
89	Kakamega Rural	18	NO RATING	16	NO RATING	-1.7
90	Kirandich	13	NO RATING	11	NO RATING	-1.4
91	Bomet	9	NO RATING	10	NO RATING	1.4
92	Mbooni	9	NO RATING	10	NO RATING	0.8
93	Oloitokitok	3	NO RATING	9	NO RATING	5.6
94	Two Rivers	46	BB	n.d.	NO RATING	
95	Tuuru	41	BB	n.d.	NO RATING	
96	Muthambi 4k	30	NO RATING	n.c.d.	NO RATING	

The analysis also considered the most improved and declined WSPs during the reporting period. Kikuyu was the most improved due to improved cost coverage and a reduction in debtors' days, while Nyasare recorded

the greatest decline due to a decline in the cost coverage ratio and increased NRW. The five most improved and five highest decliners are presented in Tables 3.16 and 3.17, respectively.

Table 3.15: CWI Performance Summary

Score	>85	71-85	61 - 70	51 - 60	41 - 50	31 - 40	<= 30
Rating	AAA	AA	A	BBB	BB	B	No RATING
2023/24	0	0	6	9	21	29	29
2024/25	0	0	13	13	14	18	35

Table 3.16: Creditworthiness Assessment Top Improvers

Rank	WSP	2023/24		2024/25		Variance
		Score	Rating	Score	Rating	
1	Kikuyu	34	B	57	BBB	**23.1**
2	Othaya Mukurweini	39	B	62	A	**22.5**
3	Kiamumbi	35	B	53	BBB	**17.5**
4	Elwak	8	NO RATING	25	NO RATING	**17.2**
5	Gatamathi	31	B	48	BB	**16.9**
6	Gatanga	28	NO RATING	45	BB	**16.9**

Table 3.17: Creditworthiness Assessment Bottom Losers

Rank	WSP	2023/24		2024/25		Variance
		Score	Rating	Score	Rating	
86	Kathiani	50	BB	35	B	**-15.3**
87	Garissa	51	BB	35	B	**-15.8**
88	Kyeni	43	BB	26	NO RATING	**-17.3**
89	Malindi	41	B	23	NO RATING	**-17.6**
90	Nyasare	43	BB	24	NO RATING	**-18.3**

3.5.4 Sector Financing

Kenya loses more than 0.9% of its GDP annually to inadequate water access. Approximately 20 million Kenyans lack access to basic drinking water, 34 million lack basic sanitation, and 33 million lack basic hygiene. To address this, the Government of Kenya launched the National Water and Sanitation Investment Plan (NAWASIP) in 2022, with the goal of achieving universal access to water, sanitation and hygiene (WASH) by 2030

Table 3.18: Scale of Investment Required

Total Investment Required (NAWASIP 2022–2030)	**995 billion**
Annual Financing Needed	**Ksh 100 billion/year**
Annual Financing Currently Mobilised	**~KShs 40 billion/year**
Current Financing Gap	**~Khs. 60 billion**

NAWASIP requires an annual investment of Ksh approximately 100 billion. However, Kenya currently mobilizes only about Ksh 40 billion per year, less than half the needed amount, leaving a persistent annual shortfall of approximately Ksh. 60 billion.

Table 3.19: Breakdown of NAWASIP Annual financing

Source	FY 2024/25 Annual
Government (National Treasury)	KShs. 30.4B
Others (Partners, donors, private sector)	Ksh. 4B
Water Tariffs (WSP Revenue for Water investment)	Ksh. 6B
Water Tariffs (WSP Revenue for Water investment)	Ksh. 6B
TOTAL MOBILISED (est.)	**~KShs 40B**
FINANCING GAP	**60B/year shortfall**

Opportunities for Commercial Banks

NAWASIP NAWASIP acknowledges that public resources alone cannot close the financing gap. Commercial banks are well-positioned to help bridge the deficit through the following opportunities:

- Lending to Water Services Providers (WSPs): As of 2022/23, 83 WSPs now hold a credit rating of 'B' or above—an impressive increase from 64 in the prior period, demonstrating their readiness for bank financing. Regulatory innovations like the WSP Creditworthiness Index and targeted lending toolkits—jointly developed by WASREB and the World Bank—remove barriers and signal a powerful moment for banks to step up.

- Results-Based Financing (RBF): Banks, including KCB, Sidian Bank, and Housing Finance, are already active in the RBF programme, backed by a 50% USAID guarantee. Equity Bank, Family Bank, and Co-operative Bank have expressed interest in expanding the pool for syndicated and blended finance products.

- Moreover, the World Bank's Kenya WASH Programme (2024–2030, US$458M) actively supports 33 WSPs in developing bankable project proposals and facilitating business-to-business introductions between utilities and commercial lenders. This support enables WSPs to access commercial financing, improve service delivery, and strengthen financial sustainability, with a target of leveraging US$8M in commercial financing.

- Non-Sovereign Borrowing: The Government is developing a policy framework enabling WSPs to borrow on a non-sovereign, non-guaranteed basis, opening a new, scalable channel for commercial credit without contingent liability to the national government.

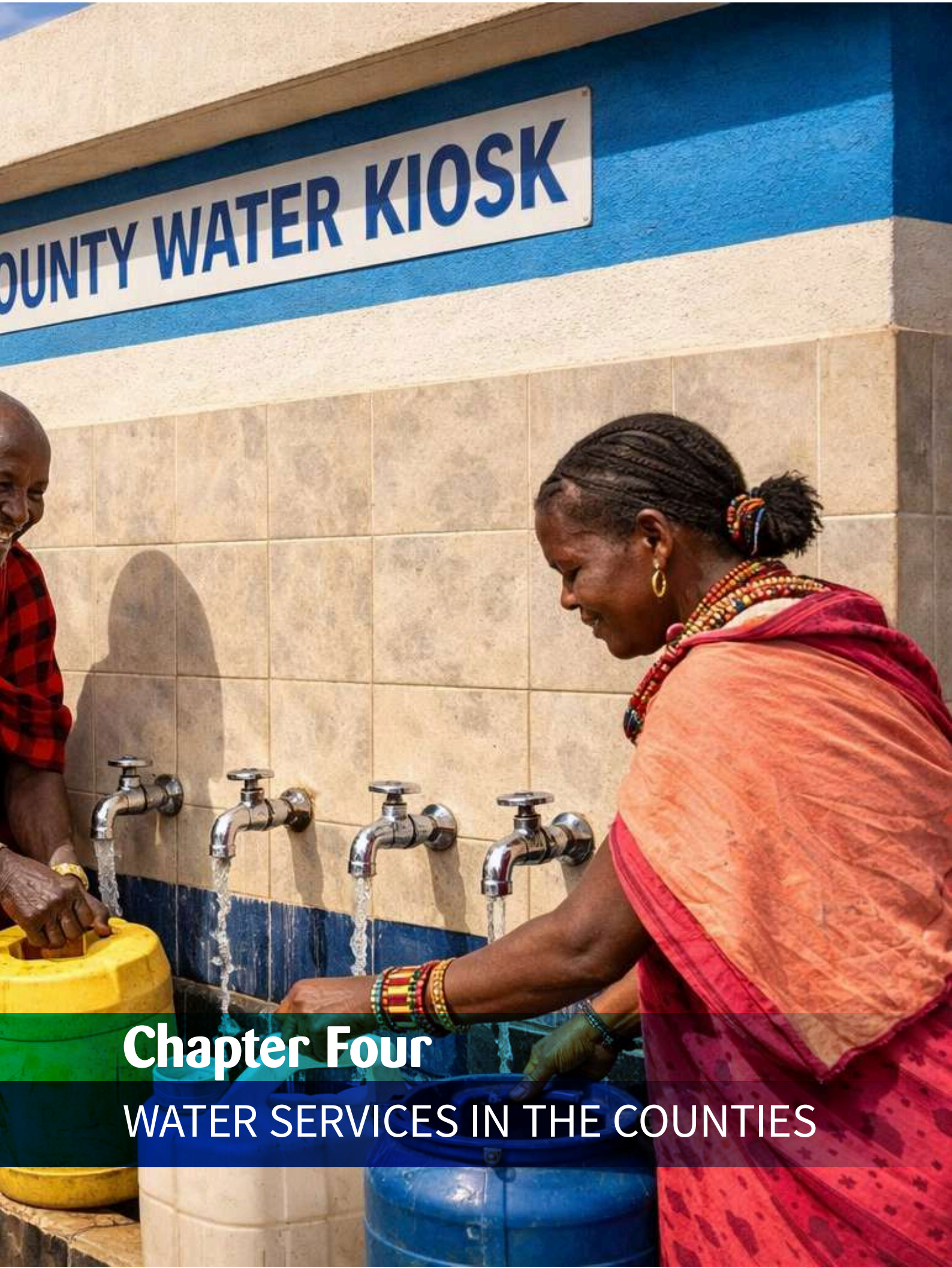
- Capital Market Instruments: Kenya's pension funds hold an estimated Ksh 1.5 trillion, and insurance companies hold Ksh 500 billion. Commercial banks can intermediate these pools through green bonds, infrastructure bonds, and structured water finance facilities aligned to ESG mandates.

- Non-Revenue Water (NRW) Financing: With NRW losses nearing 50% of water produced, banks can unlock measurable returns by financing efficiency upgrades—like metering and pipeline rehabilitation, under performance-based contracts. This is not just a lending opportunity; it is a chance to drive real sector-wide transformation and demonstrate environmental stewardship.

3.5.5 Compliance Status of Utilities

As Kenya enters the final stretch toward the Vision 2030 goal of universal access to water and sanitation, regulatory compliance by water utilities has emerged as a foundational determinant of sector performance. Evidence from WASREB's annual Impact Reports consistently shows that compliant utilities deliver better service outcomes, achieving improved water coverage, stronger financial sustainability, and more reliable supply. Compliance drives the governance discipline, operational rigor, and financial accountability that enable utilities to progressively meet their targets and attract the investment needed to expand services.
During FY 2024/25, compliance was evaluated against four key parameters: validity of licenses and tariffs, timely submission of reports through WARIS, and payment of regulatory levies.

I. License Compliance Status
All utilities must operate under a valid WASREB license, as required by section 85 of the Water Act. The license sets service delivery targets to drive performance improvement. Meeting these targets is a clear path to achieving Vision 2030 goals.



Chapter Four

WATER SERVICES IN THE COUNTIES

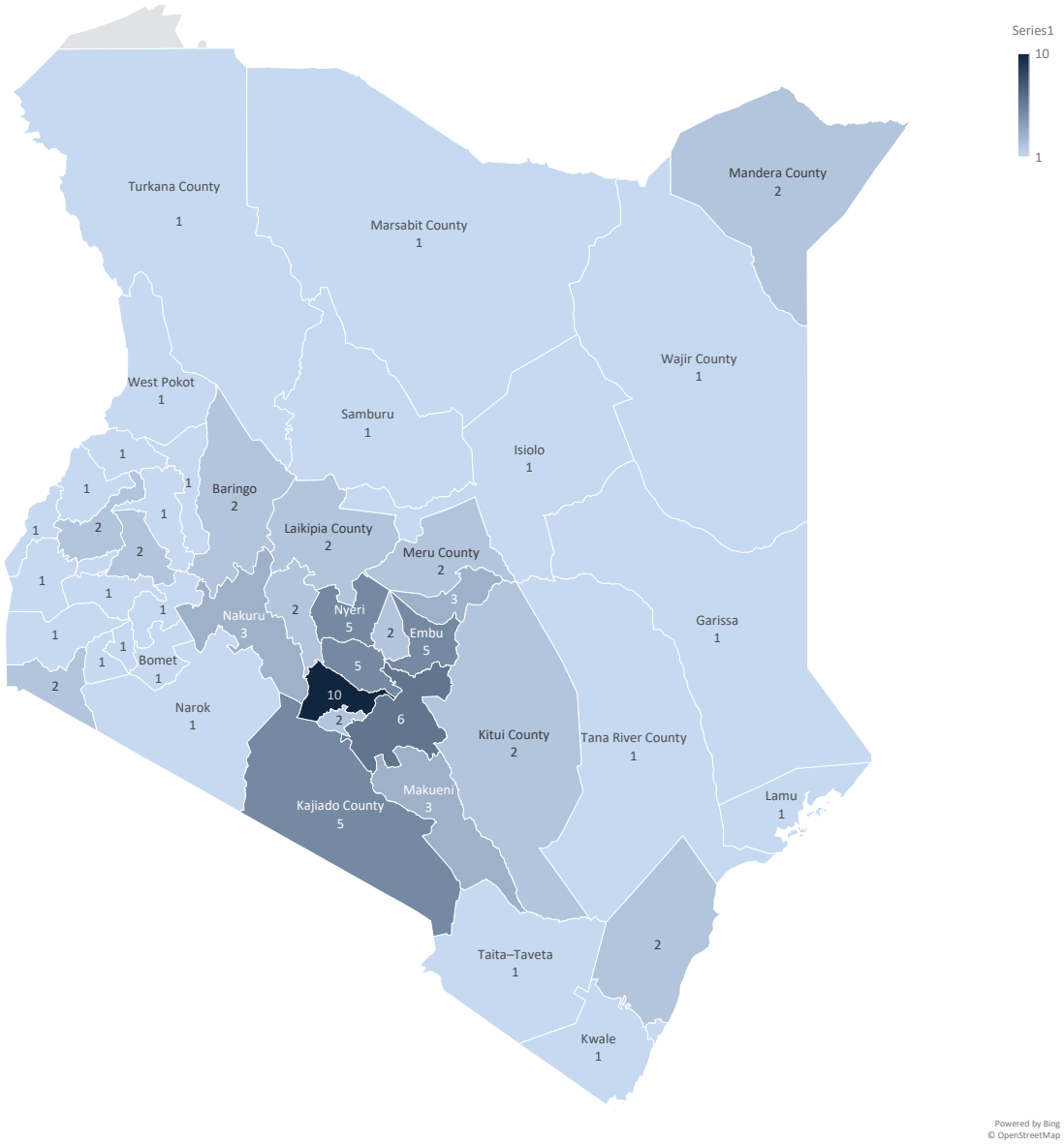
4.1 Water Services Distribution

Access to clean and safe water is recognised as a basic human right under the Constitution of Kenya, 2010. Responsibility for water supply and sanitation service provision rests with the country's 47 established counties.

The situation of water services in the counties is presented based on data from both public and private regulated utilities. The data also includes Small-Scale Service Providers (SSSPs) within the service area of utilities.

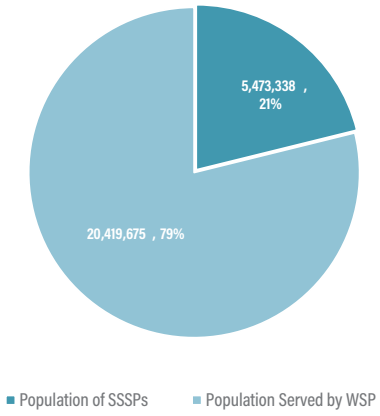
To further illustrate this distribution, Figure 4.1 gives an overview of the number of utilities established and distributed in the counties.

Figure 4.1: Distribution of Number of Water Utilities by Counties



26 counties are served by one regulated utility each. Meanwhile, Kiambu County is served by the highest number of regulated utilities at 10 (eight public and two private), followed by Machakos with six WSPs. During the reporting period, Bungoma and Trans Nzoia counties reported as two separate utilities, unlike the previous period. Additionally, the only cross-county WSP is Gusii Water and Sanitation Company, which serves Kisii and Nyamira counties, though these have also begun the process of de-clustering.

4.1.1 Regulation within Service Areas



The population in the entire service area of regulated utilities is 31.6 million out of the total national population of 54 million. This is 58.5% of the population, with a marginal decrease from 59%, reported in the previous period. The The increase in population is attributed to the growth in the service area of the formalized utilities. The population of the Small-Scale Service Providers within the regulated area of 759,636 was also included.The 2016 Water Act aligns the water sector with the Constitution's primary objective of devolution. The Act recognizes that water interrelated functions are a shared responsibility between the national government and the county government. It also gives priority to the use of abstracted water for domestic purposes over irrigation and other uses. With the constitution of Kenya 2010, the Water Act 2016 has obliged county governments to put in place measures to provide water services to rural areas that are considered not commercially viable.The measures referred to include the development of point sources, small-scale piped systems, and standpipes, which meet the standards set by WASREB and which may be managed by the community associations, public benefits organizations, or a private person under a contract with the county government.

County compliance with regulatory mandates

County water services are required to be provided through licensed Water Services Providers (WSPs). Operating any water service without a valid WASREB license constitutes a violation of the Water Act. Counties are therefore obligated to establish commercially viable WSPs that function independently and at arm's length from county governments. 45 WSPs recorded an O&M of greater than 100%, of which Kiambu, Meru, Embu, and Nyeri counties had more than half of the WSPs.

Persistent compliance gaps undermine county water service delivery and regulatory alignment. High non-revenue water, reflecting physical and commercial losses and metering inefficiencies, erodes WSPs' financial viability. Weak sanitation monitoring and political interference in operations further undermine compliance, autonomy, and efficiency. Poor financial ring-fencing, inadequate data reporting, and delayed tariff reviews threaten transparency, sustainability, and effective monitoring in county water services. Strengthened governance, improved monitoring, and enhanced financial discipline are essential for sustainable delivery.

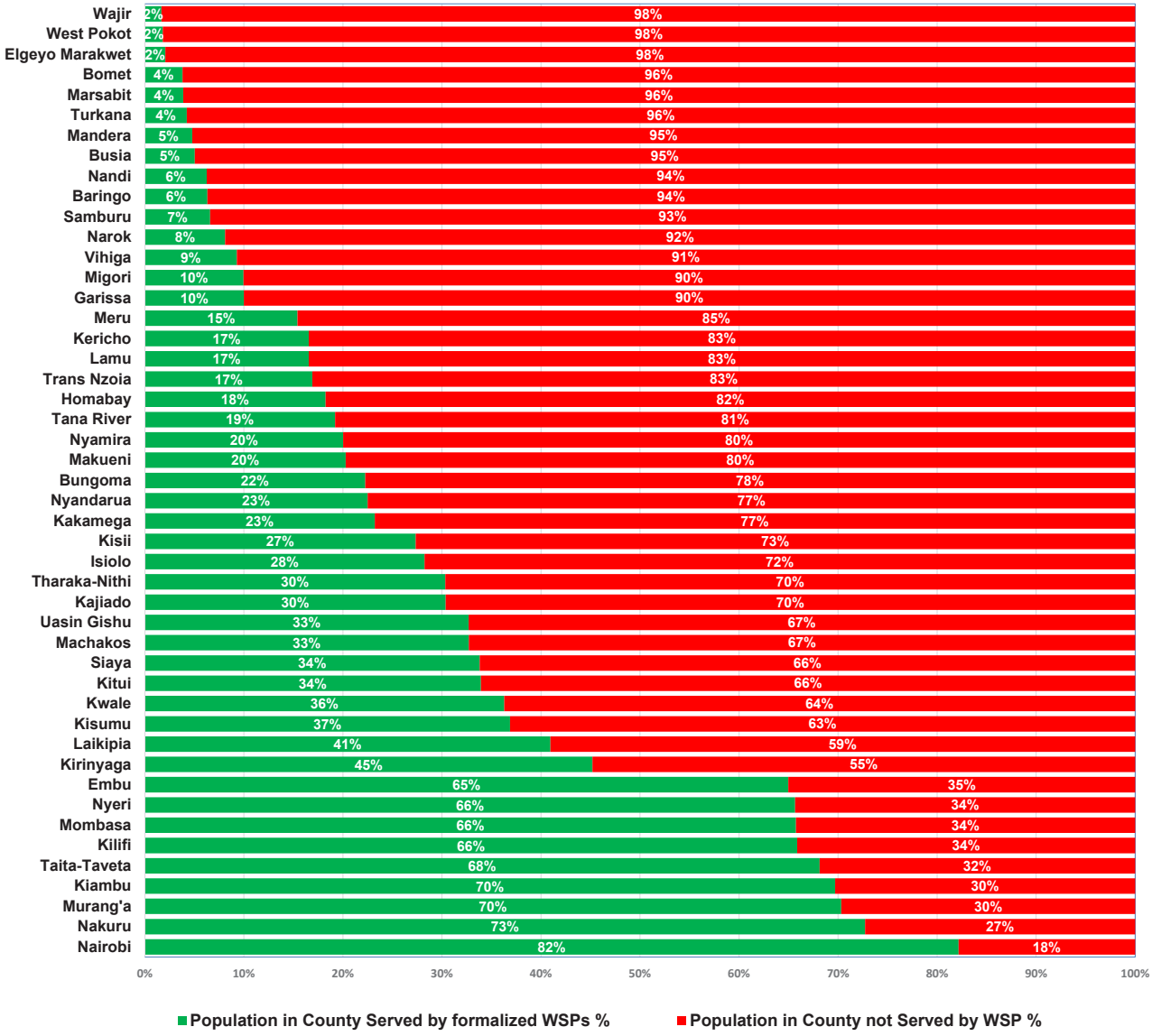


4.1.2 Access to Water and Sanitation Services

County-by-county analysis of water and sanitation coverage

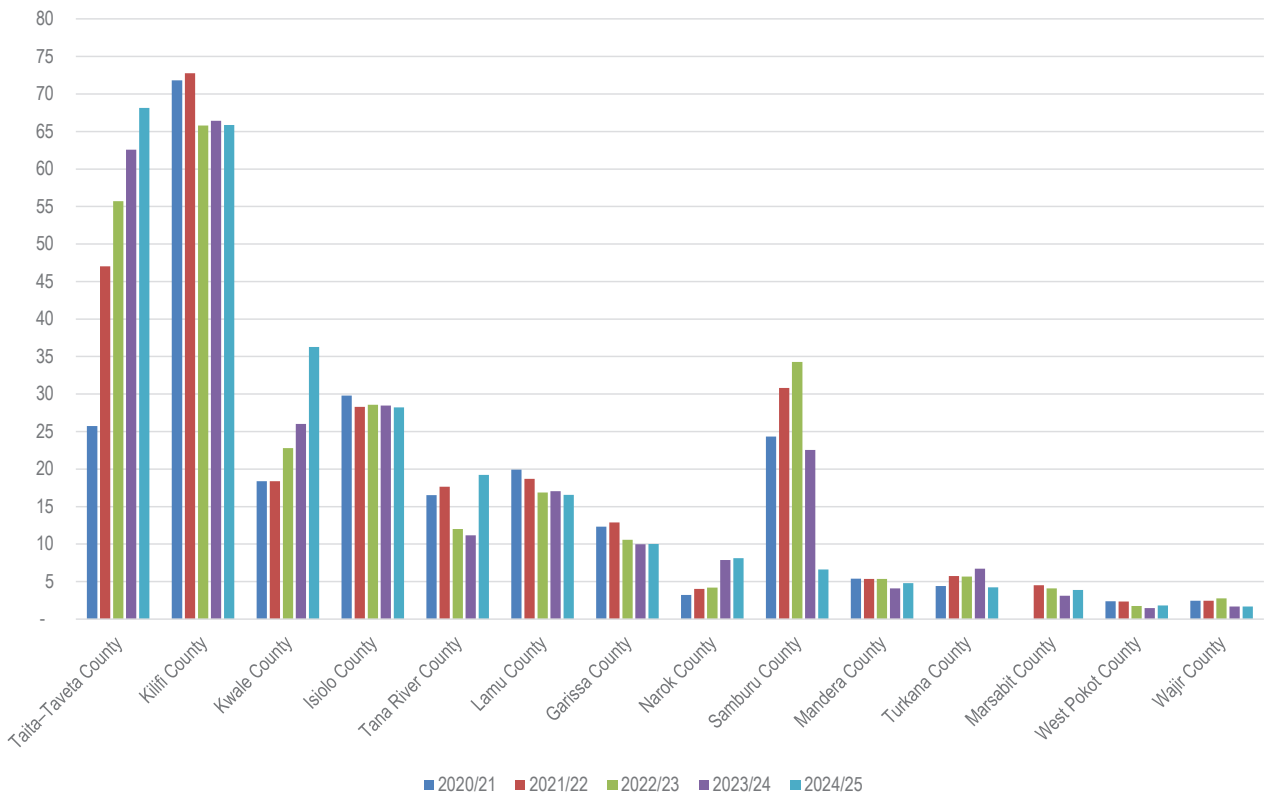
Access to water services shows significant variation across Kenya's 47 counties. The national population was estimated at 54 million. Of this population, only 31.6 million resided within the service areas of the 94 Water Services Providers (WSPs), and approximately 22.8 million people received water services, including 3.1 million served by small-scale and traceable third-party providers. This indicates that disparities in service coverage remain substantial.

Figure 4.2: Water Coverage within all counties



Total Sanitation, on the other hand, is reported at 93%, with most of the counties above the acceptable range of 80% basic sanitation coverage. The lowest sanitation coverage is in Makueni (Mbooni WSP –34%), Mandera (Elwak –21%), Kajiado (Olkejuado WSP –24%), and Wajir (Wajir WSP- 12%) counties. Sewerage coverage is stated as being present in 26 out of the 47 counties, which is said to represent 16% of the population. An estimated 14 million people reportedly use shared sanitation facilities, reflecting 46% of the population and impacting privacy and hygiene, while approximately 0.36 million (7%) are estimated to openly defecate. Operational efficiency of the systems is described as below 20% for collection, transportation, and disposal. Only 21 out of 47 counties are noted as relying on onsite sanitation.

Figure 4.4: Comparison in aggregated coverage for marginalized counties for the past 5 years



Strategies for improving service delivery in informal settlements

Strengthening water service delivery in informal settlements calls for coordinated technical, institutional, financial, and community-led strategies. It would be worth noting that WASREB continues to do pro-poor assessment of the utilities. Out of a total utility budget of Kshs 40.4 billion, Kshs 2.1 billion (5%) has been dedicated to supporting pro-poor initiatives. Through the assessment, utilities continue to be aligned with the Pro-Poor Water and Sanitation Services Guidelines requirement on allocation of at least 30% of the utility budget to pro-poor initiatives.

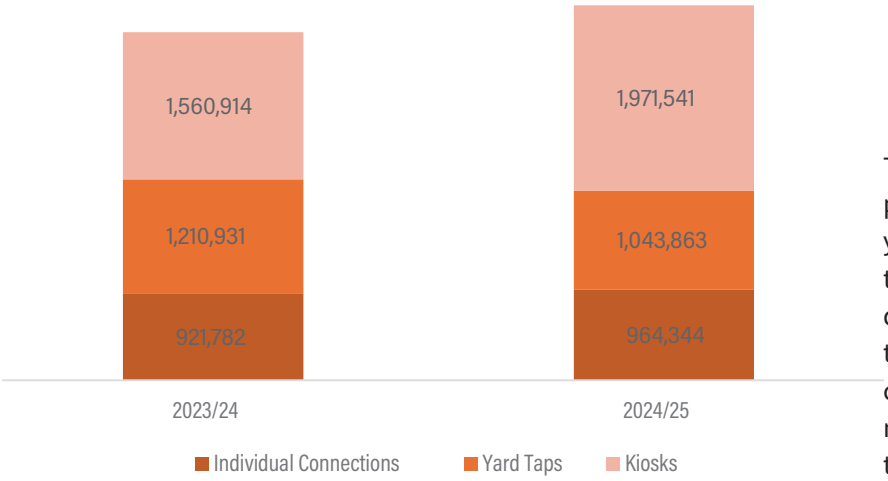
Table 4.1 Counties with WSPs that met the LIA threshold

County Name	Population in LIA, No.	Population Served in LIA with water services, No.	Utility Budget for LIA, Kshs
Busia	2,179	5,754	16,397,160
Embu	33,507	1,622	6,670,000
Garissa	25,817	16,326	30,000,000
Kakamega	110,761	109,674	116,000,000
Kericho	19,794	18,581	12,113,714
Kiambu	65,966	35,129	35,296,092
Kisii	240,765	4,427	3,500,000
Kisumu	304,229	279,212	321,203,208
Kwale	20,990	20,035	150,000,000
Lamu	12,642	8,009	11,938,952
Machakos	37,873	29,925	16,789,198
Mandera	66,906	15,562	28,688,599
Migori	17,192	3,642	6,040,000
Murang'a	28,923	20,522	23,491,714

County Name	Population in LIA, No.	Population Served in LIA with water services, No.	Utility Budget for LIA, Kshs
Nakuru	969,729	899,789	349,137,045
Nandi	42,295	2,784	8,178,250
Nyeri	127,961	125,096	300,420,000
Siaya	67,722	63,443	44,870,000
Tharaka-Nithi	2,199	1,787	2,860,831
Trans Nzoia	72,725	19,306	1,000,000
Uasin Gishu	36,545	23,027	3,303,493

An analysis of service through the kiosks and yard taps across the different consumer categories shows that while the number of people served through individual connections and kiosks increased, the population relying on yard taps declined.

Figure 4.5: Comparison of the different consumer categories' population changes within the LIAs at counties



This implies that the consumers previously served through yard taps have transitioned to individual connection. The decline in yard taps is higher than the increase in individual connection population. It may mean some are now being served through kiosks.

4.2 County Strategies for Water Services Development

Integration of water services in County Integrated Development Plans (CIDPs)

Integrating water services into County Integrated Development Plans (CIDPs) ensures that county-level investments in the water sector are aligned with broader development objectives. Aligning these plans with key national frameworks—such as WASREB KPIs, the Water Act 2016, MWSI priorities, and Vision 2030—supports effective budget allocation for water and sanitation projects, strengthens compliance with regulatory requirements, enhances coordination among departments including water, health, and urban planning, and improves counties' capacity to secure funding from both development partners and the national government.

All the 47 counties include water supply and sanitation programmes in their CIDPs, because county water planning is anchored in County Integrated Development Plans linked to county water master plans, reflecting the devolved units responsibility for water service provision. These projects are typically organized under sectoral headings such as Water and Sanitation, Environment and Natural Resources, or Infrastructure and Urban Development, depending on the county's administrative structure and planning framework. Across counties, the planned interventions share common characteristics and focus areas. They include drilling and equipping of boreholes to expand access in underserved areas, construction and extension of water supply pipelines to improve distribution networks, and development or upgrading of water treatment plants to enhance water quality. Counties also prioritize sewerage systems to improve sanitation coverage, construction of water pans and small dams to support water storage—particularly in arid and semi-arid regions—and implementation of non-revenue water (NRW) reduction programmes aimed at improving operational efficiency, minimizing losses, and strengthening the financial sustainability of water service delivery. These interventions collectively

demonstrate a consistent national planning pattern in which counties use CIDPs as the primary vehicle for expanding equitable, reliable, and sustainable water services.

Specifically, the counties that featured water programmes and projects in their CIDPs include Makueni, Kitui, Machakos, Kiambu, Kirinyaga, Kajiado, Nakuru, Elgeyo-Marakwet, Siaya and Narok.

Table 4.2: Spotlight on selected counties CIDP programmes on water

WWDA	County	Selected programmes/projects included in CIDP
Tanathi	Makueni	Integrated Water Harvesting, Storage, Treatment & Distribution, Urban and Rural Water Governance
Tanathi	Kitui	Water infrastructure development
Tanathi	Machakos	Water supply expansion & dams
Athi	Kiambu	Water connectivity prioritized
Tana	Kirinyaga	Provide sustainable urban center liquid waste management services
Tanathi	Kajiado	Increase access to safe and affordable water for domestic, agriculture and institutional consumption
Central Rift	Nakuru	County-wide development including utilities
North Rift Valley	Elgeyo-Marakwet	Water supply programmes
Lake Victoria South	Siaya	Infrastructure & service delivery including water
Central Rift	Narok	Resource-based development including water

4.2.1 County water policies and legal frameworks

The Water Act 2016 establishes the legal basis for county governments to manage water services, focusing on ensuring access and sanitation in underserved areas. The Water Services Regulatory Board (WASREB) oversees compliance with standards for quality, cost, and customer service, and provides guidance on clustering Water Services Providers to boost efficiency.

The County Governments Act 2012 outlines the functions and powers of county governments, emphasizing the need for sustainable water service delivery policies. Additionally, WASREB has issued specific guidelines to maintain water service standards in rural and underserved areas, aiming to professionalize and formalize their operations, ensuring sustainable investment and the progressive realization of the right to water. Regular performance benchmarking by WASREB helps ensure regulation compliance and identifies areas for improvement.

If county water policy and legal frameworks are unavailable, the Rural water services rollout can proceed as guided by Legal Notice 54, Water Service Regulations, 2025. It would be worth noting that the counties are required to align the County Policies, County Water Strategies, and the respective County Acts with the Water Act 2016.

Implementation of the Kenya Water, Sanitation and Hygiene (K-WASH) program

The K-WASH Program is a Program-for-Results (PforR) initiative targeting 33 Water Services Providers (WSPs) across 19 counties. Under Result Area 3, where WASREB plays a central role, the program seeks to strengthen compliance with regulatory requirements and improve utilities' operational cost coverage through performance-based incentives. To qualify for the initial disbursement of Kshs 45 million, participating utilities must demonstrate compliance with the following conditions: possession of a valid tariff and operating license, an approved Performance Improvement Action Plan (PIAP), a board compliant with WASREB standards, a performance contract with the county government, and publication of the latest audited financial statements on the utility's website. In addition, utilities that fully achieve the Operational Cost Coverage Ratio (OCCR) targets set out in their PIAPs are eligible for additional performance-based financing of up to Kshs 87 million, thereby directly linking funding to measurable improvements in financial sustainability and regulatory compliance.

4.2.2 Utility Operational Efficiency at County Level

a) NRW monitoring

Non-revenue water (NRW) represents the volume of water produced but not billed to consumers as a result of losses arising from leaks, illegal connections, or metering inaccuracies. High NRW levels weaken the financial stability of Water Services Providers and reduce the overall effectiveness of water supply systems. During the reporting period, however, NRW performance varied considerably across counties, with levels ranging from 23% in Meru to 77% in West Pokot. According to sector guidelines, NRW levels below 20% are considered optimal, those between 20% and 25% acceptable, and any value exceeding 25% unacceptable. Notably, 16 counties recorded NRW equal to or greater than 50%.

Figure 4.6: Non-Revenue Water Within the Counties

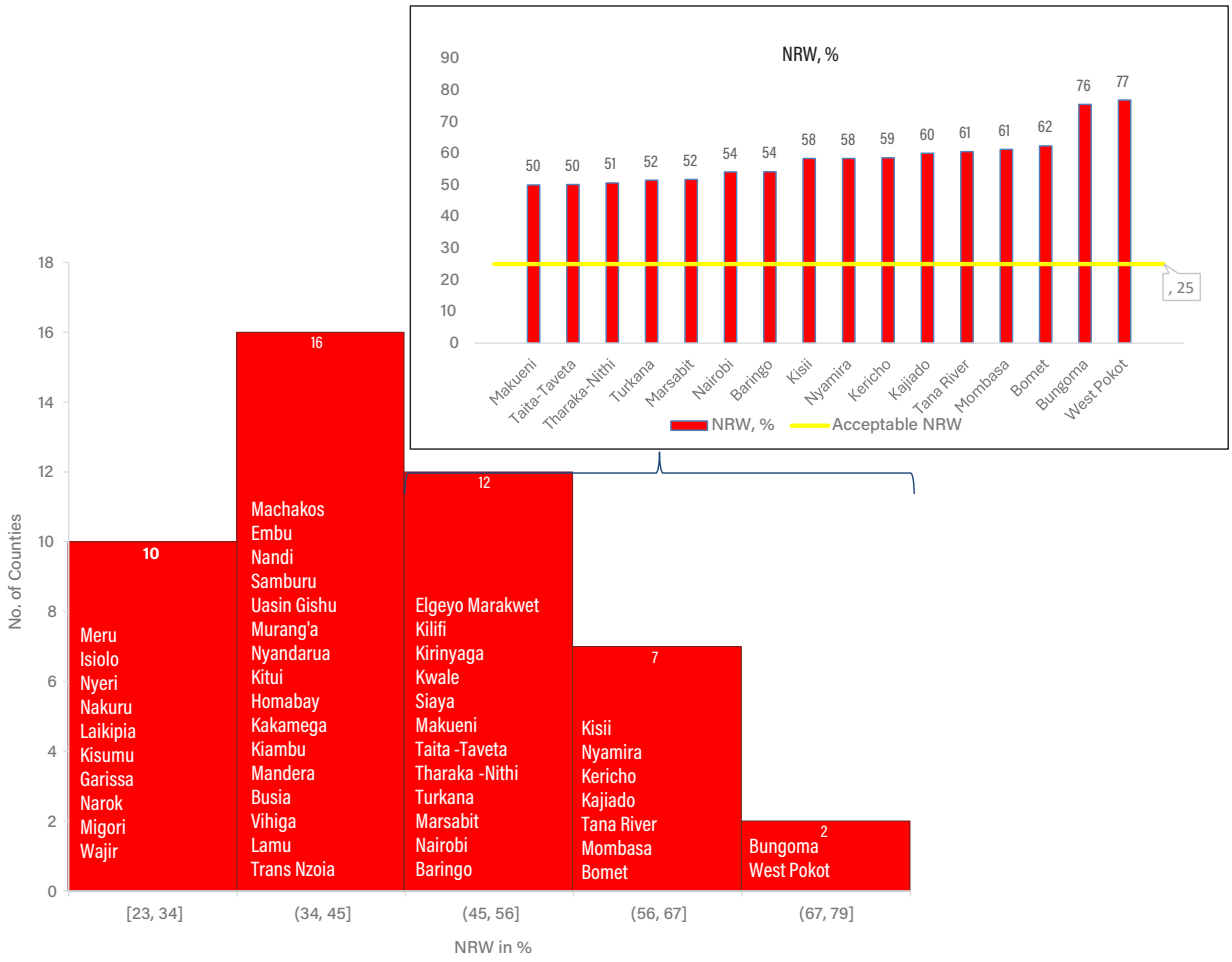


Table 4.3: The Five Stages of NRW and Recommended Reduction Measures

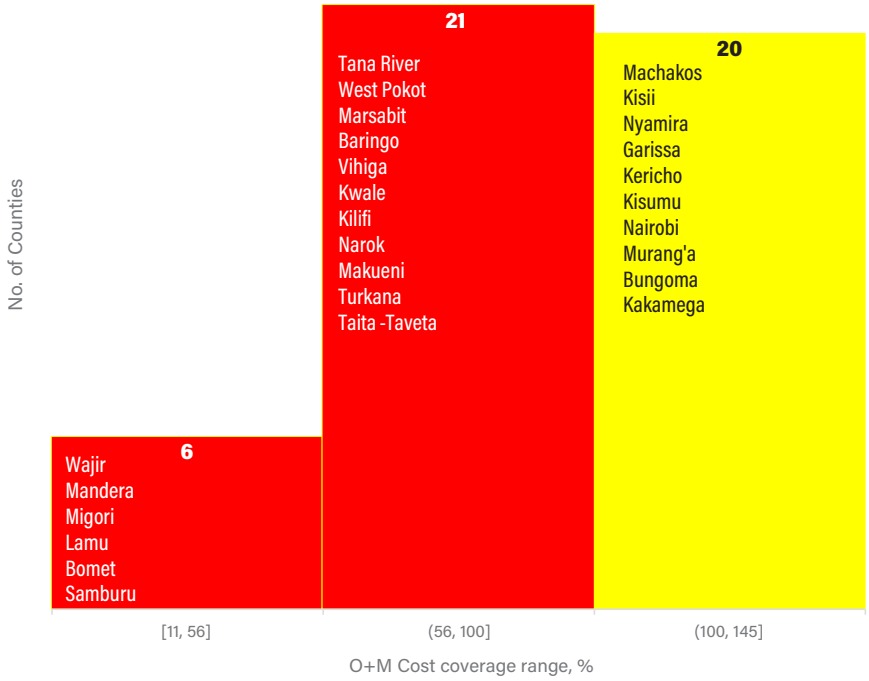
Stage (Zone)	NRW Range	Recommended Measures (GIS and NRW Monitoring being constant)
1 (Red)	≥ 40% or unreliable	- Accurate functional production meters (tested &calibrated) - Elimination of major commercial losses incl. illegal consumption - 100% metering and CIS to eliminate unbilled customers - Timely repair of burst, surface leaks and overflows
2 (Yellow)	30% < NRW < 40%	- Intensify Stage-1measures through routines - Zoning and establishment of functional district metered areas - Pressure management and reduction underground leaks; priority areas - Mapping and monitoring of burst and leakages - Upgrade Pipe materials and fittings to recommended standards - Minimize commercial losses; meter reading, billing handling errors
3 (Green)	24% < NRW ≤ 30%	- Intensify Stage-2 measures through routines - Reduction of underground leaks - Replacing pipes in bursts and leaks prone areas (mapped in stage 2)
4 (Blue)	20% < NRW ≤ 24%	- Intensify Stage-3 measures - Accelerate and complete pipe replacements
5 (Purple)	NRW ≤ 20%	- Intensify Stage-4 measures - Maintain facilities and skills to sustain the achieved low NRW

Source: Non-revenue water management guidelines 2022 – Volume 1 Guidelines

b) O&M cost recovery performance

Operational performance varied greatly across counties. Many Water Services Providers (WSPs) could not recover their full Operations and Maintenance (O&M) costs. Some counties, such as Mandera, had an average recovery rate as low as 11%, the lowest observed. Of the 47 counties, 25 had water WSPs that achieved O&M cost recovery rates above 100%. Among these, Garissa County had the highest recorded rate at 103%. The remaining 22 counties did not reach full O&M cost recovery.

Figure 4.7: O&M cost recovery performance



Low Operations and Maintenance (O&M) cost-recovery weakens water service sustainability by limiting providers' ability to maintain infrastructure, ensure reliable service, improve efficiency, and expand coverage. Ongoing revenue shortfalls also increase reliance on outside funding and jeopardize financial and operational stability.

The analysis of county-level water service performance included an analysis of personnel expenditure as a proportion of total Operations and Maintenance (O&M) costs.

Status of rural water regulation in counties with rural WSPs

4.3.1 Formalization of Rural, Underserved and Small-Scale Service Providers – Service Delivery Models, Requirements and Financing

Formalizing service provision in rural areas, underserved settlements, and for small-scale providers needs a coordinated institutional, regulatory, and financing framework. This helps shift from fragmented community-managed systems to sustainable, regulated service delivery. Steps include allocating clear service areas and integrating small providers into licensed arrangements. It is also necessary to strengthen county oversight, set minimum service standards, and introduce performance monitoring. Structured community engagement is key to transitioning assets and management. Capacity building and professionalizing operations are required, as is developing a cost-reflective, pro-poor tariff framework. Establish financing mechanisms to address the cost-recovery gap in rural areas. Better data collection, reporting, and benchmarking are essential for oversight and ongoing improvements. Together, these actions expand regulation to underserved areas, strengthen governance, and support sustainable, equitable delivery of water and sanitation services.

4.3.2 Role of WASREB

WASREB plays a central role in formalizing and regulating rural, underserved, and small-scale water service provision in Kenya. Sections 72(1)(a) and (p), read with section 94(3) of the Water Act, mandate WASREB to set standards and provide guidance to County Governments on the provision of basic water services in rural and marginalized areas. In rural contexts, WASREB develops regulatory frameworks and guidelines to support structured service delivery. These include the Guideline for the Provision of Water and Sanitation Services to Rural and Underserved Areas (2019), licensing frameworks for small-scale service providers, and tariff-setting guidelines.

WASREB also licenses Water Services Providers, including rural providers. It sets minimum service standards to ensure quality, reliability, and affordability. Through systems such as WARIS and MajiData, WASREB collects operational data to monitor performance. This data helps to guide tariff reviews and support benchmarking of rural and small-scale providers. Additionally, WASREB supports county governments and service providers through capacity building, reporting templates, and technical guidance. This support helps facilitate the transition from community-managed schemes to regulated service provision. The Board further promotes stakeholder coordination and advocates for sustainable financing mechanisms, including cost-gap subsidies. WASREB also encourages professionalization through corporatized and aggregated rural service delivery models. These roles position WASREB as a key institution in expanding regulation to rural and underserved areas. WASREB ensures sustainable, accountable, and equitable water service delivery.

4.3.3 Challenges experienced by Rural Schemes

Rural water schemes in Kenya are often unaffordable and unsustainable because of high service delivery costs. Decentralized systems, complex asset ownership, and multi-use water systems together increase operational and maintenance expenses, forming the core barrier to both affordability and sustainability.

Additionally, rural areas often have low population densities, resulting in higher per capita costs and limited economies of scale. Revenue collection is another challenge, as tariffs are typically set at low levels to ensure affordability, but this restricts the funds available for maintenance and operations. High levels of non-revenue water due to leaks, theft, or inefficient systems further exacerbate financial constraints.

The lack of professional management is a significant barrier, as many rural water schemes are managed by community-based committees or individuals without technical expertise, resulting in poor governance, inadequate maintenance, and minimal monitoring and accountability. Funding and investment are insufficient, leaving a cost-recovery gap between affordable tariffs and the real cost of reliable service.

Subsidies and funding mechanisms are often short-term and unpredictable, with limited access to private sector finance, constraining sustainable investment in rural water services. Community engagement challenges, such as legacy asset ownership issues and resistance from communities, complicate the transition to regulated service provision. Policy and governance gaps, including misalignment between national and county governments and unclear roles, create inefficiencies in planning, development, and management. Addressing these challenges requires coordinated efforts to professionalize service delivery, establish cost-gap subsidization funds, strengthen monitoring and accountability, align policies across government levels, and ensure effective community engagement and stakeholder collaboration for the long-term sustainability of rural water schemes.

4.3.4 Role of County Governments in Rural Water Services

County governments are central to the success of rural water regulation in Kenya. Their leadership, coordination, and commitment are essential for improving access, quality, and sustainability of rural water services, while ensuring inclusiveness and compliance with constitutional rights to water and sanitation.

County governments are the primary function owners of water and sanitation services in rural areas, as mandated by Schedule 4 of the Constitution of Kenya. They are responsible for overseeing Water Services Providers operating within their jurisdictions and for ensuring compliance with regulatory requirements and service standards set by the regulators. In this role, counties are also tasked with allocating service provision areas for rural water systems, which involves mapping service areas and rationalizing overlaps in order to avoid duplication and wastage of resources. To support this function, WASREB's geospatial MajiData system is intended to assist counties in documenting and mapping small-scale water systems.

Counties, led by County Executive Committee Members for water affairs and County Water Directors, are required to spearhead the collection of operational data from rural Water Services Providers and to submit aggregated monitoring information to WASREB, ideally through the Water Regulatory Information System (WARIS). Beyond data collection, counties are expected to lead capacity development efforts aimed at professionalizing rural water service delivery. This includes training personnel in water and sanitation management, establishing effective management structures, and adopting appropriate technologies to improve operational efficiency.

Counties must engage communities about new service arrangements, address concerns, and foster acceptance for the shift from community-based to regulated provision. They ensure genuine consultation, prevent elite capture, and respect past community contributions.

To strengthen service delivery, counties are encouraged to establish corporatized entities to manage rural water services or to facilitate other service delivery models that are appropriate to the local context. In all cases, counties must ensure a clear separation between ownership and management of service delivery, while holding Water Services Providers accountable for sustainable and efficient operations. Counties are also responsible for monitoring and evaluating rural water service delivery, taking corrective actions where necessary, addressing community concerns, and documenting lessons learned for sharing with WASREB to inform improvements in the regulatory framework.

In addition, counties must develop a clear vision, policy, and legal framework for rural water services that aligns with the national policy framework and the provisions of the Water Act, 2016. Where county-specific frameworks are not yet in place, counties may proceed using guidance provided under the Water (Services) Regulations, 2025 (Legal Notice No. 54 of 2025). Finally, counties are expected to facilitate sustainable funding mechanisms by establishing and operationalizing cost-gap subsidization funds to address the financial challenges of rural water service delivery. They must also support tariff-setting processes, ensure public acceptance of tariffs, and build partnerships with donors, non-governmental organizations, and private sector actors, while ensuring alignment with government priorities and avoiding governance-related risks.

Table 4.4: Combined Service Delivery Models and Formalization Requirements

Service Delivery Model	Where Applied	Institutional Arrangement	Situation Where This Might Apply
WSP takes over small water system	Within WSP service area	Existing licensed WSP absorbs scheme	Small community scheme located within an existing WSP service area but lacking technical and financial capacity
WSP delegates responsibilities to WUA	Within WSP service area	Delegated management under WSP oversight	Functioning community scheme where WSP retains oversight, but local management remains beneficial
WSP contracts private operator	Within WSP service area	PPP / management contract	Scheme requiring operational efficiency or specialized expertise not available within WSP
WUA becomes a WSP	Within WSP service area	Community provider formalized and licensed	Strong and organized WUA capable of operating independently under regulation
County establishes Rural WSP (RWSP)	Outside WSP service area	County corporatized rural provider	Rural areas not covered by existing WSPs requiring structured service delivery
RWSP takes over small water system	Outside WSP service area	Rural WSP aggregates schemes	Multiple fragmented rural schemes requiring aggregation for sustainability
RWSP delegates to WUA	Outside WSP service area	Hybrid community-professional model	Community-managed schemes requiring professional oversight but retaining local involvement
RWSP contracts private operator	Outside WSP service area	Rural PPP arrangement	Remote rural schemes needing specialized operations or investment
WUA becomes WSP (outside area)	Outside WSP service area	Independent rural provider	Isolated rural scheme capable of operating independently where no WSP exists

4.3.5 Counties Implementing Rural Guidelines

Counties that have initiated implementation of rural water service provider models include Garissa, Isiolo, Kakamega (licensed and operational), Meru (licensed and operational), Laikipia, Makueni, Marsabit, Turkana, Uasin Gishu (established but yet to be licensed) and Nakuru (licensed and operational). Most counties are still in the process of operationalizing rural providers, with Kakamega, Meru and Nakuru showing the most advanced implementation.

Table 4.5: Financing Mechanisms Supporting Formalization

Financing Instrument	Purpose	Status
1. Consumption levy (3%)	Address cost recovery gap	Not yet operationalized
2. County subsidization funds	Support underserved areas	Proposed but not operational
3. National contingency fund	Support utilities	Proposed
4. Results-based financing	Performance-based support	Limited for rural providers
5. Tariff setting (2023 guideline)	Cost-reflective sustainable tariffs	Operational
6. Household contributions	O&M sustainability	Applicable
7. Private sector financing	Infrastructure and operations	Emerging
8. Donor / partner support	Start-up financing	Ongoing (K-WASH, STAWI, WKWP)

K-WASH Program

The K-WASH Program is a Program-for-Results (PforR) initiative targeting 33 Water Service Providers (WSPs) across 19 counties. Under Result Area 3, where WASREB plays a central role, the program seeks to strengthen compliance with regulatory requirements and improve utilities' operational cost coverage through performance-based incentives.

KWASH targeted counties with utilities that were least compliant with regulatory requirements. These include: Mandera, Garissa, Samburu, Turkana, Baringo, Migori and Kapenguria. Others with moderate level of compliance such as Vihiga, Makueni and Narok were also in the list. The success of the programme to date is assessed primarily by the number of utilities that have fully complied with the five defined regulatory requirements. In addition, success is evaluated based on measurable progress toward regulatory compliance, particularly whether utilities have submitted applications for tariffs and licences, and the extent to which the programme is supporting and accelerating the completion of these regulatory processes.

Ot the 33 utilities under KWASH, 27 utilities developed performance improvement action plans (PIAPs). The PIAPs enabled the utilities conduct a self-diagnosis of their poor performance and formulate interventions that would help them improve their performance with emphasis on improving their cost coverage. The program is designed in such a way to incentivize achievement of their OCCR targets thereby improving the financial well-being of these utilities which have been struggling.

Formalization requires WASREB to expand regulation to non-conventional providers, develop simplified licensing frameworks, introduce rural performance indicators, and strengthen monitoring of small-scale providers. It also requires coordination with counties on service area allocation, corporatization of rural providers, tariff approvals, and implementation of financing mechanisms. These service delivery models provide structured pathways for transitioning community-managed schemes into regulated service provision, improving service reliability, strengthening governance, and supporting progressive realization of universal access to water and sanitation.



Chapter Five

CONCLUSION AND WAY FORWARD

5.1 Conclusion

Kenya's water and sanitation sector is at a critical juncture. Recent progress shows that regulatory oversight, targeted investments, and improved utility performance are delivering tangible results. Expanding service coverage, improved efficiency, and stronger governance indicate the sector is advancing toward national and global commitments.

However, this progress remains uneven and insufficient to achieve universal access by 2030 without a significant acceleration in implementation. Persistent disparities between urban and rural service levels, slow progress in sanitation coverage, and high levels of Non-Revenue Water continue to undermine sector performance. These challenges highlight a critical reality: the sector is no longer constrained by policy limitations, but by gaps in execution.

This report confirms that strong governance, enforced regulation, and disciplined utilities drive results. Weaknesses in any area stalls progress. Success by 2030 now depends on the sector's ability to turn commitments into sustained, measurable improvements.

5.2 Strengthening Governance and Accountability

Governance remains the most critical driver of performance across Water Services Providers. Utilities that demonstrate strong leadership, transparent management practices, and adherence to regulatory requirements consistently deliver better outcomes in service provision, financial management, and customer satisfaction. To drive meaningful change, all stakeholders must urgently reinforce accountability at both the utility and county levels. Regulatory agencies should rigorously enforce compliance with licensing conditions, tariff implementation, and reporting obligations. County governments must step up oversight of utilities, ensuring investments align with sector priorities and that governance structures are effective. Immediate action from all parties is essential to achieve lasting progress.

Without strengthened governance, continued investments in infrastructure will not translate into sustainable improvements in service delivery.

5.3 Ensuring Sustainability of Sector Investments

Significant investments have been made in water and sanitation infrastructure across the country. While these investments have contributed to expanding service coverage, their long-term sustainability remains at risk due to weaknesses in asset management and maintenance practices.
The sector must twin infrastructure expansion with sustainability of existing and developed systems. This requires strengthening asset management frameworks, ensuring adequate allocation of resources for operations and maintenance, and improving financial discipline within utilities. Sustainable infrastructure is not defined by its construction, but by its continued functionality and reliability over time. Failure to protect and maintain existing assets will erode the gains made and increase the cost of future interventions.

5.4 Driving Utility Efficiency and Financial Health

Operational inefficiencies remain a major barrier to sector performance. Excessive water losses, irregular billing, and poor revenue collection undermine utilities' ability to function sustainably and reinvest in service enhancements. Utilities must shift toward efficiency-driven operations by enhancing metering and billing accuracy, strengthening revenue collection, and optimizing operational costs like energy consumption to achieve financial sustainability. Utilities that are financially viable are better positioned to maintain infrastructure, expand services, and attract investment. Strengthening financial health is therefore not only a utility-level priority but a sector-wide imperative.

5.5 Strengthening Climate Resilience and Water Security

Climate variability now presents one of the most significant threats to water service delivery. The increasing frequency of droughts, variability in water sources, and surging demand for water are placing unprecedented, immediate pressure on existing systems. The sector must adopt a more resilient and forward-looking approach to water resource management. This includes scaling up investments in water storage infrastructure, strengthening protection of water catchments, and integrating climate risk considerations into infrastructure planning and design. Water security can no longer be treated as a long-term goal; it is an immediate priority that demands prompt, coordinated action to underpin the sustainability of all sector gains.

5.6 Strategic Priorities Toward 2030

Achieving universal access to water and sanitation services by 2030 will require a decisive shift from gradual progress to accelerated and results-driven implementation. The sector must focus on closing persistent access gaps, particularly in underserved rural areas and informal settlements, while simultaneously scaling up sanitation services, including faecal sludge management systems.

Strengthening governance and accountability across utilities and counties will be critical in ensuring that investments translate into improved service delivery. At the same time, improving operational efficiency and financial sustainability will enable utilities to function effectively and attract much-needed financing.

The sector must also leverage innovative financing mechanisms, including public–private partnerships and commercial financing, while embracing digital technologies to enhance monitoring, billing, and reporting systems.

5.7 Way Forward

The pathway to universal access is clearly defined, but progress must accelerate. The next phase requires stronger accountability, improved performance, and measurable results. The regulator will continue to strengthen enforcement mechanisms, enhance performance monitoring systems, and promote transparency and accountability across the sector. County governments must take a more proactive role in supporting utilities, prioritizing investments, and ensuring alignment with sector policies and regulatory requirements. Utilities, on their part, must demonstrate stronger leadership, improve operational efficiency, and focus on delivering reliable and sustainable services to customers. Development partners and the private sector will remain critical in mobilizing resources, supporting innovation, and strengthening sector capacity. Universal access to safe water and sanitation by 2030 is achievable with sustained commitment, coordinated action, and a focus on results. The final stretch demands urgency, discipline, and accountability for lasting impact for all Kenyans.

Annex 1: Metholodology for Quality of Service KPI's

KPI Cluster	Indicator	Indicator Elements	Computation
QUALITY OF SERVICE	Water Coverage	Population served through individual connections – A	Total No. of active connections × Average household size. Average household size is derived from census data and is unique for each area. Allowed per capita consumption is 20 L/day and 10 L/day for domestic and communal water points respectively.
		Population served through yard taps – B	Total No. of active yard taps × Average No. of households served by a yard tap × Average household size. Allowed range of average number of households per yard tap is 4–10.
		Population served through small MDUs – C	Total No. of active small MDUs × Average No. of households per small MDU × Average household size. Allowed range of average number of households per small MDU is 4–10.
		Population served through medium MDUs – D	Total No. of active medium MDUs × Average No. of households per medium MDU × Average household size. Allowed range of average number of households per medium MDU is 11–20.
		Population served through large MDUs – E	Total No. of active large MDUs × Average No. of households per large MDU × Average household size. Allowed average number of households per large MDU is > 21.
		Population served through kiosks – F	Total No. of taps (depends on kiosk type) × Average No. of people served per tap. Allowed range for kiosks is 100–400 people.
		Number of people served with water services	A + B + C + D + E + F. Sub-population is derived from census data and growth rates applied appropriately.
		Population in service area	Sum population of all sub-locations within the WSP service area.
		Water coverage	Number of people served with water services ÷ Population in service area.
	Drinking Water Quality	Compliance with planned number of residual chlorine tests	∑ total number of residual chlorine tests conducted for all schemes within the WSP service area ÷ ∑ total number of residual chlorine tests planned for all schemes within the WSP service area × 100.
		Compliance with residual chlorine standards	∑ total number of residual chlorine tests with norm for all schemes within the WSP service area ÷ ∑ total number of residual chlorine tests conducted for all schemes within the WSP × 100.
		Drinking water quality, residual chlorine	0.6 × Compliance with planned number of residual chlorine tests + 0.4 × Compliance with residual chlorine standards.
		Compliance with planned number of bacteriological tests	∑ total number of bacteriological tests conducted for all schemes within the WSP service area ÷ ∑ total number of bacteriological tests planned for all schemes within the WSP service area × 100.
		Compliance with bacteriological standards	∑ total number of bacteriological tests with norm for all schemes within the WSP service area ÷ ∑ total number of bacteriological tests conducted for all schemes within the WSP × 100.
		Bacteriological quality	0.6 × Compliance with planned number of bacteriological tests + 0.4 × Compliance with bacteriological standards.
		Drinking water quality	0.4 × Drinking water quality (residual chlorine) + 0.6 × Bacteriological quality.
	Hours of Supply	Average number of hours water services are provided per day for all zones within a scheme	Weighted average based on all registered zones, factoring in active connections: (hrs × Number of active connections (zone 1)) + (hrs × Number of active connections (zone 2)) + …

Annex 2: Methodology for Economic Efficiecy KPI's

KPI Cluster	Indicator	Indicator Elements	Computation
ECONOMIC EFFICIENCY	Personnel Expenditure as a Percentage of O&M Costs	Total personnel expenditures	Sum of personnel expenditures incurred during the reporting period. Includes basic salaries, allowances, wages, gratuity, statutory and pension contributions by employer, subscriptions and training levy, leave, incentives (bonus), and any other personnel expenditure.
		Personnel Expenditure as a Percentage of	(Total personnel expenditures / Total O + M) × 100
	Operation and Maintenance Cost Coverage	Total operating revenues A	Sum of billing for water, sewerage, and other services. Billing for other services includes charges on connection and reconnection, illegal connections, meter rent, meter testing, replacement of stolen meters, and exhauster services.
		Total operating expenditures B	Sum of expenses on personnel, BoD, general admin, direct operations, maintenance, and levies/fees. 1. Direct operational expenditures include electricity, chemicals, and fuel for vehicles. 2. Levies and fees include water abstraction fees, WSB fees, effluent discharge fees, and regulatory levy.
		Operation and Maintenance Cost Coverage	(A / B) × 100
	Revenue Collection Efficiency	Total water and sewerage billing amount – A	Total amount of all bills on water and sewerage services during the reporting period for all schemes within the WSP service area.
		Total billing for other services – B	Total of all billing for other services for all schemes within the WSP service area.
		Total billing	A + B
		Total collection	Sum of all revenue collected from all schemes within the WSP service area.
		Collection Efficiency	(Total Collection / Total Billing) × 100

Annex 3: Methodology for Operational Sustainability KPI's

KPI Cluster	Indicator	Indicator Elements	Computation
OPERATIONAL SUSTAINABILITY	Non-Revenue Water	Commercial Losses (Apparent Losses) A	Unauthorized consumption (e.g., illegal connections) + Customer meter reading inaccuracies, estimates, and data-handling errors.
		Physical Losses B	Leakages on transmission and/or distribution pipes + Leakages and overflows at utility storage tanks + Leakage on service connections up to the point of customer use.
		Non-Revenue Water	(A + B / Volume of water produced) × 100
	Metering Ratio	Total number of active water connections	Sum of all active individual, MDU, yard taps, institutional, schools', commercial, industrial, bulk, and other water connections of all schemes within a WSP service area.
		Total number of active metered water connections	Sum of all active individual, MDU, yard taps, institutional, commercial, industrial, schools', bulk, and other water connections of all schemes within a WSP service area that are metered.
		Metering Ratio	(Total number of active metered connections / Total number of active connections) × 100
	Staff Productivity	Total number of staff divided by total number of connections within the WSP service area	Total number of staff in the utility / (Total number of active water connections + Total number of sewer connections).

ANNEX 4: Components of Drinking Water

Utility	DWQ - Residual Chlorine (%)	DWQ - Bacteriological Quality (%)	DWQ (%)
Nairobi	98	94	96
Eldoret	89	100	96
Mombasa	100	99	99
Ruiru-Juja	99	100	100
Nyeri	100	100	100
Nakuru Urban	100	100	100
Kisumu	100	100	100
Thika	100	100	100
Murang'a South	100	100	100
Kilifi Mariakani	100	100	100
Embu	100	100	100
Gatundu	100	100	100
Malindi	100	100	100
Kakamega Urban	98	100	99
Kericho	100	100	100
Othaya Mukurweini	99	100	99
Bungoma	100	100	100
Kirinyaga	100	100	100
Nakuru Rural	100	100	100
Tavevo	77	100	90
Murang'a Urban	100	100	100
Trans Nzoia	100	99	99
Mathira	100	100	93
Nanyuki	100	100	100
Murang'a West	100	100	100
Garissa	100	100	93
Meru	100	100	100
Kwale	100	96	98
Nyahururu	100	100	100
Gusii	100	99	99
Bomet	100	84	90
Sibo	100	100	100
Ngandori Nginda	100	100	100
Kitui	100	100	100
Kikuyu	82	94	89
Nithi	100	100	100
Gatamathi	99	100	100
Tetu Aberdare	100	100	100
Gatanga	100	100	100
Isiolo	100	100	100
Naivasha	100	100	100
Kiambu	98	92	94
Limuru	98	96	97
Mavoko	100	100	100
Homabay	100	100	100
Machakos	100	100	100
Oloolaiser	100	87	92

Utility	DWQ - Residual Chlorine (%)	DWQ - Bacteriological Quality (%)	DWQ (%)
Meru Rural	100	100	93
Ngagaka	98	94	96
Karuri	99	100	99
Githunguri	95	92	93
Amatsi	99	100	100
Busia	100	100	100
Turkana Urban	100	100	100
Kyeni	100	100	100
Kibwezi Makindu	100	100	100
Nyandarua	100	100	100
Migori	100	100	100
Chemususu	100	100	100
Narok	100	100	95
Embe	100	100	100
Nol Turesh	98	100	99
Kapsabet Nandi	100	100	100
Tana	99	100	99
Kiambere Mwingi	99	100	93
Kirandich	100	100	100
Murugi Mugumango	100	100	100
Kakamega Rural	77	100	90
Kapenguria	100	100	100
Lamu	100	99	99
Ol Kalou	100	100	93
Iten Tambach	100	100	100
Mandera	100	100	100
Samburu	100	100	93
Olkejuado	100	100	100
Muhambi 4K	100	100	100
Naromoru	100	100	98
Tatu City	100	89	99
Rukanga	100	94	92
Oloitokitok	99	100	93
Elwak	100	100	100
Wajir	100	100	100
Yatta	82	94	89
Matungulu Kangundo	100	100	100
Namanga	99	100	100
Kiambiri	100	100	100
Mbooni	100	100	100
Wote	100	100	100
Nyasare	99	100	93
Tachasis	98	92	94
Kathiani	98	96	97
Runda	100	100	100
Mwale	100	100	93
Marsabit	100	100	100

ANNEX 5: Pro-Poor Assessment

Rank	Utility	Governance (18%)	Planning (16%)	Financing (14%)	Impact (30%)	Total Score	Weighted (%)
1	Kisumu Water and Sanitation Company	18	16	14	30	78	100
2	Nyeri Water and Sanitation Company	18	16	14	30	78	100
3	Naivasha Water and Sanitation Company	18	14	14	30	76	95
4	Murang'a Water and Sanitation Company	18	14	14	29	75	93
5	Kakamega County Water and Sanitation Company	18	13	14	29	74	91
6	Nakuru Water and Sanitation Services	18	14	14	27	73	89
7	Meru County Rural Water and Sanitation Company	14	16	14	26	68	85
8	SiBo Water and Sanitation Company	18	12	12	24	66	83
9	HomaBay Water Company	18	12	12	23	65	84
10	Mathira Water and Sanitation Company	18	12	14	22	64	84
11	Kitui Water and Sanitation Company	18	12	12	23	65	83
12	Nairobi City Water and Sewerage Company	16	13	12	21	62	81
13	Thika Water and Sewerage Company	16	13	12	21	62	81
14	Nanyuki Water and Sewerage Company	18	12	12	21	63	80
15	Bungoma Water and Sanitation Company	18	12	12	21	63	80
16	Mombasa Water Supply and Sanitation Company	18	12	12	21	63	80
17	Kiambu Water and Sanitation Company	18	12	12	21	63	80
18	Nakuru Rural Water and Sanitation Services	16	13	10	21	60	77
19	Meru Water and Sewerage Services Company	16	13	10	21	60	77
20	Ruiru Juja Water and Sanitation Company	16	13	10	21	60	77
21	Murang'a South Water and Sanitation Company	18	10	14	17	59	75
22	Nyahururu Water and Sanitation Company	16	12	12	17	57	72
23	Gusii Water and Sanitation Company	16	12	12	17	57	72
24	Bomet Water Company	16	12	12	17	57	72
25	Embu Water and Sanitation Company	14	14	14	17	59	72
26	Kapsabet Water Services Company	14	14	14	17	59	72
27	Malindi Water and Sewerage Company	14	16	10	17	57	69
28	Isiolo Water and Sewerage Company	14	12	10	17	53	68
29	Mayoka Water and Sewerage Company	12	10	12	17	51	65
30	Kirinyaga Water and Sanitation Company	12	10	12	17	51	65
31	Kwale Water and Sewerage Company	14	10	10	17	51	64
32	Tavevo Water and Sewerage Company	14	10	10	17	51	64
33	Eldoret Water and Sanitation Company	8	10	10	21	49	62
34	Gatamathi Water and Sanitation Company	14	4	10	19	47	60
35	Nithi Water and Sanitation Company	12	4	12	17	45	58
36	Amatsi Water Services Company	14	4	12	21	51	57
37	Tetu Aberdare Water and Sanitation Company	16	10	8	7	41	51
38	Kibwezi Makindu Water Company	10	7	8	19	44	51
39	Yatta Water Services Company	4	7	12	16	39	49
40	Murang'a West Water and Sanitation Company	12	9	10	16	47	47
41	Migori Water and Sanitation Company	12	9	10	16	47	47
42	Ololoisar Water and Sewerage Company	12	9	10	16	47	44
43	Kericho Water Company	6	12	8	13	33	43
44	Kikuyu Water Company	8	12	8	13	33	43
45	Trans Nzoia County Water and Sanitation Company	10	8	11	13	33	43
46	Nyandarua Water and Sanitation Company	12	2	4	13	31	43
47	Limuru Water and Sewerage Company	12	2	4	13	31	42
48	Kilifi Mariakani Water and Sewerage Company	2	2	0	22	29	40

Rank	Utility	Governance (18%)	Planning (16%)	Financing (14%)	Impact (30%)	Total Score	Weighted (%)
49	Olokalu Water and Sewerage Company	2	4	0	21	27	39
50	Narok Water and Sewerage Company	2	4	0	21	27	35
51	Gatanga Water and Sanitation Limited	2	4	0	11	17	35
52	Garissa Water and Sewerage Company	12	4	8	3	27	38
53	Navsare Water Supply Association	0	0	0	19	20	29
54	Elwak Water and Sanitation Company Limited	0	0	0	19	20	29
55	Busia Water and Sewerage Services Company	0	0	0	19	20	29
56	Machakos Water and Sewerage Company	0	0	0	19	20	29
57	Kiamber Mwngi Water and Sanitation Company	0	0	2	16	18	27
58	Othaya Mukurweini Water Company	0	0	4	17	21	27
59	Chemususu Water and Sanitation Company	8	4	4	3	19	22
60	Karuri Water and Sanitation Company	8	4	4	3	19	22
61	Muthambi 4K Water Association	0	8	10	3	21	22
62	Mandera Water and Sewerage Company	8	4	2	4	18	20
63	Iten Tambach Water and Sanitation Company	4	0	4	4	12	16
64	Ngondi Water Consumers Association	7	0	2	3	12	12
65	Wote Water and Sewerage Company	0	2	2	3	7	8

ANNEX 6: Compliance Assessment

Parameter / Utility	Validity of Tariffs as at June 2025	Licensing Status as at June 2025	License Fee Compliance	Reporting Compliance	Overall Compliance
Very Large (≥ 35,000 connections)					
Nairobi	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Eldoret	Valid	Valid	Compliant	Compliant	Compliant
Mombasa	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Ruiru Juja	Valid	Valid	Compliant	Non Compliant	Non Compliant
Nyeri	Valid	Valid	Compliant	Compliant	Compliant
Nakuru Urban	Valid	Valid	Compliant	Compliant	Compliant
Kisumu	Valid	Valid	Non Compliant	Compliant	Non Compliant
Thika	Valid	Valid	Compliant	Compliant	Compliant
Murang'a South	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Kilifi Mariakani	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Embu	Valid	Valid	Compliant	Compliant	Compliant
Gatundu	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Malindi	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Kakamega Urban	Valid	Valid	Compliant	Compliant	Compliant
Kericho	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Othaya Mukurweini	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Bungoma (BWASCO)	Valid	No Licence	Non Compliant	Non Compliant	Non Compliant
Kirinyaga	Valid	Valid	Non Compliant	Compliant	Non Compliant
Large (10,000–34,999 connections)					
Nakuru Rural	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Tavevo	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Murang'a Urban	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Trans Nzoia	Valid	No Licence	Non Compliant	Compliant	Non Compliant
Mathira	Valid	Valid	Non Compliant	Compliant	Non Compliant
Nanyuki	Valid	Valid	Non Compliant	Compliant	Non Compliant
Murang'a West	Valid	Valid	Compliant	Compliant	Compliant
Garissa	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Meru	Under Processing	Valid	Non Compliant	Compliant	Non Compliant
Kwale	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Nyahururu	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Gusii	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Bomet	Valid	Valid	Non Compliant	Compliant	Non Compliant
Sibo	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Ngandori Nginda	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Kitui	Valid	Valid	Compliant	Compliant	Compliant
Kikuyu	Valid	Valid	Non Compliant	Compliant	Non Compliant
Nithi	Valid	Valid	Non Compliant	Compliant	Non Compliant
Gatamathi	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Tetu Aberdare	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Gatanga	Valid	Valid	Compliant	Compliant	Compliant
Isiolo	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Naivasha	Valid	Valid	Non Compliant	Compliant	Non Compliant
Kiambu	Valid	Valid	Non Compliant	Compliant	Non Compliant
Limuru	Valid	Valid	Non Compliant	Compliant	Non Compliant
Mavoko	Valid	Valid	Non Compliant	Compliant	Non Compliant
Homabay	Valid	Valid	Non Compliant	Compliant	Non Compliant

Parameter / ty	Validity of Tariffs as at June 2025	Licensing Status as at June 2025	License Fee Compliance	Reporting Compliance	Overall Compliance
Machakos	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Oloolaiser	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Meru Rural	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Ngagaka	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Karuri	Valid	Valid	Non Compliant	Compliant	Non Compliant
Githunguri	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Amatsi	Valid	Valid	Non Compliant	Compliant	Non Compliant
Busia	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Turkana Urban	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Kyeni	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Kibwezi Makindu	Valid	Valid	Non Compliant	Compliant	Non Compliant
Nyandarua	Valid	Valid	Non Compliant	Compliant	Non Compliant
Medium (5,000-9,999 connections)					
Migori	Lapsed	Valid	Non Compliant	Non Compliant	Non Compliant
Chemususu	Under Processing	Under Processing	Compliant	Compliant	Compliant
Narok	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Embe	Valid	Under Processing	Non Compliant	Non Compliant	Non Compliant
Nol Turesh	Lapsed	Under Processing	Non Compliant	Non Compliant	Non Compliant
Kapsabet Nandi	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Tana	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Kiamberre Mwingi	Valid	Valid	Non Compliant	Non Compliant	Non Compliant
Kirandich	Under Processing	Valid	Non Compliant	Non Compliant	Non Compliant
Murugi Mugumango	Under Processing	Valid	Non Compliant	Non Compliant	Non Compliant
Kakamega Rural	Lapsed	Valid	Non Compliant	Non Compliant	Non Compliant
Kapenguria	Lapsed	Under Processing	Non Compliant	Non Compliant	Non Compliant
Lamu	Under Processing	Under Processing	Non Compliant	Non Compliant	Non Compliant
Small (< 5,000 connections)					
Ol Kalou	Valid	Valid	Non Compliant	Compliant	Non Compliant
Iten Tambach	Lapsed	Expired	Non Compliant	Compliant	Non Compliant
Mandera	Valid	Valid	Non Compliant	Compliant	Non Compliant
Samburu	Lapsed	Under Processing	Non Compliant	Compliant	Non Compliant
Olkejuado	Valid	Valid	Non Compliant	Compliant	Non Compliant
Muthambi 4K	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Naromoru	Valid	Valid	Non Compliant	Compliant	Non Compliant
Tatu City	Lapsed	No Licence	Non Compliant	Compliant	Non Compliant
Rukanga	Under Processing	Valid	Non Compliant	Compliant	Non Compliant
Oliotoktok	Lapsed	No Licence	Non Compliant	Compliant	Non Compliant
Elwak	Under Processing	Valid	Non Compliant	Compliant	Non Compliant
Wajir	Under Processing	Under Processing	Non Compliant	Compliant	Non Compliant
Yatta	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Matungulu Kangundo	Valid	Under Processing	Non Compliant	Compliant	Non Compliant
Namanga	Lapsed	No Licence	Non Compliant	Compliant	Non Compliant
Kiambu	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Mbooni	Lapsed	Valid	Non Compliant	Compliant	Non Compliant
Wote	Under Processing	Valid	Non Compliant	Compliant	Non Compliant

ANNEX 7: Creditworthiness Assessment Guide

Indicators	Definition	Source	Weight	4	3	2	1	0
Economic Indicators								
Poverty Rate	County poverty rates are derived simply by dividing the total number of poor people in each county in by the total population in each county	KNBS	3	0-20	20-40	40-60	60-80	80-100
Operational Indicators								
Sewerage Coverage	Number of people served with Sewerage Services/ Population of area	WARIS	1	100	90-100	80-90	70-80	<70
Water coverage	Number of people served with Water Supply Services/ Population of area	WARIS	1	100	90-100	80-90	70-80	<70
NRW	Total Volume of Water Lost from Commercial and Physical Losses as a proportion of Water Produced	WARIS	5	<20%	20-30%	30-40%	40-50%	>50%
No of staff per 1000 connections	Number of Staff Members/(Total number of Connections/1000)	WARIS	3	<5	6	7	8	>8
Financial Indicators								
Revenue Indicators								
Total revenue (Excl Grants)	Total revenue from water & sewerage sales & other income	WARIS	0	N/A	N/A	N/A	N/A	N/A
Revenue Diversification	The difference between the % residential revenue and %institutional	WARIS	6	<10%	10-30%	30-50%	50-70%	>70%
Average tariif Differential	The difference between Average tariff per cubic metre and Production cost per cubic metre.	WARIS	8	>50%	35-50%	20-35%	5-20%	<5%
Cost Indicators								
Total Opex	Total Operational & Maintenance Expenditure	WARIS	0	N/A	N/A	N/A	N/A	N/A
Maintenance costs as % of opex	Total Maintenance Costs divided by total operations and maintenance expenditure	WARIS	3	>8%	6-8%	6-4%	0-4%	>0%
Electricity as % of opex	Total Electricity Costs divided by total operations and maintenance expenditure	WARIS	2	<10%	10-15%	15-20%	20-25%	>25%
Employee Costs costs /Total Opex	The Salary Costs as a % of Total OPEX	WARIS	2	<25%	25-30%	30-35%	35-40%	>40%
Percentage O&M coverage	Total revenue from water and sewerage sales divided by total operations and maintenance expenditure	WARIS	4	>130%	120-130%	110-120%	100-110%	<100%
Grant dependency for opex	The proportion of OPEX financed by income from Grants	WARIS	3	0%	0-10%	10-15%	15-20%	20-25%
Profitability Indicators								
EBITDA/Revenue	Earnings Before Interest Tax, Depreciation & Amortization	WARIS	5	>25%	20-25%	15-20%	10-15%	<10%
Annual Operational surplus /deficit	Total Revenue Less Total O&M Costs incurred	WARIS	0	N/A	N/A	N/A	N/A	N/A
Profit / loss for year		WARIS	0	N/A	N/A	N/A	N/A	N/A
Liquidity & Solvency Indicators								
Liquidity reserves as % of annual operating expenses	Cash & Near Cash Reserves/ Annual Operating Expenses *12	WARIS	5	>25%	20-25%	15-20%	10-15%	<10%
Liquidity ratio	Cash & Near Cash Reserves/ Current Liabilities	WARIS	4	>1.6	1.5-1.6	1.4-1.3	1.2-1.3	<1
Debt Service Coverage Ratio	CFADS/ Total Debt Service (Interest + Principal Repayments)	WARIS	5	>1.8	1.5-1.8	1.3-1.5	1.2-1.3	<1.2
Cash Flow Available for Debt Service	Net Operating Cashflow + Interest Repayments	WARIS	10	>0	<0	<0	<0	<0
Debt:Equity Ratio	Total Debt/Total Equity	WARIS	5	<20%	20-30%	25-30%	30-35%	>35%
Debtor Days: average number of days it takes WSP to collect monies billed	Net billed amount outstanding/ Total annual operating revenues excluding grants and transfers *365	WARIS	5	<45 Days	45-60 Days	60-90 Days	90-120 Days	>120 Day
% Change in debtor days over the last financial year	(Debtor Days in Current Financial Year Less Debtor Days in previous Financial Year)/Debtor Days in Current Financial Year	WARIS	5	>25%	20-25%	15-20%	10-15%	<10%
Consumer bad debt provison% Cash provision for bad and doubtful debts	Cash provision for bad and doubtful debt /Consumer bad debt provison%	WARIS	5	Provision for all debt older than 60	Provision for all debt older than 90 days	Provision for all debt older than 365 days	Ad hoc limited provision	No provision
Billing Ratio	Volume of water Bought/ Volume of Water Produced	WARIS	5	95% and above	93% to 94%	90% to 92%	85% to 89%	Less than 85%
Collection effiecency :Utilities ability to collect billed accounts	Total amount collected as % of the total amount billed	WARIS	5	95% and above	93% to 94%	90% to 92%	85% to 89%	Less than 85%
	Total		**100**	**4.0**	**3.0**	**2.0**	**1.0**	**-**

ANNEX 9: General Data on Counties

ID.	County	Population in the County	Utilities in the county	Percentage of County population within service areas of Utilities (%)	Population served		INDICATORS (Aggregated Regulated Utilities)												
					Population served in the county, (no.)	Population served in the county, (%)	Water Coverage (%)	Drinking Water Quality (%)	Hrs of supply (hrs./d)	Personnel Exp. As % of O+M	O+M cost coverage (%)	Revenue Collection Efficiency (%)	NRW (%)	Staff per 1000 conns. (no.)	Metering Ratio (%)	Sewerage Coverage (%)	Unit cost of water produced (Kshs/m³)	Unit operating cost of water billed (Kshs/m³)	Average tariff (Kshs/m³)
001	Mombasa	1,386,614	Mombasa	100	911,791	66	66	93	15	35	100 Mombasa: 100	91	61	7	100	17	90	221	215
002	Kwale	1,017,337	Kwale	71	369,138	36	51	98	17	24	79 Kwale: 79	100	48	10	100	0	91	144	111
003	Kilifi	1,688,822	Kilifi Mariakani Malindi	99	1,112,385	66	67	100	21	33	81 Kilifi Mariakani: 75 Malindi: 88	93	47	8	100	0	94	165	129
004	Tana River	368,767	Tana	35	70,887	19	55	93	12	30	57 Tana: 57	72	61	19	53	0	97	214	118
005	Lamu	176,404	Lamu	23	29,190	17	71	97	12	49	43 Lamu: 43	100	45	24	100	0	131	207	81
006	Taita-Taveta	374,601	Tavevo	100	255,219	68	66	90	14	28	83 Tavevo: 83	99	50	11	100	1	86	172	135
007	Garissa	1,001,970	Garissa	15	100,199	10	65	93	22	37	103 Garissa: 103	65	32	9	61	37	76	94	96
008	Wajir	853,275	Wajir	23	14,357	2	7	78	17	53	11 Wajir: 11	75	34	104	97	0	1,265	1,732	197
009	Mandera	1,053,366	Mandera Elwak	25	50,516	5	19	55	16	35	12 Mandera: 14 Elwak: 10	67	42	51	40	0	468	650	69
010	Marsabit	607,803	Marsabit	31	23,518	4	12	93	3	59	61 Marsabit: 61	78	52	90	100	0	486	752	459
011	Isiolo	288,004	Isiolo	31	81,320	28	91	100	20	56	117 Isiolo: 117	100	28	4	100	7	47	63	70
012	Meru	1,656,309	Meru Meru Rural Tuuru	20	255,210	15	78	99	20	46	107 Meru: 109 Meru Rural: 101 Tuuru: n.d.	92	23	8	90	9	71	83	69
013	Tharaka-Nithi	408,296	Nithi Murugi Mugumango Muthambi 4K	50	123,866	30	60	65	21	45	104 Nithi: 112 Murugi Mugumango: 87 Muthambi 4K: n.c.d.	98	51	6	99	1	28	51	51
014	Embu	664,915	Embu Ngandori Nginda Ngagaka Kyeni Embe	85	432,073	65	85	94	23	52	120 Embu: 124 Ngandori Nginda: 114 Ngagaka: 130 Kyeni: 95 Embe: 106	97	35	5	96	6	56	74	84
015	Kitui	1,206,391	Kitui Kiambere Mwingi	50	409,316	34	70	95	14	30	84 Kitui: 96 Kiambere Mwingi: 47	91	40	10	100	1	233	315	220
016	Machakos	1,643,284	Mavoko Machakos Yatta Matungulu Kangundo Kathiani Mwala	59	537,512	33	59	93	9	41	101 Mavoko: 107 Machakos: 98 Yatta: 99 Matungulu Kangundo: 82 Kathiani: 85 Mwala: 50	86	35	9	73	28	151	220	203
017	Makueni	1,045,706	Kibwezi Makindu Mbooni Wote	57	212,175	20	46	100	13	48	82 Kibwezi Makindu: 85 Mbooni: 44 Wote: 84	96	50	17	100	0	68	129	98
018	Nyandarua	661,466	Nyandarua Ol Kalou	39	148,862	23	59	86	20	43	92 Nyandarua: 86 Ol Kalou: 101	94	40	10	100	0	97	151	131
019	Nyeri	796,192	Nyeri Othaya Mukurweini Mathira Tetu Aberdare Naromoru	77	522,808	66	87	99	24	45	112 Nyeri: 113 Othaya Mukurweini: 114 Mathira: 117 Tetu Aberdare: 104 Naromoru: 75	95	29	5	100	23	74	90	92
020	Kirinyaga	659,483	Kirinyaga Rukanga	83	298,029	45	55	100	19	53	83 Kirinyaga: 83 Rukanga: 89	95	48	5	100	1	48	85	66
021	Murang'a	1,122,209	Murang'a South Murang'a Urban Murang'a West Gatamathi Gatanga	98	789,234	70	75	100	22	51	106 Murang'a South: 105 Murang'a Urban: 101 Murang'a West: 119 Gatamathi: 100 Gatanga: 105	98	38	5	95	9	60	87	83
022	Kiambu	3,072,979	Ruiru-Juja Thika Gatundu Kikuyu Kiambu Limuru Karuri Githunguri Tatu City Kiamumbi	93	2,142,086	70	84	94	20	31	114 Ruiru-Juja: 130 Thika: 123 Gatundu: 89 Kikuyu: 115 Kiambu: 104 Limuru: 92 Karuri: 103 Githunguri: 54 Tatu City: 107 Kiamumbi: 100	90	42	5	100	34	76	120	129
023	Turkana	966,310	Turkana Urban	5	40,993	4	84	33	8	49	82 Turkana Urban: 82	68	52	7	98	0	45	87	70
024	West Pokot	690,987	Kapenguria	25	12,506	2	7	-	10	40	61 Kapenguria: 61	100	77	33	9	0	25	108	58
025	Samburu	374,962	Samburu	100	24,751	7	7	98	7	69	48 Samburu: 48	53	38	23	72	0	102	156	73
026	Trans Nzoia	1,100,998	Trans Nzoia	41	186,266	17	41	99	21	27	143 Trans Nzoia: 143	81	45	5	100	2	81	110	154
027	Uasin Gishu	1,352,957	Eldoret	39	442,288	33	84	96	23	51	145 Eldoret: 145	91	38	4	99	75	68	84	117
028	Elgeyo Marakwet	509,590	Iten Tambach	18	10,525	2	12	93	17	48	96 Iten Tambach: 96	100	47	16	99	0	57	104	94
029	Nandi	968,715	Kapsabet Nandi Tachasis	14	60,580	6	43	99	19	30	86 Kapsabet Nandi: 82 Tachasis: 105	95	35	8	98	5	91	139	110
030	Baringo	737,077	Chemususu Kirandich	24	46,595	6	27	56	19	34	67 Chemususu: 96 Kirandich: 35	91	54	11	88	0	50	106	52
031	Laikipia	601,139	Nanyuki Nyahururu	44	246,166	41	94	100	23	54	117 Nanyuki: 126 Nyahururu: 104	98	30	5	100	42	90	118	121
032	Nakuru	2,569,197	Nakuru Urban Nakuru Rural Naivasha	87	1,868,442	73	90	99	21	34	110 Nakuru Urban: 112 Nakuru Rural: 105 Naivasha: 107	98	29	3	100	19	86	111	116
033	Narok	1,384,696	Narok	11	112,319	8	77	93	11	36	81 Narok: 81	89	33	12	100	10	147	209	160
034	Kajiado	1,513,867	Oloolaiser Nol Turesh Olkejuado Oloitokitok Namanga	62	459,754	30	45	66	15	61	92 Oloolaiser: 108 Nol Turesh: 93 Olkejuado: 71 Oloitokitok: 29 Namanga: 98	82	60	15	87	0	86	160	124
035	Kericho	996,911	Kericho	44	164,929	17	38	100	18	60	104 Kericho: 104	79	59	6	100	7	47	111	108
036	Bomet	968,360	Bomet	47	36,891	4	8	90	14	52	48 Bomet: 48	62	62	23	71	1	128	325	142
037	Kakamega	1,992,114	Kakamega Urban Kakamega Rural	65	462,475	23	89	96	21	50	107 Kakamega Urban: 113 Kakamega Rural: 51	97	40	5	98	11	80	119	116
038	Vihiga	610,623	Amatsi	90	56,794	9	10	93	21	36	72 Amatsi: 72	94	44	17	100	0	68	112	78
039	Bungoma	1,863,274	Bungoma (BWASCO)	39	414,622	22	57	93	21	31	107 Bungoma (BWASCO): 107	84	76	6	95	4	36	143	145
040	Busia	991,558	Busia	38	49,980	5	13	93	15	60	89 Busia: 89	44	43	11	68	2	130	217	186
041	Siaya	1,089,111	Sibo	55	368,306	34	62	93	19	37	89 Sibo: 89	94	49	8	100	3	117	198	168
042	Kisumu	1,274,614	Kisumu	40	470,118	37	93	100	24	30	105 Kisumu: 105	100	32	5	100	15	102	140	142
043	Homabay	1,237,967	Homabay	26	225,953	18	70	100	22	35	90 Homabay: 90	85	40	13	100	6	96	146	113
044	Migori	1,246,899	Migori Nyasare	35	124,227	10	33	99	9	25	38 Migori: 30 Nyasare: 88	71	33	11	74	0	99	137	49
045	Kisii	1,334,333	Gusii	49	364,957	27	55	99	22	40	102 Gusii: 102	95	58	7	100	20	87	190	180
046	Nyamira	610,539	Gusii	36	122,302	20	55	99	22	40	102 Gusii: 102	95	58	7	100	20	87	190	180
047	Nairobi	5,352,641	Nairobi Runda Two Rivers	100	4,397,885	82	79	96	9	55	105 Nairobi: 105 Runda: 117 Two Rivers: n.d.	95	54	6	100	46	60	119	121
	Total	54,093,633																	

Ministry of Water, Sanitation and Irrigation

COUNCIL OF GOVERNORS

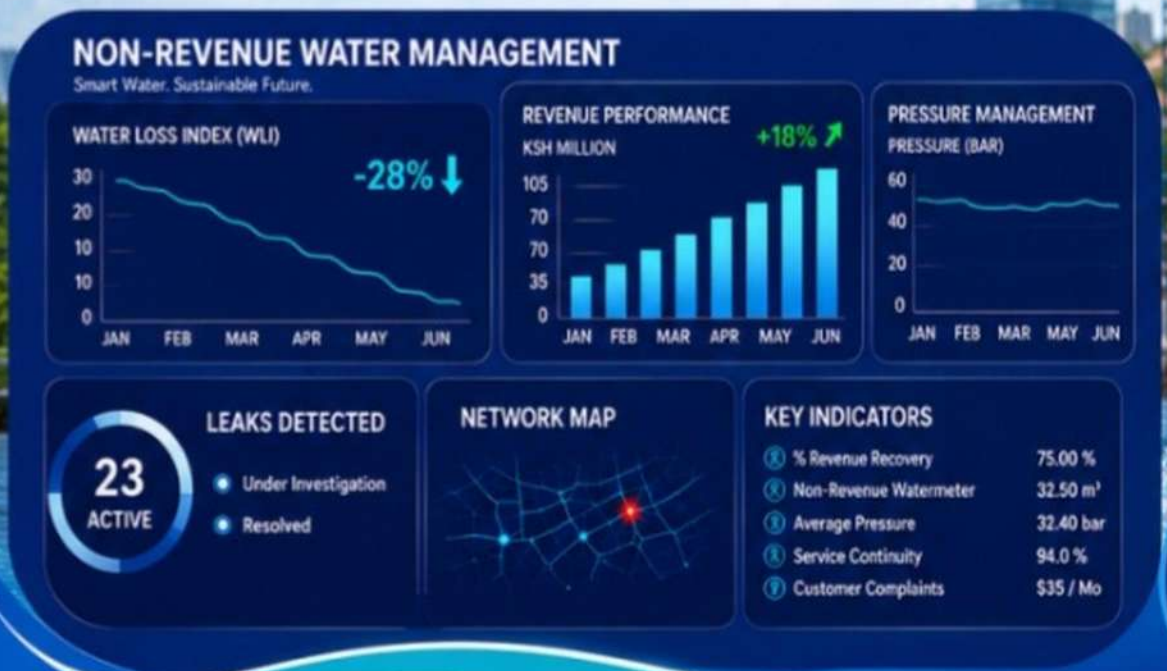
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COUNTY OF UNLIMITED OPPORTUNITIES

KENYA WATER INSTITUTE

NRW
NON-REVENUE WATER 2026
MANAGEMENT CONFERENCE

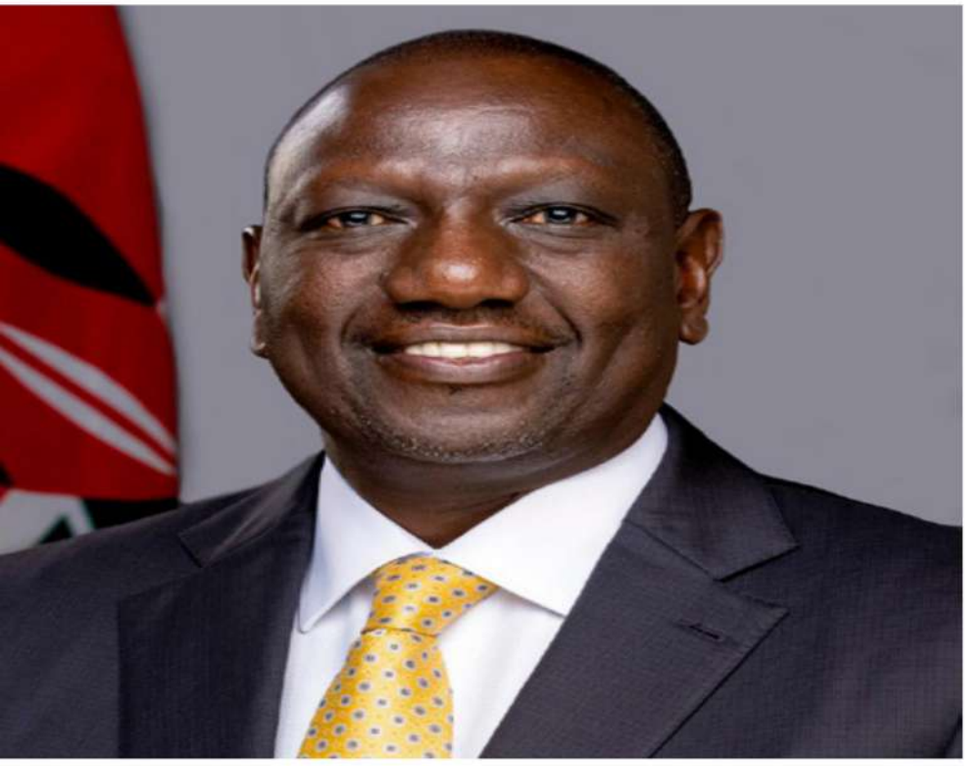
Venue: **Lake Naivasha Resort**



Conference Theme:
Improving Non-Revenue Water (NRW) Management by Leveraging on Innovations & Technology

Welcome MESSAGE

PRESIDENT



REMARKS BY

HIS EXCELLENCY
HON. WILLIAM SAMOEI RUTO, PHD., C.G.H.,
PRESIDENT OF THE REPUBLIC OF KENYA
AND COMMANDER-IN-CHIEF OF THE
DEFENCE FORCES

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026
Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

Distinguished Guests, Ladies and Gentlemen,

It is a great honour to be here today in Naivasha for this Non-Revenue Water Management Conference 2026. I commend the Water Sector players, together with the Council of Governors and the County Government of Nakuru, for convening this High-Level engagement. The timing is right. The theme is right. And the people in this room have the collective capacity to deliver the results Kenya needs.

The Progress We Have Made

1. Kenya's Water Sector has come a long way, and we should acknowledge that honestly before we address what remains to be done. According to the latest Impact Report, water coverage in our regulated service areas has reached 72%, with over 22.8 million Kenyans, this is 42% of the total population now served by regulated utilities.

   Drinking water quality compliance has risen to 96%, the highest ever recorded. Total sector revenue has grown by 14% to Ksh 32.9 billion. Operation and maintenance cost coverage has crossed 100% for the first time in our history, meaning our utilities are, on aggregate, covering their operating costs from their own revenues. These are real achievements, built through sustained investment, institutional reform, and improving commercial discipline across the sector.

2. The Infrastructure driving this progress is substantial. This Government is currently implementing ten large dam projects valued at Ksh 184 billion. When complete, they will add 0.97 billion cubic metres of storage, bring 73,500 acres under Irrigation, generate 22 megawatts of clean energy, and serve close to six million households. The Thwake Multipurpose Dam stands at 94% completion. The Mwache Dam in Kwale County is at 86%. These are structures rising from the ground, not plans on paper.

3. Behind those ten, we have mapped a pipeline of 50 planned large dams with a combined storage capacity of 13.1 billion cubic metres, irrigation potential of 1.61 million acres, and 1,068 megawatts

of embedded hydropower. We have also identified over 200 medium-scale dams for community water security and irrigation. This Plan represents the most ambitious water storage investment Kenya has ever planned, and we will see it through.

4. Our Development Partners are delivering alongside us. The Kenya Towns Water Supply and Sanitation Programme has reached 3.4 million people across 30 Counties and is approximately 90% complete, with the National Urban Water and Sanitation programme targeting a further 5 million. The K-WASH programme is active in 19 Counties, the Water and Sanitation Development Project is serving 2 million people along the Coast, and the Groundwater for Resilience programme is reaching 1.5 million people in our borderland Counties. The Northern Collector extension for 1.2 million Nairobians. Together, these programmes have connected millions of Kenyans who had no formal water services before. That is a record to be proud of.

5. On energy, which is one of the sector's most significant cost pressures, we have launched a National Solarisation programme across 14 Counties, with Ksh 917 million committed. The flagship Baricho Wellfields Solarisation Project on the Coast, generating 4.3 megawatts to power the Baricho pumping system, is over 90% complete. This programme reduces pumping costs, insulates utilities from electricity price volatility, and frees up operational budgets for maintenance and service expansion.

6. Urban Water Infrastructure has also been modernised significantly, with pipeline replacements exceeding 1,000 kilometres and smart pressure management units integrated with sensors deployed across Nairobi, Kisumu, and Mombasa. SCADA systems and GIS mapping tools are now fully operational in several major utilities, enabling real-time flow monitoring and faster leak response.

The Challenges We Must Now Confront

7. Against that record of achievement, the latest Impact Report presents a challenge we must confront with equal honesty. Non-Revenue Water has risen to 48% Nationally, up from 44% one year ago. Our utilities produce 504 million cubic metres of water every year, and nearly half of it never generates revenue. The financial cost is Ksh 14.9 billion in lost revenue annually. The gap between the cost of producing water and the revenue recovered when it is billed has widened from Ksh 44 per cubic metre to Ksh 51 in a single reporting period. We are investing more, producing more, and losing more. That trajectory must be reversed, and this Conference is where we begin.

8. Sewered Sanitation has remained effectively static at around 16% for three consecutive years, even as our Cities grow at pace. Twenty-four Counties have no sewerage network at all. Kenya loses an estimated USD 365 million annually, equivalent to one% of GDP, from the public health and economic consequences of poor sanitation. That is a cost falling hardest on the most vulnerable Kenyans, and it is a cost we have the tools to reduce.

Tackling the Energy Burden

9. Electricity costs average 12.94% of operational expenditure across our utilities, rising to 30 to 40% in systems dependent on pumping. Only 51 of the 94 regulated utilities are within the recommended energy cost benchmark.

   This is a structural constraint on financial sustainability and on the affordability of water to consumers.

10. Solarisation is part of our response, but it is not sufficient on its own. Water is a constitutional right and a common good, and its production deserves the same consideration in our national energy pricing framework that we extend to agriculture and strategic industries. I am directing the Ministry of Energy and Petroleum, Energy and Petroleum Regulatory Authority (EPRA), Ministry of Water, Sanitation and Irrigation, WASREB and Water Service Providers to develop a framework for a preferential

electricity tariff for water production and distribution. The cost recovery gap across our utilities has already narrowed from Ksh 9.36 per cubic metre to Ksh 1.61. The right tariff structure can close what remains.

Technology and Innovation for NRW Reduction

11. The tools to address Non-Revenue Water are not new, and they are not beyond Kenya's reach. Several of our utilities have already deployed them with results that speak for themselves. Meru Water and Sewerage Services has brought NRW to 19%. Nyeri Water and Sanitation Company has held it below 16%. These utilities operate in the same regulatory environment and under the same economic pressures as those recording losses above the recommended threshold. What sets them apart is not geography. It is governance, investment in the right technology, and the institutional discipline to maintain it.

12. Smart metering, District Metered Areas, GIS-based and satellite leakage detection, pressure management systems, SCADA integration, and AI-driven predictive maintenance are all proven in the Kenyan context.

The KEWI NRW Centre of Excellence, launched in 2025, now serves as a national hub for training and research on these tools. The knowledge exists. The technology exists. What this conference must produce is the commitment to deploy it at scale.

13. Our national NRW targets are 25% by 2027 and 15% by 2030. Every % age point we reduce recovers approximately 5 million cubic metres of water. Getting from 48% to 25% would create the equivalent of a major new water source serving millions of additional Kenyans, without a single new dam or treatment plant. It is the most cost-effective investment available to the sector.

The Unfinished Business of Sanitation

14. Water supply and sanitation are two halves of the same obligation. Our Cities are growing faster than our wastewater treatment capacity, and the consequences are borne by Rivers, Groundwater Sources, and communities downstream. Nairobi, Mombasa, Kisumu, Nakuru, and Eldoret all face an urgent need for treatment infrastructure that matches the scale of their populations.

15. I am directing the Ministry to fast-track the development and rehabilitation of wastewater treatment infrastructure, beginning with our five major cities, and to move from planning through procurement to construction within the current financial year. The National Sanitation Management Policy 2025 has set the strategic direction. Execution must follow without further delay.

Financing the Path to 2030

16. Kenya's total investment requirement to achieve universal water and sanitation access by 2030 is Ksh 1.27 trillion. The NAWASIP framework has structured Ksh 995 billion of that in prioritised, County-screened investments, drawing on public budgets, concessional lending, donor grants, Public-Private Partnerships, and commercial borrowing. The residual financing gap is approximately Ksh 71 billion, which is manageable if implementation discipline matches the plan's ambition.

17. Through the Kenya Water Sector Trust Fund, the Government is channelling blended finance to utilities investing in smart metering, rehabilitation, and data systems. Performance-based contracts are being deployed, tying private partner returns to verified water savings. Commercial banks are being engaged through the WSP Creditworthiness Index and lending frameworks developed jointly with the World Bank, with 83 utilities now holding a credit rating of B or above. The financing architecture is in place. Utilisation is what the moment demands.

Water Is Not Free: The Accountability Imperative

18. Producing water, treating it, and delivering it to a household costs money. When a utility loses half of what it produces before it can bill for it, those costs are passed to consumers, accumulated as debt, and subtracted from the maintenance budgets that keep systems functioning. The sector cannot invest its way out of that cycle without first closing the losses that drive it.

19. I am calling on County Governments to ring-fence water revenues without exception. Every shilling collected from water consumers must be reinvested into water infrastructure and operations. Diversion of water revenue to other county functions is a breach of the Water Act 2016 and a failure of the

constitutional obligation to progressively realise the right to water. This is not a recommendation. It is a legal requirement, and it will be enforced.

20. Water Service Providers will be measured against WASREB standards and against the NRW targets set out in this address. Providers that demonstrate credible, measurable progress will receive priority in capital grants, concessional finance, and technical support. Those who cannot demonstrate that progress will face consequences in licensing, tariff decisions, and access to public funds. We are moving from measuring effort to measuring outcomes.

Towards Universal Access by 2030

21. Article 43 of the Constitution of Kenya gives every Kenyan the right to clean and safe water in adequate quantities. That is a justifiable right, not a programme aspiration. This Government is accountable for its progressive realisation, and every institution in the water sector shares that accountability.

22. Our goal is to expand national water coverage to 80% by 2030, to reduce NRW to 15%, and to see sewered sanitation coverage grow in every major city. These targets are achievable. The infrastructure pipeline, the financing framework, the technology base, and the institutional architecture are all in place. What the final stretch to 2030 requires is urgency, discipline, and results.

23. Let this conference produce not declarations, but decisions. Let every Water Service Provider leave with a specific NRW reduction target and a technology deployment plan. Let every County Government leave with a clear commitment to protect water revenues.

24. The Water Works Development Agencies are currently finalizing and implementing standardized Bulk Water Supply Agreements. These agreements are governed by WASREB to formalize supply contracts, enforce tariff guidelines and establish clear technical standards between the bulk supplier and retailers.

    Let every development partner and private investor leave knowing that Kenya is a sector where commitments are honoured and results are delivered.

Distinguished Guests, Ladies and Gentlemen,

We have built something real in Kenya's water sector. The question before this conference is whether we will protect what we have built by closing the losses that are eroding it, and whether we will accelerate what remains to be done with the urgency that 2030 demands.

With those remarks, it is my honour to officially declare the Non-Revenue Water Management Conference 2026 open.

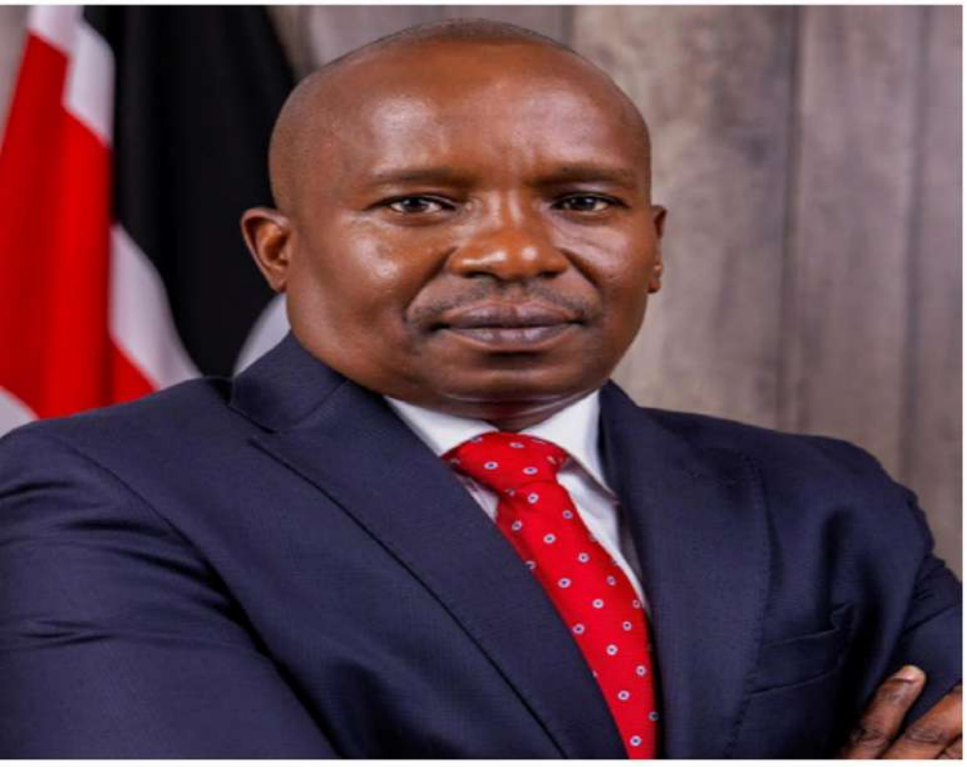
Thank you.

God bless you.

God bless the Republic of Kenya.

Welcome MESSAGE

DEPUTY PRESIDENT



REMARKS BY

HIS EXCELLENCY
HON. KITHURE KINDIKI, PHD., E.G.H.,
DEPUTY PRESIDENT
OF THE REPUBLIC OF KENYA

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

It is a privilege to join you at this Conference and to reaffirm this Government's commitment to delivering Safe, Affordable, and reliable water and Sanitation Services to every Kenyan. His Excellency the President has set out the National Agenda comprehensively. I want to use my time to speak to three things that I believe will determine whether we achieve it: the governance of Water Services under Devolution, the Climate Challenge, and the role of our development partners.

Devolution and the Governance of Water Services

1. Water is a devolved function. Schedule 4 of the Constitution assigns County Governments direct responsibility for Water Services and Sanitation within their jurisdictions. That assignment is not merely administrative. It is a constitutional commitment to bringing services closer to the people who need them.

   Devolution has delivered real gains. All 47 Counties now include water and sanitation in their County Integrated Development Plans. County Governments are establishing Water Service Providers and aligning local planning with the National Regulatory Framework. That is progress worth acknowledging.

2. But the WASREB Impact Report also records persistent compliance failures that are undermining what devolution was meant to deliver. Political interference in utility operations continues to distort hiring, procurement, and tariff decisions. Water revenues are being diverted from utility accounts to other county functions, stripping utilities of the working capital they need to maintain systems and respond to faults. Tariff reviews are being deferred for years at a time, leaving utilities unable to cover their own operating costs.

   These failures show up directly in service delivery data, and they are county governance failures, not infrastructure failures.

3. The NRW performance range across our counties makes the governance argument concrete. NRW runs from 23 percent at the top of the performance table to 77 percent at the bottom, with sixteen counties at or above 50 percent. That range is not explained by the age of pipes or the availability of donor funding. It is explained by governance quality: whether utility management is professional and independent, whether financial controls are in place, and whether county leadership treats water as a constitutional obligation rather than a political resource.

4. I am making four specific requests of every Governor here today. Increase your county's water and sanitation budget allocation and ring-fence it from diversion. Ensure your Water Service Providers are led by independent, professionally appointed boards.

Embed a costed, timebound water programme in your CIDP and treat it as a delivery commitment. And bring your tariff structures current. These four actions, done seriously and sustained consistently, will deliver more for water service in your county than any single infrastructure project funded from outside.

Climate Change: An Immediate Operational Reality

5. Climate change is not a future challenge for this sector. It is a present one. Kenya has experienced four severe drought events in the past decade. Rainfall variability has increased to the point where the hydrology our infrastructure was designed around is no longer reliable.

   Aquifers are being drawn down faster than they recharge. Reservoirs run critically low in dry seasons. And when the rains arrive, they increasingly arrive as flash floods that damage the distribution infrastructure they should be replenishing.

6. The consequences for service delivery are direct. Utilities in arid and semi-arid counties face service hours approaching zero during extended dry spells. Catchment degradation is reducing both the volume and quality of water reaching abstraction points. The sector cannot plan for 2030 using the climate assumptions of 2000. Every dam design, every distribution network, every county water master plan must be built around the climate we expect, not the one we once had.

7. The Government is scaling up climate-resilient interventions across the sector: catchment protection under the Kenya Water Towers Agency, aquifer recharge programmes, rainwater harvesting mainstreamed as a first-line intervention in ASAL counties, and infrastructure designs that incorporate multi-purpose storage and adaptive management. The Groundwater for Resilience programme is reaching 1.5 million people in borderland counties where surface water supply cannot reliably function under current climate conditions. Climate adaptation and water security are, ultimately, the same investment, and they must be treated that way in every planning and financing decision this sector makes.

Development Partners: Deepening a Productive Partnership

8. Kenya's Development Partners have been transformative contributors to the sector, and I want to acknowledge that partnership with genuine appreciation. The World Bank, the African Development Bank, JICA, the AFD, KfW, UNICEF, the European Union, and bilateral partners including Italy, Belgium, and DANIDA have together invested billions in Kenya's water and sanitation infrastructure. Programmes like Kenya Towns, K-WASH, the Water and Sanitation Development Project, and the Kenya WASH Programme to 2030 are active and delivering. These partnerships have changed the lives of millions of Kenyans, and they deserve to be protected and deepened.

9. But the nature of what Kenya needs from its partners is evolving. The foundational infrastructure is largely in place. What the sector now needs is support for utility governance reform, results-based financing frameworks, commercial creditworthiness building, and climate adaptation planning. The shift toward results-based financing, where disbursements are tied to verified service delivery outcomes rather than input expenditure, is the right model and we want to see it extended across all major partner programmes.

10. Kenya's commercial financing landscape is also maturing. 83 utilities now hold a credit rating of B or above, up from 64 in the previous period. Pension funds hold an estimated KSh 1.5 trillion and insurance companies KSh 500 billion. These are pools of long-term capital that can be mobilised for water infrastructure through green bonds and structured finance facilities. Development partners have a critical role to play in de-risking these instruments and building the track record that attracts private capital at scale. One area where we need stronger partnership is climate adaptation financing, where Kenya has a strong case to make to the Green Climate Fund and bilateral climate finance windows, and where we ask our partners to support us actively.

The Way Forward: A Direct Call to County Governments

11. Universal water and sanitation access by 2030 is achievable, but it will not be delivered from Nairobi alone. It will be delivered, or it will not be delivered, at the county level. Every Governor must leave this conference with a clear commitment: budget more for water and sanitation, protect the independence of your utilities, govern them well, and hold them to account for results. The national government and WASREB will track your performance. Development partners will prioritise counties that demonstrate genuine commitment. And the Kenyans you serve will judge you by whether their taps run.

Distinguished Delegates, Ladies and Gentlemen,

The progress Kenya has built in the water sector is real and worth defending. The path to 2030 is defined. What the final stretch demands is county governments that govern water services with the seriousness the constitutional mandate requires.

Thank you.

God bless you.

God bless the Republic of Kenya.

Welcome MESSAGE

CABINET SECRETARY,

MINISTRY OF WATER, SANITATION AND IRRIGATION



REMARKS BY

ENG. ERIC MUGAA,
CABINET SECRETARY,
MINISTRY OF WATER, SANITATION AND IRRIGATION

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

Distinguished Guests.
Ladies and Gentlemen.

I stand before you not only as Cabinet Secretary but as an engineer. From a technical perspective, the efficiency of a system defines its worth. From a policy perspective, the financial sustainability of that system determines whether it can serve the people it was built for. Both lenses point to the same conclusion today: this sector has made real progress, and it has a specific, quantifiable problem that we are here to solve.

The Progress the Sector Has Made

1. The financial trajectory of our sector is encouraging. Total revenue has grown 14% to Ksh 32.9 billion. Operation and maintenance cost coverage has crossed 100% in aggregate for the first time. The cost recovery gap has narrowed from Ksh 9.36 per cubic metre to Ksh 1.61. Water coverage in regulated areas stands at 72%, drinking water quality compliance at 96%, and revenue collection efficiency at 93.82%. These are signs that the financial model works when applied with discipline, and they are the platform from which we must now go further.

The Problem We Must Solve

2. Non-Revenue Water has risen to 48% nationally. Our utilities produce 504 million cubic metres of water every year, and nearly half never generates revenue. The financial cost is Ksh 14.9 billion annually, equivalent to 45% of everything our utilities earn. The gap between the unit cost of producing water and the unit cost of water billed has widened from Ksh 44 to Ksh 51 per cubic metre in a single reporting period. We are investing more, producing more, and losing more. That trajectory ends here.

3. As an engineer, I want to be precise about what drives NRW, because diagnosis determines intervention. There are three distinct failure modes. Physical failure: aging pipelines under pressure they were not designed to sustain, producing burst mains and background leakage that persist for months undetected. Commercial failure: illegal connections, faulty meters, compromised billing databases, and systematic revenue manipulation. Operational failure: the absence of digital monitoring systems that would allow utilities to see what is happening in their networks and respond before losses compound. Each failure mode

is addressable. The tools exist, they are proven, and several of our own utilities are already using them to strong effect.

The Energy Burden

4. Electricity now accounts for an average of 12.94% of operational expenditure across our utilities, rising to 30 to 40% in pumping-dependent systems. Only 51 of 94 utilities are within the recommended benchmark. Our national solarisation programme, covering 28 projects in 14 counties with Ksh 917 million committed, is part of the response. The Baricho Wellfields project on the Coast, with 4.3 megawatts of solar generation capacity, is over 90% complete. But solarisation addresses part of the problem. Water is a constitutional right and a common good. This Ministry is making a formal case for a preferential electricity tariff for water production and distribution. The cost recovery gap has narrowed to Ksh 1.61 per cubic metre. The right tariff structure closes it.

The Ministry's Five-Pillar NRW Reduction Framework

5. This Ministry has built a National NRW Reduction Framework on five pillars. Enforcement: WASREB standards are regulatory requirements, not guidelines, and persistent non-compliance will carry consequences in licensing, tariff decisions, and access to public capital. Specific Action Plans: every utility must have a costed, timebound NRW reduction roadmap with named milestones and named management accountable for delivery. Infrastructure Modernisation: aging pipelines must be replaced, and this Ministry is prioritising rehabilitation in utilities with the highest physical loss rates. Digitisation: smart metering, SCADA integration, GIS network mapping, and AI-driven predictive maintenance must move from pilots to national standard. Performance Contracts: funding will be tied to verified NRW reduction. Utilities that demonstrate credible progress will be supported. Those that cannot will not.

Financing and Accountability

6. The investment required to bring NRW down is substantial but financeable. 83 of our 95 utilities now hold a credit rating of B or above, up from 64 in the previous period. That growing creditworthiness base enables commercial NRW financing. Public-Private Partnerships structured on performance-based contracting allow private technology partners to invest upfront and recover returns through revenue savings. The Kenya Water Sector Trust Fund is channelling blended finance tied to verified performance improvements. Kenya's pension funds and insurance companies hold combined assets of approximately Ksh 2 trillion, and green bonds and infrastructure bonds aligned to ESG mandates are the instruments through which that capital can be mobilised for the sector.

Sanitation and Wastewater

7. Sewered sanitation has remained at 16% for three consecutive years while our cities grow. Kenya loses USD 365 million annually from the consequences of poor sanitation. This Ministry is fast-tracking wastewater treatment infrastructure, beginning with our five major cities, prioritising less energy-intensive technologies and designs that incorporate resource recovery. Sanitation is not a secondary agenda. It is a public health obligation and an economic investment whose returns far exceed the capital outlay.

Distinguished Guests, Ladies and Gentlemen,

By securing the drop, we secure the shilling.

Thank you.
God bless you.
God bless the Republic of Kenya.

Welcome MESSAGE

PRINCIPAL SECRETARY

MINISTRY OF WATER, SANITATION AND IRRIGATION
STATE DEPARTMENT FOR WATER AND SANITATION



REMARKS BY

MR. JULIUS KORIR, CBS,

PRINCIPAL SECRETARY,
STATE DEPARTMENT FOR WATER AND SANITATION

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

Distinguished Guests.
Ladies and Gentlemen.

As the Principal Secretary and Accounting Officer for this State Department, my priority is ensuring that every shilling invested in the water sector yields maximum value for the Kenyan taxpayer. The data gives us grounds for confidence and for urgency in equal measure, and I want to speak to both.

What the Service Delivery Chain Tells Us

1. The WASREB Impact Report confirms real progress in the sector's financial health. Total sector revenue has grown to **Ksh 32.9 billion**, O&M cost coverage has crossed 100% in aggregate for the first time, and drinking water quality compliance stands at 96%. The cost recovery gap has narrowed from Ksh 9.36 to Ksh 1.61 per cubic metre, a trajectory that demonstrates the financial model works when it is applied consistently. These are outcomes this Department has worked to enable through regulatory alignment, results-based financing, and sustained engagement with our development partners.
2. But the same report identifies pressure points that demand our attention. The unit cost gap between water produced and water billed has widened from Ksh 44 to **Ksh 51 per cubic metre** in a single year. Water connections grew by only 1.3% and sewer connections by 0.9%, both below population growth. Revenue collection efficiency has slipped to 93.82%, with large utilities recording the steepest decline. Electricity costs average 12.94% of O&M expenditure, with only 51 of 94 utilities within the recommended benchmark. These are the pressure points this Department is tracking, and they define where our interventions must be targeted.

Resource Mobilisation and Results-Based Financing

3. This Department is actively managing a significant portfolio of donor-funded programmes, each carrying specific performance obligations. The World Bank's K-WASH programme covers 19 counties. The Kenya WASH Programme running to 2030 with a USD 458 million commitment supports 33 utilities in building bankable project proposals and accessing commercial financing. The African Development Bank's Kenya Towns programme is 90% complete across 30 counties. The Water and Sanitation Development Project is delivering on the Coast. Each of these programmes has absorption targets, safeguard requirements, and results frameworks that this Department monitors closely.

4. Future funding will be tied to results, not to expenditure. We are implementing results-based financing frameworks across all major programmes, where allocations to Water Service Providers are linked to demonstrated, downward trends in NRW levels and verified improvements in service delivery. A utility that cannot show progress on NRW will not receive the next tranche of capital support, regardless of how much it has spent. That discipline is what converts financing into outcomes.

Supporting Counties to Deliver

5. Under our devolved system, water service delivery is a county function. This Department's role is to enable counties to perform that function well. We do this through three channels. First, policy harmonisation: working with the Council of Governors to ensure county water strategies align with the National Water Policy and the Water Act 2016. Second, technical support and capacity building: providing the expertise and training that county Water Service Providers need to adopt the technologies and management practices that reduce NRW. Third, conditional grants and fiscal oversight: ensuring that funds reaching counties are used strictly for infrastructure upgrades and NRW reduction, and tracking that utilisation against verified results.
6. The Water Services Regulations 2025 are being fast-tracked to standardise governance across all WSPs and raise accountability standards for utility management. Counties that align their WSPs with these regulations, maintain financial ring-fencing, and report transparently to WASREB will be prioritised in the allocation of conditional grants and technical assistance. Those that do not will find the path to external financing increasingly difficult.

Technology as the Delivery Mechanism

7. The technologies that reduce NRW are not experimental. Smart metering, GIS-based and satellite leakage detection, District Metered Areas, automated billing, and real-time data analytics are all in use in Kenya's better-performing utilities. This Department is supporting the scaling of these tools from county pilots to national deployment, working with development partners to make financing accessible across all utility size categories. The transition to digital water management is not optional for utilities seeking to achieve the sector's NRW targets. It is the delivery mechanism through which those targets become reachable.

The Targets We Are Working To

8. This Department's performance framework is anchored in clear sector targets: **NRW to 25% by 2027 and 15% by 2030,** water coverage expanded to 80% nationally, and sewered sanitation coverage growing year on year in every major city. Every programme we manage, every grant we disburse, and every utility we oversee will be evaluated against progress toward those targets. The WASREB Impact Reports will continue to publish the data publicly. Performance is on the record, and this Department reads it.

Ladies and Gentlemen,

The war on NRW is a war on fiscal waste and on the inequality that comes when water produced at public cost never reaches the households that need it most. Let us use this conference to commit to innovation that is not just high-tech but high-impact, and to implementation that is not just planned but delivered.

Thank you.

Welcome MESSAGE

CHAIR COG



REMARKS BY

H.E JOSHUA IRUNGU, EGH

CHAIRPERSON, WATER AND NATURAL RESOURCES MANAGEMENT COMMITTEE, COUNCIL OF GOVERNORS & GOVERNOR, LAIKIPIA COUNTY

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

Distinguished Guests.

Ladies and Gentlemen.

1. It is both an honour and a privilege to address you today at this important NonRevenue Water Management Conference 2026.
2. This is a matter that is inadequately addressed but a preserve to the right to clean and safe water in adequate quantities our constituents' including the marginalized and underserved.
3. But first, allow me to commend the Ministry of Water, Sanitation and Irrigation, WASREB, county governments, water utilities, development partners and all sector stakeholders for convening this timely forum.
4. As Kenya continues to face increasing pressure on water resources and rising demand for clean and safe water, Substantial amount of treated water never reaches the consumer or fails to generate revenue. That is the challenge of Non-Revenue Water. Ladies and Gentlemen,
5. Non-Revenue Water is not merely a technical issue. It is an economic issue, a governance issue, a climate issue and ultimately a development issue. Every litre of water lost through leakages, illegal connections, meter inaccuracies or poor billing systems represents lost opportunity for households, industries, farmers and institutions that desperately need reliable water supply.
6. According to recent WASREB sector reports, Kenya's national Non-Revenue Water average stands at approximately 45 percent, up from 43 percent previously. This means that nearly half of all treated water produced by our utilities does not generate revenue. The financial implications are enormous.
7. The water sector is estimated to lose over KSh 10 billion annually due to Non-Revenue Water. These are resources that could otherwise expand water access, improve sewerage systems, rehabilitate infrastructure and strengthen service delivery across our counties. In practical terms, this lost water could supply millions of Kenyans with clean water every year.
8. County governments recognize that reducing Non-Revenue Water is one of the fastest and most cost-effective ways of increasing water availability without necessarily developing new water sources. Indeed, the cheapest water is the water we do not lose.
9. I am encouraged by the progress being made in several counties and utilities across the country. We have examples demonstrating that with leadership, technology, investment and accountability, significant reductions in NRW are achievable.

10. For example, Nyeri Water and Sanitation Company has consistently emerged among the best-performing utilities in Kenya due to strong investments in smart metering, pressure management, active leakage control and customer accountability systems.

11. Similarly, several utilities are now embracing District Metered Areas, GIS mapping, SCADA systems, digital billing platforms and real-time monitoring technologies to detect losses and improve operational efficiency.

Ladies and Gentlemen,

12. As the Council of Governors, we reaffirm our commitment to supporting counties and utilities in the following strategic areas:

13. First, strengthening governance and accountability in county water utilities. Water Service Providers must operate with professionalism, integrity and sound corporate governance. Boards and management teams must be appointed on merit and held accountable for performance outcomes, including NRW reduction targets.

14. Second, increasing investment in rehabilitation and modernization of infrastructure. Many of our water networks are old, overstretched and poorly maintained. In some towns, pipes installed over 40 years ago continue to serve rapidly growing populations. Counties must prioritize replacement of aging infrastructure and modernization of distribution systems.

15. Third, embracing technology and innovation. Digital transformation is no longer optional. Smart meters, automated billing systems, pressure sensors, satellite leak detection and data analytics must become standard tools in water management.

16. Fourth, strengthening partnerships. The NRW challenge cannot be solved by government alone. We need stronger collaboration with development partners, research institutions, private sector innovators and communities. Public-Private Partnerships will be critical in mobilizing financing, technical expertise and operational efficiencies necessary for NRW reduction.

17. Fifth, enhancing community engagement and consumer responsibility. Illegal connections, vandalism and meter bypasses continue to undermine sustainability in many counties. Communities must understand that protecting water infrastructure is a shared responsibility.

Ladies and Gentlemen,

18. Reducing NRW is not only about improving utility finances; it is about safeguarding our future. We therefore cannot afford to lose almost half of treated water through inefficiencies.Every cubic meter saved contributes to sustainable water access, food security, public health and economic growth.

19. The Council of Governors therefore, is committed to support the national target of reducing NRW levels to below 20 percent in line with Vision 2030 and sector reform strategies.

20. To achieve this ambition, counties will continue to work closely with the national government and sector institutions to, develop county-specific NRW reduction strategies; Strengthen utility performance contracts; Expand investment in metering and network rehabilitation; Improve data quality and reporting systems; and Build technical capacity within county water entities.

21. As I conclude, we recognise the efforts of National Government on NRW Management Programmes. We however request the the Ministry of Water, Sanitation and Irrigation to enroll the NRW standards and training to all the Counties and utilities. WASREB for continued enforcement in performance monitoring and benchmarking utilities helping drive sector reforms and operational improvements.

22. To our Partners, I invite you to work with the Counties on performance improvements, funding and adoption of necessary innovations technologies.

23. Finally, Water is life. But water without efficiency is unsustainable. The future of our water sector will depend not only on how much water we produce, but also on how effectively we manage every drop.

24. This conference should therefore produce actionable resolutions, practical partnerships and measurable commitments that will accelerate reduction of NonRevenue Water across all counties.

25. With those remarks, I wish you fruitful deliberations and a successful conference.

God Bless Kenya, God bless our Counties.

Thank you.

Welcome MESSAGE

NAKURU GOVERNOR

REPUBLIC OF KENYA

NAKURU COUNTY
COUNTY OF UNLIMITED OPPORTUNITIES



REMARKS BY

H.E. SUSAN KIHIKA,

NAKURU COUNTY GOVERNOR,

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha

June 30th – July 3rd, 2026

Distinguished Guests.
Ladies and Gentlemen.

1. Karibuni sana to Nakuru —the County of Unlimited Opportunities.

   It is both an honour and a pleasure to welcome you to the beautiful shores of Lake Naivasha, one of our greatest natural treasures. Beyond its breathtaking beauty, this lake is the lifeblood of countless families, a driver of economic growth, and a critical source of water for homes, farms, industries and businesses. There could be no more fitting place for us to come together and reflect on the future of water management in our country.

2. I am delighted that we are gathered here for this important Non-Revenue Water Management Conference under the timely theme, Leveraging Technology and Innovations. At a time when the demand for clean water continues to grow and climate-related pressures become more pronounced, innovation is no longer a luxury—it is a necessity. If we are to safeguard our water resources and ensure sustainable service delivery, reducing water losses and improving efficiency must remain at the centre of our efforts.

3. The latest regulatory data paints a sobering picture. Kenya's national Non-Revenue Water level has now reached 48 percent. This means that almost half of all the water produced, treated, and distributed across the country is lost before it reaches paying customers. Whether through aging infrastructure, leakages, faulty meters, or illegal connections, these losses represent more than lost revenue. They translate into missed opportunities to extend water services, improve reliability, and enhance the quality of life for millions of Kenyans.

4. In Nakuru County, our average Non-Revenue Water currently stands at 29 percent according to the latest Water Services Regulatory Board (WASREB) IMPACT Report. While this performance is significantly better than the national average, we know there is still room for improvement. For us, reducing water losses is not simply about meeting regulatory targets. Nakuru is naturally water-scarce. Unlike many other counties, we do not enjoy the advantage of large permanent rivers flowing across our landscape. Instead, we depend heavily on underground aquifers, boreholes, springs, and water transferred from neighbouring catchments. Every litre of water requires significant investment to abstract, treat, and distribute. Losing that water through leakages or theft is a luxury we simply cannot afford.

Ladies and gentlemen

5. Across Nakuru County, water coverage currently stands at 63 percent. While we are encouraged by the progress made over the years, we remain conscious that many families, particularly in rural and peri-urban areas, still lack reliable access to safe water. Our experience has shown that focused investments deliver meaningful results. Within Nakuru City and the surrounding urban areas, sustained improvements have increased water coverage to approximately 90 percent. Our commitment now is to ensure that residents in every corner of the county enjoy the same level of service, regardless of where they live.

6. To accelerate this progress, we continue to work closely with the National Government and our development partners on transformative water infrastructure projects. We are particularly grateful for the KfW-funded Lake Nakuru Biodiversity Project, which is adding an additional 20,000 cubic metres of water per day into our supply system. Equally important is the successful bulk water transfer from Chemususu Dam, which is already delivering 6,000 cubic metres of clean water daily to residents of Rongai and Kiamunyi who have waited for many years for reliable water services.

7. As we continue to advocate for the expedited completion of the Itare Dam project, we remain optimistic about the immense impact it will have once operational. With an expected capacity of 100,000 cubic metres per day, the project will significantly strengthen Nakuru's domestic and industrial water supply while supporting the county's long-term economic growth.

8. However, increasing water production alone is not enough. Expanding supply without addressing losses within the distribution network would amount to wasting valuable public resources. That is why we adopted a deliberate, data-driven approach built on strong partnerships, modern technology and accountable governance

9. Through the Nakuru Water and Sanitation Services Company, NAWASSCO, together with our rural water service providers, we have invested heavily in modern solutions that are already delivering measurable results. More than 15,000 smart water meters have been installed across Nakuru City and neighbouring towns, allowing us to monitor consumption in real time and quickly identify anomalies. Advanced acoustic leak detection equipment and Geographic Information Systems have dramatically improved our ability to locate underground leaks before they escalate into major losses. We have also established District Metered Areas, replaced more than 120 kilometres of aging pipelines, and strengthened collaboration with local administrators to curb illegal connections and water theft.

10. These deliberate investments are yielding impressive outcomes. I am proud to note that NAWASSCO has been ranked by WASREB as the top-performing water utility in Kenya, a remarkable achievement that reflects the dedication of our teams and our unwavering commitment to excellence in service delivery. By reducing operational losses and improving efficiency, we are saving millions of shillings every year—resources that are being reinvested into expanding and strengthening our water infrastructure. Most importantly, these improvements have enabled more than 25,000 additional families to enjoy a more reliable and consistent supply of clean water.

11. Looking ahead, our ambition is clear. We are determined to reduce average Non-Revenue Water to well below 25 percent by the year 2030 in line with Kenya's Vision 2030 aspirations. Achieving this will require continued investment in smart metering across all urban centres, greater use of predictive artificial intelligence to detect leaks before they occur, and stronger partnerships with industries, particularly around Naivasha, to promote water recycling and sustainable water use.

    Ladies and gentlemen

12. Securing Kenya's water future is a responsibility that belongs to all of us. It requires close collaboration between the National Government, county governments, regulators, water service providers, development partners, the private sector, and our communities. Every drop of water we save translates into better services, stronger utilities, lower operational costs, and improved livelihoods for our people.

13. Allow me to express my sincere appreciation to everyone gathered here today—our ministries, regulators, water utilities, researchers, innovators, and development partners—for your continued commitment to strengthening Kenya's water sector. I encourage us to use this conference not only as a platform for exchanging ideas but also as an opportunity to forge practical partnerships and commit ourselves to bold, innovative solutions that will shape the future of water management in our country.

    Thank you once again for choosing Nakuru as your host. I wish you fruitful deliberations and an enjoyable stay in our beautiful county.

Thank you.

H.E. SUSAN KIHIKA, EGH

GOVERNOR, NAKURU COUNTY

Welcome MESSAGE

WATER SECRETARY

MINISTRY OF WATER, SANITATION AND IRRIGATION
STATE DEPARTMENT FOR WATER AND SANITATION



REMARKS BY

ENG SAO ALIMA, EBS,

WATER SECRETARY,
STATE DEPARTMENT FOR WATER AND SANITATION

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha
June 30th – July 3rd, 2026

Ladies and Gentlemen,

Good morning

Good morning. This Conference addresses one of the most consequential challenges facing our Water Sector, and I am glad to see the level of Seniority and expertise gathered in this room to confront it. The policy direction has been set clearly by His Excellency the President and the leadership that has spoken before me. I want to speak briefly to the institutional and policy architecture that will carry us to the outcomes we have committed to.

A Policy Framework That Is Working

1. Kenya's water sector operates within one of the strongest policy and legal frameworks in sub-Saharan Africa. The National Water Policy 2021 anchors our shift from infrastructure-led delivery to a service-oriented approach that prioritises equity, sustainability, and universal access. The Water Act 2016, now fully operationalised through the Water Services Regulations 2025, has clarified institutional mandates, strengthened the regulatory role of WASREB, and established the accountability framework within which every utility and every County Government must operate. The National Irrigation Services Strategy 2022 to 2026 is on track to bring an additional 500,000 acres under Irrigation by the close of this year. These are not aspirational documents. They are operational frameworks, and our task is to implement them fully and consistently.

2. The Water Services Regulations 2025 deserve particular mention. They standardise governance requirements across all Water Service Providers, establish minimum service standards, clarify the licensing regime, and provide the regulatory basis for the preferential tariff and results-based financing frameworks that speakers before me have outlined. My office is working closely with WASREB to ensure that these Regulations are understood, adopted, and enforced across all 95 regulated utilities and at every level of the devolved Water Service Delivery Structure.

Managing the Donor Portfolio

3. This Department coordinates a donor programme portfolio that spans the World Bank, the African Development Bank, JICA, the AFD, KfW, UNICEF, the European Union, and several bilateral partners. These programmes collectively represent billions of shillings in committed financing for Water Supply, Sanitation, Irrigation, and Climate Resilience across Kenya.

Managing them well requires three things above all else: absorption efficiency, accountability to results frameworks, and strict compliance with environmental and social safeguard obligations.

4. Absorption rate is where we must do better. Slow procurement, delayed feasibility work, and weak project preparation at County level continue to constrain how quickly committed funds reach the ground. My office is working directly with Implementing Agencies and County Governments to address these bottlenecks, because every month of delay is a month in which Kenyans who should be connected to water are not. Future programme designs will build in stronger project readiness requirements upfront, so that once financing is confirmed, implementation can begin without the preparatory delays that have cost us time in the current portfolio.

Institutional Coordination

5. The Water Sector Inter-Governmental Consultation and Cooperation Framework is the mechanism through which National and County Governments align their water planning, financing, and implementation. Making that framework fully operational is a priority for my office. So is strengthening the coordination between WASREB, the Water Works Development Agencies, and the Water Service Providers that together form the institutional backbone of service delivery.

   Each institution has a defined mandate. Where those mandates overlap or create gaps, my role is to ensure they are resolved at the coordination level rather than allowed to stall implementation.

6. Non-Revenue Water at **48% and Ksh 14.9 billion in annual losses** is ultimately an institutional coordination failure as much as a technical one. The tools, the financing, and the regulatory framework to address it are in place. What is required now is the institutional discipline to deploy them consistently, to hold implementing agencies to their mandates, and to ensure that the policy framework we have built translates into the service delivery outcomes that every Kenyan is entitled to expect.

Ladies and Gentlemen,

The presentations that follow over the course of this conference will demonstrate, in technical detail, what is possible when institutions coordinate well, when financing is deployed efficiently, and when utilities are held to account for results. I look forward to those deliberations and to the concrete commitments they will produce.

Thank you.

Welcome MESSAGE

WASPA CHAIR



SPEECH BY THE CHAIRPERSON

MR. THOMAS ODONGO

CHAIRMAN WATER AND SANITATION PROVIDERS ASSOCIATION (WASPA) & MD KISUMU WATER AND SANITATION COMPANY

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha

June 30th – July 3rd, 2026

Distinguished Guests.

Ladies and Gentlemen.

It is a great honour and privilege to stand before you today as Chairperson of the Water and Sanitation Providers Association (WASPA) during this important Non-Revenue Water Management Conference and Exhibition 2026.

Allow me to begin by expressing our sincere appreciation to the Government of Kenya, the County Government of Nakuru, our development partners, regulators, member utilities, sponsors, exhibitors, and all stakeholders who have made this conference possible. A gathering that brings together the entire ecosystem of Kenya's water sector. Such forums are important because they allow us not merely to discuss challenges but to forge practical solutions that improve the lives of millions of Kenyans.

The theme of this conference, **"Improving Non-Revenue Water by Leveraging Technology and Innovations,"** could not be more timely.

We meet at a particularly significant moment for our country. The recently unveiled FY 2026/2027 National Budget places strong emphasis on fiscal responsibility, efficient public service delivery, digital transformation, climate resilience, infrastructure modernization, and sustainable economic growth under the Bottom-Up Economic Transformation Agenda.

These national priorities mirror the challenges and opportunities facing Kenya's water sector today. The message from the budget is clear: every public institution must deliver greater impact with available resources. For water service providers, perhaps no opportunity offers greater returns than reducing Non-Revenue Water.

Ladies and Gentlemen,

As the association representing water and sanitation service providers across Kenya, WASPA's mission is closely tied to the challenge of Non-Revenue Water. A utility that loses 40 to 50 percent of the water it produces cannot achieve financial sustainability. Such a utility struggles to maintain infrastructure, expand services, service debts, attract investment, or provide quality services to customers.

The consequences are far-reaching. Lost water translates into lost revenue. Lost revenue translates into deferred investments. Deferred investments translate into communities that remain underserved.

This is why NRW remains one of the most critical challenges facing our sector. The urgency of this agenda is reinforced by the findings of WASREB Impact Report No. 18.

The report also confirms something we have long understood: utilities with lower NRW levels consistently perform better financially, recover costs more effectively,

invest more in service expansion, and provide better customer service. The lesson is clear. Reducing NRW is not merely a technical objective. It is a strategic imperative for sector sustainability.

Ladies and Gentlemen,

While NRW has been discussed for many years, what is different today is the availability of technologies capable of transforming utility performance.

This conference will showcase smart metering systems, district metered areas, GIS mapping technologies, supervisory control and data acquisition systems, artificial intelligence applications, predictive analytics, IoT sensors, digital billing platforms, and advanced leak detection technologies.

The FY 2026/2027 Budget rightly recognizes digital transformation as a catalyst for productivity and service delivery. For our sector, this validates a strategic direction that many progressive utilities have already embraced.

However, technology alone is not the solution. Technology succeeds only when supported by strong leadership, skilled personnel, sound governance, and a culture of accountability. It must therefore be viewed as an enabler of excellence rather than a substitute for good management.

Ladies and Gentlemen,

As we pursue NRW reduction, we must recognize that success requires a coordinated partnership architecture. National policy must translate effectively into county-level implementation.

Regulatory expectations must be matched with capacity-building and investment support. Development financing must be deployed efficiently and transparently. Technology providers must deliver solutions that are practical, scalable, and sustainable. County governments must continue supporting water utilities while protecting their operational autonomy and financial viability.

The Government's continued investment in water infrastructure through the FY 2026/2027 Budget provides a strong foundation for growth. Yet we must acknowledge that building new infrastructure while allowing substantial losses within existing systems is neither economically prudent nor fiscally sustainable.

Every investment made in water infrastructure must be protected through efficient utility operations and sound asset management. This is why NRW reduction must become a national performance priority.

As WASPA, we remain committed to strengthening collaboration among all stakeholders. We shall continue working closely with WASREB and WRA to promote evidence-based regulation.

Indeed, one of our greatest strengths as a sector is our ability to learn from one another. When one utility succeeds, others should not have to reinvent the wheel. Through WASPA, best practices can be shared and scaled across the country.

Ladies and Gentlemen,

Over the coming days, I challenge every participant in this conference to move beyond discussion and embrace commitment.

I propose four concrete outcomes.

First, every utility represented here should leave with a specific and measurable NRW reduction target accompanied by a clear implementation roadmap.

Second, county governments should reaffirm their commitment to supporting financially sustainable utilities through good governance and protection of water revenues.

Third, development partners and financiers should identify strategic opportunities for targeted investments that accelerate NRW reduction and digital transformation.

Fourth, WASPA commits to publishing a Sector NRW Progress Report within six months to track implementation of commitments made during this conference and promote accountability across the sector.

Additionally, WASPA commits to supporting the sector in three strategic areas: First accelerating technology adoption and digital transformation; secondly, strengthening governance, accountability, and performance management; thirdly enhancing utility financial sustainability and investment readiness.

These priorities align directly with the national development agenda, Vision 2030, the Bottom-Up Economic Transformation Agenda, and the recommendations emerging from WASREB Impact Report 18.

Let this conference therefore be remembered not simply as another sector gathering, but as the moment when Kenya's water sector collectively resolved to transform technology into measurable impact, innovation into operational excellence, and ambition into sustainable service delivery.

God bless you.

God bless the Republic of Kenya.

Welcome MESSAGE

WASPA CEO



REMARKS BY

MR. ANTHONY NJARAMBA,

CHIEF EXECUTIVE OFFICER, WASPA

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha

June 30th – July 3rd, 2026

Distinguished Guests, Ladies and Gentlemen,

Good Morning,

It is my honour and privilege to welcome you to this Non-Revenue Water Management Conference and Exhibition 2026. This conference comes at a defining moment for Kenya's water sector.

The recently approved FY 2026/2027 National Budget has reaffirmed Government's commitment to fiscal discipline, efficient utilization of public resources, digital transformation, climate resilience, infrastructure modernization and sustainable economic growth under the Bottom-Up Economic Transformation Agenda.

For the water sector, these priorities are not abstract policy statements. They directly speak to our greatest operational challenge and our greatest opportunity: reducing Non-Revenue Water., currently at 48%.

Today, every water utility in Kenya is under pressure to expand service coverage which stands at 72%, improve water quality, strengthen customer service, modernize infrastructure, and remain financially sustainable. Yet many utilities continue to lose between 35 and 50 percent of the water they produce before it reaches the billing system.

According to WASREB Impact Report No. 18, Non-Revenue Water remains one of the most significant obstacles to utility sustainability and sector growth.

These losses represent billions of shillings in foregone revenue every year. They represent treatment chemicals purchased but not recovered. Electricity consumed but not paid for. Infrastructure investments that fail to generate expected returns. Most importantly, they represent thousands of households that could have received water services using water that was already produced but never accounted for.

Ladies and Gentlemen,

As a country, we are investing billions of shillings in dams, water transmission systems, treatment works, sewerage infrastructure and climate resilience projects. The FY 2026/2027 Budget continues this commitment through substantial investments in water resource development and service delivery infrastructure.

However, building new infrastructure while losing significant volumes of treated water within existing systems is economically unsustainable. The cheapest source of new water today is the water we are already producing but losing. This is why NRW reduction must become one of the most important efficiency measures in the sector. Reducing NRW is no longer merely an operational

concern. It is a national economic imperative, a climate adaptation strategy. It is a public finance management issue.

And it is one of the fastest pathways towards achieving universal access to water and sanitation.

Ladies and Gentlemen,

The encouraging news is that the solutions already exist. WASREB Impact Report No. 18 demonstrates that utilities that have embraced technology, improved governance, strengthened accountability and invested in network management consistently outperform those that have not.

Across Kenya, several utilities are proving that NRW reduction is achievable. In Nyeri, Eldoret, Kirinyaga, Embu and Makueni, technology-enabled interventions are producing measurable improvements in revenue collection, network efficiency and customer satisfaction.

These success stories demonstrate that the challenge before us is no longer technological. It is institutional. The technologies are available. The financing opportunities exist. The regulatory framework is in place. What remains is the commitment to implement at scale. The future water utility will be driven by data, Smart metering systems, Artificial Intelligence, Internet of Things sensors, District Metered Areas, Digital asset management systems, SCADA platforms, Satellite leak detection technologies, and Advanced customer management systems.

These are no longer technologies of the future. They are becoming the minimum operational standards required to run efficient water utilities. However, technology alone will not reduce NRW. Technology must be accompanied by strong governance, leadership accountability, staff capacity development and performance management. The most sophisticated system cannot compensate for weak institutional discipline.

Ladies and Gentlemen,

The Kenya Kwanza Administration has repeatedly emphasized the importance of value for money, accountability and results-oriented public service. The water sector must embrace the same philosophy. Every investment in NRW reduction must demonstrate measurable outcomes, with clearly established NRW reduction targets.

Every Board must monitor progress and every Managing Director must be accountable for implementation. While every county government must support utilities in creating an enabling environment for sustainable service delivery. This is precisely why WASPA exists.

Our mandate is to strengthen utilities currently ninety four (94) compliant ones, promote knowledge sharing, support innovation, build technical capacity and advocate for policies that enhance sector performance.

Going forward, WASPA will intensify its bench-marking programme to support evidence-based decision making. We shall strengthen peer-learning networks among utilities and expand partnerships with technology providers, development partners and financial institutions.

We shall support the development of utility investment readiness frameworks to improve access to financing, and continue working closely with WASREB and other sector institutions to promote accountability and performance excellence.

Ladies and Gentlemen,

The theme of this conference calls upon us to leverage technology and innovation. But technology and innovation must ultimately translate into outcomes which are lower NRW, higher revenues, better customer service, improved utility sustainability, greater climate resilience, and expanded access to water and sanitation services. These are the results that matter.

As we deliberate over the coming days, I urge every participant to leave this conference with a concrete action plan. Not merely an appreciation of the problem. But a roadmap for solving it. Let every utility leave with a target. A timeline. An implementation strategy, and a commitment to deliver measurable results.

If we succeed in reducing Non-Revenue Water, we will strengthen utility finances, protect public investments, improve service delivery, increase water security and accelerate achievement of Kenya's development aspirations.

Most importantly, we will improve the lives of millions of Kenyans who depend on reliable and affordable water services every day.

I thank you for your participation and commitment to this important agenda.

God bless you all.

God bless the Republic of Kenya.

Thank you.

Welcome MESSAGE

KEWI CEO

REPUBLIC OF KENYA



WELCOME ADDRESS BY

DR. LEIRO LETANGULE Ph.D. EBS,

CHIEF EXECUTIVE OFFICER,
KENYA WATER INSTITUTE

OPENING CEREMONY OF THE NON-REVENUE WATER (NRW) MANAGEMENT CONFERENCE 2026

Lake Naivasha Resort, Naivasha

June 30th – July 3rd, 2026

1. It gives me pleasure and privilege to welcome you all to the Non-Revenue Water (NRW) Management Conference 2026. On behalf of the Kenya Water Institute, I extend a warm welcome to our sector leaders, policymakers, water service providers, and industry partners who have travelled from across the country and around the world to join us here in Naivasha.

   We gather here to address a challenge that sits at the very core of our nation's socioeconomic development. This conference serves as a platform for tracking our collective progress, disseminating technical innovations, and establishing the strategic partnerships required to transform our water sector. Your presence today underscores our commitment to securing Kenya's water future.

2. In Kenya, our national NRW average currently stagnates between 45% and 47%. According to Water Services Regulatory Board (WASREB), this inefficiency translates into an estimated KES 12 billion worth of treated water lost every year. Nearly half of the water we treat and pump vanishes. It does not reach our citizens, and it generates zero revenue for our utilities. This massive financial and operational loss heavily strains our Water Service Providers (WSPs), directly crippling their capacity to expand networks, maintain existing infrastructure, and achieve true financial self-sufficiency.

3. To understand the magnitude of our challenge, we must contrast ourselves with global benchmarks like Japan and Denmark who have tamed NRW through operational discipline and advanced systems:

   Japan have kept their national NRW average below 10%. In Tokyo, the capital of Japan, through active, continuous acoustic leak detection, preventative pipe replacement, and high-tech pressure controls, their NRW rate drops below an incredible 4%.

   Denmark operates at elite efficiency, maintaining NRW levels between 5% and 8%. The Danish model relies on smart metering networks, predictive hydrodynamic modeling, and automated pressure valves that isolate stress zones before a pipeline can rupture.

   When we place Kenya's 45% loss alongside Japan's 10% and Denmark's 5%, the gap is clear and sobering. Every liter of water that leaks into the ground is a citizen denied access, a school left without sanitation, and a utility sliding closer to financial insolvency. We cannot achieve universal water access under the weight of such systemic inefficiencies.

4. To solve this crisis, we must address the elephant in the room; our WSPs face a severe structural hurdle. A massive percentage of our distribution networks relies on old, dilapidated infrastructure. Many pipes were

laid decades ago; They are corroded, brittle, and long overdue for replacement.

We must accept that rehabilitating these aging networks requires massive capital investments. WSPs revenues alone cannot bridge this financing gap. Therefore, I appeal to our development partners, multilateral banks, and international financiers to heavily back our water utilities. We need targeted grants, concessionary loans, and infrastructure funds specifically earmarked for network rehabilitation and smart technology upgrades.

5. Simultaneously, our WSPs must evolve. We can no longer rely solely on traditional exchequer allocations or external donor goodwill. Utilities must become creative and aggressive in commercial resource mobilization. We must boldly explore commercial financing, blended finance frameworks, and public-private partnerships (PPPs) for infrastructure development. We must run our water utilities as viable, credit-worthy corporate entities capable of attracting investment on their own merit.
6. The future of the water sector depends entirely on our willingness to embrace technology and harness its positive power. Transitioning to smart water solutions is no longer a matter of luxury but an absolute operational necessity. They guarantee precise billing, eliminate human error, and instantly restores utility cash flows.
7. However, technology is only as good as the human hands operating it. You can procure the most advanced smart meters or deploy advanced software, but if your personnel lack the necessary skills to interpret data, calibrate systems, and perform active maintenance, those investments will fail. Conversely, a skilled workforce cannot succeed if they are forced to fight modern NRW challenges with outdated, manual tools.

   Capacity Building and Technology must go hand in hand. Training empowers our people, and technology empowers our networks.
8. As a strategic institution mandated to promote standard of service in the water sector, the Kenya Water Institute is actively driving the solution. We take pride in producing the next generation of water professionals. Our long-term academic craft, certificate, and diploma programs continue to supply the sector with highly skilled graduates. Indeed, many of the managers and technical experts steering the water utilities in Kenya today are proud KEWI alumni.

   We deeply appreciate all the WSPs represented here for consistently employing our graduates and providing our students with invaluable opportunities for industrial attachments and internships. These practical experiences are important as they bridge the gap between classroom theory and field realities, ensuring our young professionals hit the ground running.
9. Beyond long-term academic courses, KEWI offers short courses and professional development programs. These short courses are structured to address the immediate, evolving technical needs of the water sector and to provide hands-on solutions to the operational challenges utilities and the sector face daily.

   Specifically, on water loss, we have a dedicated short course on Non-Revenue Water Management. This program is structured into three specialized modules:
   1. Incentive-Based Management Approach,
   2. Management of Commercial Water Losses and
   3. Management of Technical Losses to address all aspects of NRW independently and comprehensively.
10. To stimulate a sustainable ecosystem for skills and technology transfer, KEWI in partnership with Gastby Africa has established the National NRW Centre of Excellence at our Nairobi Campus. This centre serves as a platform to drive NRW conversation across the sector. The centre is equipped with state-of-the-art equipment, including ultrasonic flow meters, leak noise detectors, pressure loggers, smart meters, electric test pump, a modern meter test bench and many other integrated soft tools. This facility equips water utilities with latest knowledge and technology to handle water losses through hand-on capacity building and NRW diagnostic consultancies. I invite all utilities present to tour this facility and enroll their teams.

    I urge all Board Chairs and Members, Managing Directors of WSPs and water sector professionals present today to review this calendar, identify your organizational skill gaps, and formally enrol your staff into these programs.
11. Let us use this conference to network transparently, learn aggressively, and commit to bold, immediate actions. Let us completely reject the notion that a 46% water loss is a normal cost of doing business. It is an unsustainable, unacceptable loss that we have the technology, the talent, and the partnerships to conquer.

    Let us modernize our networks, invest in our people, and realize SDG 6: "Ensure availability and sustainable management of water and sanitation for all."

Thank you very much, and I wish you all a highly successful, productive, and transformative conference.

Welcome MESSAGE

NAKURU CECM



SPEECH BY

DR. NELSON MAARA,

CECM FOR WATER, ENVIRONMENT, ENERGY, CLIMATE CHANGE AND NATURAL RESOURCES, NAKURU COUNTY

During the Non-Revenue Water Management Conference and Exhibition 2026

Theme: Leveraging Technology and Innovation for Non-Revenue Water Management

Venue: Naivasha, Nakuru County

June 30th – July 3rd, 2026

Distinguished Guests,
Ladies and Gentlemen,

Good Morning.

It gives me great pleasure to welcome you all to Nakuru County for the Non-Revenue Water Management Conference and Exhibition 2026. We are honored to host this important gathering here in Naivasha, a town that symbolizes growth, resilience, innovation, and the future of sustainable water management in Kenya.

This conference comes at a very critical time when counties and water utilities across the country are grappling with increasing urbanization, population growth, climate variability, aging infrastructure, and rising operational costs. Amid these challenges, one issue continues to significantly undermine the sustainability of our water sector — Non-Revenue Water.

Non-Revenue Water is not merely a technical challenge. It is an economic challenge, a governance challenge, and indeed a development challenge. Every drop of water lost through leakages, illegal connections, metering inaccuracies, or system inefficiencies translates into lost revenue, reduced service coverage, and delayed investments in water infrastructure.

For counties like Nakuru, where demand for water continues to rise due to rapid urban expansion and industrial growth, addressing Non-Revenue Water is no longer optional. It is an urgent necessity.

Ladies and Gentlemen,

Nakuru County has experienced tremendous growth over the last decade. The elevation of Nakuru to city status accelerated urbanization and increased pressure on existing water and sanitation systems. Our county now serves a growing population spread across urban municipalities, peri-urban settlements, agricultural zones, and rapidly emerging economic hubs. This growth presents both challenges and opportunities.

As a county, we have deliberately embraced innovation, technology, and institutional reforms to improve water service delivery and reduce water losses. Through our water service providers, including Nakuru Rural Water and Sanitation Company, Nakuru Water and Sanitation Services Company, Naivasha Water and Sanitation Company and other sector stakeholders, we have intensified efforts to modernize our systems and improve operational efficiency.

Among the measures we are implementing include:

- Deployment of smart metering technologies to improve billing accuracy and detect anomalies in consumption patterns.
- Geographic Information Systems (GIS) mapping of water infrastructure for better monitoring and asset management.
- District Metered Areas (DMAs) for effective monitoring of water flows and leak detection.
- Adoption of digital customer management systems to improve accountability and customer responsiveness.
- Infrastructure rehabilitation and replacement of aging pipelines prone to bursts and leakages.
- Strengthening enforcement against illegal water connections and vandalism.

These interventions are already beginning to yield positive results in several parts of the county.

However, we recognize that technology alone is not enough.

Successful Non-Revenue Water management also requires strong governance systems, skilled human resources, adequate financing, inter-agency collaboration, and active community participation. Water consumers themselves must become partners in conservation, reporting leakages, protecting infrastructure, and promoting responsible use of water.

Ladies and Gentlemen,

Climate change continues to remind us that water security can no longer be taken for granted. Extended droughts, erratic rainfall patterns, shrinking water catchments, and increased environmental degradation are threatening the sustainability of our water sources.

In Nakuru County, we are therefore integrating water resource conservation with NRW reduction strategies. We understand that saving water at the distribution stage must go hand in hand with protecting the source itself.

Our county remains committed to: Rehabilitation and protection of water towers and catchment areas; Promotion of climate-smart water infrastructure; Expansion of wastewater recycling and reuse initiatives; Rainwater harvesting programs; and Partnerships with communities and conservation groups in environmental restoration.

As we deliberate during this conference, I encourage all stakeholders to focus not only on reducing losses but also on building resilient, sustainable, and future-ready water systems.

Distinguished delegates,

This conference provides an excellent platform for sharing experiences, innovations, technologies, research findings, and practical solutions from across the sector. The exhibitions and technical sessions will undoubtedly enrich our understanding and inspire new partnerships.

I particularly encourage counties and water service providers to learn from one another. Some of the most effective solutions are often homegrown and adaptable to our local realities.

To our development partners and technology providers, we appreciate your continued support in strengthening Kenya's water sector. Your investments in innovation, capacity building, and infrastructure development are helping counties move toward universal access to clean and safe water.

To the young professionals and innovators present here today, the future of water management lies significantly in your creativity, data-driven solutions, and technological ingenuity. We challenge you to continue developing affordable and scalable solutions for African cities and communities.

As Nakuru County hosts this important conference, we reaffirm our commitment to supporting reforms and investments that will strengthen water service delivery and reduce Non-Revenue Water across our county and beyond.

Water is life. Water is health. Water is economic growth. Water is dignity. Every litre saved is an investment in our people, our economy, and our future generations.

I Welcome you all to Nakuru County and wish you fruitful deliberations during this conference and exhibition.

Thank you very much, and may God bless you all.

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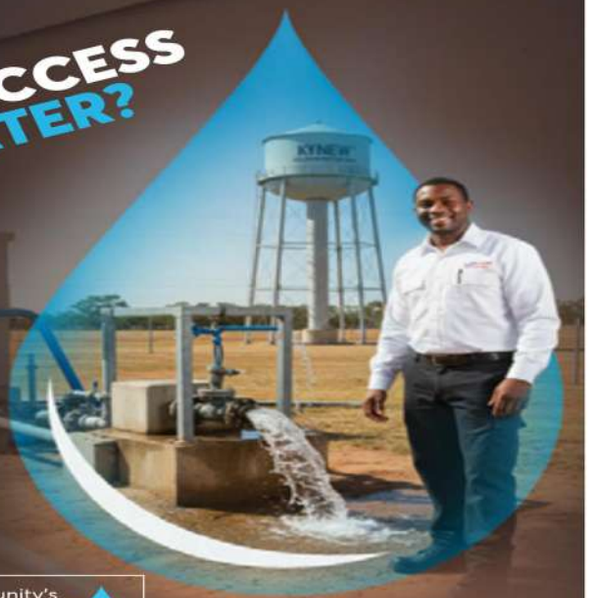


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WASPA

TACKLING THE NRW CHALLENGE. TOGETHER.

Non-Revenue Water remains one of the most significant barriers to sustainable water service delivery. It affects operational efficiency, financial sustainability and our ability to provide reliable services to our communities.

KENYA CONFERENCE ON NON-REVENUE WATER MANAGEMENT 2026

The Kenya Conference on Non-Revenue Water Management 2026 brings together utilities, policymakers, regulators, researchers, development partners and technology providers to:

- Explore practical solutions to NRW challenges
- Share experiences and lessons across the sector
- Advance innovation, technology and best practices
- Strengthen collaboration for sustainable impact

As a participant and exhibitor, NYEWASCO is proud to contribute to these important discussions. At the conference, we will be showcasing our experiences, initiatives and approaches that support effective NRW management and sustainable water service delivery.

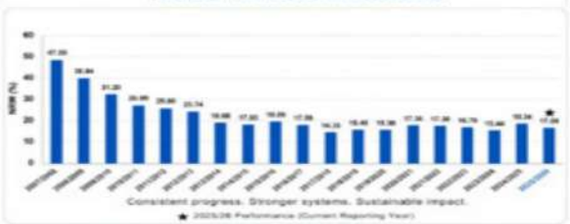
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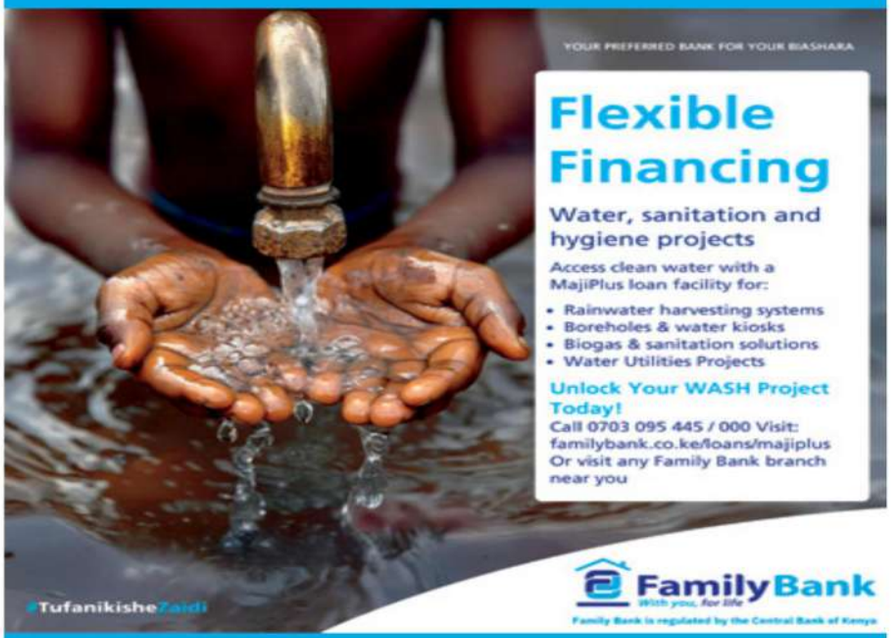
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- Increased access to water and sanitation for over 8.4 million underserved and marginalized Kenyans.
- Contributed to conservation and rehabilitation of about 533 water catchment areas and enhanced water storage capacity by 0.4 million meters cubic.







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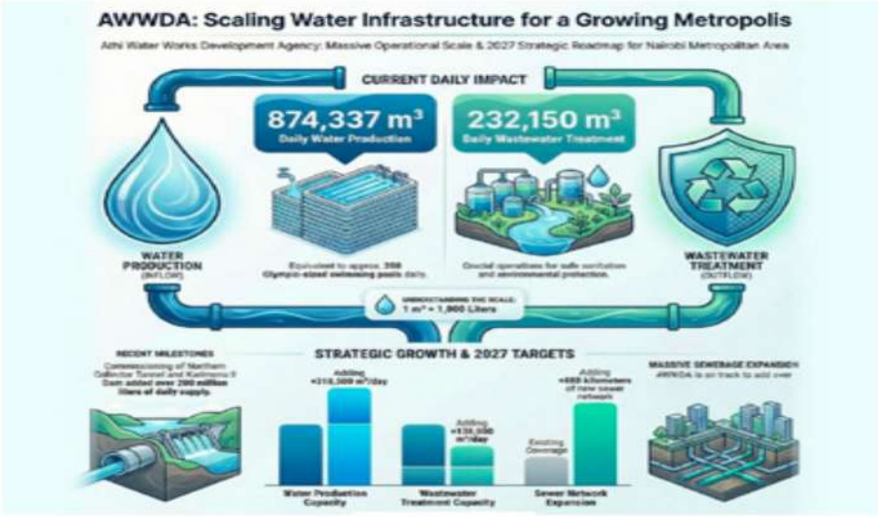
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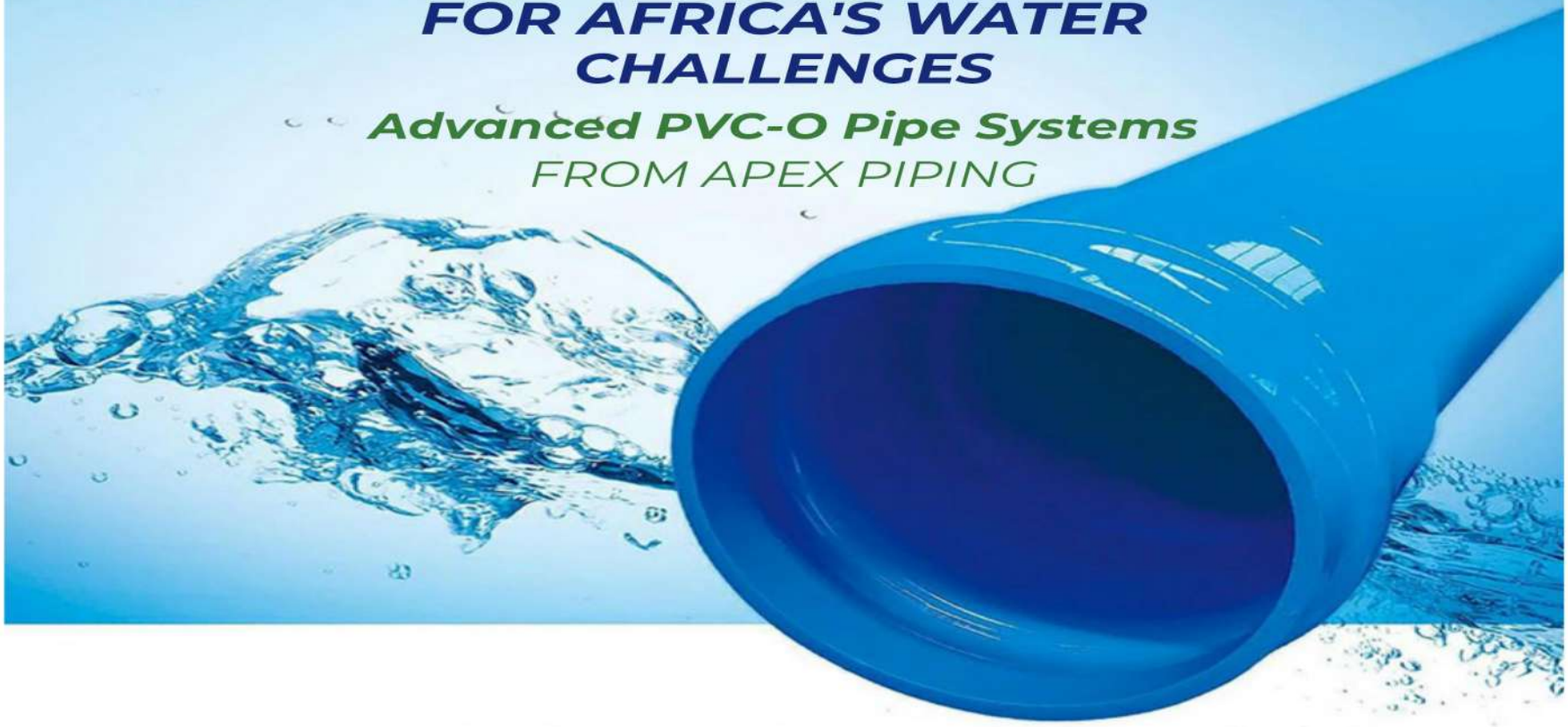
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ETKD Single-Jet Dry Dial Water Meter



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The principal mandate is to accredit and exercise oversight over organizations, both private and public, that carry out conformity assessment activities. These Organizations include: testing and calibration laboratories, medical laboratories, certification bodies and inspection and verification bodies

WHAT WE DO

- We assess and accredit conformity assessment bodies including testing laboratories, calibration laboratories, inspection bodies, certification bodies and other conformity assessment service providers
- Provide training, and other related services and promote research on accreditation and conformity assessment matters.

OUR REACH

- Accredited over 300 conformity assessment bodies in Kenya and Beyond
- Providing accreditation services in over 11 countries in Africa.
- Providing training on conformity assessment matters.

OUR IMPACT

We build trust in results, measurements, inspections and certifications, supporting trade, regulatory compliance, public safety, environmental protecion and sustainable economic development.

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KENAS ensures that Water Service Providers and other stakeholders have access to competent and reliable testing, calibration and inspection services

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ELDOWAS
ELDORET WATER AND SANITATION COMPANY

ELDORET WATER AND SANITATION COMPANY LTD (ELDOWAS)

FROM WATER LOSS TO WATER VALUE.

Across Kenya, water utilities lose billions of shillings every year through Non-Revenue Water (NRW) – due to leakages, illegal connections, inaccurate metering, billing inefficiencies, and operational losses.
For Eldoret Water and Sanitation Company (ELDOWAS), NRW is not simply a technical challenge.
It is a challenge of water security.
It is a challenge of financial sustainability.
And ultimately, it is a challenge of service delivery.



As one of Kenya's leading urban water utilities experiencing a loss of 16,948 m3/day, ELDOWAS has embarked on an ambitious transformation journey to reduce losses, improve accountability, and ensure that every drop delivered creates value for both customers and the utility.

Smart Technology at Scale

Through the Conditional Liquidity Support Grant Phase II (CLSG-II), ELDOWAS implemented one of the largest smart metering programmes in the country, replacing 50,000 customer meters with modern smart and smart-enabled devices. The initiative has revolutionised how water is measured, monitored, billed, and managed. By generating real-time consumption data, improving meter accuracy, and minimising human error, ELDOWAS is creating a more efficient, transparent, and customer-responsive water service.



Turning Data into Decisions

The future of NRW management lies beyond infrastructure.
It lies in information.

ELDOWAS is leveraging digital technologies to strengthen operational intelligence, detect anomalies faster, improve billing accuracy, monitor consumption patterns, and support evidence-based decision-making across its service area.
This shift from reactive management to predictive management is enabling the utility to identify losses earlier, improve revenue collection, and optimise network performance.

Beyond NRW: Building a Water-Secure Future

Reducing NRW is not only about recovering lost revenue.
It is about protecting scarce water resources, expanding access to underserved communities, improving customer confidence, and strengthening the resilience of urban water systems.
Through investments in smart infrastructure, digital transformation, and watershed conservation initiatives such as the Eldoret-Iten Water Fund, ELDOWAS is creating an integrated approach that connects source water protection with efficient water distribution.

"We are proud to be part of WASPA's transformative journey. As a proud member of WASPA and a champion of innovation in Kenya's water sector, ELDOWAS continues to share experiences, adopt emerging technologies, and contribute to national efforts to reduce NRW and achieve sustainable water service delivery.
Because every drop saved is a drop that can transform lives."
– CPA Dr Lawrence Tanui, Managing Director, ELDOWAS

Email: info@eldowas.or.ke | www.eldowas.or.ke
Kambi Somali Rd, Off Oloo Street,
PO BOX 8418-30100 Eldoret |Mobile: +254 724 255 538 |Landline: +254 (0)53-2035000
Toll Free: 0800-211-155

Nanyuki Water and Sanitation Company (NAWASCO)

MESSAGE FROM THE MANAGING DIRECTOR



Eng. Kennedy Gitonga

Nanyuki Water and Sanitation is pleased to participate in this years' Non-Revenue Water conference under the theme: Improving Non- Revenue Water (NRW) management by leveraging on innovations and technology. Non-Revenue Water management is a critical global and national development priority, contributing directly to the achievement of the United Nations Sustainable Development Goals (SDGs), particularly SDG 6 – Clean Water and Sanitation for All and SDG 13 – Climate Action.

These goals emphasize the efficient utilization of increasingly scarce water resources amidst growing population demands, rapid urbanization, and the impacts of climate variability and climate change. These aspirations are further aligned with Article 43 (1)(d) of the Constitution of Kenya, 2010, which guarantees every person the right to clean and safe water in adequate quantities and to reasonable standards of sanitation.

Since its establishment in 2007, Nanyuki Water and Sanitation Company (NAWASCO) has remained committed to the reduction of Non-Revenue Water (NRW) through the adoption of best practices aligned with the International Water Association (IWA) Water Balance Framework. This framework provides a structured approach for quantifying, analyzing, and managing both physical and commercial water losses, thereby supporting evidence-based decision-making and continuous performance improvement.

The Company has embraced a data-driven approach to NRW management, integrating smart technologies, customer consumption monitoring, billing analytics, and District Metered Area (DMA) management. These initiatives have enhanced the Company's ability to identify loss hotspots, optimize operational interventions, and improve water accountability across the distribution network. The sustained implementation of these strategies has yielded significant results, with NRW levels declining from approximately 63% in 2007 to 25% in the current financial year.

Leadership role policy and strategies:

The successful reduction of Non-Revenue Water (NRW) requires strong leadership commitment, effective governance, and clear policy direction. In addition to alignment with national water sector regulations and performance benchmarks, the company has benefitted from the leadership of Laikipia County Government commitment on management of NRW. The Board of Directors and management team play a critical role in putting in place NRW policy and strategy, setting NRW reduction targets, allocating resources, monitoring performance, and fostering accountability across technical and commercial functions. The company has put in place the Non-Revenue Water unit supported with continuous training and equipment's for effective service delivery. Leadership also promotes a culture of innovation and continuous improvement within the company.

NAWASCO has fostered a culture of collaboration involving all departments, staff, and stakeholders .

NRW Success stories :

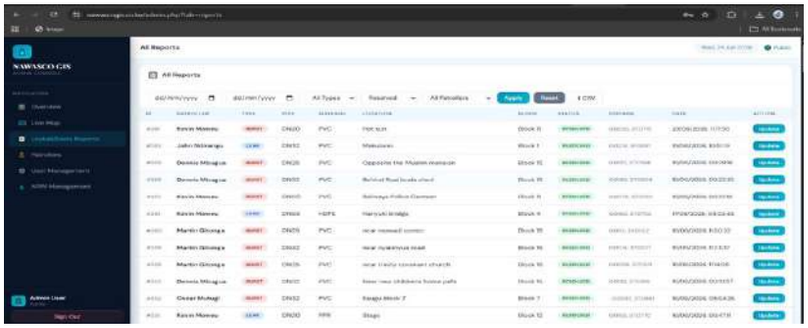
- **GIS-Based Leak and Burst Management:**

  NAWASCO has strengthened its operational efficiency through the use of a GIS-based monitoring dashboard that tracks leak and burst incidents across the entire distribution network.

  The dashboard enables the Company to record, monitor, and analyse the turnaround time for repair of reported leaks and bursts from the time of reporting to closure. Through real-time visualization of incidents, supervisors are able to prioritize repairs, allocate resources efficiently, and monitor field team performance. This approach has significantly improved response times,

  reduced water losses associated with prolonged leakages, and enhanced accountability in maintenance operations. Historical GIS data is also used to identify recurring hotspots and support informed planning for pipeline rehabilitation and network improvements

Table below is the GIS: Leaks and burst manage-



- **Sustaining Flow Performance Through District Metered Areas (DMAs):**

The Company continues to strengthen the management of District Metered Areas (DMAs) as a key strategy for reducing Non-Revenue Water. Each DMA is monitored regularly through water balance analysis, enabling the identification of abnormal consumption patterns, leakages, and

commercial losses at a localized level. Monthly performance reviews are conducted for all DMAs to assess water supplied, billed consumption, and NRW levels. This structured approach allows

the Company to quickly identify high-loss zones and implement targeted corrective actions. The sustained monitoring of DMAs has improved operational visibility, enhanced accountability, and contributed significantly to the reduction of NRW across the service area.

DMAs PERFORMANCE REPORT

DMA Zone	Input (m^3)	Billed (m^3)	Loss (m^3)	NRW %	Daily Flow
MUTHAIGA	2,423	2,417	6	0%	107
MOSQUE	706	655	51	7%	29
TEACHERS	6,264	5,761	503	8.03%	256
ICHUGA	11,037	9,438	1,599	9%	419
TEMU	6,446	5,769	677	11%	256
NGEI	1,935	1,708	227	12%	76
THINGITHU	2,323	1,957	366	16%	87
PHASE 3-BLUEGUM	6,168	4,859	1,309	21%	216
SPORTEE ESTATE	756	590	166	22%	26

- **Leveraging Artificial Intelligence for Billing and Consumption Analysis:**

As part of its digital transformation agenda, NAWASCO is increasingly leveraging Artificial Intelligence (AI) and advanced analytics to improve billing accuracy and revenue assurance. AI-supported analysis of billing and consumption data enables the Company to identify unusual

consumption trends, meter under-registration, billing anomalies, and potential cases of illegal

consumption. The technology supports predictive decision-making by highlighting customers or areas that require further investigation, allowing the Company to take proactive measures before revenue losses occur. These innovations are improving efficiency in commercial operations while supporting data-driven management decisions.

Customer band	No. of customers	No. %	Est. customers	Est. %	Total customers	Total %	Volumes	Volume contrib.
C1: >300	31	100%	-	0%	31	0%	77,643	30%
C2: 101-300	144	100%	-	0%	144	1%	22,506	9%
C3: 51-100	277	100%	1	0%	278	1%	18,595	7%
C4: 21-50	1,459	99%	19	1%	1,478	7%	42,920	17%
C5: 7-20	7,007	98%	126	2%	7,133	33%	71,451	28%
C6: 0-6	12,450	97%	378	3%	12,828	59%	26,198	10%
TOTAL	21,368	98%	524	2%	21,892	100%	259,313	100%

- **Internet of Things (IoT) for Real-Time Water Monitoring:**

The Company has embraced Internet of Things (IoT) technology through the installation of Mobi Water Level Sensors at key storage facilities. These smart sensors provide real-time information on tank water levels, enabling continuous monitoring of storage infrastructure from a central platform. The system generates alerts in the event of low water levels, overflows, or

abnormal operational conditions, allowing timely intervention by operational teams. Real-time visibility of water storage levels has improved water distribution planning, reduced water losses

associated with tank overflows, enhanced service reliability, and strengthened overall operational efficiency.

strengthen water accountability throughout the distribution network. These innovations position the Company as a leader in the adoption of smart utility management practices within the water sector.

- **Ongoing Partnerships:**

During the Financial Year 2025/2026, NAWASCO benefited from the rehabilitation and upgrading of water distribution infrastructure in the Kilimo–Teachers and Temu–Emmanuel areas, as well as the repair of five masonry storage tanks. These interventions were financed by the World Bank through the Water Sector Trust Fund under the Conditional Liquidity Support Grant II (CLSG II) programme. The investments contributed to an estimated 3% reduction in water losses, while simultaneously improving service reliability and overall customer satisfaction within the Company's service area. The success of these projects demonstrates the critical role of strategic capital investments in accelerating NRW reduction and improving utility performance.

- **Customer identification and engagement efforts:**

The company undertakes customer identification through regular customer audits, GIS mapping, meter verification, and account validation which helps to detect illegal connections and inactive accounts, thereby reducing commercial losses. In addition, NAWASCO has been intentional on effective customer engagement through awareness campaigns,

customer clinics across the service provision area. Digital platforms such as toll -free lines, Facebook, WhatsApp and twitter have been useful community reporting mechanisms to promptly report leaks, bursts, illegal water use, and service disruptions. This collaborative approach strengthens customer trust, improves revenue collection, enhances water accountability, and supports the utility's efforts to sustainably reduce both physical and commercial water losses.

- **Future investments:**

in Non-Revenue Water: Looking ahead, NAWASCO targets to reduce NRW from the current 25% to 18% by the year 2028. Our Strategic plan 2023/28 has outlined key investments in Non-Revenue Water to address both commercial and physical losses including replacement of over 7,000 customer meters, pipeline upgrade of various sizes, NRW equipment and establishment of District Metering Areas. Achieving this target will require sustained implementation of high-impact interventions, rigorous water balance monitoring, and continued investment in smart technologies. Priority will be placed on interventions that deliver the highest returns in reducing both physical and commercial losses while enhancing operational efficiency and service reliability.

PICTORIALS



Nanyuki Water and Sanitation Company awarded as the best utility under large Category during launch of WASREB impact 18 Report on 19th June 202 by Eng. Julius Muriithi Mugaa, Cabinet Secretary Ministry of Water, Sanitation and Irrigation:



Nanyuki water and Sanitation Treatment Plant; located at Kanyoni



Nturukuma elevated Masonry tanks (223m³) and elevated steel tank (108m³) with Solar pumping system



Nanyuki Water Bottling Plant Filtration Unit



Nanyuki Water and sanitation waste water treatment Plant



Nanyuki Water Intake From Likii River

Email: info@nawasco.co.ke
nawascom@yahoo.com

Address: Nanyuki Water & Sanitation Services Company
P.O. Box: 995-10400, Nanyuki

The Water Services Regulatory Board (WASREB) is a regulatory state corporation established by the Water Act 2002, this law was repealed by the Water 2016 operationalized in April 2017. Section 70 (1) of the Water Act 2016 established WASREB with the main objective to protect the interests and rights of consumers in the provision of water services, while ensuring other stakeholders' interests are also safeguarded.

Accordingly, WASREB sets standards and enforces regulations that guide the sector in not only ensuring that consumers are protected and have access to efficient, affordable and sustainable services, but also, provide for financial sustainability of Water Service Provider (WSPs), by allowing financing of operations, capital cost recovery and a return on capital that sustains services through ongoing investments.

Mandate

The Water Act 2016 confers the Regulatory Board with powers to:

Determine and prescribe national standards for the provision of water services and asset development for water services providers.

Evaluate and recommend water and sewerage tariffs to the county water services providers and approve the imposition of such tariffs in line with consumer protection standards.

Set license conditions and accredit water services providers. Monitor and regulate licensees and enforce license conditions.

Develop a model memorandum and articles of association to be used by all water companies applying to be licensed by the regulatory board to operate as water services providers.

Monitor compliance with standards including the design, construction, operation and maintenance of facilities for the provision of water services by the water works development bodies and the water services providers.

Advise the Cabinet Secretary on the nature, extent and conditions of financial support to be accorded to water services providers for providing water services.

Monitor progress in the implementation of the water strategy and make appropriate recommendation.

Maintain a national database and information system on water services.

Establish a mechanism for handling complaints from consumers regarding the quality or nature of water services.

Report annually to the public on issues of water supply and sewerage services and the performance of relevant sectors and publish the reports in the gazette.

For more information, please visit **www.wasreb.go.ke**

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Charges for calibration are as follows;

	Unit Cost (Kshs)	
Description (In Inches)	**Mechanical water meter**	**Electro-magnetic flow/Ultrasonic flow meter**
1/2"	500	2,000
3/4"	800	2,500
1"	1,000	3,000
1 1/2"	1,500	3,500
2"	2,500	4,000
3"	3,500	5,000
4"-8"	6,000	8,000
9"-32"	8,000	10,000
Training	Kshs.10,000 per day for both Mechanical, Electro-magnetic & Ultrasonic flow meters.	



MAVOKO WATER AND SANITATION COMPANY LTD

Incorporated in 2009 and wholly owned by the County Government of Machakos, MAVWASCO is dedicated to keeping pace with the rapid growth of our vibrant sub-county.

FROM REACTIVE REPAIRS TO PROACTIVE WATER LOSS MANAGEMENT

Mavoko Water and Sanitation Company has transformed its approach to Non-Revenue Water (NRW) management by moving from reactive leak repairs to a structured, data-driven strategy. Through the establishment of District Metered Areas (DMAs), the company has divided its distribution network into manageable zones, allowing engineers to monitor water flows, detect abnormal losses, and respond proactively before leaks become visible. This shift addresses the persistent challenge of NRW, which has ranged between 31% and 41% due to ageing infrastructure, underground leakages, defective pipe joints, and third-party damage, while strengthening operational efficiency and revenue protection.

Technology Driving Sustainable NRW Reduction

Mavoko Water has integrated Minimum Night Flow (MNF) analysis with modern technologies such as Geographic Information Systems (GIS), SCADA, mobile meter reading, spot billing, and smart metering. By monitoring water flows during periods of lowest customer demand, engineers can identify hidden leaks and accurately locate them using step testing and acoustic detection equipment, reducing unnecessary excavation and repair time. This experience demonstrates that sustainable NRW reduction is achieved through continuous monitoring, integrated digital systems, cross-departmental collaboration, and a long-term commitment to innovation, ensuring more efficient operations and reliable water service delivery.







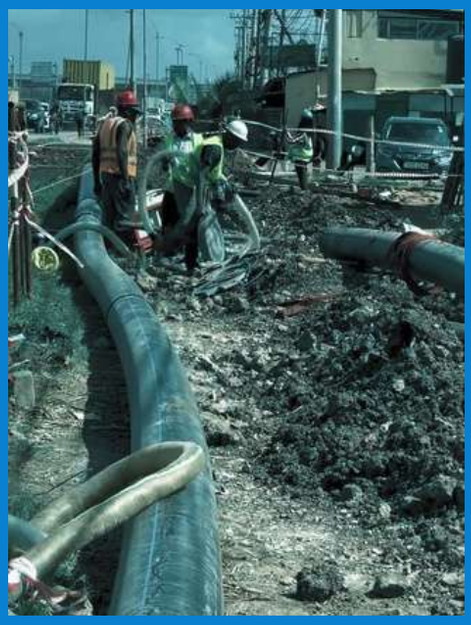
WATER AND GENDER EQUALITY: Advancing Inclusive Water Access Through Pro-Poor Water Kiosks

Access to safe, reliable and affordable water is fundamental to improving livelihoods, promoting public health and advancing gender equality. In Mavoko sub-county, women and girls often carry the responsibility of collecting water for their households, making access to nearby water sources essential. To address this challenge, Mavoko Water and Sanitation Company (MAVWASCO) has established 31 permanent and semi-permanent pro-poor water kiosks strategically located across underserved communities including Sofia, Slota, Njuguini, KMC, Bondeni/Juakali, Makadara, Kosovo, Kwa Mang'eli, Kisumu Ndogo, Jamcity, Canaan and Mlolongo Ngwata Phase 3.

The pro-poor water kiosks currently provide safe, affordable and reliable water to over 2,000 households, reducing the time and distance spent collecting water while improving the quality of life in vulnerable communities.

By bringing water closer to homes, the kiosks empower women and girls with more time for education, childcare and income-generating activities, while enhancing safety and promoting gender-responsive service delivery through affordable pricing and community engagement.

Between January and June 2026, the kiosks supplied 4,791–8,263 m^3 of water each month, demonstrating their vital role in meeting daily community needs. As noted by the Pro-Poor Coordinator, the programme ensures vulnerable communities have access to safe water while helping prevent waterborne diseases. Through this initiative, MAVWASCO supports SDG 6 (Clean Water and Sanitation) and SDG 5 (Gender Equality), reinforcing its commitment to expanding equitable access to clean water, improving public health, and promoting sustainable community development.





CONNECTING COMMUNITIES THROUGH STRATEGIC WATER INFRASTRUCTURE

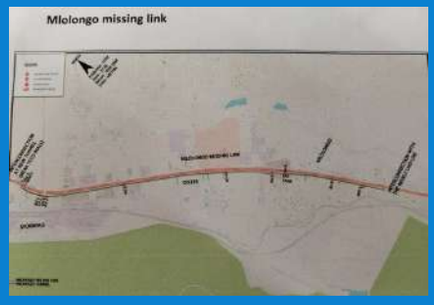
The Mlolongo–Syokimau Water Supply Project is one of the flagship water infrastructure investments being undertaken by the Athi Water Works Development Agency (AWWDA) in partnership with the French Development Agency (AFD). Designed to improve reliable access to safe water in rapidly growing urban centres, the project addresses long-standing water shortages in Mlolongo, Syokimau, Katani, and surrounding areas. While bulk water has long been available through major projects such as the Northern Collector Tunnel, the absence of downstream distribution infrastructure has prevented many households and businesses from accessing a dependable water supply.

To bridge this gap, the project is constructing approximately 41 kilometres of new distribution pipelines across a 40-square-kilometre service area, supported by a 4,500 m^3 reservoir at Syokimau to ensure adequate storage, pressure, and continuous supply. Designed to serve more than 208,000 residents by 2047, the project will reduce dependence on costly private water vendors and untreated borehole water while improving public health, supporting economic development, and enhancing the value of the rapidly expanding residential and commercial developments within the Mavoko area.

Complementing the Mlolongo–Syokimau Water Supply Project is MAVWASCO's Project in Utawala, another key initiative under the company.

On 24 June 2026, the Athi Water Works Development Agency (AWWDA) officially handed over completed infrastructure works to MAVWASCO. The completed works included the 6.7-kilometre DN315 Mlolongo Missing Link pipeline interconnecting TECO Mall, KAPA, Mlolongo and AIC Kasina, together with 8.7 kilometres of water supply pipelines serving the Airways–Utawala area, including Twins Court, Goslom Court, Acacia Court, Faith Road, General Mathenge, Corner A, Corner B and the surrounding neighbourhoods. MAVWASCO is currently undertaking customer last-mile connectivity works to connect households and businesses to the newly completed network, ensuring residents begin benefiting from reliable access to safe, treated water.

Together, the Utawala and Mlolongo–Syokimau projects reflect AWWDA's commitment to strengthening water distribution infrastructure and ensuring that existing bulk water supplies reach homes, businesses, and institutions where they are needed most. By expanding and enhancing the distribution network, these strategic investments are expected to transform water service delivery, improve access to reliable and safe water, promote better public health, reduce household water costs, support sustainable urban growth, and lay the foundation for more resilient and equitable water services.







Need More Guidance?

For more resources, visit
www.mav-water.org

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WORLD WATER DAY

2026



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