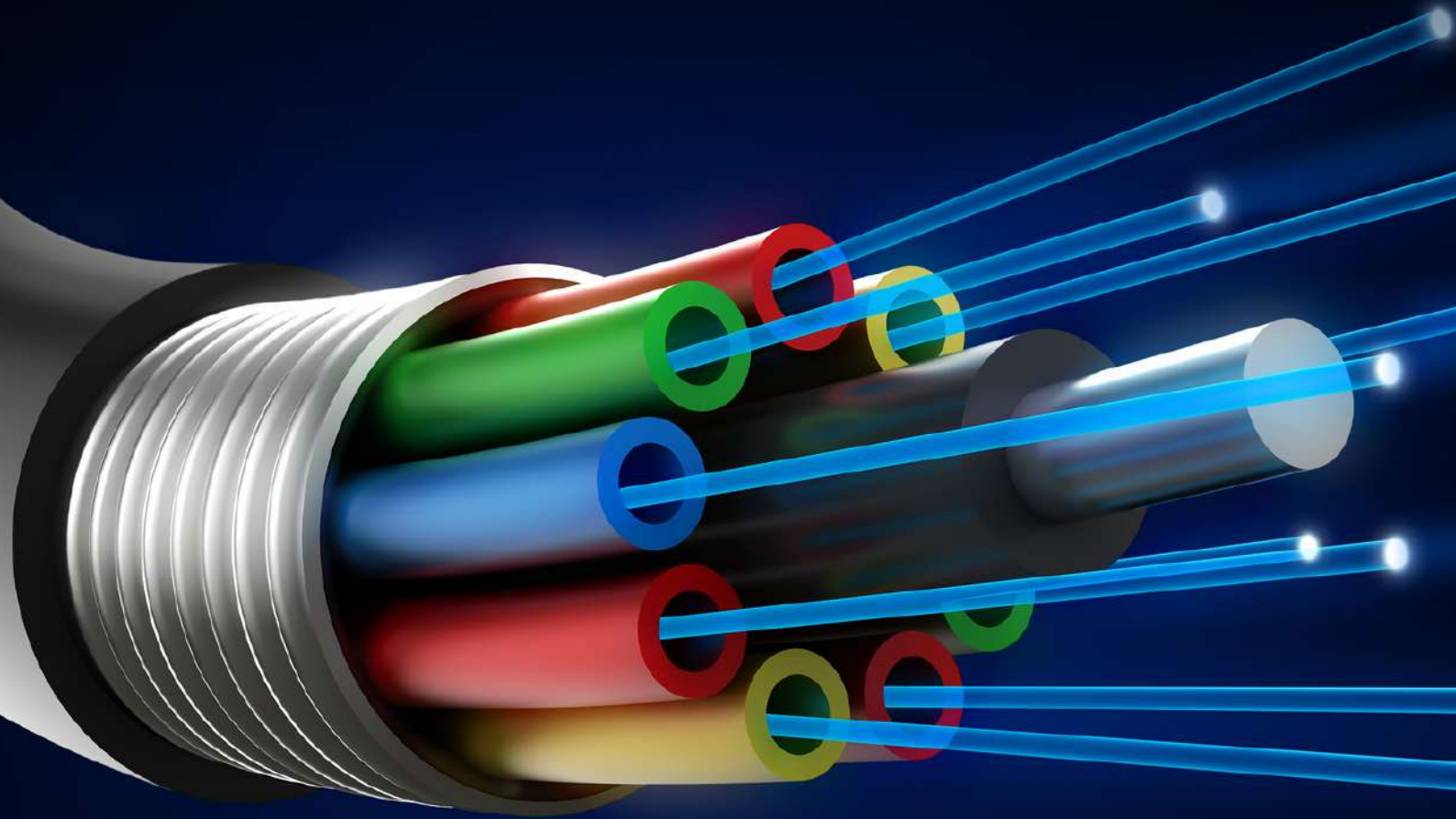




The Voice of Information Technology influencing  
Policy, Direction and Development in the Industry



# An Assessment of ICT Infrastructure Deployment and Maintenance Charges and Fibre Optic Expansion in Kenya's Counties (FY 2021/22-FY 2023/24)

REPORT

May 2026

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COMMISSIONED BY TECHNOLOGY SERVICE PROVIDERS OF KENYA (TESPOK)

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This study was commissioned by the Technology Service Providers of Kenya (TESPOK) and conducted by Darian Sterling Consulting. TESPOK extends its appreciation to the member Internet service providers (ISPs) who participated in this study by submitting fibre deployment data and engaging with the research team during the data collection phase. Your contribution is a direct investment in the future of Kenya's broadband sector. The research team acknowledges the 42 county governments whose publicly available Finance Bills and Finance Acts form the primary data foundation for this report. The accessibility of these documents was essential to the realisation of the objectives of this study.

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# ACRONYMS AND ABBREVIATIONS

| ABBREVIATION  | FULL FORM                                   |
|---------------|---------------------------------------------|
| <b>FY</b>     | Financial year                              |
| <b>ICT</b>    | Information Communication Technology        |
| <b>ICTA</b>   | Information Communication Technology Agency |
| <b>ISP</b>    | Internet service provider                   |
| <b>KeNHA</b>  | Kenya National Highways Authority           |
| <b>KeRRA</b>  | Kenya Rural Roads Authority                 |
| <b>KIIs</b>   | Key Informant Interviews                    |
| <b>KPC</b>    | Kenya Pipeline Company                      |
| <b>KPLC</b>   | Kenya Power and Lighting Company            |
| <b>KRC</b>    | Kenya Railways Corporation                  |
| <b>KURA</b>   | Kenya Urban Roads Authority                 |
| <b>NBS</b>    | National Broadband Strategy                 |
| <b>NDAs</b>   | Non-Disclosure Agreements                   |
| <b>ROW</b>    | Right of Way                                |
| <b>RURA</b>   | Rwanda Utilities Regulatory Authority       |
| <b>TESPOK</b> | Technology Service Providers of Kenya       |

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# EXECUTIVE SUMMARY

## *Background and Purpose*

Kenya's broadband ambitions require affordable, predictable fibre deployment across all 47 counties. Yet ISPs continue to operate in a fragmented regulatory environment marked by inconsistent Information Communication Technology (ICT) infrastructure deployment and maintenance charges, duplicative approvals, and overlapping jurisdictional authority between county governments and national agencies. These barriers raise deployment costs, delay project timelines, and disproportionately constrain smaller operators. Technology Service Providers of Kenya (TESPOK) commissioned this study to generate evidence for policy advocacy, with two objectives: to document changes in ICT infrastructure charges across 47 counties and key national agencies between financial year (FY) 2021/22 and FY 2023/24, and to assess fibre deployment trends among TESPOK members over the same period.

## *Methodology*

The study employed a mixed-method, comparative research design. Data was collected through a desk review of publicly available and stakeholder-provided documents, including: (1) county finance bills and fee schedules (FY 2021/22–2023/24); (2) Gazette notices and policy documents (e.g., the National Broadband Strategy 2023, ICTA Fibre Optic Infrastructure Standard 2021, and the Kenya Roads Act 2007); and (3) relevant national legislation and agency guidelines (KeNHA, KURA, KeRRA, Kenya Railways, and Kenya Power), as well as prior studies, ministry reports, and TESPOK-related materials. Five members submitted their data on fibre deployment and this, alongside the desk review data, was analysed and presented in this final report.

## *Regulatory Context*

Kenya's frameworks, including Information Communication Technology Agency (ICTA).2.001:2021 and the National Broadband Strategy (2018-2023), articulate clear principles for ICT infrastructure deployment and charge standardisation. However, they remain advisory and lack statutory force over county governments under Article 185 of the Constitution of Kenya (2010). No national authority currently holds an enforcement mandate, and non-compliance with gazettment requirements under the Kenya Roads Act (2007) often goes unpenalised. By contrast, Rwanda, Tanzania, and Ethiopia have enacted binding legislative instruments that compel uniform wayleave and Right of Way (ROW) standards. Kenya's gap is, therefore, not one of policy intent, but of binding legal authority, a gap that can only be closed through dedicated national legislation.

## County Charge Landscape

The review yielded 515 charge records across 42 counties, covering wayleave, approval, infrastructure access, fibre laying, telecom mast, and maintenance categories. Three findings stand out:

- 57% of counties recorded no charge change across the three-year period. Stability over time, however, masks wide cross-county divergence: average annual charges range from KES 100 in some counties to over KES 23,000 in others.
- Five counties increased charges during the study period. Nairobi recorded the broadest revision, with all nine charge types raised in FY 2023/24. Kisii, Taita Taveta, Kilifi, and Nyamira also recorded upward movements.
- Wayleave and approval fees together account for over two-thirds of recorded charge types. High-value outliers, including road cutting charges of up to KES 30,000 per metre and mast renewal fees of up to KES 300,000, create a disproportionate burden relative to their frequency in the data.

## Fibre Deployment Trends

Deployment data has been received from 5 of 27 deployment-active TESPOK members. Two cases are presented here to illustrate the study's analytical framework.

- ISP One: Grew its network from 1,607 km to 1,646 km (+2.4%), with all growth concentrated in Kwale (+33%) and Nakuru (+61%). Nairobi, Mombasa, Uasin Gishu, and Kisumu recorded no expansion.
- ISP Two: Expanded its network from 33.75 km to 56.64 km (+67.8%), with growth accelerating year-on-year. Central Rift and Central grew 125%, while the Coast and Western and North Rift also recorded substantial gains.

Agency charge data for Kenya National Highways Authority (KeNHA), Kenya Urban Roads Authority (KURA), Kenya Rural Roads Authority (KeRRA), Kenya Railways Corporation (KRC), and Kenya Power and Lighting Company (KPLC) was not identifiable through publicly available sources, despite the gazette requirement under the Kenya Roads Act (2007).

Both cases point to constrained expansion in major urban markets and accelerating deployment in secondary and emerging regions. If the full dataset confirms this pattern, it carries a direct regulatory implication: the counties where fibre deployment is growing fastest are also those with the most fragmented and unpredictable wayleave environments.

## Policy Implication

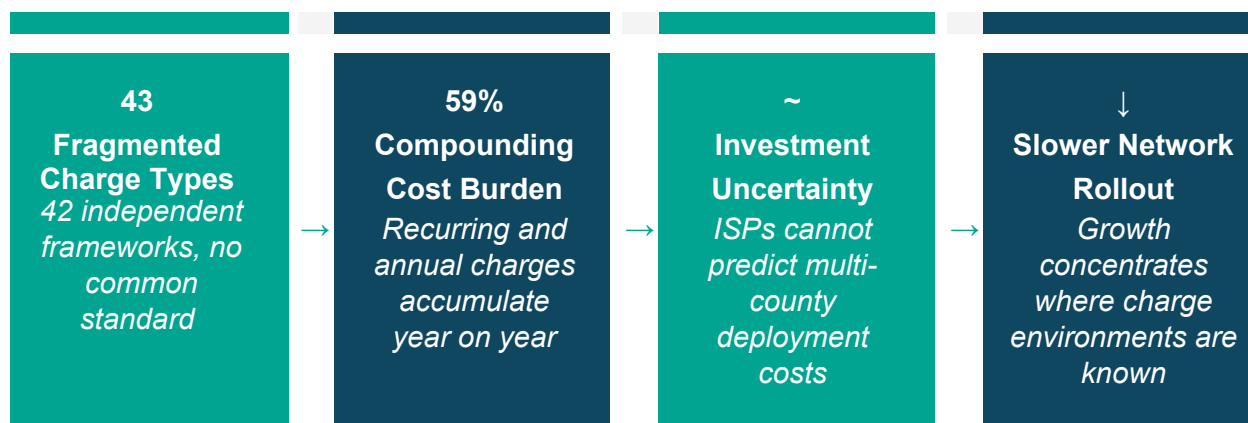
The evidence points to a legislative gap. Kenya lacks a nationally binding instrument that compels ROW charge standardisation across counties and agencies. Enacting such legislation is the necessary step from policy aspiration to enforceable harmonisation, and the foundation for accelerated, equitable broadband deployment across Kenya.



# 1. INTRODUCTION

Kenya's ambition to become a globally competitive, knowledge-based society hinges critically on widespread, affordable, and reliable broadband connectivity.<sup>1</sup> As detailed in the National Broadband Strategy (NBS) 2018-2023, there is a need to transform the country through secure, fast broadband access.<sup>2</sup> This goal can only be achieved if persistent barriers (such as fragmented wayleave regimes, inconsistent county-level fees, poor supporting infrastructure, and overlapping jurisdictional approvals for fibre optic deployment) are addressed. Although there are national policies in place to promote harmonisation (including calls for standardised wayleave charges and expedited RoW access), deployment of fibre optic infrastructure remains a challenge across Kenyan counties. As shall be demonstrated in this report, unresolved administrative fragmentation across Kenya's 47 counties and multiple national agencies (e.g., KeNHA, KURA, KeRRA) continues to be a major hindrance.

In the recent past, county governments have introduced diverse fee structures for ICT infrastructure deployment and maintenance. To a large extent, this has resulted in duplicative charges, opaque processes, high administrative burdens, and unpredictable costs. In effect, ISPs, particularly smaller operators, are disproportionately affected. This fragmentation not only undermines national goals for digital inclusion but also increases deployment timelines and costs, as well as erodes Kenya's regional competitiveness in broadband rollout.



These challenges are not isolated. They form a causal chain with direct consequences for Kenya's broadband expansion, as illustrated above. Cognisant of these challenges, TESPOK commissioned this study to generate evidence-based insights for policy dialogue and advocacy. There are two objectives that this study sought to achieve:

1. To document changes in charges for the deployment and maintenance of ICT infrastructure (particularly fibre optic) across all 47 counties and key national agencies for the period 2022-2024.

<sup>1</sup> Ministry of Information, Communications and Technology. (2018). National Broadband Strategy: 2018–2023. Government of Kenya. <https://ict.go.ke/national-broadband-strategy/> <sup>2</sup> Ibid

2. To assess trends in the length of fibre optic cable deployed by TESPOK members in the respective counties over the same period.

To meet these objectives, a comprehensive desk review was conducted and secondary document analysis. The analysed data revealed persistent fragmentation in wayleave administration and limited year-on-year charge adjustments in most counties. In addition, there were emerging increases in select jurisdictions (e.g., Nairobi, Kisii) and modest but uneven fibre deployment growth among initial participating TESPOK member ISPs.

The remainder of this report is structured as follows: Section 2 provides the literature review and regulatory context, Section 3 presents the methodology, Section 4 documents county and agency-level charge findings, Section 5 presents fibre deployment trends among participating TESPOK members, and Section 6 sets out conclusions and recommendations for policy action.



## 2. LITERATURE REVIEW

### 2.1 Introduction

This desk review examines the regulatory frameworks governing ICT infrastructure deployment and maintenance charge administration in Kenya, with a particular focus on fibre optic expansion across the country's 47 counties. It draws on national policy documents, legislation, and institutional standards, including the National Broadband Strategy (2023), the Kenya Roads Act (2007), and ICTA.2.001:2021, alongside county-level Finance Bills from FY 2021/22 to FY 2023/24. The review establishes the policy and regulatory context within which ISPs operate and provides the foundation for the primary data collection that follows.

### 2.2 Regulatory Frameworks Governing Fibre Optics Expansion

Kenya has established national ICT policy frameworks to guide fibre optic infrastructure deployment. For instance, the Government of Kenya, through the Ministry of Information, Communications, and Technology, advanced the National Broadband Strategy (NBS) (2018–2023), which outlines the vision of transforming the country into a globally competitive, knowledge-based society supported by affordable, secure, and fast broadband access. The NBS (2018–2023) recognises that broadband expansion faces structural barriers at the county level, including inadequate supporting infrastructure, inconsistent requirements, and high wayleave charges.

Both the National Broadband Strategy and the Ministry of ICT and the Digital Economy call for stronger support for ISPs by harmonising legislation on wayleave charges and related physical infrastructure across the national government and all 47 counties. The goal is to avoid duplicate infrastructure deployment fees and any other associated charges to ISPs. The NBS (2018–2023) proposes collaborative planning, deployment, and maintenance of broadband and related infrastructure. The document further suggests collaboration to harmonise laws and regulations within the Land Act, county legislation, and other national laws to standardise infrastructure deployment charges, such as wayleave fees.

The NBS (2018–2023) also calls for enacting wayleave harmonisation across counties through a national regulation or policy on wayleaves and broadband infrastructure legislation to support the revision and standardisation of these charges. Lastly, there is a call to...

<sup>3</sup> Ministry of Information, Communications and Technology. (2018).

<sup>5</sup> Ibid.

Ministry of ICT, Innovation and Youth Affairs. (2021). The Kenya national digital master plan 2022-2032. <https://repository.kippra.or.ke/handle/123456789/3580>.

<sup>6</sup> Ministry of Information, Communications and Technology. (2018).

<sup>7</sup> Ibid.

action for County governments and government agencies such as KURA, KeNHA, and KERRA to facilitate access to Right of Way by expediting wayleave issuance aimed at easing deployment of fibre optic towards transforming the country into a globally competitive knowledge-based society supported by affordable, secure, and fast broadband access by 2030.<sup>8</sup>

The government ICT standards in Kenya are provided by the ICT Authority (ICTA), a State Corporation under the State Corporations Act 446<sup>9</sup>. ICTA has outlined clear and structured standards for broadband deployment and maintenance charges management. These standards guide the deployment of fibre optic infrastructure in Kenya and are formally codified in the Fibre Optic-Backbone, Metro and Last Mile Infrastructure Standard First Edition 2021 (ICTA. 2.001: 2021). ICTA mandates that all fibre ducts must be installed along and across key infrastructure corridors. This includes roads, railways, and pipelines, wherever the corridor width permits.<sup>10</sup>

ICTA (2021) specifically categorises ICT infrastructure deployment charges according to their jurisdiction as summarised below:

- County governments for county road reserves.
- The Kenya National Highways Authority (KeNHA) for trunk roads.
- The Kenya Urban Roads Authority (KURA) for urban road reserves.
- The Kenya Rural Roads Authority (KeRRA) for rural road reserves.
- The Kenya Railways Corporation (KRC) for wayleaves along and across railway corridors.
- Kenya Pipeline Company (KPC) for wayleaves along pipelines.
- Private properties wayleaves.<sup>11</sup>

The ICTA. 2.001: 2021 provides that the wayleave unit of measure be expressed in meters (M). The standard also requires that charges for wayleave permits be standardised across all jurisdictions to promote equitable access and transparency.<sup>12</sup> The Kenya Roads Act 2007 reinforces these requirements by mandating that any charges, fees, or levies imposed by an authority (KeNHA, KURA, or KeRRA) must be published in the Kenya Gazette.<sup>13</sup> The Act also indicates that such schedules come into effect after a thirty-day notice period.<sup>14</sup> While these national frameworks establish the intended architecture for ICT infrastructure deployment regulation, their application diverges significantly at the county level, as the following section examines.

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<sup>8</sup> Ibid.

<sup>9</sup> ICT Authority. (2021). *Fiber-optic-backbone, metro and last mile infrastructure standard* (Standard No. ICTA.2.001:2021). Information and Communications Technology Authority.

<sup>10</sup> Ibid.

<sup>11</sup> Ibid.

<sup>12</sup> Ibid.

<sup>13</sup> Republic of Kenya. (2007). *Kenya Roads Act, No. 6 of 2007*.

<sup>14</sup> Ibid.

## 2.3 County-Level Regulations on ICT Infrastructure Deployment

Regulatory variation across Kenya's 47 counties has created a fragmented environment for ICT infrastructure deployment.<sup>15</sup> This is particularly significant for fibre optic rollouts. The absence of a harmonised policy has led to transparency gaps, cost inefficiencies, and delays in deployment. Data shows that some counties impose duplicative wayleave charges and enforce opaque, bureaucratic approval processes under inconsistent legal frameworks governing civil works.<sup>16</sup> These legal environments directly impact ISP fibre deployment timelines as well as the cost-efficiency of such operations. Notably, this situation stems from Article 185 of the Constitution of Kenya, which vests legislative authority in county assemblies, enabling them to regulate infrastructure development within their jurisdictions, including ICT-related civil works.<sup>17</sup>

This fragmentation constrains consistent national broadband expansion. It also disincentivises smaller ISPs that cannot withstand regulatory friction. A coordinated national approach—based on Article 189 of the Constitution on cooperation between national<sup>18</sup> (through its various agencies) and county governments—is required to streamline wayleave administration. It is also needed to facilitate fair access to infrastructural corridors by ISPs. Without such harmonisation, digital inclusion will remain uneven, undermining the goals of the various policy initiatives reviewed here. Beyond county governments, institutional fragmentation among national state agencies further compounds deployment challenges, as discussed in the section that follows.

## 2.4 Regulatory Provisions by State Agencies

On top of the disparate regulatory regimes across the 47 counties, institutional fragmentation continues to increase the cost and complexity of fibre deployment. Each key stakeholder, from KeNHA, KURA, KeRRA, KRC, KPC, to KPLC, independently manages RoW rights. Ownership of key passive infrastructure, such as utility poles (KPLC), road reserves (KeNHA, KURA, and KeRRA), and railway corridors (KRC), has often led to access bottlenecks. This is attributed to a non-transparent or non-harmonised RoW charge structure. Consequently, the decentralised infrastructure ownership has created overlapping jurisdictional demands related to fibre optic deployment and maintenance. Non-transparent wayleave charges undermine investment predictability and rollout planning.

For **TESPOK** members, these structural inefficiencies translate directly into higher operating costs, delayed project timelines, and constrained capital allocation decisions. Predictable and harmonised charge regimes are, therefore, not only a regulatory issue, but a competitiveness and investment issue.

<sup>15</sup> Finance bills (FY 2021/2022, FY2022/2023, and FY2023/2024).

<sup>16</sup> Finance bills (FY 2021/2022, FY2022/2023, and FY2023/2024).

<sup>17</sup> Republic of Kenya. (2010). *The Constitution of Kenya, 2010*.

<https://kenyalaw.org/kl/fileadmin/pdfdownloads/TheConstitutionOfKenya.pdf>

<sup>18</sup> Ibid.

## 2.5 Why Harmonisation Has Remained Aspirational in Kenya

The persistence of fragmentation despite existing frameworks reflects several structural weaknesses. First, both ICTA.2.001:2021 and the NBS (2018-2023) are advisory instruments. The review reveals that they lack statutory force and cannot compel compliance from county governments or state agencies operating under independent legal mandates. Second, no single national authority carries a designated enforcement mandate over the harmonisation of ICT infrastructure deployment charges. This creates an accountability vacuum. Third, the political economy of county revenue generation creates incentives for counties to maintain discretionary and often inflated charge regimes, particularly where ICT infrastructure fees represent a visible and low-resistance revenue stream. Finally, the absence of penalties for non-compliance with gazettment requirements under the Kenya Roads Act (2007) means that procedural obligations are routinely disregarded without consequence. Together, these factors explain why harmonisation has remained aspirational rather than operational.

## 2.6 Regional Comparators

Regional experience from East Africa demonstrates that coordinated telecommunications infrastructure deployment frameworks are achievable and yield measurable improvements in broadband deployment outcomes. Rwanda offers the most instructive example in the region. The Rwanda Utilities Regulatory Authority (RURA) administers a centralised permitting system for telecommunications infrastructure deployment, including fibre optic way leaves.<sup>19</sup> This system is backed by *Law No. 09/2013 of 01/03/2013* establishing RURA, *Law No. 24/2016 of 18/06/2016* governing Information and Communication Technologies, and the Infrastructure Sharing Regulations first issued in 2017 and updated in 2026 (Regulation No 20/R/ICT/RURA/2026).<sup>20</sup> These instruments establish nationally standardised coordinated infrastructure deployment.<sup>21</sup> All permits are processed through a unified regulatory portal. This significantly reduces administrative friction for ISPs. This approach has contributed to Rwanda achieving one of the highest fibre penetration rates in Sub-Saharan Africa.<sup>22</sup> The Rwandan model illustrates that centralised regulatory authority, when paired with transparent and gazetted charge structures, can substantially reduce the cost and complexity of infrastructure rollout.

Tanzania and Ethiopia illustrate contrasting reform pathways relevant to Kenya. Tanzania's Electronic and Postal Communications Act (2010) and Infrastructure Sharing Guidelines (2016) mandate harmonised ICT infrastructure deployment charges.<sup>23</sup> However, uneven enforcement by local governments has left fee disparities that echo Kenya's county-level fragmentation.<sup>24</sup>

<sup>1</sup> Rwanda Utilities Regulatory Authority. (2026). Regulation No. 20/R/ICT/RURA/2026 of 27/01/2026 Governing Telecommunication Infrastructure Sharing and Service Provision in Rwanda. Rwanda Utilities Regulatory Authority.

<sup>20</sup> Rwanda Utilities Regulatory Authority. (2026).

ITU & UNESCO. (2025). The state of broadband in Africa. ITU & UNESCO.

<sup>21</sup>

Ethiopia's Communications Service Proclamation (No. 1148/2019) created a liberalised, centrally regulated framework under the Ethiopian Communications Authority.<sup>25</sup> The framework provides a national RoW policy that has already eased deployment for new entrants.<sup>26</sup> Collectively, these regional cases highlight a critical legislative gap in Kenya's regulatory architecture. Unlike Rwanda, Tanzania, and Ethiopia, Kenya lacks a dedicated, legally binding national instrument that compels uniform ICT infrastructure deployment charge standardisation across counties and state agencies. Existing frameworks such as ICTA.2.001:2021 and the NBS (2018-2023) remain advisory and cannot override county-level legislative authority under Article 185 of the Constitution. This study therefore argues that harmonisation requires enactment of dedicated national legislation that establishes binding, transparent, and uniformly enforceable wayleave charge standards across all jurisdictions. This is a legislative step that the evidence from regional peers suggests is essential to accelerated broadband deployment.

## 2.7 Summary of Review

The review indicates administrative disjoint between counties and the national government in regulating broadband expansion. This creates legal and procedural ambiguity, allowing room for discretionary interpretation to the detriment of nationwide fibre rollouts by ISPs. The resulting jurisdictional overlaps increase deployment costs and transaction complexity for ISPs. The absence of a harmonised or centralised digital RoW registry further compounds inefficiencies and weakens transparency. Collectively, these constraints limit broadband expansion and weaken Kenya's competitiveness in fibre deployment timelines relative to regional peers.

While ICTA.2.001:2021 codifies technical guidelines for fibre rollout, these standards remain advisory rather than uniformly enforceable across infrastructure-owning entities. Counties and agencies such as KeNHA, KURA, and KeRRA continue to apply independent RoW procedures, resulting in inconsistent implementation. Although the Kenya Roads Act (2007) mandates that charges or levies be gazetted and subjected to a 30-day notice period prior to enforcement, compliance with this requirement appears inconsistent across jurisdictions. The persistence of fragmentation reflects not a lack of policy frameworks, but weak harmonisation and uneven institutional uptake.

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<sup>22</sup> UN-OHRLLS.(2017).Leveraging investments in broadband for national development: The case of Rwanda and Senegal. United Nations

<sup>23</sup> Tanzania Communications Regulatory Authority. (2018). The Electronic and Postal Communications (Access, Co-location and Infrastructure Sharing) Regulations, 2018. Government Notice No. 59 of 23 February 2018, made under Section 165 of the Electronic and Postal Communications Act (Cap. 306). Dar es Salaam: Government Printer.

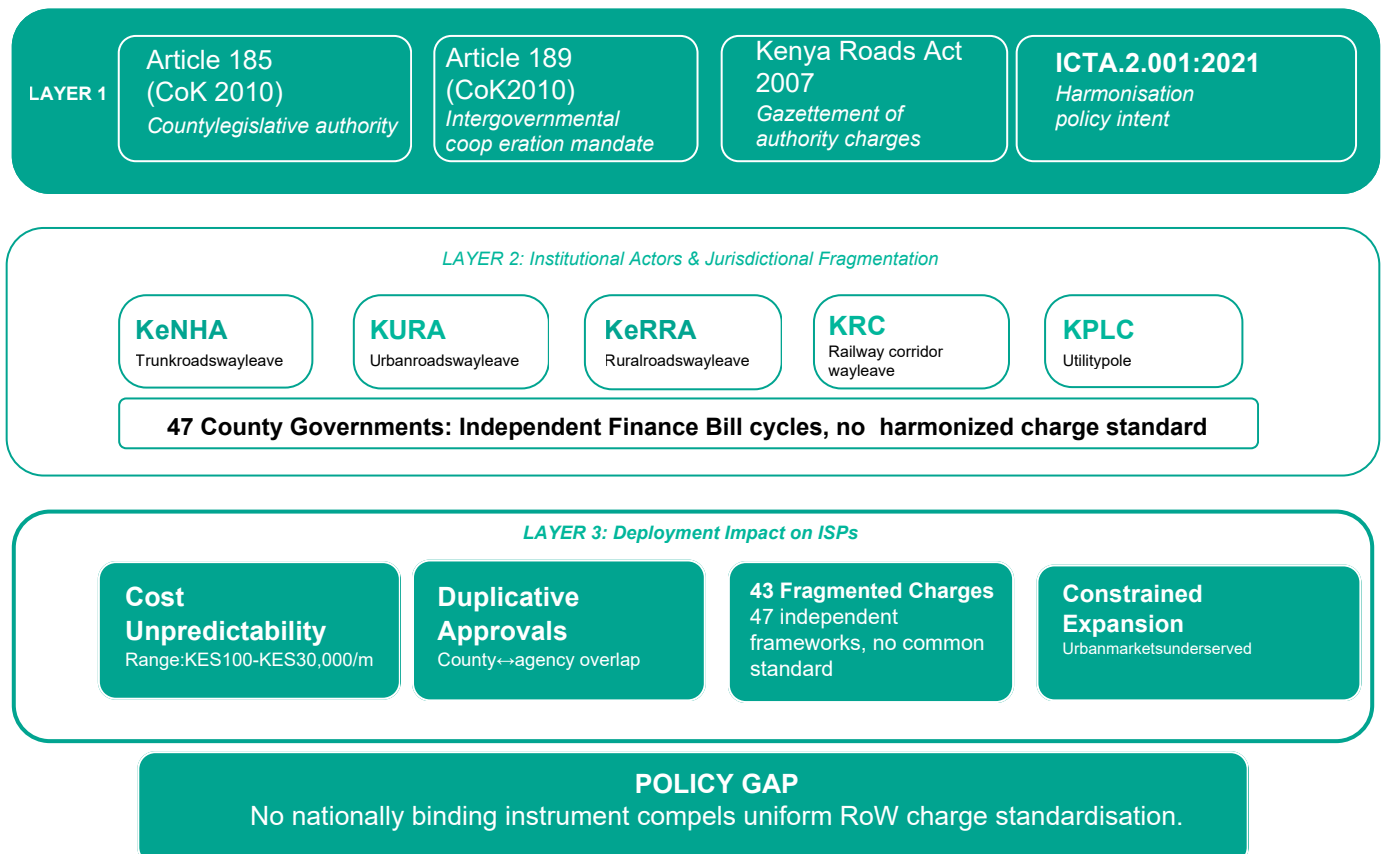
<sup>24</sup> GSMA (2023). Tanzania's Digitalisation Journey: Opportunities for Value Creation. GSMA.

<sup>25</sup> Federal Democratic Republic of Ethiopia. (2019). Communications Service Proclamation No. 1148/2019. Federal Negarit Gazette, Addis Ababa.

<sup>26</sup> Ibid.

For industry stakeholders, regulatory predictability and cost transparency are critical determinants of infrastructure investment planning and rollout efficiency. Against this backdrop, this study analysed data from 47 county governments and key national agencies (Kenya Power, Kenya Railways, KeNHA, KURA, KeRRA) to examine charges levied for ICT infrastructure deployment and maintenance between FY 2021/22 and FY 2023/24, alongside the annual fibre optic deployment by TESPOK members over the same period. The regulatory fragmentation framework developed for this study is illustrated below. It demonstrates how constitutional structures, institutional fragmentation, and jurisdictional overlaps collectively shape ICT infrastructure deployment and maintenance charges in Kenya.

### A Three-Layer Analysis of Structural Barriers to Fibre Optic Expansion

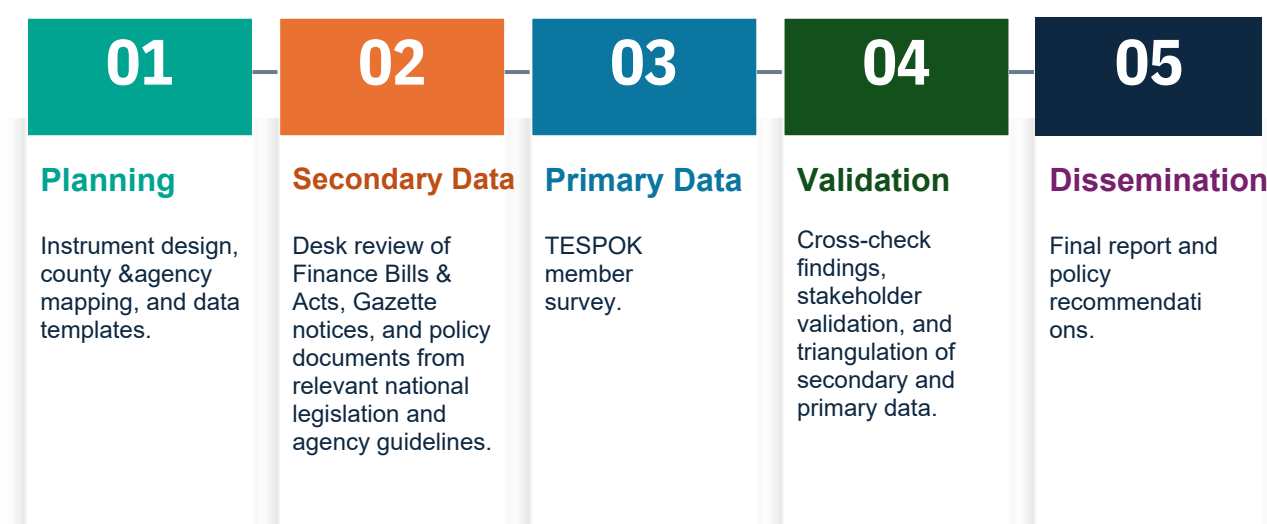


## 3. METHODOLOGY

### 3.1 Research Design

The study employed a mixed-method, comparative research design. The main analytical approach is descriptive and longitudinal. That is, it documents and compares ICT infrastructure charges across 47 counties and over three financial years. In effect, it enabled both cross-sectional comparison (between counties at a point in time) and temporal trend analysis (within counties over time). The rationale for the choice of a comparative research design hinged on the study's objectives. Specifically, it allowed for the identification of structural patterns in a fragmented regulatory environment. This explains why the findings, as shown in chapters 4 and 5, are directly actionable for TESPOK advocacy and for national harmonisation proposals. Further, the longitudinal dimension (three financial years) enabled distinguish deliberate policy change from annual variance. It also enabled assess whether charge trajectories are consistent with national broadband policy goals.

*Five-phase approach: secondary desk review, primary collection, and validation*



### 3.2 Study Area and Scope

The study covered all 47 counties of Kenya and five national agencies (KeNHA, KURA, KeRRA, KRC, and KPLC). The geographic scope is indicative of ICT infrastructure charge-setting in Kenya, where county governments and national agencies independently set and administer fees for ICT infrastructure.

The study focused on three financial years: FY 2021/22, FY 2022/23, and FY 2023/24. This period was selected to capture charge trends in the years following the publication of the

National Broadband Strategy (2018-2023) and the ICTA Fibre Optic Infrastructure Standard (ICTA.2.001:2021). These two publications called for wayleave harmonisation. In addition, the scope of the study included the annual fibre optic deployment activity of TESPOK members. Of TESPOK's approximately 160 member organisations, 27 are engaged in active fibre optic deployment and were therefore relevant to this component of the study. See Table 1.

**Table 1: Summary of study scope and coverage**

| Dimension          | Detail                                          | Coverage                                                                     |
|--------------------|-------------------------------------------------|------------------------------------------------------------------------------|
| Geographic scope   | 47 counties (Kenya)                             | 42 counties with data; 5 excluded (Kwale, Nyeri, Samburu, Tana River, Wajir) |
| National agencies  | KeNHA, KURA, KeRRA, KRC, KPLC, and KPC          | Secondary data unavailable.                                                  |
| TESPOK members     | 27 active in ICT infrastructure deployment      | 5 of 27 deployment-active members submitted data                             |
| Period of analysis | FY 2021/22 - FY 2023/24 (three financial years) | Three-year trend analysis enabled for 34 counties with complete data         |
| Charge categories  | County Finance Bills and Finance Acts           | 515 charge records across 42 counties                                        |

### 3.3 Secondary Data Collection

#### 3.3.1 County Charge Data

The primary source for county ICT infrastructure charge data was the annual Finance Bill and Finance Act published by each of the 47 county governments. These documents, most of which are publicly available, contain the schedule of fees and charges applicable within each county for the relevant financial year. Where Finance Bills were not accessible online, the study team sought documents through county assembly records and direct engagement with county officials. Charge data was extracted from Finance Bills for FY 2021/22, FY 2022/23, and FY 2023/24 for each county where documents were available. Data extraction focused on all charge types relevant to ICT infrastructure deployment and maintenance. This includes wayleave fees, application and approval fees, road cutting and excavation charges, infrastructure access fees, telecom mast charges, and maintenance-related levies. Once raw data was extracted, it was standardised through a five-step aggregation process to enable cross-county and cross-year comparison. The five-step data aggregation steps are as follows:

- (i) Column structure standardization.
- (ii) Charge logic harmonisation across diverse fee structures.
- (iii) Unit type alignment (per metre, per km, per instance, per mast, per sq. metre)

- (iv) Temporal segmentation by financial and calendar year
- (v) Categorical mapping to a six-category taxonomy (wayleave, approval, infrastructure access, fiber laying, telecom mast fees, maintenance).

**Note:** Original charge descriptions as reported in county Finance Bills are retained in the underlying dataset.

### 3.3.2 Data Coverage and Distribution

Secondary data was collected from 42 of the 47 counties, representing 89% geographic coverage. Data for five counties, namely, Kwale, Nyeri, Samburu, Tana River, and Wajir was not available. Samburu County issued a formal waiver on fibre optic-related charges for FY 2023/24. Figures 1 and 2 represent the country representation in the dataset across charge lines (Figure 1) (the number of charges represented in the data set in percentage) and across financial years (Figure 2).

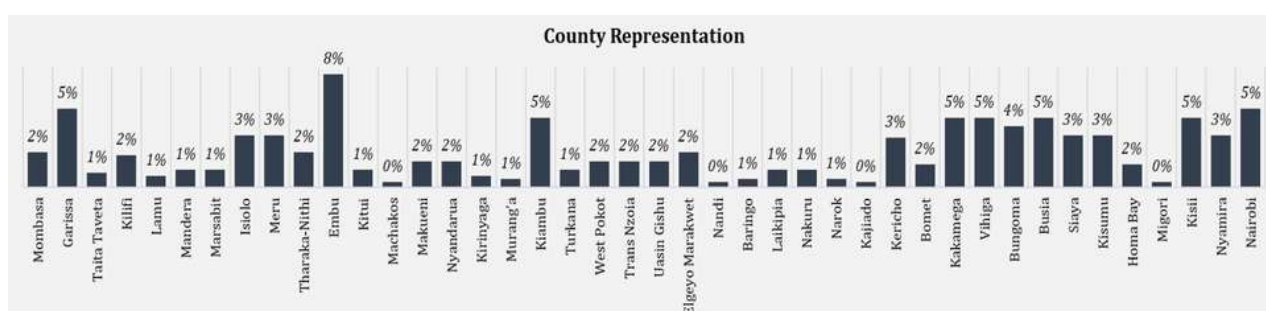


Figure 1: County Representation

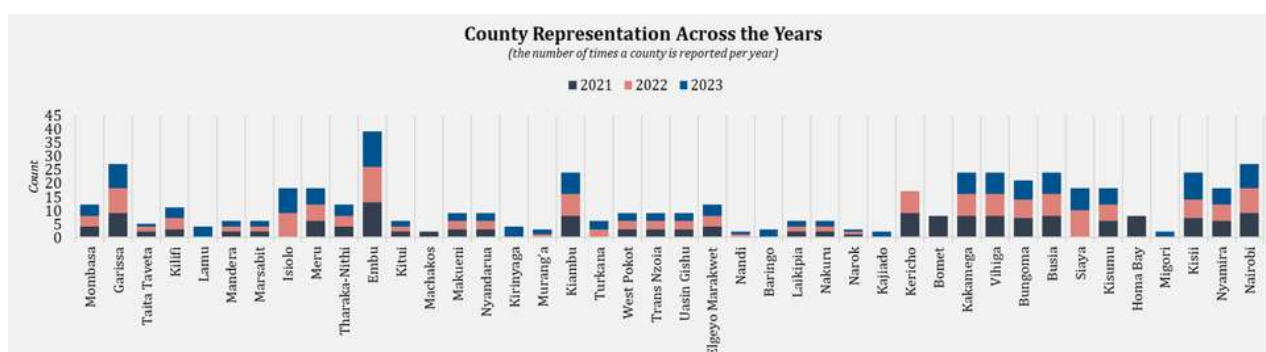


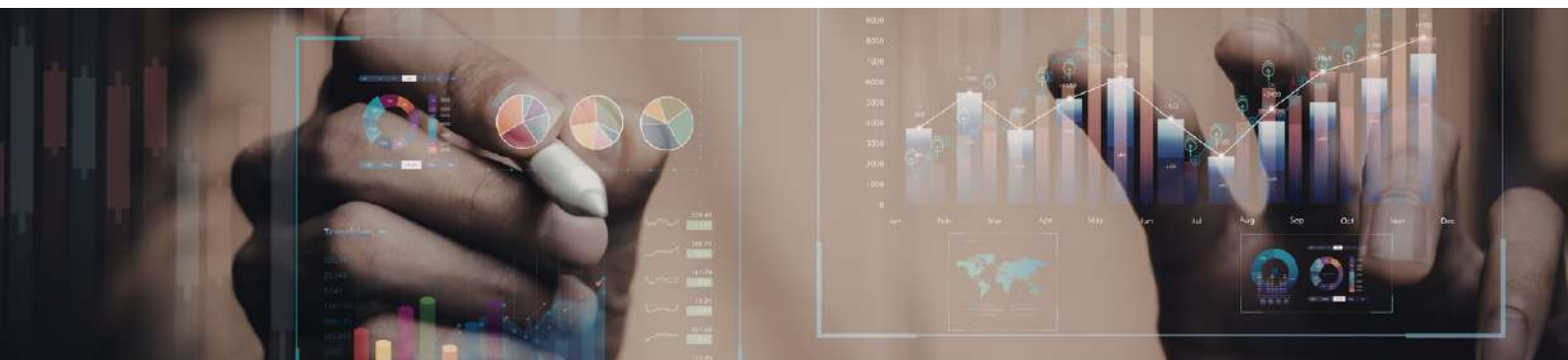
Figure 2: Year-to-Year Distribution of Collected Data

Of the 47 counties, 28 counties (67%) have complete charge records across all three financial years. This enabled trend analysis. Additionally, 14 counties have partial data covering fewer than three financial years. The overall year distribution across the dataset is broadly balanced. For example, 32% of records are from FY 2021/22, 33% from FY 2022/23, and 35% from FY 2023/24. This distribution confirms that the dataset is suitable for year-on-year trend analysis and that no single financial year dominates the findings. A complete breakdown of data availability by county and financial year is provided in Annex A.

### 3.3.3 Data Validation and Triangulation

Data validation and triangulation is the process of cross-checking findings obtained through different methods and sources to confirm their accuracy and identify any inconsistencies. For this study, triangulation operates across two dimensions:

1. A validation workshop was held with ISP and TESPOK in March 2026 itself constituted a formal triangulation exercise.
2. County charge data drawn from Finance Bills and Finance Acts was cross-referenced against the Kenya Roads Act (2007) and ICTA.2.001:2021 to assess the extent to which actual county charging practice conforms to prescribed national standards.
3. Agency charge data sought from ISPs (as a contingency) and cross-referenced across multiple ISP submissions. This helped identify consistent figures and flag outliers.



### 3.3.4 Data Analysis Approach

The analytical approach for this study operated across three levels, corresponding to the three study objectives.

#### **Trend Analysis: Objective 1**

The county charge data collected was analysed longitudinally to identify year-on-year changes in charge levels and structures. The average charge values per county per year was then calculated across all charge types reported in each financial year and used as a summary metric for directional change. Where the average metric was distorted by changes in charge composition, charge-level case studies are presented to provide a more accurate account of specific revisions. The resultant trend analysis was then used to distinguish between counties with no change, counties with increases, counties with decreases or model revisions, and counties with mixed patterns.

#### **Deployment Trend Analysis: Objective 2**

Fibre deployment data submitted by TESPOK members was aggregated by county and financial year to calculate annual deployment volumes and growth rates. Where county-level breakdown was available, deployment intensity was mapped against the county charge environment to identify preliminary associations between charge levels and deployment activity. Also, where members reported deployment data by region rather than by individual county, regional analysis was conducted.

### 3.3.5 Limitations

Table 2 summarises the key limitations of the study, their impact on findings, and the mitigation measures applied. It is important to acknowledge these limitations for the appropriate interpretation of the findings presented in this report k.

**Table 2: Study limitations, impact, and mitigation measures**

| Limitation                                   | Description                                                                                                                                                                        | Impact on Findings                                                                                                                                                            | Mitigation                                                                                                                                                        |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agency charge data is not publicly available | Charge data for KeNHA, KURA, KeRRA, and KRC was not identified through the desk review of publicly available documents. No gazetted charge schedules were found for most agencies. | Agency charges cannot be presented alongside county charges in the secondary data findings. The agency dimension of the cost burden on ISPs remains partially documented.     | ----                                                                                                                                                              |
| Partial TESPOK member response rate          | Charge data for KeNHA, KURA, KeRRA, and KRC was not identified through the desk review of publicly available documents. No gazetted charge schedules were found for most agencies. | Chapter 5 fibre deployment findings are based on 2 ISPs. A nationally representative deployment analysis cannot be conducted until broader member participation is achieved.  | NDA's were offered to all members with confidentiality concerns. Submission timelines were extended. A designated one-on-one technical support was also provided. |
| Five counties with no data                   | Charge data for KeNHA, KURA, KeRRA, and KRC was not identified through the desk review of publicly available documents. No gazetted charge schedules were found for most agencies. | The dataset represents 42 of 47 counties (89% coverage). The missing counties are geographically distributed and do not cluster in a single region, limiting systematic bias. | ---                                                                                                                                                               |

|                                        |                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                   |                                                                                                                                                                                                            |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Partial county data across years       | Fourteen counties have charge data available for fewer than three financial years, limiting the trend analysis to the years covered. This reflects variation in the availability and accessibility of historical Finance Bills across counties.   | Year-on-year trend analysis for these counties is limited to the years for which data is available. Average charge comparisons may be less reliable where only one year of data is present.                       | Counties with partial data are clearly identified in Annexure A and in the trend analysis in Section 4.3. Trend conclusions are drawn only from counties with sufficient data coverage.                    |
| Average charge as a comparative metric | The use of county-level average charges as a summary metric can be distorted by the presence of high-value charge types that dominate the average without reflecting the typical cost experience of a fibre-deploying ISP.                        | Average charge movements in some counties (particularly Siaya and Murang'a) reflect changes in charge composition rather than genuine fee revisions. This is documented and addressed explicitly in the findings. | Charge-level case studies are used alongside average charge data to provide a more accurate representation of the cost burden. The limitations of the average metric are noted explicitly in the analysis. |
| Finance Bill data quality variation    | The specificity, format, and completeness of charge information in county Finance Bills vary significantly across counties. Some counties provide detailed per-metre rates across multiple charge types; others list only a single aggregate fee. | Cross-county comparability is constrained in some cases. Standardisation was applied during data aggregation to maximise comparability, but some residual variation in charge definitions persists.               | A standardised charge taxonomy was developed and applied consistently across all counties. Original charge descriptions are retained in the underlying dataset for reference and verification.             |

Notwithstanding these limitations, the study's county charge findings are based on primary source documents (Finance Bills and Finance Acts) for 42 of 47 counties, covering 515 charge records across three financial years. Thus, the findings constitute a robust and comprehensive dataset for the purposes of trend analysis and policy-level comparative assessment. Most of the limitations identified above are consistent with those commonly encountered in multi-jurisdiction regulatory studies in developing country contexts and do not fundamentally undermine the validity of the findings reported in Chapters 4 and 5.

### 3.3.6 Ethical Considerations

The study adhered to the required research ethics principles applicable to policy and regulatory research. The following ethical considerations were observed throughout the data collection and analysis process.

#### **Confidentiality and data protection**

**TESPOK** members were offered NDAs as a condition of participation. In addition, fibre deployment data obtained from individual members was presented in aggregated form, with individual member data anonymized. Finally, county charge data was drawn from publicly available Finance Bills and Finance Acts. Hence, it does not raise individual confidentiality concerns.

#### **Accuracy and representation**

The study research team was committed to representing the findings accurately and without selective presentation. Where inconsistencies, data gaps, or methodological limitations exist, they were transparently documented. The validation workshop was itself an ethical safeguard. It offered an opportunity to stakeholders to correct inaccuracies before findings are finalised and disseminated.

#### **Independence**

The study was commissioned by TESPOK and the findings are intended to inform TESPOK's advocacy on wayleave harmonisation. Throughout this study, the research team maintained analytical independence. The findings are presented based on the data, including where those findings are unfavourable to specific counties or do not support pre-existing assumptions about the charge environment.

### 3.3.7 Study Closure Note

Following the validation workshop, a one-month window was provided after validation process to allow the ISPs to submit deployment data and any additional supporting information for inclusion in the final analysis. At the close of this window, 22 out of the 27 ISPs had not submitted the requested deployment data. The analysis and findings presented in this study are therefore based on evidence that was available within the stipulated timelines, with no further data incorporated.



## 4. FINDINGS: ICT Infrastructure Deployment and Maintenance Charges (FY 2021/22-FY 2023/24)

### 4.1 Introduction

This chapter presents findings on county ICT charges levied for ICT infrastructure deployment and maintenance between FY21/2022 and FY23/2024. The findings were drawn on a structured secondary review of County Finance Acts and Finance Bills across 42 counties. Five counties (Kwale, Nyeri, Samburu, Tana River, and Wajir) were excluded from the analysis due to data unavailability. Samburu County waived fiber optics laying-related charges for 2023.

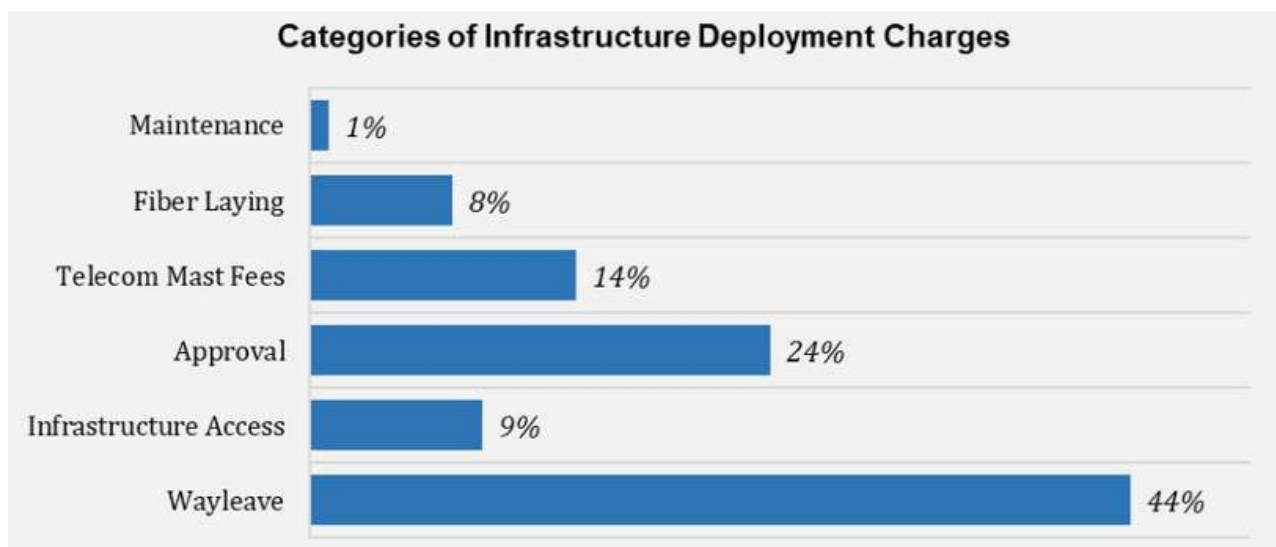
The chapter is organized into four key sections. Section 4.2 provides an overview of the overall charge landscape. Section 4.3 analyzes county government charges across FY 2021/22 to FY 2023/24. Building on this, Section 4.4 offers a county-level comparative analysis, identifying the highest and lowest charge environments to illustrate disparities in ICT deployment and maintenance charges. Finally, Section 4.5 synthesizes these findings into key observations and emerging patterns. Across the counties reviewed, the analysis shows that ICT infrastructure charges vary widely in structure and magnitude. It also reveals that ICT infrastructure charges are largely static over the three years characterised by significant structural fragmentation.

### 4.2 Overview of Charge Landscape

Six charge categories were developed from the secondary data: wayleave, approval, infrastructure access, fiber laying, telecom mast fees, and maintenance. The units used to operationalize each charge category varied. This variation is reflected in distance per feet, per metre, per km, per instance, per mast, and per sq. metre (see Table 3). In their raw form, the charges were not directly comparable. Thus, these charges were standardized to allow direct comparability over the three years of analysis.

*Table 3: ICT infrastructure deployment and maintenance charge categories*

Wayleaves accounted for 44% of the recorded charge types. This implies that counties primarily manage the RoW rather than the act of construction itself. Approval-related fees comprise 24% of the recorded charges. The findings reveal a significant regulatory layer that adds upfront administrative cost before ICT infrastructure deployment begins. Telecom mast fees represent 14%. Accordingly, tower infrastructure is treated by counties as a distinct revenue stream rather than an extension of fibre deployment. Infrastructure access (9%) and fibre laying (8%) together account for less than a fifth of charge types. This indicates that, at the county level, the primary structural cost pressures stem less from the physical installation itself and more from land-use expenses and application or approval fees.

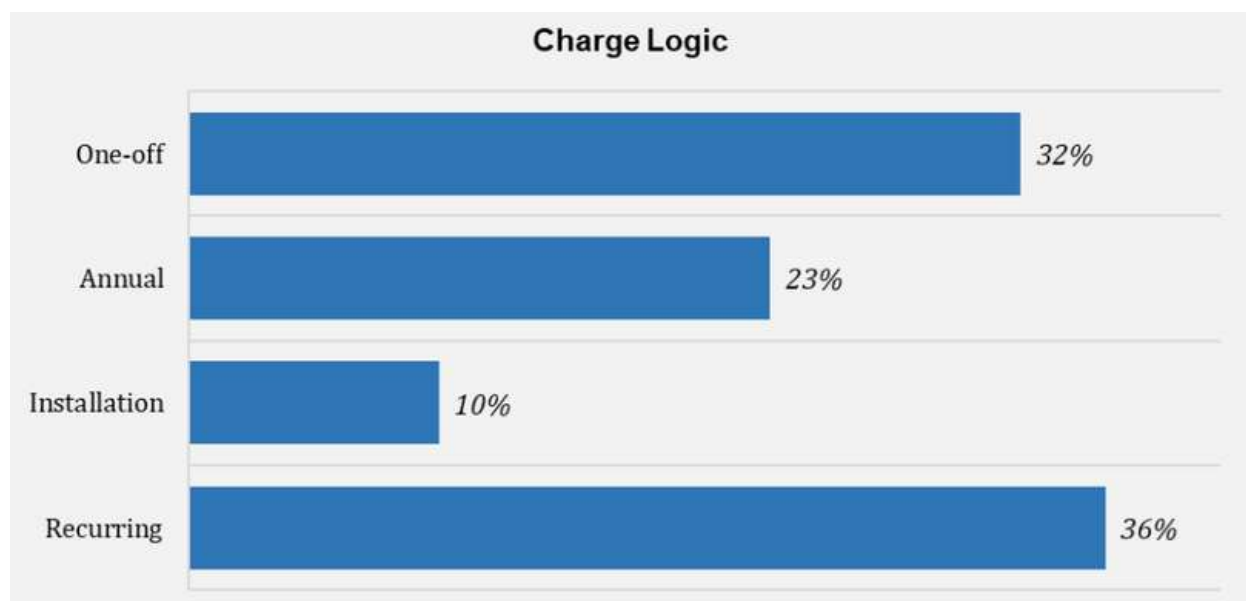


*Figure 3: Different categories of infrastructure deployment charges.*

It is important to note that the percentages presented in Figure 3 reflect the frequency of charge occurrence across the 42 counties surveyed, not the financial cost burden imposed on ISPs. A charge category that appears in a small proportion of records may represent a significantly higher financial liability in practice. For instance, road cutting charges, which are classified under fiber laying (8% of records), can reach KES 30,000 per meter in some counties (e.g., Siaya). This means a single deployment corridor can generate a cost that exceeds the total annual wayleave liability for an equivalent stretch of overhead fiber. Similarly, though representing 14% of charge records, telecom mast renewal fees carry annual values of up to KES 300,000 per mast in certain counties. The distribution of charge categories should therefore be read as an indicator of regulatory complexity and the breadth of cost exposure faced by ISPs, rather than as a ranking of financial impact.

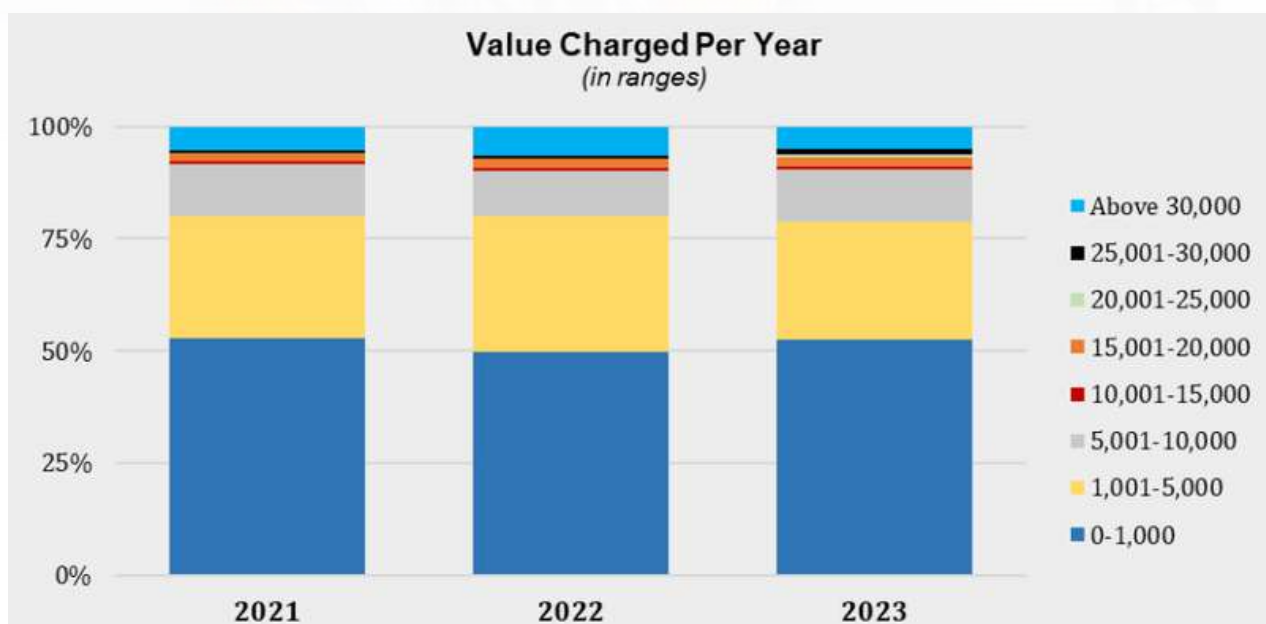
The six charge categories were operationalized using four charge logics as demonstrated in Figure 4. Recurring fees accounted for 36% of total records, one-off charges accounting for 32%, annual fees, 23%, and installation-related charges, accounting for 10%. This distribution indicates that county ICT deployment charging frameworks are weighted toward sustained

and repeat revenue streams as opposed to purely construction-linked costs. The combined share of recurring and annual charges (59%) suggests a structural emphasis on ongoing revenue tied to infrastructure occupation and operation. The sizeable proportion of one-off fees further reflects a notable administrative and approval burden at the point of market entry. By contrast, installation-related charges constitute the smallest share. It follows that physical deployment activity is not the primary driver of county fee structures. The co-existence of recurring, installation, one-off, and annual charges within a single county means ISPs face a compounding cost structure when deploying infrastructure. What's more, the charge logic profile points to a revenue model centered on access, permissions, and continued occupation.



*Figure 4: ICT infrastructure deployment charges logic profile.*

Figure 5 presents the distribution of charge values across the three years of analysis. The distribution is grouped into eight value bands ranging from KES 0-1,000 to above KES 30,000. This distribution reveals two important patterns. The first and most striking pattern is structural stability across all three years. The proportion of charges falling within each value band remained almost identical between FY 2021/22, FY 2022/23, and FY 2023/24. Interestingly, no band reveals a meaningful movement in either direction. This provides an aggregate-level confirmation of what the county-by-county trend analysis in Section 4.3 establishes: that the majority of counties did not revise their charge levels during the study period.



*Figure 5: Charge value distribution remains stable across all three financial years (FY 2021/22- FY 2023/24)*

The second pattern identified in Figure 5 concerns the concentration of ICT infrastructure charges in the lower value bands. Approximately half of all reported charges across each year fall within the KES 0-1,000 range. This finding highlights the prevalence of wayleave fees, which reflect modest values typically between KES 10 and KES 200 per metre. The KES 1,001-5,000 band accounts for a further significant share. This is consistent with the application fee range reported across most counties in the dataset.

However, the presence of upper bands, while small in percentage terms, represents a disproportionate financial burden for ISPs in practice. These upper-band charges correspond to high-value items such as telecom mast renewal fees, road cutting charges, and lump-sum application fees. Unlike per-metre wayleave charges, these charges are not scaled to deployment length. Therefore, they cannot be absorbed incrementally (based on the length of fiber) across a network rollout. Accordingly, the financial exposure they create for ISPs is explored in Section 4.4.

### 4.3 County Government Charges: Trend Analysis (FY 2021/22-FY 2023/24)

This section examines how ICT infrastructure deployment and maintenance charges changed from FY 2021/22 to FY 2023/24 for the 42 counties examined. The analysis draws on average charge values per county per year and categorises observed movements into four groups: counties with no change, counties that increased charges, counties that decreased or revised charges, and counties exhibiting a mixed pattern. Eight counties are excluded from trend analysis because of insufficient data spanning fewer than two financial years. Accordingly, these counties are documented separately at the end of this section.

### 4.3.1 Counties with No Change in Charges

Table 4 indicates that 24 counties recorded no change in any reported charge type across the study period. Of these, three counties (Isiolo, Turkana, and Nandi) had data available from FY 2022/23 onwards. However, they recorded no change between FY 2022/23 and FY 2023/24. Together, the counties represent 57.14% of the 42 counties for which data were obtained. A headline finding is that the stability of charges across this group is consistent across all charge categories. In other words, wayleave rates, approval fees, infrastructure access charges, maintenance, and fibre laying fees all remained unchanged across the three years examined. However, there is a marked lack of uniformity in both the level and structure of charge types across the counties. Notably, stability over time masks significant cross-county disparities. This is revealed by the average annual charge values ranging from as low as KES 100 in some counties to over KES 23,000 in others.

*Table 4: Counties with no change in reported ICT infrastructure deployment and maintenance charges (FY 2021/22 – FY 2023/24)*

|      |            | Change in Charges Over Time     |                    |                    |                                          |
|------|------------|---------------------------------|--------------------|--------------------|------------------------------------------|
|      |            | Average values charged per year |                    |                    |                                          |
| Code | County     | FY2021/22<br>(KES)              | FY2022/23<br>(KES) | FY2023/24<br>(KES) | Charge status<br>FY2021/22-<br>FY2023/24 |
| 1    | Mombasa    | 575                             | 575                | 575                | No change                                |
| 7    | Garissa    | 23,466.70                       | 23,466.70          | 23,466.70          | No change                                |
| 9    | Mandera    | 2,500.00                        | 2,500.00           | 2,500.00           | No change                                |
| 10   | Marsabit   | 100                             | 100                | 100                | No change                                |
| 12   | Meru       | 10,200.00                       | 10,200.00          | 10,200.00          | No change                                |
| 14   | Embu       | 12,476.90                       | 12,476.90          | 12,476.90          | No change                                |
| 15   | Kitui      | 100                             | 100                | 100                | No change                                |
| 17   | Makueni    | 400                             | 400                | 400                | No change                                |
| 18   | Nyandarua  | 1,633.30                        | 1,633.30           | 1,633.30           | No change                                |
| 22   | Kiambu     | 3,781.30                        | 3,781.30           | 3,781.30           | No change                                |
| 24   | West Pokot | 673.3                           | 673.3              | 673.3              | No change                                |

|    |                 |           |           |           |           |
|----|-----------------|-----------|-----------|-----------|-----------|
| 26 | Trans Nzoia     | 732       | 732       | 732       | No change |
| 27 | Uasin Gishu     | 732       | 732       | 732       | No change |
| 28 | Elgeyo Marakwet | 1,049.00  | 1,049.00  | 1,049.00  | No change |
| 31 | Laikipia        | 5,250.00  | 5,250.00  | 5,250.00  | No change |
| 32 | Nakuru          | 1,350.00  | 1,350.00  | 1,350.00  | No change |
| 37 | Kakamega        | 2,042.50  | 2,042.50  | 2,042.50  | No change |
| 38 | Vihiga          | 5,286.30  | 5,286.30  | 5,286.30  | No change |
| 39 | Bungoma         | 10,728.60 | 10,728.60 | 10,728.60 | No change |
| 40 | Busia           | 4,775.00  | 4,775.00  | 4,775.00  | No change |
| 42 | Kisumu          | 6,383.30  | 6,383.30  | 6,383.30  | No change |
| 11 | Isiolo*         | N/A       | 1,926.70  | 1,926.70  | No change |
| 23 | Turkana*        | N/A       | 7,666.70  | 7,666.70  | No change |
| 29 | Nandi*          | N/A       | 10,000.00 | 10,000.00 | No change |



**Note:** Counties marked with a partial data note had charge records available from FY 2022/23 onwards only. Stability is confirmed for the period covered by available data. \* = partial data coverage.

This wide variation indicates that ICT deployment costs are heavily influenced by localized policy decisions rather than guided by a harmonised national approach. For ISPs expanding across multiple counties, this fragmented pricing environment increases transaction costs. It also complicates financial planning and introduces regulatory uncertainty into network rollout strategies. The absence of alignment in charge structures risks distorting investment flows. In revealing the trend, the data suggests that, while counties may exhibit internal pricing stability, the broader inter-county divergence undermines predictability, timeliness, and equity in national ICT infrastructure expansion.

### 4.3.2 Counties that Recorded Changes in Charges

Table 5 reveals that 10 counties recorded a change in at least one charge type over the analysis period. Of these, five recorded an increase in average charges. Another four recorded a downward revision of one or more charge types. Tharaka-Nithi demonstrated a mixed pattern of marginal fluctuation that returned to its original level by FY 2023/24.

*Table 5: Counties that recorded changes in average ICT Infrastructure deployment and maintenance charges (FY 2021/22-FY 2023/24)*

| Average values charged per year |               |                 |                 |                 |                           |                           |
|---------------------------------|---------------|-----------------|-----------------|-----------------|---------------------------|---------------------------|
| Code                            | County        | FY2021/22 (KES) | FY2022/23 (KES) | FY2023/24 (KES) | Change FY 2021/22–2022/23 | Change FY 2022/23–2023/24 |
| 4                               | Taita Taveta  | 10,500          | 10,500          | 20,000          | No change                 | Increased                 |
| 3                               | Kilifi        | 3,667           | 3,750           | 3,750           | Increased                 | No change                 |
| 45                              | Kisii         | 1,771           | 1,771           | 6,625           | No change                 | Increased                 |
| 46                              | Nyamira       | 43,617          | 43,750          | 43,750          | Increased                 | No change                 |
| 47                              | Nairobi       | 2,093           | 2,093           | 3,196           | No change                 | Increased                 |
| 33                              | Narok         | 300             | 200             | 200             | Decreased                 | No change                 |
| 35                              | Kericho       | 2,471           | 2,280           | —               | Decreased                 | NA                        |
| 21                              | Murang'a      | —               | 50,000          | 30              | NA                        | Decreased                 |
| 41                              | Siaya         | —               | 41,869          | 2,336           | NA                        | Decreased                 |
| 13                              | Tharaka-Nithi | 3,075           | 3,063           | 3,075           | Mixed                     | Mixed                     |

**Note:** Average charge values are calculated across all charge types reported by each county in the given financial year. Counties with missing year data are shown as —. The Murang'a and Siaya figures reflect a change in charging model and data composition, respectively, and are discussed in detail in Section 4.2.4. Mixed indicates the county recorded both an upward and downward movement across the two comparison periods.

### 4.3.3 Counties that Increased Charges

#### Nairobi County

The broadest charge increase of any county in the dataset was recorded by Nairobi County. All nine reported charge types remained unchanged between FY 2021/22 and FY 2022/23. Revisions to the finance bill took effect in FY 2023/24 across every charge category.

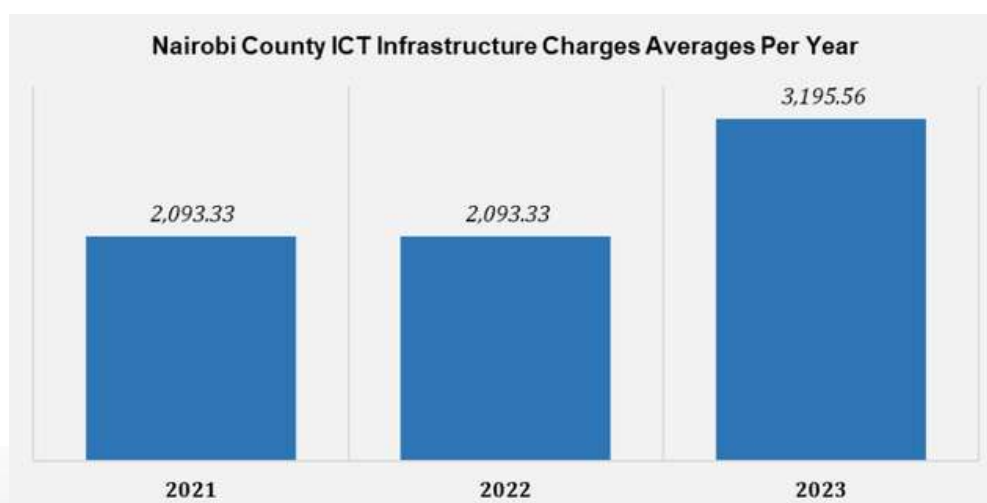
Table 6 presents the complete charge-by-charge breakdown for Nairobi County across the three years analysed.

*Table 6: Charge-level detail and Year-on-Year change for Nairobi County (FY 2021/22- FY 2023/24)*

| Charge Type                 | Average values charged per year |                  |                  | % Change (FY 22/23-23/24) |
|-----------------------------|---------------------------------|------------------|------------------|---------------------------|
|                             | FY 2021/22 (KES)                | FY 2022/23 (KES) | FY 2023/24 (KES) |                           |
| Application fee-1 to 2 km   | 4,000                           | 4,000            | <b>5,200</b>     | <b>30%</b>                |
| Application fee-2 to 5 km   | 5,000                           | 5,000            | <b>6,500</b>     | <b>30%</b>                |
| Application fee- above 5 km | 5,000                           | 5,000            | <b>6,500</b>     | <b>30%</b>                |
| Turret box                  | 2,000                           | 2,000            | <b>5,000</b>     | <b>150%</b>               |
| Carriageway wayleave        | 150                             | 150              | <b>200</b>       | <b>33%</b>                |
| Footpath wayleave           | 80                              | 80               | <b>150</b>       | <b>88%</b>                |
| Verge-1.5m offset           | 30                              | 30               | <b>60</b>        | <b>100%</b>               |
| Verge-outside 1.5m          | 80                              | 80               | <b>150</b>       | <b>88%</b>                |
| Manhole opening             | 2,500                           | 2,500            | <b>5,000</b>     | <b>100%</b>               |

**Note:** Percentage changes are calculated relative to FY 2022/23 values. All charges remained unchanged between FY 2021/22 and FY 2022/23.

Figure 6 illustrates the ICT infrastructure deployment charge changes across the three years. This confirms all nine charge types remained unchanged between FY 2021/22 and FY 2022/23 before increasing in FY 2023/24.



*Figure 6: Nairobi County ICT infrastructure charge average values across FY 2021/22-FY 2023/24*

## Kisii County

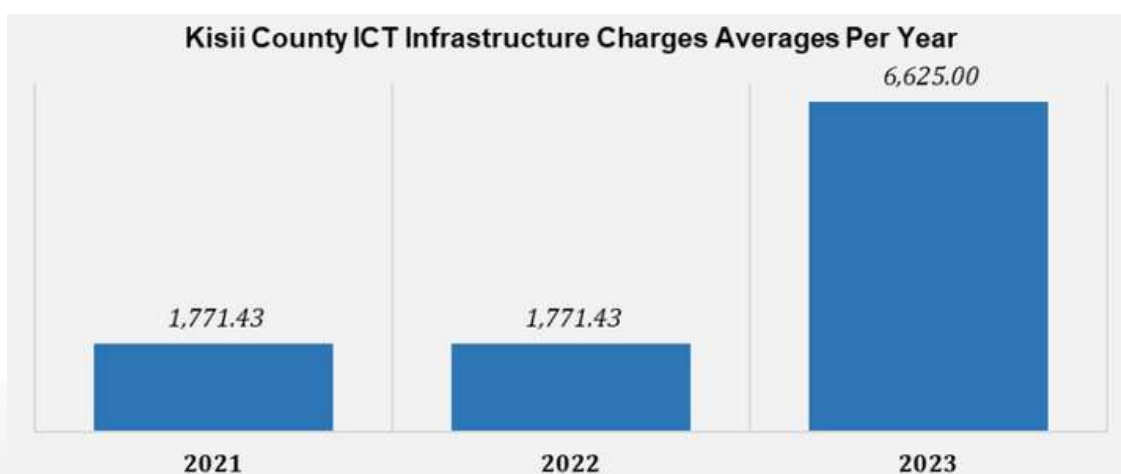
A different charge mechanism informed Kisii County's charge profile change compared to Nairobi County: rather than an upward revision of existing charges, the county introduced three entirely new charge types in FY 2023/24. This is while simultaneously reducing several existing wayleave and infrastructure access rates. Table 7 presents the full charge-level changes for Kisii.

*Table 7: Charge-level, including new charges introduced in FY 2023/24 in Kisii County*

| Average values charged per year            |                     |                     |                     |                            |
|--------------------------------------------|---------------------|---------------------|---------------------|----------------------------|
| Charge Type                                | FY 2021/22<br>(KES) | FY 2022/23<br>(KES) | FY 2023/24<br>(KES) | Note                       |
| Fibre overhead wayleave                    | 100                 | 100                 | <b>50</b>           | Reduced 50%                |
| Fibre underground wayleave                 | 200                 | 200                 | <b>100</b>          | Reduced 50%                |
| Manhole fee                                | 2,000               | 2,000               | <b>1,000</b>        | Reduced 50%                |
| Pole charge                                | —                   | —                   | <b>50</b>           | New charge introduced 2023 |
| Fibre network maintenance                  | —                   | —                   | <b>30,000</b>       | New charge introduced 2023 |
| Performance security – fibre reinstatement | —                   | —                   | <b>25,000</b>       | New charge introduced 2023 |

*Note: (—) indicates the charge type was not reported in the relevant financial year. New charges introduced in FY 2023/24 are highlighted.*

As demonstrated in Figure 7, the net effect was a sharp increase in average charges. This is from KES 1,771 in FY 2022/23 to KES 6,625 in FY2023/24, a 274% increase.

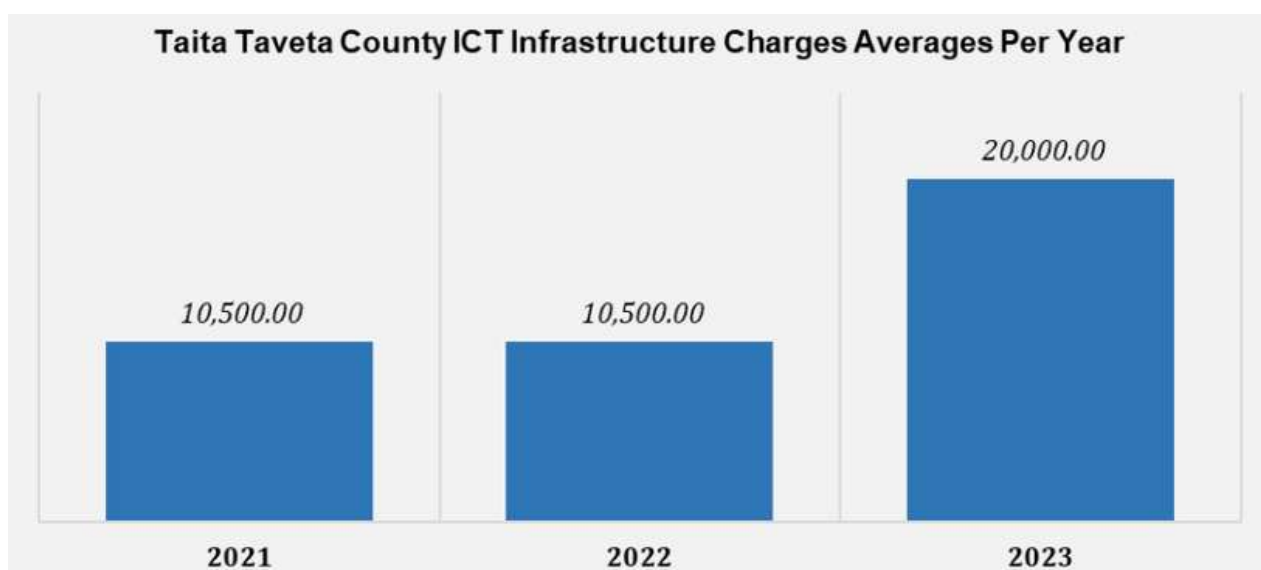


*Figure 7: Kisii County ICT infrastructure charge average values across FY 2021/22-FY 2023/24.*

The introduction of an annual fibre network maintenance charge of KES 30,000 and a performance security fee for fibre reinstatement of KES 25,000 are significant. Consequently, these charges create a recurring annual liability for ISPs with existing networks in Kisii. This is over and above the cost of new deployments. What's more, they introduce a maintenance fee that does not appear in any other county reported in this study. This raises questions about whether such charges will expand to other counties in the future.

### **Taita Taveta County**

Taita Taveta recorded a 48% increase in average charges between FY 2022/23 and FY 2023/24. This increase was not driven by a revision to existing charge values, as both the annual wayleave fee (KES 20,000) and the application fee (KES 1,000) remained consistent across 2021 and 2022. Rather, the increase in the average figure reflects the absence of a reported application fee entry in the FY 2023/24 Finance Bill, reducing the number of charge types captured for that year from two to one. With only the wayleave fee (KES 20,000) recorded in FY 2023/24, the average for that year equals the single reported charge, compared to the mean of both charges (KES 10,500) in the preceding years. This represents a data coverage variation rather than a substantive policy change in Taita Taveta's ICT infrastructure charge structure.



*Figure 8: Taita Taveta County ICT infrastructure charge average values across FY 2021/22- FY 2023/24.*

### **Kilifi County**

Figure 9 demonstrates that Kilifi recorded a marginal 2.3% increase in average charges between FY 2021/22 and FY 2022/23, from KES 3,666.67 to KES 3,750. There was no further change noted in FY 2023/24. The increase reflects a minor upward revision to one charge type. It does not represent a material change in the county's overall charge burden for ISPs.

The introduction of an annual fibre network maintenance charge of KES 30,000 and a performance security fee for fibre reinstatement of KES 25,000 are significant. Consequently, these charges create a recurring annual liability for ISPs with existing networks in Kisii. This

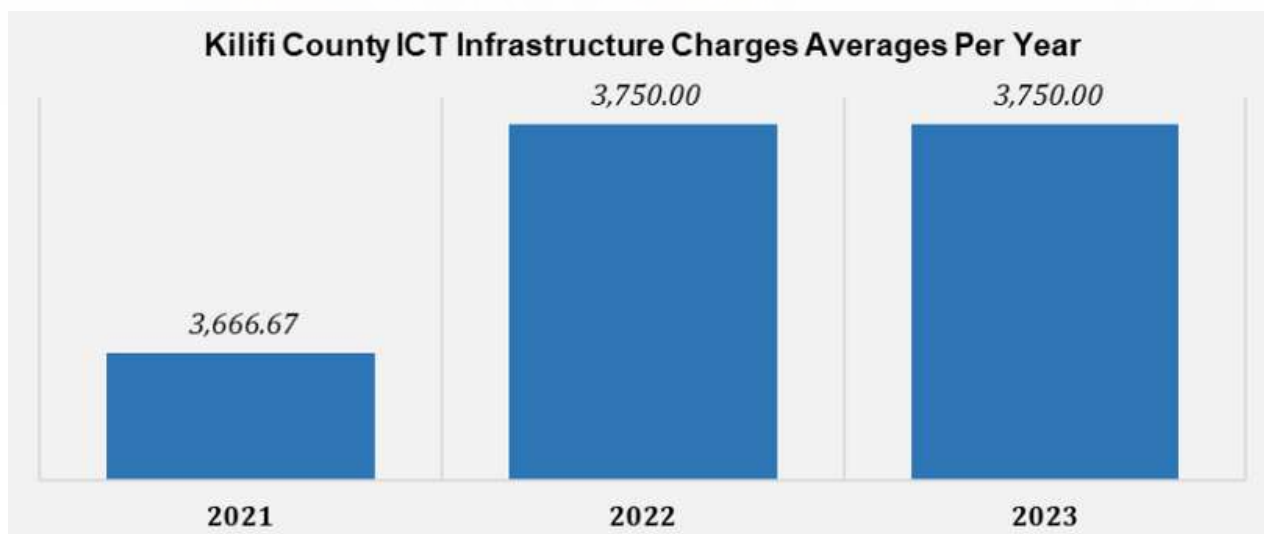


Figure 9: Kilifi County ICT infrastructure charge average values across FY 2021/22-FY 2023/24.

#### Nyamira County

Figure 10 reveals that Nyamira recorded a slight 0.3% increase in average charges between FY 2021/22 and FY 2022/23. This change was driven by a small upward adjustment to its underground cable wayleave rate from KES 1,200 to KES 2,000 per kilometre. In terms of line item, this represented a 67% increase on that specific charge. Average charges remained stable in FY 2023/24. While the average movement is small, the specific charge revision is notable as it represents a meaningful increase in the per-kilometre cost of underground cable deployment in the county.

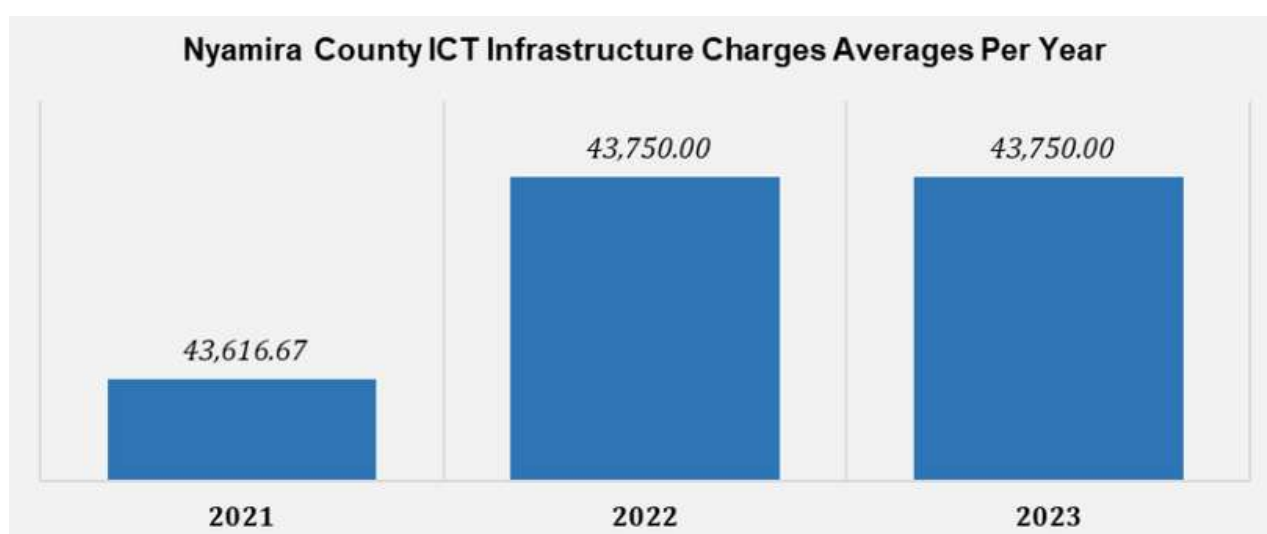


Figure 10: Nyamira County ICT infrastructure charge average values across FY 2021/22-FY 2023/24.

#### 4.3.4 Counties Revised Charges Downward

##### **Murang'a County Policy Revision**

Murang'a County represents the most analytically significant change in the entire dataset. Interestingly, it was the only instance of a county revising its charging model. This is as opposed to simply adjusting the value of an existing charge. In FY 2022/23, the county charged a flat fee of KES 50,000 per application for fibre deployment. This was regardless of the length of the deployment. However, it replaced this with a variable per meter charge of KES 30 per metre of fibre deployed in FY 2023/24.

Notably, this shift from a one-off, flat, length-independent fee to a variable, length-proportionate model aligns with the harmonisation principles set out in both the National Broadband Strategy (2023) and the ICTA Standard (ICTA.2.001:2021). Both advocate for charge structures that reflect the actual scale of infrastructure deployment. The average charge figure in the dataset dropped from KES 50,000 in FY 2022/23 to KES 30 in FY 2023/24.

Murang'a's move from a model that charges any deployment equally regardless of scale to one that charges per meter of deployment benefits ISPs undertaking large-scale deployments. It should be noted that the FY 2023/24 rate of KES 30 per metre places Murang'a among the lowest-cost wayleave environments in the dataset for both overhead and underground fibre. This represents a significant improvement in the county's attractiveness to fibre ISPs

##### **Narok County**

Figure 11 reveals that Narok recorded a 33% reduction in its underground fibre wayleave charge. This was the only reported charge type for the county. The RoW charge reduced from KES 300 per metre in FY 2021/22 to KES 200 per metre in FY 2022/23. The rate remained at KES 200 in FY 2023/24. No explanation is available in the public record for this reduction. The revised rate of KES 200 per metre remains within the mid-range of underground wayleave charges reported across the 42 counties.

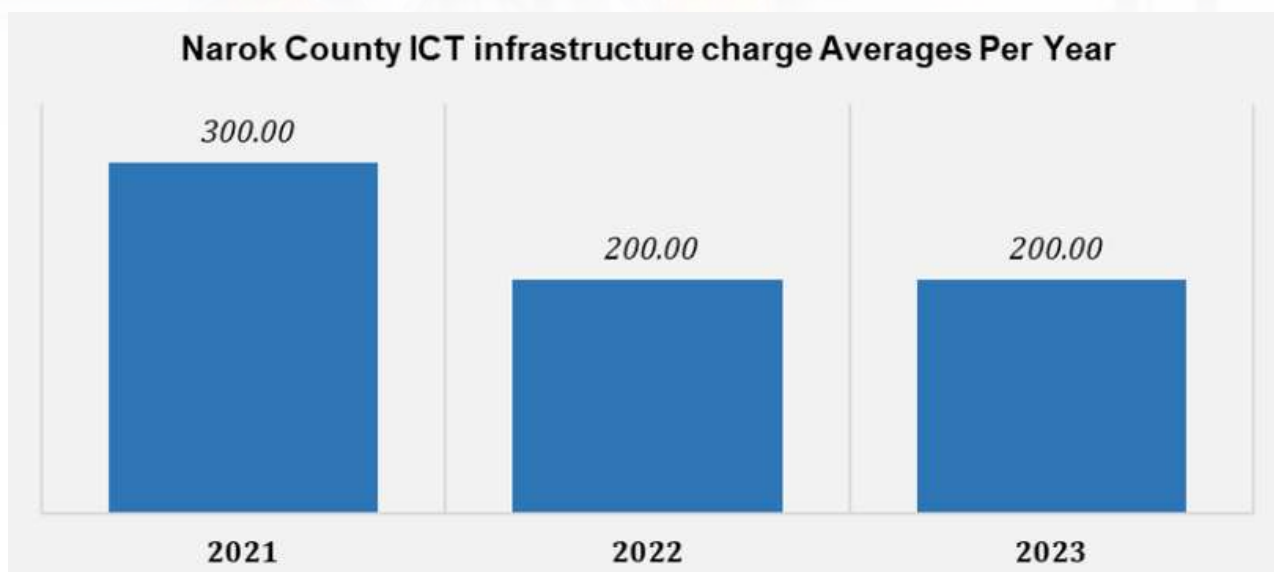


Figure 11: Narok County ICT infrastructure charge average values across FY 2021/22-FY 2023/24.

#### **Kericho County**

Kericho recorded a modest 8% decrease in average charges between FY 2021/22 and FY 2022/23. This reflects a minor downward adjustment across its charge structure. Data for FY 2023/24 was not available. The unavailability limited the ability to assess whether the downward trend continued or reversed.

#### **4.3.5 Mixed Fluctuation: Tharaka-Nithi County**

Tharaka-Nithi is the only county in the dataset to record both a decrease and a subsequent increase across the two comparison periods (see Figure 12). The movement is confined to a single charge type: the underground fibre wayleave rate. This rate fell from KES 200 per metre in FY 2021/22 to KES 150 per metre in FY 2022/23, before returning to KES 200 per metre in FY 2023/24.

All other charge types in the county, including overhead wayleave (KES 100/m), application fee (KES 2,000), and road cutting (KES 10,000/m), remained unchanged throughout the study period. The fluctuation is marginal in financial terms and does not represent a meaningful policy change. Arguably, it may reflect a correction to an earlier revision rather than a deliberate adjustment to the RoW charges.

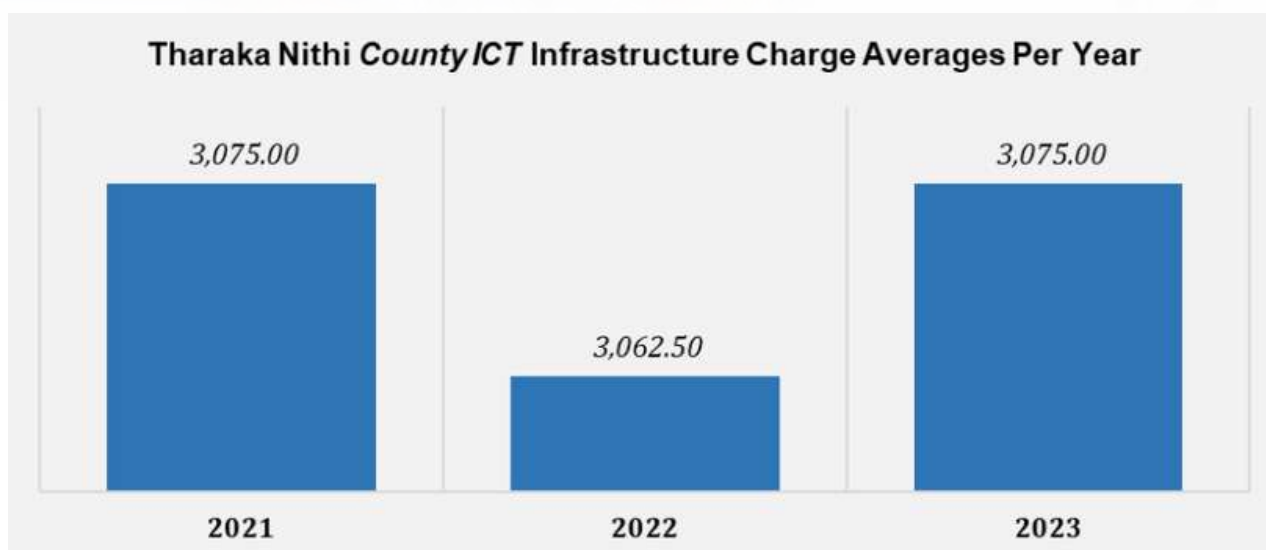


Figure 12: Tharaka Nithi County ICT infrastructure charge average values across FY 2021/22- FY 2023/24.

#### 4.3.6 Counties with Insufficient Data for Trend Analysis

Eight counties had charge data available for only one financial year, making year-on-year trend comparison impossible. These counties are presented in Table 8. Their exclusion from the trend analysis does not reflect an absence of charges. Rather, it reflects gaps in the availability of historical data during the secondary data collection phase.

Table 8: Counties excluded from trend analysis due to insufficient data

| Code | County    | Data Availability |
|------|-----------|-------------------|
| 5    | Lamu      | FY 2023/24 only   |
| 16   | Machakos  | FY 2021/22 only   |
| 20   | Kirinyaga | FY 2023/24 only   |
| 30   | Baringo   | FY 2023/24 only   |
| 34   | Kajiado   | FY 2023/24 only   |
| 36   | Bomet     | FY 2021/22 only   |
| 43   | Homa Bay  | FY 2021/22 only   |
| 44   | Migori    | FY 2023/24 only   |



*Note: All eight counties have ICT infrastructure charge data for at least one financial year. The absence of multi-year data limits trend analysis.*



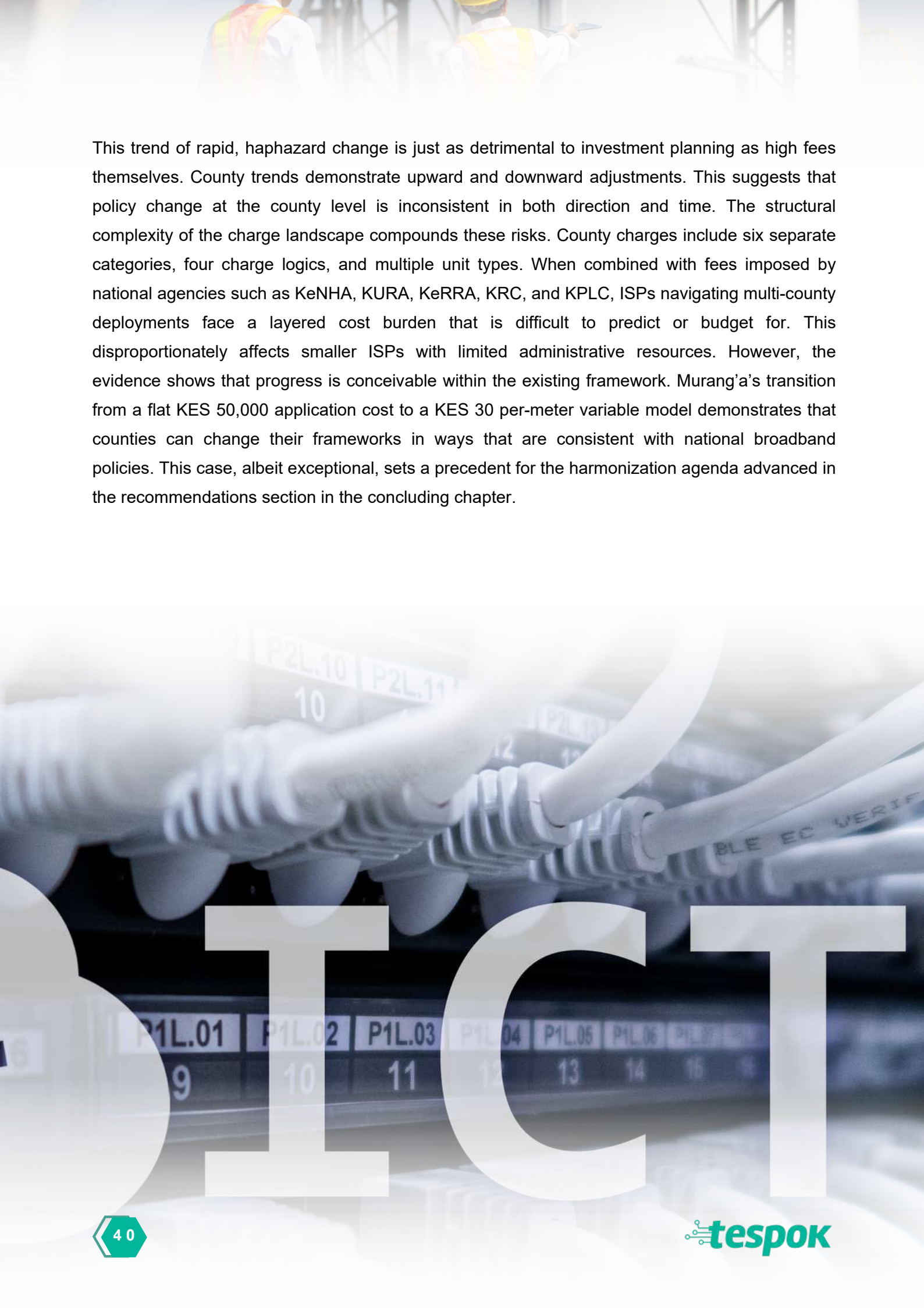
A synthesis of the findings from this section reveals several structural attributes of the ICT infrastructure deployment and maintenance charges environment at the county level in Kenya. These attributes have direct implications for ISP fibre optic deployment investment planning. They also have significant policy recommendations developed in the concluding chapter.

1. **Charge stagnation is systemic:** The fact that 24 of 34 counties with usable trend data (70.59%) recorded no change across the study period reveals that charges are set through periodic, administratively-driven Finance Bill cycles as opposed to the use of a responsive review process. This study reveals no evidence to suggest the existence of a mechanism via which ISPs' cost experience feeds back into county charge-setting decisions.
2. **When changes do occur, they are unilateral and signalled:** The findings reveal that counties that have introduced new cost schedules do so without prior public consultation with ISPs. In overlooking this key step, counties indirectly expose ISPs to materially higher costs without the opportunity to factor revisions into their deployment plans.
3. **Downward revision is rare but possible:** Murang'a's model revision and Narok's rate reduction demonstrate that county governments can and do revise charges downward. Murang'a demonstrates a structurally meaningful downward review that enhances alignment with national policy principles. These cases, though isolated, provide a precedent that can be referenced in advocacy for broader harmonisation.

#### 4.4 Key Observations and Emerging Patterns

The findings reveal a county-level ICT infrastructure deployment and maintenance charge environment defined by the near-absence of change. Across 42 counties examined over three financial years, 70% of counties with usable trend data recorded no revision to any charge type across the analysis period. This suggests that county charge-setting operates through infrequent administrative cycles rather than a market-informed review process. What's more, the ICT infrastructure deployment charges are highly diverse in structure and magnitude across counties. There is also a pronounced lack of a harmonized national pricing framework to guide county-level ICT infrastructure deployment charge setting.

Where ICT infrastructure deployment and maintenance charge changes did occur, they were unilateral and unannounced. The revision of all nine charge types in Nairobi County and the introduction of new charge categories in Kisii County occurred without previous industry input. This exposed ISPs to significantly increased costs with little opportunity to change deployment plans. This trend of rapid, haphazard change is just as detrimental to investment planning as high fees themselves. County trends demonstrate upward and downward adjustments.



This trend of rapid, haphazard change is just as detrimental to investment planning as high fees themselves. County trends demonstrate upward and downward adjustments. This suggests that policy change at the county level is inconsistent in both direction and time. The structural complexity of the charge landscape compounds these risks. County charges include six separate categories, four charge logics, and multiple unit types. When combined with fees imposed by national agencies such as KeNHA, KURA, KeRRA, KRC, and KPLC, ISPs navigating multi-county deployments face a layered cost burden that is difficult to predict or budget for. This disproportionately affects smaller ISPs with limited administrative resources. However, the evidence shows that progress is conceivable within the existing framework. Murang'a's transition from a flat KES 50,000 application cost to a KES 30 per-meter variable model demonstrates that counties can change their frameworks in ways that are consistent with national broadband policies. This case, albeit exceptional, sets a precedent for the harmonization agenda advanced in the recommendations section in the concluding chapter.

# ICT

## 5. FINDINGS: Fibre Optic Deployment by TESPOK Members (FY 2021/22-FY 2023/24)

### 5.1 Introduction to the Chapter

This chapter presents findings on fibre optic deployment trends among TESPOK member ISPs over the three financial years from FY 2021/22 to FY 2023/24. As outlined in the methodology (Section 3), deployment data was collected directly from TESPOK members. To protect commercial confidentiality, participating ISPs are anonymised throughout this report as ISP One, ISP Two, and so forth. The two cases presented here demonstrate the analytical framework and the type of deployment insights.

**Important note:** The final response rate was 5 out of 27 targeted ISPs, following a one-month post-validation submission window, after which no additional data was incorporated. These findings therefore do not constitute a comprehensive assessment of the deployment. A full and more robust deployment analysis remains feasible in a future study, depending on the improved ISP participation and more complete data submission.

### 5.2 ISP One: County-Level Deployment Trends

ISP One reported a modest growth in its fibre network over the study period. It expanded its network from 1,607 km in FY 2021/22 to 1,628 km in FY 2022/23 and 1,646 km in FY 2023/24. This is a net addition of 39 km, representing 2.4% overall growth. Year-on-year growth rates remained relatively stable, at 1.3% between FY 2021/22 and FY 2022/23, and 1.1% between FY 2022/23 and FY 2023/24. While the trajectory is consistently upward, the pace of expansion is conservative. This suggests sustained but constrained investment in infrastructure.

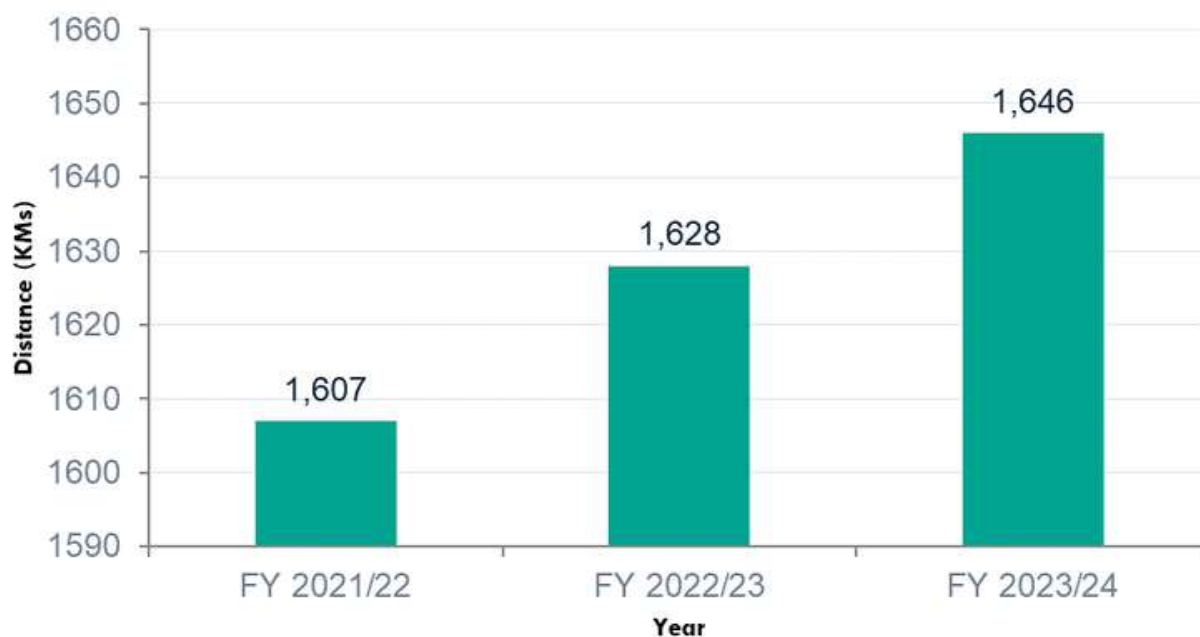


Figure 13: ISP One total fibre network deployment, FY 2021/22–FY 2023/24 (km)

A county-level breakdown reveals a highly concentrated network geography. Nairobi alone accounts for 1,320 km. This is approximately 82% of ISP One's total network. This was followed by Mombasa at 160 km (10%), Uasin Gishu at 21 km (1.3%), and Kisumu at 15 km (0.9%). Notably, these four counties recorded no growth across the study period. These findings suggest that ISP One's major urban markets have reached deployment saturation or that expansion in these corridors is constrained by regulatory or cost factors.

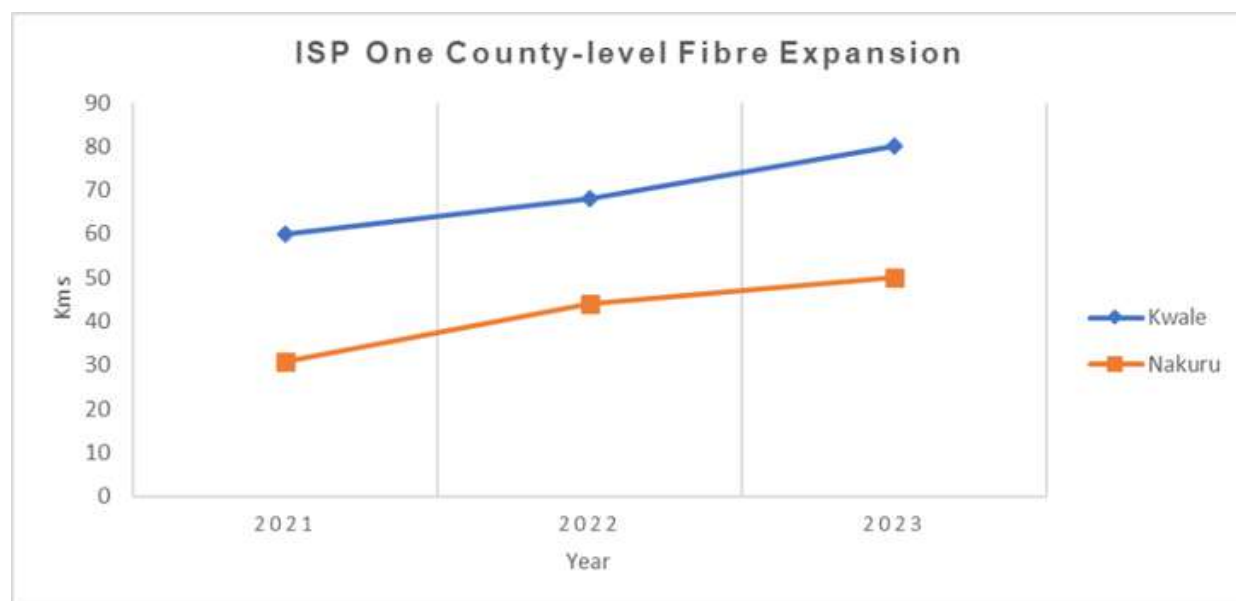


Figure 14: ISP One county-level fibre expansion, Kwale and Nakuru Counties, FY 2021/22–FY 2023/24 (km).

All network growth during the study period was concentrated in two counties. Kwale County expanded from 60 km to 80 km, a net gain of 20 km representing 33% growth and accounting for 51% of ISP One's total network expansion over the period. Nakuru County grew from 31 km to 50 km, a net gain of 19 km representing 61% growth and accounting for the remaining 49% of total expansion.

### 5.3 ISP Two: Regional Deployment Trends

ISP Two demonstrated markedly stronger and accelerating growth over the same period. Its network expanded from 33.75 km in FY 2021/22 to 40.935 km in FY 2022/23, and further to 56.64 km in FY 2023/24. This is a net addition of 22.89 km, representing 67.8% overall growth. Crucially, the pace of expansion accelerated sharply, with year-on-year growth rising from 21.3% in the first period to 38.4% in the second. This suggests a strong and building investment momentum.



Figure 15: ISP Two total fibre network deployment, FY 2021/22–FY 2023/24 (km)

It should be noted that ISP Two reports deployment data by region rather than by individual county. Each region aggregates multiple counties as detailed in Annexure C. While this limits the granularity of cost-to-deployment analysis, it nonetheless provides useful insights into geographic deployment priorities and how regional expansion patterns respond to the broader regulatory environment.

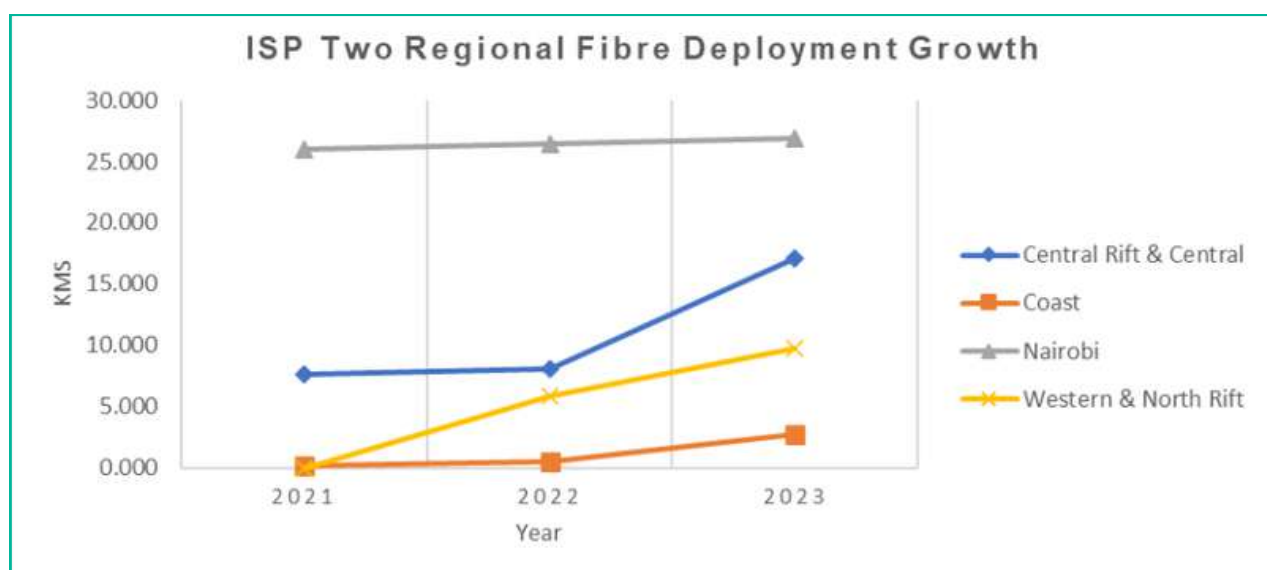
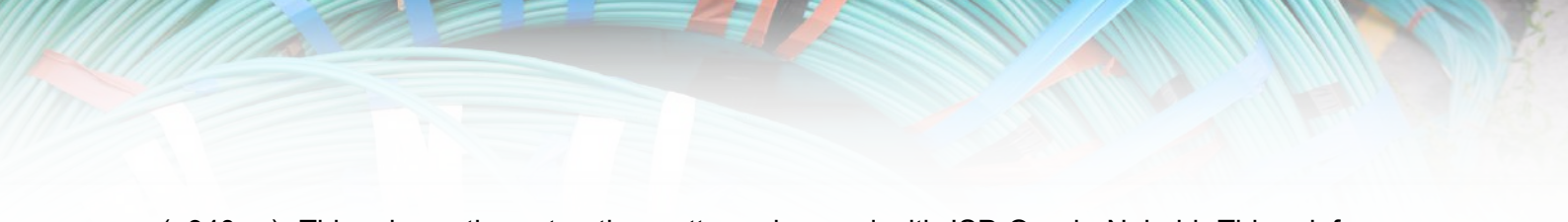


Figure 16: ISP Two regional fibre deployment growth, FY 2021/22–FY 2023/24 (km)

At the regional level, the Nairobi region holds the largest network at 26.93 km by FY 2023/24. However, it recorded the lowest growth rate of the four regions at just 4% over the study period



(+940 m). This mirrors the saturation pattern observed with ISP One in Nairobi. This reinforces the finding that major urban markets are approaching deployment ceilings. By contrast, the Central Rift and Central region were the fastest-growing regions. It expanded the fiber network from 7.62 km to 17.15 km, a net gain of 9.53 km representing 125% growth. The Western and North Rift region recorded a new deployment from a zero base to 9.76 km. This makes it the second-largest expansion in absolute terms. The Coast region, while smallest in absolute scale, recorded the highest percentage growth at 1,900%, expanding from 140 m to 2.8 km over the period.

#### 5.4 Comparative Observations

The deployment patterns of ISP One and ISP Two suggest that, while major urban markets such as Nairobi and Mombasa continue to record growth, the pace of expansion in these areas is modest compared to the accelerating deployment activity observed in secondary counties and emerging regions such as the Central Rift and Western and North Rift. If corroborated by the complete dataset, this shift would carry significant implications for the regulatory findings presented in Chapter 4, as secondary and emerging county markets tend to present more fragmented and less predictable ICT infrastructure deployment environments.

## 6. CONCLUSION AND RECOMMENDATIONS

### 6.1 Conclusion

The findings presented in Chapters 4 and 5 indicate that Kenya's ICT infrastructure deployment environment is characterised by significant regulatory fragmentation across county and national jurisdictions. While county governments retain constitutionally protected authority to establish and administer infrastructure-related charges within their jurisdictions, the exercise of this authority has produced a highly uneven deployment environment with limited coordination across counties and sector agencies. Although most counties recorded minimal changes to their charge structures during the study period, the findings reveal substantial variation in charge categories, approval processes, documentation requirements, and implementation practices across jurisdictions. Counties that revised their charges, particularly Nairobi and Kisii, introduced increases that further elevated deployment costs and administrative burdens for ISPs.

The study also established that fragmentation extends beyond county governments. National agencies including KeNHA, KURA, KeRRA, KRC, and KPLC continue to administer infrastructure access under separate operational and charging frameworks. Existing policy instruments such as ICTA.2.001:2021 and the National Broadband Strategy 2018-2023 advocate for harmonisation but do not provide binding enforcement mechanisms across implementing institutions.

Deployment data from participating TESPOK members further suggests that operators are increasingly concentrating fibre expansion in markets perceived to offer more predictable administrative and cost conditions, while deployment growth in major urban centres remains comparatively constrained. Collectively, these findings indicate that the principal barriers affecting broadband infrastructure expansion in Kenya are regulatory and institutional rather than purely technological or financial.

The study therefore concludes that Kenya's current ICT infrastructure governance framework lacks a nationally enforceable harmonisation mechanism capable of standardising deployment and maintenance charges across counties and sector agencies. As a result, broadband expansion continues to be affected by fragmented charge structures, duplicative approval processes, and inconsistent administrative practices across jurisdictions.

The recommendations presented in the following section are intended to address these challenges through legislative reform, institutional coordination, and the development of a more predictable and harmonised infrastructure deployment framework.

## 6.2 RECOMMENDATIONS

Seven recommendations across four tiers: Legislative, Regulatory, Advocacy, and Operational. All recommendations are grounded in the county charge evidence (42 counties, 515 records, FY 2021/22–FY 2023/24). Recommendations referencing deployment trends are based on illustrative cases from two ISPs and are framed accordingly.

|                    | Recommendation                                                                                       | Rationale                                                                                                                                                                                                                                                                                                                                                                                                      | Required Action                                                                                                                                                                                                              | Stakeholder Responsible                | Impact |
|--------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|--------|
| <b>LEGISLATIVE</b> |                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                              |                                        |        |
| 1                  | Introduce law compelling both county governments and national agencies to harmonise wayleave charges | As demonstrated in the report, the ICTA.2.001:2021 and the NBS 2018–2023 are only advisory. They cannot supersede county legislative authority under Article 185 of the Constitution. Evidence from other jurisdictions such as Ethiopia (Proclamation No. 1148/2019), Rwanda (Law No. 24/2016) and Tanzania (EPOCA 2010) reveal that binding instruments are a necessity. This is something that Kenya lacks. | Lobby Parliament to enact a binding national ICT infrastructure law establishing uniform wayleave and RoW charges across all counties and national agencies.                                                                 | TESPOK<br>Ministry of ICT / Parliament | High   |
| <b>REGULATORY</b>  |                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                              |                                        |        |
| 2                  | Create a publicly accessible national ICT infrastructure charge registry                             | At the moment, data on charges levied by KeNHA, KURA, KeRRA, KRC, and KPLC is not publicly available. This comes amid the Kenya Roads Act (2007) gazettelement requirement. There is no centralised registry.                                                                                                                                                                                                  | ICTA to develop and maintain a digital charge registry, publicly available. Target stakeholders to publish their charge schedules. Failure to publish to attract a compliance notice under the new legislation (see Rec. 1). | ICTA                                   | High   |

|                 | Recommendation                                                                                                                                                                                                                              | Rationale                                                                                                                                                                                                                                                                                                                                      | Required Action                                                                                                                                                                                                                                                         | Stakeholder Responsible | Impact |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|--------|
| 4               | Standardise and cap excessive infrastructure charges, including road-cutting and mast renewal fees, at the national level.                                                                                                                  | Currently, fees levied for road cutting and mast renewal are too excessive. A good example is that of Siaya where road cutting charges reach KES 30,000/m for a single deployment corridor. Also, Telecom mast renewal fees can reach KES 300,000/mast annually. Lack of standardisation exposes ISPs to significant cost burdens.             | Standardise and cap the maximum charge across all counties. These charges to be reviewed after every three years but in consultation with ICTA, TESPOK and other licensed operators.                                                                                    | Ministry of ICT / ICTA  | Medium |
| <b>ADVOCACY</b> |                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                         |                         |        |
| 5               | Target TESPOK advocacy in high-growth secondary counties (Central Rift, North Rift, and Western Kenya) to operationalise national wayleave harmonisation and address fragmented, rapidly escalating charge regimes affecting ISP expansion. | Evidence shows constrained expansion in Nairobi and Mombasa and accelerating deployment in secondary regions. For example, ISP One grew Kwale (+33%) and Nakuru (+61%). Also, ISP Two grew Central Rift and Central (+125%) and Coast (+1,900% from a low base). These two counties recorded unpredictable and fragmented charge environments. | TESPOK to allocate resources for conducting advocacy in counties experiencing escalated growth. They should engage these counties directly to fast-track charge harmonisation. This will facilitate ISP investment that is likely to be deterred by escalating charges. | TESPOK                  | Medium |

**Priority guide:** **High** = foundational; cannot achieve harmonisation without this action. **Medium** = important; advances harmonisation once legislative foundation is in place.

|   | Recommendation                                                                                                      | Rationale                                                                                                                                                                                                                                                        | Required Action                                                                                                                                                                                                                                                                                            | Stakeholder Responsible     | Impact |
|---|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|--------|
| 6 | Targeted engagement to ensure inclusion of the five data-deficient counties in the national harmonisation framework | Kwale, Nyeri, Tana River, Wajir, and Samburu have no publicly available Finance Bill data. The remaining four counties present an unquantified charge risk for ISPs deploying in the Coast and North Eastern regions.                                            | Formal engagement with these five counties by TESPOK for them to publish the missing data, just like the rest of the 42 counties.                                                                                                                                                                          | TESPOK / County Governments | Medium |
| 7 | Commission a follow-on fibre deployment study upon completion of the advocacy phase of this report is complete      | During this study, 22 of 27 deployment-active TESPOK members did not submit fibre deployment data within the study window. The two ISPs, whose data was analysed for illustrative purposes, underscore analytical value of deployment data when it is available. | TESPOK should commission a follow-on deployment study. Unlike previously, this study will have longer submission window, intensive ISP level briefings on data use, and ISP level briefings on data use. The target sample for this study will be all the 27+ member ISPs deploying fibre across counties. | TESPOK                      | Medium |

**Priority guide:** **High** = foundational; cannot achieve harmonisation without this action. **Medium** = important; advances harmonisation once legislative foundation is in place.

# ANNEXURES

## Annexure A: County-Level Data Coverage by Financial Year

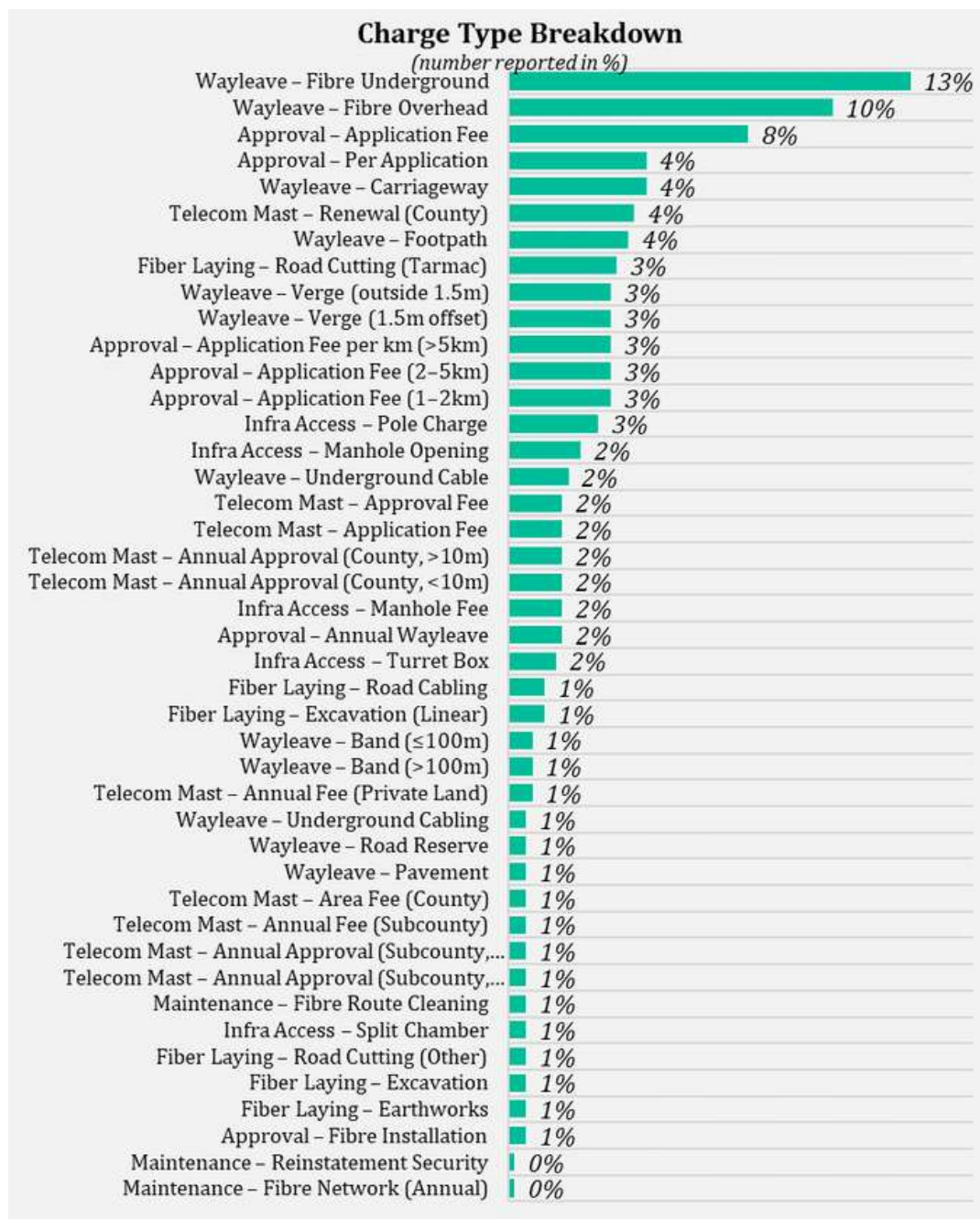
| County            | FY 2021/22 | FY 2022/23 | FY 2023/24 | Data Coverage Status      |
|-------------------|------------|------------|------------|---------------------------|
| Mombasa           | ✓          | ✓          | ✓          | Full                      |
| Garissa           | ✓          | ✓          | ✓          | Full                      |
| Taita Taveta      | ✓          | ✓          | ✓          | Full                      |
| Kilifi            | ✓          | ✓          | ✓          | Full                      |
| Lamu              | —          | —          | ✓          | Partial (FY 2023/24 only) |
| Mandera           | ✓          | ✓          | ✓          | Full                      |
| Marsabit          | ✓          | ✓          | ✓          | Full                      |
| Isiolo            | —          | ✓          | ✓          | Partial (from FY 2022/23) |
| Meru              | ✓          | ✓          | ✓          | Full                      |
| Tharaka-Nithi     | ✓          | ✓          | ✓          | Full                      |
| Embu              | ✓          | ✓          | ✓          | Full                      |
| Kitui             | ✓          | ✓          | ✓          | Full                      |
| Machakos          | ✓          | —          | —          | Partial (FY 2021/22 only) |
| Makueni           | ✓          | ✓          | ✓          | Full                      |
| Nyandarua         | ✓          | ✓          | ✓          | Full                      |
| Kirinyaga         | —          | —          | ✓          | Partial (FY 2023/24 only) |
| Murang'a          | —          | ✓          | ✓          | Partial (from FY 2022/23) |
| Kiambu            | ✓          | ✓          | ✓          | Full                      |
| Turkana           | —          | ✓          | ✓          | Partial (from FY 2022/23) |
| <b>West Pokot</b> | ✓          | ✓          | ✓          | <b>Full</b>               |
| Trans Nzoia       | ✓          | ✓          | ✓          | Full                      |
| Uasin Gishu       | ✓          | ✓          | ✓          | Full                      |

|                   |   |   |   |                                    |
|-------------------|---|---|---|------------------------------------|
| <b>West Pokot</b> | ✓ | ✓ | ✓ | <b>Full</b>                        |
| Trans Nzoia       | ✓ | ✓ | ✓ | Full                               |
| Uasin Gishu       | ✓ | ✓ | ✓ | Full                               |
| Elgeyo Marakwet   | ✓ | ✓ | ✓ | Full                               |
| Nandi             | — | ✓ | ✓ | <i>Partial (from FY 2022/23)</i>   |
| Baringo           | — | — | ✓ | <i>Partial (FY 2023/24 only)</i>   |
| Laikipia          | ✓ | ✓ | ✓ | Full                               |
| Nakuru            | ✓ | ✓ | ✓ | Full                               |
| Narok             | ✓ | ✓ | ✓ | Full                               |
| Kajiado           | — | — | ✓ | <i>Partial (FY 2023/24 only)</i>   |
| Kericho           | ✓ | ✓ | — | <i>Partial (FY 2021/22 –22/23)</i> |
| Bomet             | ✓ | — | — | <i>Partial (FY 2021/22 only)</i>   |
| Kakamega          | ✓ | ✓ | ✓ | Full                               |
| Vihiga            | ✓ | ✓ | ✓ | Full                               |
| Bungoma           | ✓ | ✓ | ✓ | Full                               |
| Busia             | ✓ | ✓ | ✓ | Full                               |
| Siaya             | — | ✓ | ✓ | <i>Partial (from FY 2022/23)</i>   |
| Kisumu            | ✓ | ✓ | ✓ | Full                               |
| Homa Bay          | ✓ | — | — | <i>Partial (FY 2021/22 only)</i>   |
| Migori            | — | — | ✓ | <i>Partial (FY 2023/24 only)</i>   |
| Kisii             | ✓ | ✓ | ✓ | Full                               |
| Nyamira           | ✓ | ✓ | ✓ | Full                               |
| Nairobi           | ✓ | ✓ | ✓ | Full                               |

*Note: ✓ = data available; — = data not available. Trend analysis for partial-coverage counties is limited to the years for which data is available, as documented in Section 4.3.*

## Annexure B: Full Charge Type Breakdown by Frequency

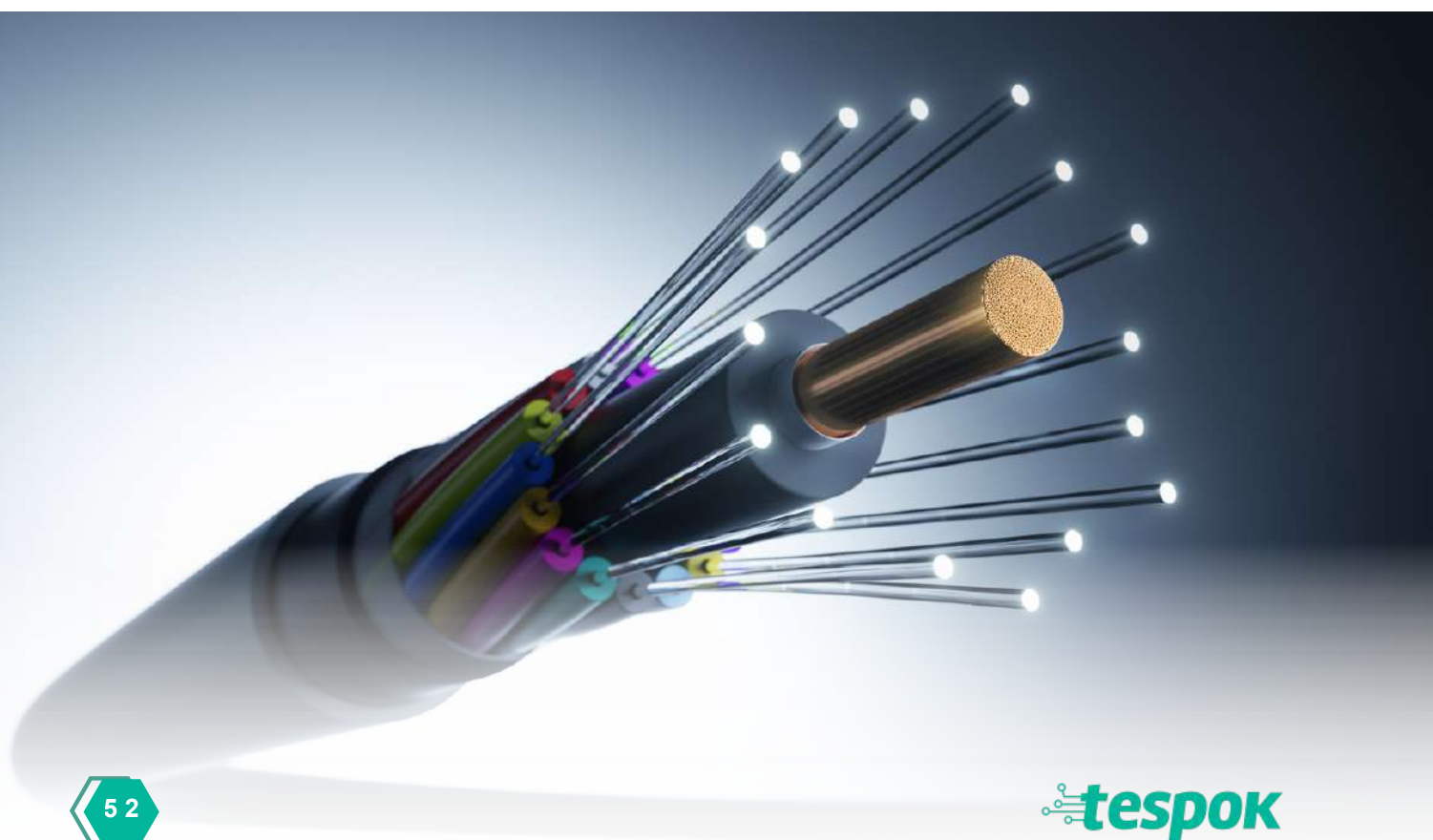
The figure below presents the complete breakdown of all 43 standardised charge types identified across the 42 counties investigated. The charges are expressed as a percentage share of total charge records in the dataset (n = 515). This detailed breakdown underpins the category-level summary presented in Figure 3 of Section 4.2.



Note: Percentages are rounded to the nearest whole number and reflect the share of total charge records (n=515) in which each charge type appears. The standard charge names reflect harmonised terminology applied during data aggregation to enable cross-county comparison. Original charge descriptions as reported in county Finance Bills are retained in the underlying dataset.

### Annexure C: ISP Two: Counties Represented by Deployment Region

| Region                            | Counties                                                                                                                                                     |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Coast</b>                      | Mombasa, Kwale, Tana River, Kilifi, Taita Taveta, Makueni, Kitui, Mwingi, Garissa, Marsabit, Mandera, Lamu, and Wajir.                                       |
| <b>Western &amp; North Rift</b>   | Kisii, Nyamira, Migori, Siaya, Homabay, Kisumu, Kakamega, Bungoma, Transzoia, Uasin Gishu, Nandi, Elgeyo Marakwet, West Pokot, Baringo, Turkana, and Vihiga. |
| <b>Nairobi</b>                    | Nairobi, Kajiado, Machakos, and Kiambu.                                                                                                                      |
| <b>Central Rift &amp; Central</b> | Nakuru, Narok, Kericho, Bomet, Laikipia, Samburu, Urunga, Kirinyaga, Nyeri, Tharaka Nithi, Embu, Meru, Isiolo, and Nyandarua.                                |





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2026

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