



MINISTRY FOR WATER,  
SANITATION AND IRRIGATION

## IMPACT 18 REPORT LAUNCH



# Closing the gap to 2030: A call for leadership, accountability, and action

### MESSAGE FROM THE CABINET SECRETARY FOR WATER, SANITATION AND IRRIGATION

Stronger leadership, accountability, and operational efficiency is needed within the water sector. Many stakeholders may not fully grasp the significance and depth of the information contained in the *'Impact 18 Report'* until its findings are brought to the forefront and translated into action.

Capacity gaps exist within Water Service Providers (WSPs). Notably, non-revenue water (NRW) has increased from 44 per cent to 48 per cent over the past year, translating into an estimated loss of KSh14.8 billion. These losses represent resources that could otherwise be used to expand and improve water services across the country. The greatest



Eng. Eric Mugaa, Cabinet Secretary for Water, Sanitation and Irrigation.

challenge facing the water sector is not a lack of funding but the significant losses resulting from inefficiencies and water wastage. I challenge sector leaders to reflect on the true meaning of leadership, and that effective leadership requires making difficult and, at times, unpopular decisions that safeguard the long-term sustainability of institutions and services.

We are now four years away from the SDG targets and Kenya's Vision 2030 aspirations. The sector must accelerate progress to stay on track toward universal access to water and sanitation services. The target is an annual increase of two percentage points in water coverage, three-and-a-half percentage points in sewerage sanitation coverage, and one percentage point in sanitation coverage.

Findings from the current *'Impact*

*18 Report'* show that water coverage and sanitation have grown in line with annual targets and demonstrates sector progress. However, sewerage sanitation coverage has not achieved the required annual growth. We need to intensify investment, stronger implementation, and better collaboration among stakeholders. These efforts will help accelerate expansion and close the existing gap before 2030.

I reaffirm the Government's commitment to strengthening the water sector through strategic investments aimed at enhancing service delivery, improving infrastructure, and ensuring sustainable access to water and sanitation services for all Kenyans. I would like to highlight the Horn of Africa Groundwater for Resilience Project, under which approximately KSh13.5 billion has been committed

to support groundwater resilience initiatives in border counties, thereby enhancing water security for vulnerable communities.

The financing requirement for universal access by 2030 far exceeds annual public allocations, and it is only through disciplined delivery that we will sustain the confidence of Parliament, the National Treasury, and our Development Partners.

Focus is often on seeking external solutions while overlooking opportunities to optimise existing resources and assets already within the sector. I therefore urge all sector players to maximise the use of available infrastructure, financial resources, and expertise before pursuing additional interventions.

### MESSAGE FROM PS WATER AND SANITATION, MR JULIUS K. KORIR

Sustainable development and human dignity continue to be based on access to safe, reasonably priced, and dependable water and sanitation services. As we present the 18<sup>th</sup> edition of the IMPACT Report, we consider the vital role that regulation plays in promoting accountability, transparency, and equity throughout Kenya's water sector.

This year's theme, *"The Final Stretch to 2030: Delivering Water and Sanitation for All,"* underscores the urgency of accelerating progress towards universal access by closing existing service gaps and enhancing the performance of Water Service Providers through compliance with regulatory standards and best practices.

On the question of delivery, Parliament has spoken, and the Ministry stands with it. The ongoing efforts to address delays in water projects, in-



Mr. Julius Korir, CBS PS, State Department for Water and Sanitation.

cluding considerations around contractor performance are indeed a national demand for accountability and the timely completion of critical dams and pipelines. Every implementing

agency must treat project timelines as binding commitments to the Kenyan people, not aspirations. At the retail level, the regulatory framework is also delivering results. Water companies across the country have implemented revised tariffs approved by the Water Services Regulatory Board (WASREB), responding to rising operational costs and to commitments on last-mile connectivity and debt financing. I wish to underscore one principle that the Government holds firm: the additional revenue is ring-fenced for infrastructure upgrades. Tariffs must translate into improved service at the household tap — never merely into higher bills. This is the social contract on which the legitimacy of cost-reflective pricing rests, and my Ministry will hold the sector to it.

Sanitation has for too long remained the quieter half of our mandate. The Government has now launched the

National Sanitation Management Policy — a framework that brings together all key stakeholders to drive safely managed sanitation for all by 2030, in fulfilment of Article 43 of our Constitution, which guarantees every Kenyan reasonable standard of sanitation. A policy, however, is only as strong as the evidence that tracks its implementation. I therefore commend WASREB for publishing the Sanitation Key Performance Indicator (KPI), which will provide the baseline against which the Policy's 2030 ambition is measured — utility by utility and county by county.

This Report provides an impartial assessment of sector performance across licensed Water Service Providers (WSPs) and counties, highlighting key insights into their levels of compliance. Crucially, the regulatory environment must ensure that non-compliance is not a viable option—through consistent enforcement, appropriate sanctions, and strengthened institutional

accountability.

WASREB has prioritised collaborative regulation in accordance with national and international commitments, such as the Sustainable Development Goals (SDGs). We are still collaborating closely with County Governments, WSPs, consumers, and development partners to enhance governance, investment planning, and open up new financing options. We hope these collaborations will spur quantifiable improvements in service resilience, quality, and coverage.

Since we can only attain universal and equitable access to water and sanitation for all Kenyans through shared responsibility, I implore all stakeholders in the sector to continue to be resolute in their commitment to regulatory compliance so that together, we can ensure that by 2030, every Kenyan has access to safe, reliable, and sustainable water and sanitation services.

## Regulation that delivers: Driving accountability, performance and universal access

### MESSAGE FROM CHAIRMAN, WATER SERVICES REGULATORY BOARD

*'Impact 18 Report'* findings provide encouraging signs of progress. The sector has recorded improvements in key performance areas, including water coverage, drinking water quality, personnel expenditure management, operation and maintenance cost coverage, sewerage sanitation, and overall sanitation coverage. These gains demonstrate the commitment of sector players to improving service delivery and the effectiveness of ongoing regulatory interventions.

However, Non-Revenue Water has increased significantly. How can we effectively reduce it? Addressing this challenge requires bold and sustained investment in smart metering, full digitisation of utility operations, and stronger enforcement against illegal connections. These measures are essential for safeguarding resources, improving operational efficiency, and ensuring the financial viability of our utilities.



Mr. Job Chirchir

On the role of Water Service Providers, I maintain that they remain the vital bridge between policy and the citizens we serve. They must be placed at the centre of the national conversation on water security. Without empowered and accountable Water Service Providers, our regulatory efforts cannot translate into meaningful impact and improved service delivery for Kenyans.

The sector's prospects have been further strengthened by the Government's commitment to water and sanitation development. The 2026 national budget allocated an additional KSh4.89 billion to support climate resilience initiatives, expand household access to services, and contribute to lowering the cost of living for Kenyans. This investment reflects the recognition that water and sanitation are fundamental to economic growth, public health, and social development.

With increased investment comes increased responsibility. Every public resource committed to the sector carries an expectation that it will translate into improved services at the household, school, healthcare facility, and community levels. As the regulator, Water Services Regulatory Board (WASREB) remains committed to ensuring accountability and value for money through robust monitoring, performance reporting, licensing, and enforcement of governance standards. Good regulation not only safeguards public resources but also strengthens

investor confidence and supports the long-term financial sustainability of the sector.

The growing focus on accountability across the sector is equally encouraging. Increased scrutiny of project implementation and service delivery reflects a broader commitment to ensuring that investments produce tangible results. WASREB welcomes such scrutiny because accountability is essential to sector transformation. Through benchmarking, public reporting, and incentive-based regulation, the Board continues to promote a culture where performance is measured, reported, and improved.

At the utility level, regulatory interventions are also supporting sustainability and service expansion. Several Water Service Providers have implemented tariff adjustments approved by WASREB to address rising operational costs and support infrastructure development. These approvals are guided by a clear principle: additional revenue must be directed towards improving services and expanding

access. Consumers should experience visible improvements in service quality, reliability, and infrastructure as a result of these investments. WASREB will continue to closely monitor compliance to ensure that tariff adjustments deliver the intended benefits.

As Kenya moves closer to the 2030 deadline for achieving national development goals and the Sustainable Development Goals, the importance of evidence-based regulation, sound governance, and strong partnerships cannot be overstated. The Impact Report demonstrates that progress is possible when institutions remain focused on performance, accountability, and continuous improvement.

I reaffirm WASREB's commitment to regulating in the public interest. Our work is guided by one overriding objective: ensuring that every Kenyan has access to safe, reliable, affordable, and sustainable water and sanitation services. We will continue to strengthen regulation, promote accountability, and support sector transformation until this goal becomes a reality for all.



# IMPACT 18 REPORT LAUNCH



The Water Services Regulatory Board (WASREB) has released the 18th issue of IMPACT Report. This edition of IMPACT covers the period 2024/25 and analyses performance of 92 (88 public and three private) Water Service Providers and 47 Counties. It also presents the overall situation of water coverage at the county level by incorporating data collected on small-scale water service providers in the rural and under-served areas. The report is meant to give feedback to the public on how the water services sector is performing, with a view of holding to account institutions charged with service delivery.

Performance analysis is based on nine Key Performance Indicators. These are Water Coverage, Water Quality, Hours of Supply, Non-Rvenue Water, Metering, Staff Productivity, Revenue Collection Efficiency, Personnel expenditure as a percentage of Operations and Maintenance cost, and Operations and Management cost-coverage.

The average Water Coverage for piped water systems in the regulated utilities was 72 per cent, an

## Water Service Providers record improvement in performance

improvement of two percentage points from 2023/24, where coverage was 70 per cent.

An additional 1,261,271 people were served in 2024/25, compared to a 3,266,760 increase in the number of people within the service areas of WSPs in the previous period.

Production increased by nine percent, from 461 million cubic metres to 504 million m<sup>3</sup>, while sector turnover increased by 14 per cent, from KSh28.8 billion to KSh32.8 billion. Active water connections grew from 1.85 million to 1.87 million, representing a one per cent growth.

The population served increased from 21.5 million to 22.8 million, representing a six per cent growth. The gap between these two growth rates suggests significant reliance on shared or communal connections, which has implications for service equity.

The national average for Drink-

ing Water Quality was 96 per cent, a notable improvement of seven percentage points from the previous period.

Overall sanitation improved by 1 percentage point to 93 per cent. This covers populations with access to facilities including flush or pour-flush to piped sewer systems, septic tanks, ventilated improved pit latrines, and traditional pit latrines with a squatting slab. The population served with sewerage services in the regulated WSPs improved from 15 per cent to 16 per cent, with the number of people served increasing by five per cent, representing an additional 240,701 people. The population in the service area increased by two per cent.

Under the Water Act 2016, WASREB is mandated to report to the public annually to promote transparency and accountability in the sector.



CS Water, Sanitation and Irrigation Eng Eric Mugaa (L) and Eng SAO Alima (R) during the unveiling of the IMPACT 18 Report

## Highlights of how regulated utilities performed in selected areas

### Water Coverage

- Improved from 70 per cent to 72 per cent for piped water systems in the regulated utilities.
- There was additional 1,261,271 people served in 2024/25 compared to a 3,266,760 increase in number of people within the service area of the WSPs in the previous period
- Production during the period increased by nine per cent while the turnover increased by 14 per cent.
- Active water connections increased from the previous 1.85 million to 1.87 million, representing a one per cent growth.
- The population served increased from 21.5 million to 22.8 million, representing an a six per cent growth.

- Despite a marginal improvement from 26.42 litres per capita per day in 2023/24 to 26.68 litres per capita per day in 2024/25, per capita consumption remains far short of the recommended standard of 50 litres per capita per day.

### Non-Rvenue Water Reduction

- Non-Rvenue Water increased from 44 per cent to 48 per cent.
- The sector recorded financial losses of approximately KSh13.7 billion, after accounting for the acceptable non-revenue water threshold of 25 per cent.
- The amount lost annually in terms of volume is 242 million cubic meters.

### Metering

- The metering level remained at 97 per cent
- Higher metering levels mean metering is being utilised as a tool for accounting for the water produced.

### Staff Productivity

- The average staff productivity remained at seven seven
- The medium and small category registered 12 and 22 staff per 1,000 connections an improvement from the previous period where medium and small registered 13 and 24 respectively.

### Personnel Expenditure as a Percentage of Operations and Maintenance Costs

- There was a notable improvement in performance of this indicator from 47 per cent in 2023/24 to 44 per cent in 2024/25. This decline was attributed to the large and medium

- categories, which declined by four and three per cent respectively.
- Considering the sector benchmarks, personnel expenditure is still high, a trend that implies constrained resources meant for other operations and a decline in service quality.

### Revenue Collection Efficiency

- Overall, performance in this indicator dropped slightly from 95 per cent in 2023/24 to 94 per cent in 2024/25.
- This indicator is crucial because internally generated, and collected revenue provides reliable liquidity for the WSPs to fund its operations.

### Cost Coverage

- Cost coverage increased by five percentage points, rising from 98 per cent to 103 per cent. This marks a positive trend for two years in a row.
- Higher cost coverage means improved sustainability and financial resilience for the sector. Lower cost coverage would be a threat to sustainability.

### Sewered Sanitation Coverage

- The population served with sewerage services improved from 15 per cent to 16 per cent in the regulated WSPs despite the number of people served increasing by five per cent.
- This increase was equivalent to 240,701 people.
- The average number of people served per sewer connection remained at 12 people per connection in 2024/25
- Sewered sanitation coverage is a sub-set of sanitation coverage and refers to the number of peo-

ple served with flush or pour-flush to piped sewer systems.

### Sanitation Coverage

- The overall sanitation for the period improved slightly to 93 per cent in 2024/25 from 92 per cent in 2023/24.
- It measures performance regarding the provision of seweraged and non-sewered sanitation.
- Only about 58 per cent of sanitation is safely managed which underpins the need for effective management of

sanitation components from containment to treatment.

The 'Impact Report' serves as WASREB's main tool for public reporting and documents the performance of Kenya's water services sector over a given period of time. It is meant to spur comparative competition in the sector, thus creating impetus for institutions to improve their performance whilst encouraging accountability of stakeholders in the water sector to the public.

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

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

### Hours of Supply and per capita consumption

- This improved to 18 hours per day, from 17 hours per day, with improvement noted only in all the categories.
- Hours of supply is a measure of service quality (reliability) and customer satisfaction.



Guests at the IMPACT 18 Report launch