

# Market Intelligence Brief

## KENYA

2019/2020



INTERNATIONAL  
EDUCATION  
SERVICES

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## 1. KENYA AT A GLANCE

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### Market background

- Kenya is the fourth largest economy in Sub-Saharan Africa. Its economy has grown substantially, averaging 5.6 per cent growth between 2010-2019. In 2019, GDP growth was slightly lower at 5.4 per cent due to slowdowns in agriculture, manufacturing and building and construction. Growth in 2020 could be as low as 1 per cent because of the COVID-19 pandemic and the swarms of desert locusts that have devastated crops.
- Kenya ranks as one of the fastest-growing digital economies in Africa and as a leading ICT innovation hub in Sub-Saharan Africa. Solid growth in services, particularly ICT and finance, have contributed to Kenya's economic strength.
- In 2019, there were 47.6 million people living in Kenya and the median age of the population was 20. The exploding younger brackets of the population provide great potential for the country's burgeoning economy.
- Kenya has achieved Millennium Development Goals in reducing child mortality, attaining near-universal primary school enrolment, and narrowing gender gaps in education. The country has also reduced poverty from 50 per cent in 2005/06 to 38.8 per cent in 2015/16 when measured at the national poverty line.

### Local education trends

- The government has made education a policy priority. Children in Kenya have access to 12 years of tuition-free, compulsory education. The system is currently being reformed to a competency-based curriculum (CBC) with exams at the end of each segment of schooling. At the end of secondary school, students sit the Kenya Certificate of Secondary Education (KCSE) exam to qualify for university.
- The number of Kenyan universities has increased to meet growing demand. However, fewer than half of qualifying students are admitted to university due to lacking capacity. There are also major quality issues, such as a lack of qualified lecturers, and there are frequent university staff strikes. Despite decrees to increase university capacity, the government has not increased financial support to tertiary institutions.
- Technical and vocational education and training (TVET) is also struggling with a lack of funding, and the sector needs better infrastructure and equipment, stronger industry links, and more qualified teachers in order to meet labour market demands.

### International education

- In 2018, there were just under 15,000 Kenyan tertiary students abroad. In 2018/19 the UK saw 2,325 Kenyan enrolments, an increase year-on-year but still lower than the peak of 2,360 students in 2009/10. Most Kenyan tertiary students in the UK are enrolled in undergraduate programmes.
- Australia is the most popular destination for Kenyan students, reaching 3,200 enrolments in 2018/19, up from just 1,095 in 2012/13. The popularity of US institutions has waned, with just 3,008 enrolments in 2018/19 (excluding Optional Practical Training), down from a peak of 5,475 in 2008/09. Other African countries are also popular destinations for international tertiary study, particularly South Africa, Tanzania and Uganda.

## 2. INTRODUCTION

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Kenya is a country of more than 47 million people on the eastern coast of Africa. Its young population and strong economy make it a place of high potential for growth, both in general and specifically as an education market. According to the World Bank, it is one of the fastest-growing digital economies in Africa and a leading ICT innovation hub in Sub-Saharan Africa. Kenya has great growth potential if it can leverage its growing cohort of young people, its dynamic private sector, and its influential position in East Africa and provide sufficient opportunities for its workforce.

Between 2010 and 2019, Kenya's economy averaged 5.6 per cent annual GDP growth. Though annual growth slowed slightly in 2019 (5.8 per cent, down from 6.3 per cent in 2018), the economy has stayed strong due to expanding consumer services, public investment in infrastructure, and increased urbanisation. Major locust invasions, heavy rains and the impact of the COVID-19 pandemic, however, will weigh heavily on economic growth in 2020, and growth projections have been lowered to between 1 and 3 per cent.

Thanks to its strong economic growth and the government's emphasis on education, Kenya has made strides in improving education access and quality. It has committed to several initiatives with a focus on improving provision, increasing the number of qualified teaching staff, expanding online learning and boosting research capabilities. The school system is currently being reformed to a competency-based curriculum, a process that began for grades one, two and three in 2019 and grade four in 2020. The full transition to CBC is expected to be completed by 2027.

However, the growing school-age population is creating challenges for the tertiary sector as universities struggle with poor infrastructure, insufficient funding, and an overall lack of capacity to meet demand. Fewer than half of qualifying students can access tuition-free tertiary education, which may drive more students to study elsewhere in the world. As families' aspirations continue to rise and a university education becomes the norm for a widening share of the population, overseas enrolment has considerable potential.

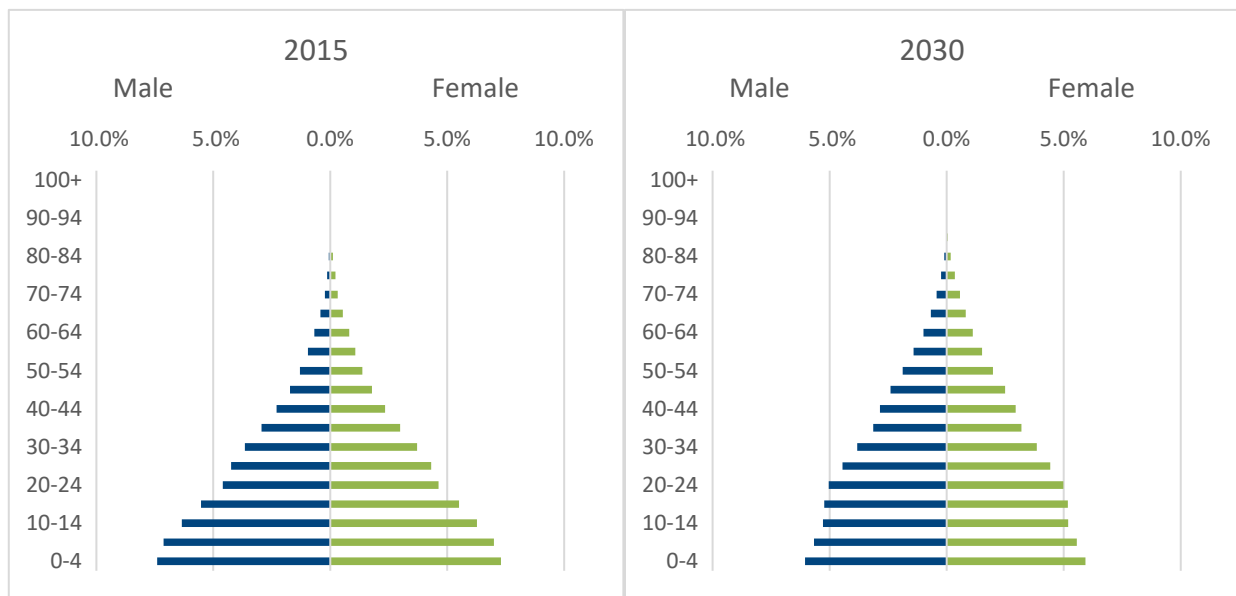
The government is looking to improve technical and vocational education and training (TVET) in order to implement its development plans, support ICT development and improve the skills of the labour force. However, TVET programmes are often perceived as inferior to more academic study routes. While there is demand for quality vocational education, TVET institutions lack the infrastructure and equipment to meet new standards set out in Kenya's new competency-based curriculum.

The US, the UK, and Australia are popular destinations for Kenyans, but other destinations on the African continent such as Ghana, Uganda, and South Africa, are gaining popularity. Scholarships and pathways to working visas after graduation are particularly important factors for Kenyans looking to study abroad. The number of Kenyan students studying in the UK reached a peak of 2,360 enrolments in 2009/10 and has remained stable above 2,000 over the last decade. The 2018/19 academic year saw 2,325 enrolments, a 1 per cent increase from the previous year. The majority of Kenyan students in the UK are undergraduates, and the reinstatement of the two-year post-study working visa could boost interest in the UK as a study destination.

### 3. DEMOGRAPHICS

Kenya has a young and growing population with a median age of just 20. The 2019 national census found that Kenya is home to 47.6 million people, and the population is expected to continue to increase, though at a slowing rate, beyond 2050.<sup>1</sup> The fertility rate has declined from 4.8 in 2009 to 3.5, still well above the replacement rate of 2.1.<sup>2</sup> The rapid growth in the younger brackets of the population is creating challenges for Kenya's education system, social services, and labour market, but the growing working-age population also brings great potential.

**Figure 1: Kenya's Population Pyramid, 2015 and 2030**



Source: UN Population Division

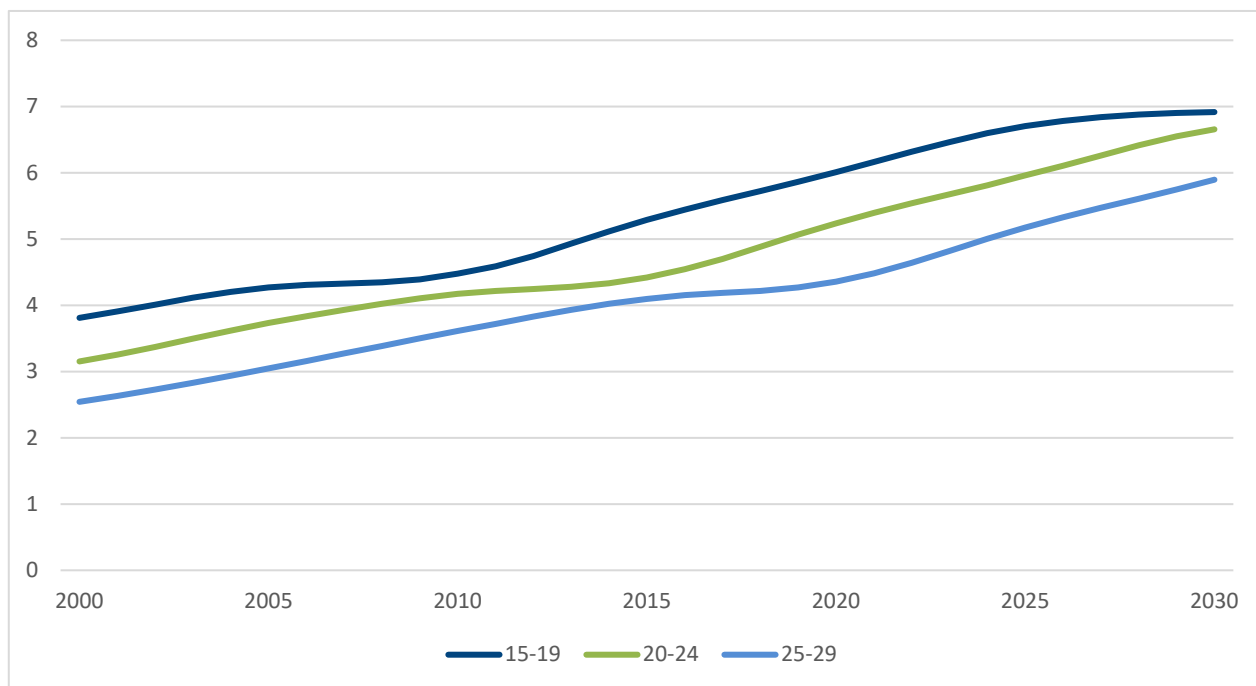
. Kenya has made strides in reducing child mortality, lowering the rate from one in seven children dying before the age of five in 1963 to one in every 19 in 2013, a 62 per cent decline. Kenya's rate of 46 deaths per 1,000 live births is well below the Sub-Saharan African average of 76 deaths per 1,000 live births.<sup>3</sup> As seen in Figure 2, the student-age population brackets are expected to continue to grow through 2030. The UN estimates that in 2020, around 38 per cent of the population is under the age of 15 years old and about 20 per cent are between the ages of 15-24.

<sup>1</sup> The United Nations projects that in 2020 Kenya's population would be 52.7 million. [World Population Prospects](#), United Nations Department of Economic and Social Affairs, Population Division, 2019.

<sup>2</sup> [2019 Kenya Population and Housing Census](#), Kenya National Bureau of Statistics, 4 November 2019.

<sup>3</sup> [What mapping Kenya's child deaths for 50 years revealed – and why it matters](#), *The Conversation*, 17 February 2019.

Figure 2: Kenya's Student Age Population (Millions)



Source: UN Population Division

The country is home to over 70 ethnic groups, the largest of which is the Kikuyu (17 per cent at the 2009 census), followed by the Luhya (13.8 per cent), the Kalenjin (12.8 per cent), the Luo (10.5 per cent) and the Kamba (10.3 per cent). The country is largely Christian with the greatest shares of the population being Protestant (47.4 per cent), Catholic (23.3 per cent) or belonging to other Christian denominations; there is also a Muslim minority (11.1 per cent).<sup>4</sup>

In 2019, 31 per cent of the population lived in urban areas.<sup>5</sup> The urbanisation rate in 2019 was 4.2 per cent, higher than the African continental average of 3.5 per cent, and urbanisation is forecast to reach almost 50 per cent by 2030.<sup>6</sup> The rapid population growth and high rural to urban migration in search of jobs and security are placing significant pressure on urban housing. The country's major cities include the capital city Nairobi, which is home to 4.4 million people, the coastal city of Mombasa (1.2 million people), Kisumu, Nakuru and Eldoret.<sup>7</sup> Research by Pew in 2015 found that only 5 per cent of Kenyans fall within a middle-income bracket, compared to the 13 per cent global average. The same report estimates that about nine in ten Kenyans are either in a low-income bracket or living in poverty.<sup>8</sup>

<sup>4</sup> [Ethnic Affiliation](#), Kenya National Bureau of Statistics, 22 March 2013.

<sup>5</sup> [Kenya Economic Survey 2020](#), Kenya National Bureau of Statistics, 28 April 2020.

<sup>6</sup> [High urbanisation pushing urban dwellers into slums- study](#), *The Star*, 17 December 2019.

<sup>7</sup> [2019 Kenya Population and Housing Census](#), Kenya National Bureau of Statistics, 4 November 2019.

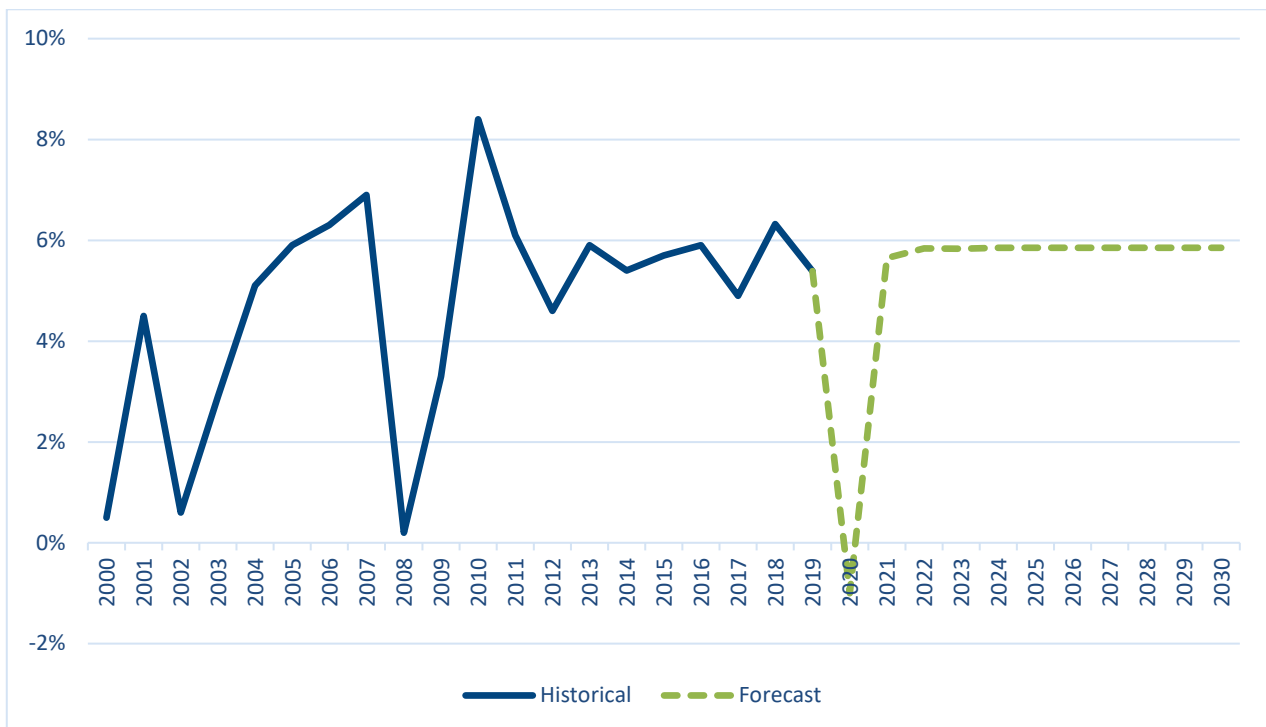
<sup>8</sup> [A Global Middle Class is More Promise than Reality](#), PEW Research Center, 8 July 2015

## 4. ECONOMICS

Kenya is the fourth-largest economy in Sub-Saharan Africa and the fastest-growing economy in East Africa. The strong economic growth has supported Kenya in succeeding to meet Millennium Development Goal targets in reducing child mortality, near-universal primary school enrolment, and narrowing gender gaps in education. The World Bank classified Kenya as a “middle-income country” in 2016 thanks to a decade of strong growth, averaging at 5.6 per cent annually 2010 and 2019, 1.8 percentage points higher than the average for Sub-Saharan African countries.<sup>9</sup>

Kenya’s real GDP growth slowed to 5.4 per cent in 2019, down from 6.3 per cent in 2018, and was originally forecast to rise to 6 per cent in 2020. Growth in 2019 was slower, primarily due to a slowdown in agriculture, but medium-term economic prospects were supported by sustained expansion in consumer services, public investment in infrastructure, and increased urbanisation.<sup>10</sup> However, the Kenyan government revised down its growth outlook for 2020 to between 1 and 3 per cent due to the COVID-19 pandemic and resulting global recession, though it could be lower still depending on the duration and severity of the outbreak and the recession.<sup>11</sup>

**Figure 3: Real GDP growth per annum**



Source: IMF, Euromonitor forecasts

Kenya’s economy is relatively diversified, contributing to its sustained strength, but derives more than half of its growth from agriculture or agriculture-related output. The sector accounts for about 26 per cent of GDP directly and 25 per cent indirectly.<sup>12</sup> Up to 60 per cent of employment is in agriculture and

<sup>9</sup> [Improving Higher Education Performance in Kenya: A Policy Report](#), World Bank, 21 August 2019.

<sup>10</sup> [Country Profile: Kenya](#), Euromonitor, 24 January 2020; [Kenya Profile](#), International Monetary Fund, October 2019.

<sup>11</sup> [Kenya sees GDP growth slowing to 3% or less in 2020](#), Reuters, 7 April 2020.

<sup>12</sup> [Kenya Economic Update](#), World Bank, October 2019.

the sector accounts for 60 per cent of exports, primarily exporting black tea, horticultural products, and coffee. While Kenya's agricultural sector is strong, it is subject to external factors, such as the environment and commodity price changes. For example, favourable rains led to agriculture contributing 1.8 per cent to GDP in the first half of 2018, compared to a meagre 0.2 per cent in 2017.<sup>13</sup> Environmental conditions such as drought, floods, and locust invasions can damage crops, food supplies, and destroy housing, farmland, and infrastructure, thus impacting export earnings and GDP growth.<sup>14</sup> In the first half of 2020, multiple desert locust invasions and unusual heavy rains presented a serious threat to crops and food supplies.<sup>15</sup>

Rapid growth in services has accounted for more than half of the increase in GDP growth since 2010, particularly in ICT and finance, and the services sector made up 42 per cent of GDP in 2019.<sup>16</sup> Kenya is ranked as one of the fastest-growing digital economies in Africa and is viewed as a leading ICT innovation hub in Sub-Saharan Africa.<sup>17</sup> Kenya's manufacturing and financial services are both considered to be among the most sophisticated in East Africa, and manufacturing accounted for 7.6 per cent of GDP in 2019 and 20 per cent of formal jobs.<sup>18</sup> Before the COVID-19 pandemic, tourism was expected to grow by 5 per cent in 2020, though growth in this sector is likely to be severely impacted. Terrorist attacks, such as one in January 2019 that killed 14 civilians, is another aspect that might negatively impact tourism.<sup>19</sup>

The country has a relatively diverse export profile and has close trade links with fellow members of the Common Market for Eastern and Southern Africa (COMESA) and the East African Community (EAC). Horticulture, tea exports, tourism, and remittances from Kenyans abroad are the major sources of hard currency.<sup>20</sup> Real estate is also a growing sector. Nevertheless, poor infrastructure and weak institutions continue to plague Kenya despite the government's recent successes in attracting foreign investment.

Kenya's impressive economic development has led to strong progress in development indicators, such as in poverty reduction, especially in rural areas. The rate of people living below the national poverty line of US\$1.90 per day has decreased from 43.7 per cent in 2005 to 36.8 per cent in 2018 (and is estimated at 33.6 per cent in 2019). In 2019, about 17.3 per cent of the population lived in extreme poverty.<sup>21</sup> However, urban poverty reduction has stalled and overall inequality remains high.<sup>22</sup> Kenya ranked 147<sup>th</sup> out of 189 countries on the UN Human Development Index 2019, above fellow EAC members Rwanda (157), Tanzania and Uganda (both 159), and Burundi (185).<sup>23</sup> GDP per capita was estimated at US\$2,152 in 2019.

The country ranked 56 out of 190 countries in the World Bank's 2020 Ease of Doing Business Rankings, up five places from the previous year. Kenya came in 95<sup>th</sup> out of 141 countries in the World Economic Forum's Global Competitiveness Index 2019, performing well in business dynamism (51<sup>st</sup>), social capital (23<sup>rd</sup>), corporate governance (25<sup>th</sup>) and institutions (68<sup>th</sup>). However, this was two places lower than the

<sup>13</sup> [Kenya Economic Update](#), World Bank, October 2019.

<sup>14</sup> [Birds, insects and drought make Kenya's food situation bleak](#), Kenya Daily Nation, 19 January 2020.

<sup>15</sup> [Kenya in 2020: higher taxes, higher debt, more referendums](#), The Africa Report, 16 January 2020; [Second wave of locusts in east Africa said to be 20 times worse](#), The Guardian, 13 April 2020.

<sup>16</sup> [Improving Higher Education Performance in Kenya: A Policy Report](#), World Bank, 21 August 2019; [Kenya - Services \(% of GDP\)](#), World Bank, 2019

<sup>17</sup> Ibid.

<sup>18</sup> [Kenya in 2020: higher taxes, higher debt, more referendums](#), The Africa Report, 16 January 2020.

<sup>19</sup> [Kenya received warnings of imminent al-Shabaab terror attack](#), The Guardian, 16 January 2019.

<sup>20</sup> [Kenya's horticulture exports drop 7% in 2019](#), Reuters, 18 March 2020.

<sup>21</sup> [Poverty and Equity Data Portal: Kenya](#), World Bank, accessed 12 May 2020.

<sup>22</sup> [Macro Poverty Outlook: Sub-Saharan Africa](#), The World Bank, 2019.

<sup>23</sup> [2019 Human Development Index Ranking](#), United Nations Development Programme, 2019.



previous year and meant that it dropped from ranking 8<sup>th</sup> in Africa to ranking 10<sup>th</sup>, behind Egypt and Namibia.<sup>24</sup>

The labour market is one of the major challenges for Kenya. There are an estimated 500,000 people entering the workforce every year, but there are not enough salaried jobs created, due in part to weak development in the manufacturing sector, which accounts for about 20 per cent of employment. Unemployment was at 11.8 per cent in 2019 and is expected to increase in 2020 due to the impact of the COVID-19 pandemic. Youth unemployment was at 24.3 per cent in 2019.<sup>25</sup> There is rising demand for skilled labour, particularly in ICT, but a shortage of workers with ICT-intensive skills. The World Economic Forum predicts that that 52 per cent of all work activities in Kenya are likely to be automated in the next few years, compared with 44 per cent in South Africa and 46 per cent in Nigeria.<sup>26</sup>

The country also has a high level of public debt, reaching 61.7 per cent of GDP in 2019, up from 50.2 per cent at the end of 2015. High levels of debt and fiscal deficit led to public sector austerity measures in 2018 and 2019. In April 2020, the IMF approved US\$739 million in emergency funding to help Kenya fight the COVID-19 pandemic, and in May the international bank raised Kenya's debt distress level from moderate to high. According to the IMF, the budget deficit has grown because of large infrastructure projects and has been exacerbated by the pandemic.<sup>27</sup> In 2019, the World Bank approved US\$750 million for Kenya to support reforms in agriculture, housing, digital technology and fiscal management.<sup>28</sup>

The currency of Kenya is the Kenyan shilling. The average exchange rate to the US dollar in 2019 was Ksh101.99, weakening to 104.05 to the dollar in July before regaining strength to end the year at 100.30. However, the shilling weakened dramatically from 101.10 to the dollar at the end of February to 104.96 in mid-March, its lowest level since 2015, mainly due to the COVID-19 pandemic. In May, the currency fell further to Ksh107.17 to the dollar.<sup>29</sup> Inflation is projected to drop from 5.6 per cent in 2019 to 5.3 per cent in 2020, well within the government's target range of 5±2.5 per cent.<sup>30</sup>

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<sup>24</sup> [The Global Competitiveness Report 2019](#), World Economic Forum, 2019.

<sup>25</sup> [Country Profile: Kenya](#), *Euromonitor*, 24 January 2020.

<sup>26</sup> [Improving Higher Education Performance in Kenya](#), The World Bank, 21 August 2019.

<sup>27</sup> [Kenyan shilling weakens to US dollar as IMF raises Kenya's risk of debt distress to high](#), Metropol TV, 12 May 2020.

<sup>28</sup> [World Bank approves \\$750 Million for Kenya](#), The World Bank, 28 May 2019.

<sup>29</sup> [Kenyan shilling exchange rate](#), *Exchange Rates UK*, accessed May 2020.

<sup>30</sup> [Kenya Economic Update](#), *World Bank*, October 2019.

## 5. POLITICS & POLICYMAKING

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Kenya is a former British colony and became a constitutional democracy following its independence in 1963. The country is led by a president, who heads the executive branch and is directly elected for a maximum of two five-year terms. The president is the head of state and government, commander-in-chief of the armed forces, and chair of the National Security Council. The legislature consists of the Senate and the National Assembly. Members of the Senate are elected directly from Kenya's 47 Counties, whereas members of the National Assembly are elected from 290 smaller constituencies.

The current constitution has only been in place since 2010. It retained the presidential system but ushered in major reforms extending to the judiciary, the electoral process and the security sector. This included establishing constitutional and independent offices, and legal frameworks governing the management of public expenditure. These reforms are widely viewed as having enhanced public participation, transparency, and accountability and are expected to significantly improve service delivery in public sectors. These developments have been enhanced by the devolution of power in 2013, when authority, resources and responsibilities in many areas were transferred to local governments in 47 counties.

Tribalism plays a strong role in Kenyan politics and support in elections tends to fall along tribal lines. The current president, Mr Uhuru Kenyatta, was elected to his second term in 2017 and is a member of the largest tribe in Kenya (the Kikuyu), and his deputy president, William Ruto, is a member of the Kalenjin. Low-level violence remains a feature of elections, and there is a risk that there will be more violence in the next presidential elections to be held in 2022.<sup>31</sup>

President Kenyatta, whose second term will end in 2022, is the son of Independence leader Jomo Kenyatta. He has pledged to make economic growth and development a centrepiece of his second administration under the Vision 2030 strategy, which aims to “transform Kenya into a newly industrializing, globally competitive, and prosperous upper-middle income country with a high quality of life for all citizens by 2030.” The strategy has three pillars: economic, social and political, and has set targets to be achieved through successive five-year “Medium Term Plans” (MTP), the most recent of which is MTP III and runs from 2018 to 2022.

The latest plan prioritises the implementation of “Big Four” initiatives, with the following goals: increase the manufacturing share of GDP from 9.2 per cent to 15 per cent and agro-processing to at least 50 per cent of total agricultural output; provide affordable housing by building 500,000 affordable houses in five years; enhance food and nutrition security; and achieve 100 per cent universal health coverage.<sup>32</sup>

Major challenges facing the government include corruption and ensuring transparency, natural disaster management, crime, and ongoing development issues. The country ranked 137 out of 190 countries on Transparency International's Corruption Perceptions Index 2019, though its score has improved since 2015.<sup>33</sup> The majority of Kenya's land area is at risk of drought and there are also four regions of the country prone to floods.

Since 2006, Kenya has been a target for attacks from al-Shabab, an al-Qaeda affiliate based in Somalia, most recently in an attack on a hotel and office complex in Nairobi in January 2019.

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<sup>31</sup> [Succession Politics and the Renewed Threat of Ethnic Violence in Kenya](#), *Lawfare Blog*, 22 September 2019.

<sup>32</sup> [Key Highlights of the Third Medium Term Plan](#), *Kenya National Treasury*, 12 September 2019.

<sup>33</sup> [Kenya](#), Transparency International, 2020. The Corruption Perceptions Index measures perceived corruption in the public sector.

## 6. EDUCATION

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Kenya's Ministry of Education is mandated with managing the country's education system, including pre-tertiary, tertiary, technical and vocational education, examinations, and research institutions. The constitution provides children with the right to free and compulsory basic education.

Government policy states that children should be taught in the language of the catchment area from grades one to three in rural areas, during which time English is taught as a separate subject. Kiswahili is used as the language of instruction in urban areas. From grade four, English is used as a language of instruction. Because English is one of the two official languages of Kenya (Kiswahili is the other), it is universally used around the country. However, there are over 40 indigenous languages in Kenya, many of which have dialects, which means English is a second language for the majority of students. Kenya ranks 18<sup>th</sup> out of 100 countries in the English Proficiency Index, the second highest in Africa.<sup>34</sup>

In 2018, the education system began a structural reform process. This will transition the system from a system of eight years primary, four years secondary, and four years university education (8-4-4) to a "competency-based curriculum" (CBC) system. This system involves two years of pre-primary, three years of lower primary, three years of upper primary, three years of lower secondary, three years of senior secondary and three years of tertiary education (2-3-3-3-3 system), with emphasis on continuous assessment. The CBC system was rolled out for grades one, two and three in 2019 and will be rolled out for grade four in 2020. The curriculum is expected to be fully in place by 2027. Under it, students at senior secondary level will choose a specialisation of either arts and sports science, social sciences, or science, technology, engineering and mathematics (STEM). The new system is expected to reduce or remove the need for pre-tertiary foundation courses.<sup>35</sup>

### Pre-tertiary education

The education sector has been growing rapidly to meet demand as the school-age population grows, and the government has made significant progress towards achieving universal basic education, though it did not meet its EFA goals. Compulsory education in Kenya lasts 12 years from ages six to 17 and is free. According to official government statistics, in 2019 10.1 million students were enrolled in primary schools, a 4.5 per cent decrease from 2018, and 3.3 million students were enrolled in secondary schools in 2019, a 10.8 per cent increase from the previous year.<sup>36</sup> In 2019, 85.5 per cent of students completing primary school transitioned to secondary school, up from 81 per cent in 2016.

Under the new CBC system, school education is split into five stages: pre, lower and upper primary and lower and upper secondary. Upper primary (ages nine to 11) is the first stage of education to include English as a formal subject (previous years include "English language activities") and ends with a formative and national assessment to assess learning outcomes. Senior secondary is the final stage of pre-tertiary education and is split into three learning pathways: Arts and Sports Science, Social Sciences, and STEM. In each of the pathways, grades 10 and 11 are more general within their respective pathways and students in grade 12 specialise further.<sup>37</sup>

At the end of secondary school, students sit the KCSE (Kenya Certificate of Secondary Education) exam, overseen by the Kenya National Examinations Council. In 2018, over 660,000 students sat the KCSE exam, but only 13.75 per cent obtained a grade high enough to qualify for university.<sup>38</sup>

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<sup>34</sup> [Kenya](#), English Proficiency Index, 2019.

<sup>35</sup> [Changes to Kenya's Education System Seeks to increase access and standards](#), Oxford Business Group, 2018.

<sup>36</sup> Ibid.

<sup>37</sup> [The New Basic Education System in Kenya](#), Kenya National Qualifications Authority, 2017.

<sup>38</sup> [How universities shared out 2018 KCSE students](#), *The Standard*, 16 April 2019.

In 2018, Kenya's literacy rate was 86 per cent, a figure which has increased slowly but steadily in the past decades. The literacy rate has increased by 3.5 per cent in the last 10 years.<sup>39</sup> In 2015, the primary to secondary transition was at 99 per cent, with 100 per cent of female students and 98 per cent of males progressing to secondary education.<sup>40</sup>

The school system has grown rapidly to meet demand from the expanding school age population but has not managed to keep pace with the scale or quality demanded, resulting in overcrowding and the proliferation of private institutions.<sup>41</sup> The number of primary and secondary schools declined by 15 per cent and 8 per cent, respectively, due to schools inspections that led to the closure of schools that did not meet Ministry requirements.<sup>42</sup>

In a 2017 survey, one in four households reported having a child in one of the country's 1,350 private schools operating in the 2017/18 academic year, with the ratio particularly high in Nairobi.<sup>43</sup> These schools range from elite national and international schools to low-cost private schools, which may be provided by non-governmental organisations in rural and remote areas. On average, private school students outperform state school students in exams.

In 2017 the World Bank approved a six-year US\$200 million credit to improve learning outcomes in public primary and secondary schools via the Secondary Education Quality Improvement Project. The project will focus on improving the quality of teaching, expanding retention in upper primary and the transition to secondary school, supporting ongoing curriculum and assessment reforms, supporting evaluation, management and training. The project also aims to address the skills gap between education and market needs.<sup>44</sup>

Kenya's TVET sector is struggling. Quality vocational education is in demand but many TVET institutions do not have the infrastructure or equipment to comply with the new competency-based curriculum and have weak industry links.<sup>45</sup> TVET programmes are often perceived as second-rate options for students with lower academic ability.

In 2019, there were a total of 2,191 technical and vocational education training (TVET) institutions in Kenya, a 10 per cent increase year-on-year. Just over 430,590 students were enrolled at TVET institutions in 2019, an increase of 20 per cent from 2018.<sup>46</sup> TVET is managed by the Technical and Vocational Education Training Authority (TVETA), which was established in 2013 to regulate and coordinate training in Kenya through licensing, registration, and accreditation of institutions, programmes, and trainers.

As part of Kenya's involvement in China's Belt and Road Initiative, the two countries have collaborated on technical and vocational education and training (TVET) to revitalize Kenyan TVET institutions. In June 2019, Kenya and China signed an MOU aimed at further improving the quality of TVET in Kenya. The Kenyan government considers the collaboration between China and Kenya to be in line with the goals of the Big Four development agenda.<sup>47</sup>

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<sup>39</sup> [Literacy rate](#), *World Bank Data*, 2019.

<sup>40</sup> [Education and Literacy: Kenya](#), UNESCO UIS, accessed 30 April 2020.

<sup>41</sup> [Some Kenyan schools are dangerously overcrowded. What must be done](#), *The Conversation*, February 2020.

<sup>42</sup> [Kenya Economic Survey 2020](#), Kenya National Bureau of Statistics, 28 April 2020.

<sup>43</sup> [What's Going on in Our Schools?](#), *Twaweza*, May 2018.

<sup>44</sup> [Kenya's Education Sector Gets a \\$200 Million Boost from the World Bank](#), The World Bank, 15 September 2017

<sup>45</sup> [Africa ascending: Four growth markets to watch](#), *ICEF Monitor*, 8 January 2020; [Improving Higher Education Performance in Kenya](#), The World Bank, 21 August 2019.

<sup>46</sup> [Kenya Economic Survey 2020](#), Kenya National Bureau of Statistics, 28 April 2020.

<sup>47</sup> [China Partners With Kenya To Improve TVET Institutions](#), *Kenya news*, June 2019.

## Higher education

The higher education sector in Kenya has grown rapidly in recent years to meet demand. It is managed by the Commission for University Education (CUE), a government agency under the Ministry of Education. CUE recognises 31 public chartered universities, six public constituent colleges, 19 private chartered universities, and 13 institutions with letters of interim authority (institutions that are working towards full accreditation).<sup>48</sup> Many HEIs have been formed by the upgrading of community and technical colleges into satellite campuses. However, there is also a significant regional disparity in higher education provision, with some counties not having any higher education facilities.

There is strong competition for places, with fewer than half of those who qualify for entry in terms of their KCSE results finding a place in recent years.<sup>49</sup> Students must achieve an average grade of C+ across eight subjects, but due to higher demand the minimum average threshold for guaranteed entry has been raised to a B (or a combined overall points score). Competition is particularly intense for state-funded places, and university education is therefore often limited to those who can afford to fund their studies. Gross enrolment in tertiary institutions was just 10.5 per cent in 2018, higher than the Sub-Saharan African rate of 9 per cent but well behind the Vision 2030 goal of 70 per cent.<sup>50</sup> The high demand has resulted in the emergence of a private-within-public system. In public institutions, 'regular' state-funded students may study alongside 'parallel' students, who pay the full cost of their courses.

In 2019/20, 509,473 students were enrolled at universities, up from just 193,000 in 2010, though this is a 1.9 per cent decline from 2018/19.<sup>51</sup> About 81 per cent of university enrolments were in public universities. Male students continue to make up the largest share of enrolments at around 58 per cent. According to the Kenyan government, the decline in enrolments in public universities may be in part because of a lower number of candidates joining universities through self-sponsored programmes. Enrolment in private universities increased from just over 86,000 in 2018/19 to over 96,000 in 2019/10.<sup>52</sup>

Rapid growth in the university sector has resulted in quality concerns, including a lack of qualified lecturers, limited quality assurance mechanisms, corruption, cheating and plagiarism. A sector-wide quality audit by the CUE in early 2017 found a host of problems related to admission, progression and the award of qualifications; it has implemented measures to address these including the revocation of some awards and a limited time period for universities to implement effective electronic data management systems, amend student-staff ratios and complete audit reports among other measures.<sup>53</sup>

Just one Kenyan institution, the University of Nairobi, features in the Times Higher Education (THE) World University Rankings, which moved up to the 801-1,000 bracket in 2020, and it ranks 20<sup>th</sup> in the THE snapshot of African universities. There are five Kenyan universities in the top 100 African institutions. Kenya ranked 66<sup>th</sup> for the quality of its research institutions in the 2019 Global Competitiveness Index.<sup>54</sup> More than 80 per cent of Kenyan research output is the result of international collaboration; a major driver of research collaboration is the Kenyan diaspora in developed nations.<sup>55</sup> Research output is particularly high in medicine and agricultural and biological sciences. In the Global Innovation Index 2019, Kenya ranked 77<sup>th</sup> out of 129 countries, ranked second in Sub-Saharan Africa behind South Africa,

<sup>48</sup> [Accredited Universities](#), Commission for University Education, November 2017.

<sup>49</sup> [Education Sector Report 2017/18 – 2019/20](#), Republic of Kenya Treasury, December 2017.

<sup>50</sup> [Improving Higher Education Performance in Kenya: A Policy Report](#), World Bank, 21 August 2019.

<sup>51</sup> [Kenya Economic Survey 2020](#), Kenya National Bureau of Statistics, 28 April 2020.

<sup>52</sup> Ibid.

<sup>53</sup> [Thousands of students taking 'useless' varsity degree courses](#), *The Standard*, 18 February 2019; [Audit finds public varsities in the red with Sh5 billion debts](#), *The Standard*, 3 November 2018; [Massive audit set to shake up universities](#), *University World News*, 20 January 2017. Full Report on Quality Audit of University Education by CUE, *Kenyaote CS Matiangi*: 17 February, 2017.

<sup>54</sup> [The Global Competitiveness Report 2019](#), *World Economic Forum*, 2019.

<sup>55</sup> [Kenya](#), *Scimago Journal and Country Rank*, 2019.

and was classified as an innovation achiever for the ninth consecutive year, which means that it performs at least 10 per cent above its peers for their level of GDP.<sup>56</sup>

However, Kenyan universities are in a tough situation as they try to ensure quality while expanding programmes. The number of universities increased from 31 in 2009 to 68 in 2014, and the net enrolment rate increased from 4 per cent in 2009 to 7.5 per cent in 2014, but the increases in government expenditure on public universities are not keeping pace with this expansion.<sup>57</sup> While the number of students rose fivefold between 2011 and 2018, the number of academics teaching at universities rose only 13 per cent over the same period.

### Key policies related to education

Kenya places a large premium on education, sustaining public spending within the sector at over 5 per cent of GDP between 2010 and 2019, the highest among EAC countries.<sup>58</sup> Total expenditure for the Ministry of Education is expected to increase by 9.2 per cent in 2019/20, from KSh 455.1 billion in 2018/19 to KSh 496.8 billion.<sup>59</sup>

In line with Vision 2030, priorities are to improve the quality of infrastructure and teaching, and the 2018 curriculum revision aims to raise education outcomes and their relevance to the labour market. However the bulk of the budget outside teacher salaries goes to the provision of free primary and secondary education, education schemes have also been curtailed as a result of budget deficits, and increases in per-student subsidies have not kept pace with inflation.<sup>60</sup> In 2018 and 2019, state-funded institutions were forced to cut jobs and spending and the sector is widely considered to be in crisis.<sup>61</sup> Kenya's auditor-general found in 2017 that at least 11 Kenyan universities were bordering on insolvency, with many others likely to operate at a deficit that year.<sup>62</sup> University leaders have called for fee raises, but students strongly oppose any increases. University life is often disrupted by faculty strikes over salaries, such as a 54-day strike in 2017 that resulted in the loss of nearly a full trimester of classes.<sup>63</sup>

The government has also committed to a number of initiatives for the higher education sector, such as: funding students at private HEIs; boosting the enrolment of doctoral graduates; increasing the number of qualified teaching staff; and increasing online learning. It also aims to boost the research and innovation sector internationally, particularly in medicine and agricultural and biological sciences. Meanwhile, as noted above, the results of a major audit by the government in 2017 found serious problems around poor teacher qualifications and absenteeism, a lack of quality mechanisms, cheating, corruption and plagiarism.

TVET is being heavily promoted as part of Kenya Vision 2030. There are various government initiatives to boost the appeal of the sector, including establishing pathways for TVET students attending polytechnics and technical colleges to apply for advanced entry to technical degree programmes at universities. Enrolments in TVET increased 10 per cent in 2019 from one year earlier.<sup>64</sup>

The government formulated a five-year education plan for the 2018-2022 period, which states priority areas for higher education investment. These areas include preparing students to meet labour market demands, improving access and equity, improving quality, and addressing governance and accountability.<sup>65</sup> The national education strategy also strives to:

<sup>56</sup> [Global Innovation Index 2019](#), Cornell University, INSEAD, and WIPO, 2019.

<sup>57</sup> [Improving Higher Education Performance in Kenya](#), The World Bank, 21 August 2019.

<sup>58</sup> [Expenditure on education as % of GDP \(from government sources\)](#), UNESCO UIS data, accessed 2 March 2020.

<sup>59</sup> [Kenya Economic Survey 2020](#), Kenya National Bureau of Statistics, 28 April 2020.

<sup>60</sup> [Kenya cracks down in sweeping review of higher education quality](#), *ICEF Monitor*, 21 February 2017.

<sup>61</sup> [University cash crisis worsens](#), *University World News*, 5 October 2018.

<sup>62</sup> [Could Kenya become a growth market for outbound mobility?](#) *ICEF Monitor*, 24 October 2017

<sup>63</sup> [Lecturer strike means years of wasted time for students](#), *University World News*, 2 May 2018.

<sup>64</sup> [Economic Survey 2019 Highlights](#), Kenya National Bureau of Statistics, 1 May 2019.

<sup>65</sup> [Improving Higher Education Performance in Kenya](#), The World Bank, 21 August 2019.

- Establish the Open University of Kenya (OUK), making 30 per cent of degree programmes available through online learning by 2022.
- Increase university GER from 7 per cent to 15 per cent.
- Increase enrolment on STEM programmes to 60 per cent of the student population.
- Enhance the quality and relevance of training and research.
- Enhance equity and inclusion in university education, especially for females and low-income students.
- Strengthen governance and management of university education.

The government has been keen to promote regional and international collaboration and partnerships as part of its development plans, yet it lacks a clear agenda on attracting and accrediting branch campuses.

Quality assurance is also a major issue for Kenyan higher education, and the CUE has made improvements to their quality assurance mechanisms over the last decade. However, the World Bank believes that there is still progress to be made in HE governance, mechanisms (such as accreditation, assessment and audit), accountability, and institutional capacity to enforce educational standards.<sup>66</sup>

Through the Global Partnership for Education, the World Bank has provided grants amounting to more than US\$204.5 million since 2005 to improve Kenya's education system. The latest grant, for a program running 2020-2022, gives an additional US\$9.7 million to improve early grade mathematics competency and strengthen management systems at school and national levels.<sup>67</sup>

## International student recruitment

### Overall inbound trend

Kenya is not a major destination for inbound international students. According to the most recent UNESCO data (2017), there was a total of 5,254 inbound students in Kenya. Nearly all tertiary international students come from other African countries, primarily Angola, Tanzania, Congo DR, and Uganda.

The Kenya National Qualifications Agency (KNQA) announced plans in 2019 to attract more international students, with a hope to transform Kenya into a regional education hub. KNQA is working with universities to upgrade accommodation facilities, settle clearly defined academic calendars, and establish student directorates to assist learners in order to increase inbound numbers by nearly six times to 30,000 students in the space of five years.<sup>68</sup> The current education hub of Sub-Saharan Africa is South Africa, which hosts over 45,000 international students annually.

### Overall outbound trend

Despite a recent outbound lull, Kenya is seen as a high-potential market for international students. This is largely due to its large young population and the large unmet demand for higher education. UNESCO reports that almost 15,000 Kenyan students were studying overseas in 2018, an increase of 7 per cent on the previous year. Cost is likely to remain a concern for many Kenyans, with study abroad out of reach for most of the population.<sup>69</sup> Yet as the local higher education sector expands along with the country's emerging middle class, it is likely that quality concerns and increasing competition for places will drive students abroad in larger numbers.

Historically, the US has been most popular among Kenyans, and still hosts just over one in five Kenyan students abroad. As noted by ICEF, the UK, Australia, and South Africa account for another 35 per cent

<sup>66</sup> [Improving Higher Education Performance in Kenya](#), The World Bank, 21 August 2019.

<sup>67</sup> [Kenya](#), *Global Partnership for Education*, 2020.

<sup>68</sup> [Kenya announces bold plans to reach 30,000 international students](#), *The Pie News*, 5 June 2019.

<sup>69</sup> [Affordability Shaping Kenyan Outbound Trend](#), *ICEF Monitor*, 4 April 2018

combined, after which destinations for Kenyan students become more diffused. The top ten sees host countries in the Middle East, Asia, and Europe. Yet UNESCO figures often fail to take into account mobility to non-traditional destinations and mobility within Africa and the East Africa region in particular; for example, tens of thousands of Kenyan students are reported to be studying in the more affordable regional higher education hubs of Tanzania, Uganda and, increasingly, South Africa.<sup>70</sup> In 2019, China awarded scholarships to 182 Kenyan students to study at Chinese universities and to 50 students to study at local universities.<sup>71</sup> Ukraine is also intensively advertising its 240 universities directly to students in Nairobi.<sup>72</sup> Scholarships are an important motivating factor when choosing a destination. While there are no significant funding sources from the Kenyan government, Kenyans can benefit from a range of development scholarships, with Chevening and Commonwealth scholarships significant for those targeting the UK.

Kenyan students hold the KCSE, which may be equivalent to UK GCSEs or Australian secondary certificates at C grade and above. Some Kenyan students may need to complete foundation or bridging programmes before enrolling in undergraduate courses overseas, with an NCUK foundation programme offered in country. However very high scores may be equivalent to UK 'A' levels on a subject-by-subject basis, and many outbound students graduate from high quality international schools.

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<sup>70</sup> [Kenyan Students Staying Home in Greater Numbers but Quality Concerns Persist](#), *ICEF Monitor*, 23 February 2016

<sup>71</sup> [Hundreds of Kenyan students receive scholarships from Chinese government](#), *CGTN*, 27 August 2019.

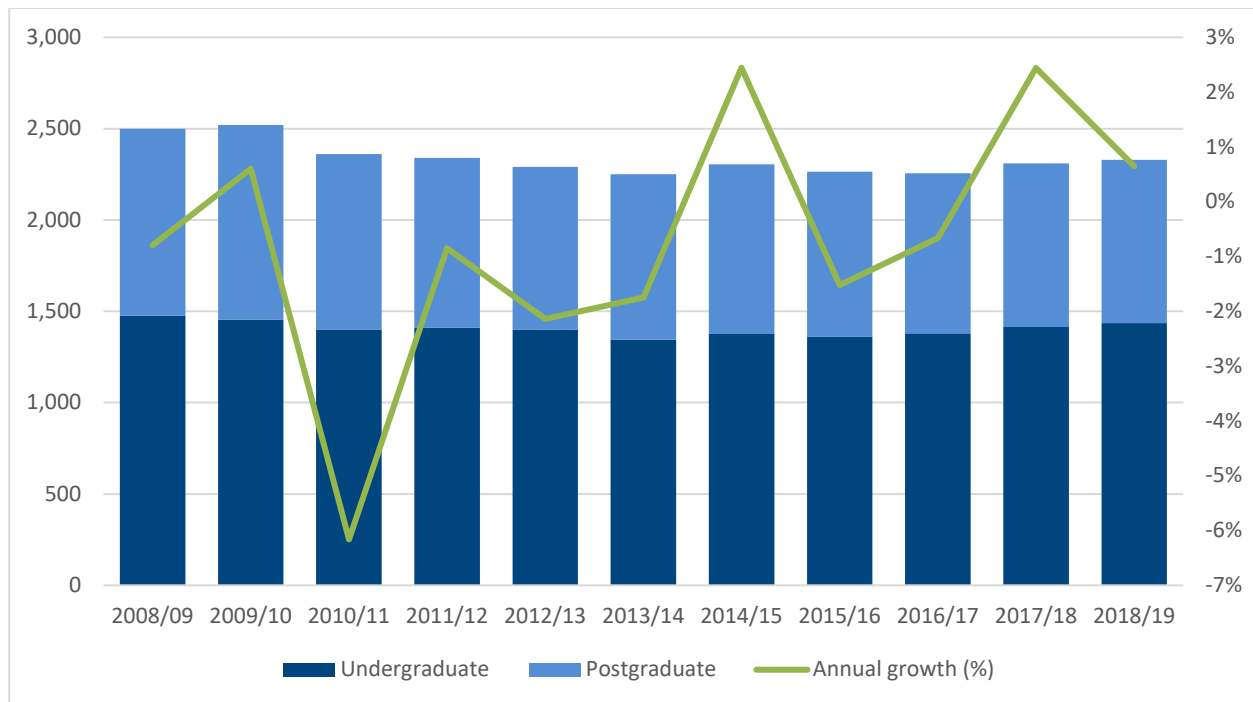
<sup>72</sup> [Changes to Kenya's Education System Seeks to increase access and standards](#), *Oxford Business Group*, 2018.



## UK recruitment

In 2019, there were 2,325 Kenyans at UK tertiary institutions, an increase of 1 per cent on the previous year. Kenyan enrolments in the UK have remained relatively stable for nearly a decade, with current enrolments just below the peak of 2,520 students in 2009. Since 2010, the annual growth in enrolments has never increased or decreased more than 2.5 per cent.

**Figure 4: UK student enrolments, undergraduate and postgraduate**



Source: HESA, Home Office

Kenya is predominantly an undergraduate market for the UK, accounting for 62 per cent of enrolments in 2018/19. Though this is a 3 per cent increase since 2008/09, the ratio of undergraduate to postgraduate enrolments has remained very close to a 60-40 split for the last decade. In 2018/19, 35 per cent of enrolments were at Russell Group institutions, the lowest proportion in 10 years. Kenyan enrolments in Russell Group institutions reached a peak of 39 per cent in 2013/14.

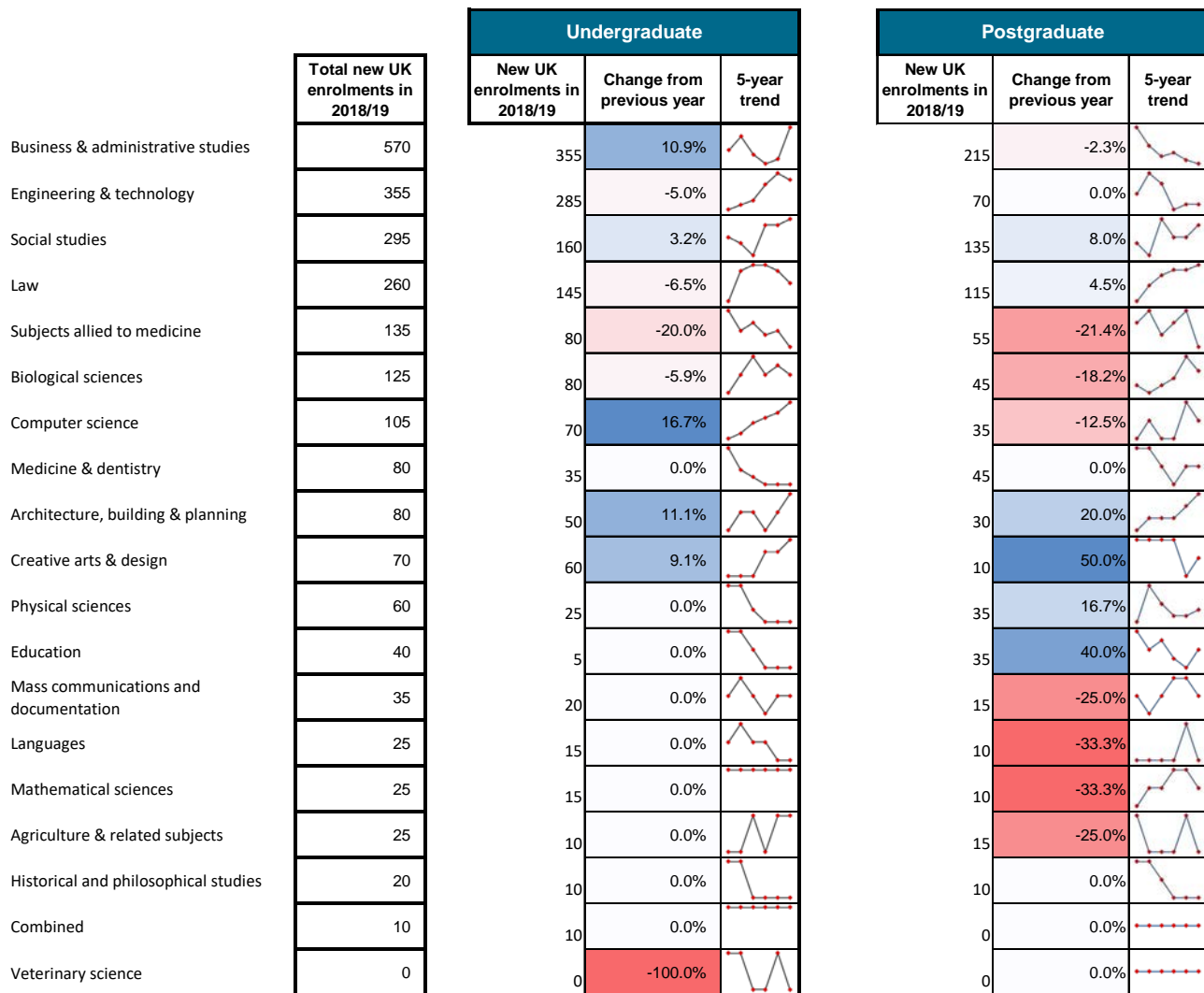
In 2018/19, there were only five Kenyan students on government scholarships studying in the UK, the same as the previous year. The same year, 35 Kenyan students had tuition fees paid by an “overseas provider,” “overseas industry or commerce,” or “other overseas funding.”<sup>73</sup>

According to discussions with agents, newly popular countries such as Canada are beginning to impact the UK’s market share among Kenyan students, particularly those that offer post-study work opportunities and easier visa application processes. While there is some distance learning provision from UK universities, this tends to be priced high for the market at between £3,000-6,000 per year.

<sup>73</sup> HESA data, accessed 18 March 2020.

## Subject areas

Figure 5: Change in new UK enrolments according to subject area

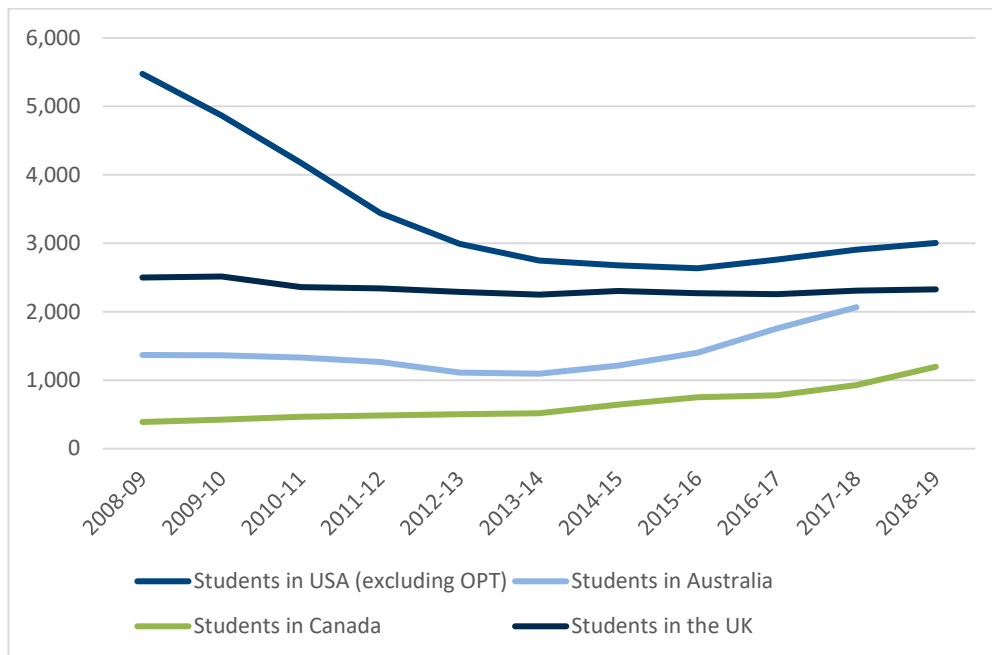


Source: HESA

Among both undergraduates and postgraduates, business and administrative studies is consistently the most popular subject and was chosen in 2018/19 by 355 of the former (23 per cent) and 215 of the latter (26 per cent). Engineering and technology, social studies and law are also popular subjects, though engineering and technology attracts a much higher proportion of undergraduate students than postgraduates. Undergraduate computer science has seen the fastest growth among the more popular subject areas, an increase of 16.7 per cent year-on-year. It is also the only subject area to have grown consistently over the last five years for undergraduates. As for the most popular subject area, business and administrative studies, new enrolments at the undergraduate level increased by 10.9 per cent while new postgraduate enrolments continued a negative trend, decreasing by 2.3 per cent.

## Competitor activity

Figure 6: Student mobility to the UK's main competitors



Source: HESA, UIS, Stat Canada, Austrade. Notes: US data excludes OPT; some data for Canada is estimated based on study visa issuance, Australia 2018 data is compared against 2018/19 data for the other countries.

### United States

Kenyan enrolments in the US have fallen sharply from the most recent peak of 5,466 in 2008/09, with 3,004 enrolments in 2018/19 (excluding those on Optional Practical Training, or OPT). This likely reflects the high cost of overseas study, along with the increasing visibility of more affordable, quality learning options. There has been a small rebound since enrolments reached a low in 2015/16.

### Australia

Enrolments in Australia picked up significantly in 2014 after several years in decline and have since almost doubled, surpassing the UK to reach 3,200 in 2018. Australia has increased its recruitment work around the world, particularly in Africa, and is viewed as an attractive destination because of scholarship opportunities, such as the Australia Awards, and pathways to obtaining work visas after graduation.

### Canada

The Canadian market has similarly seen an increase in momentum since 2014, though at a slower pace than Australia. The 2018/19 academic year saw 1,196 Kenyan enrolments, more than double 2013/14 figures (516). This is associated with the Canadian government's increased efforts to recruit international students, the lower cost of education compared to the US and the UK, and a perception that it is more student-friendly than other countries.<sup>74</sup>

<sup>74</sup> [Kenyan Students Staying Home in Greater Numbers but Quality Concerns Persist](#), ICEF Monitor, 2016.

## Transnational education

Kenya is not currently a major host of international branch campuses. Kenya was the 15<sup>th</sup> largest host of UK TNE students globally in 2017/18, down from eighth in 2015/16, and was the sixth largest market in Sub-Saharan Africa. Kenya's approximately 1,500 TNE students accounted for 1.5 per cent of all UK TNE students. Of these, 1,185 were on postgraduate programmes and 310 were on undergraduate programmes.<sup>75</sup>

Kenya differentiates between foreign universities and branch campuses of universities. According to the 2016 updated version of the University Act of 2012, "A foreign university means a university established outside Kenya, which intends to offer university education in Kenya. A foreign university campus means an extension of a foreign university set up by the university pursuant to its statutes and established in accordance with the University Act."<sup>76</sup>

Some private foreign institutions had previously operated in Kenya without the approval of CUE, leading to the strict regulations that now exist. Universities located outside of Kenya wishing to offer programmes inside the country must apply to CUE for accreditation. In 2019, there were no longer any international branches or private foreign universities from outside Africa operating in Kenya.<sup>77</sup> There were two franchise arrangements with Intel College, which has a partnership with the University of Sunderland, and Edulink International College, which offers foundational and honours BA programmes from a handful of UK universities such as the University of Northampton and the University of London.<sup>78</sup>

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<sup>75</sup> [The scale of UK HE TNE 2017-18](#), Universities UK International, 6 November 2019.

<sup>76</sup> [International programme and provider mobility \(IPPM\) in selected African countries](#), British Council, March 2019.

<sup>77</sup> [International Universities in Kenya](#), Tuko, January 2020.

<sup>78</sup> [International programme and provider mobility \(IPPM\) in selected African countries](#), British Council, March 2019.