

E-MOBILITY PROJECT REPORT NO. 02

E-Mobility value chain and entrepreneurial ecosystem in Kenya: Comparative results from a quantitative survey and recommendations for gendered policy and practice

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By Esin Yoruk,¹ Ann Kingiri,² Catherine Kilelu,² Yvonne Gitu² and Ernest Chichi³

Design and layout by Yvonne Gitu

1 - Centre for Resilient Business and Society, Coventry University, UK

2 - African Centre for Technology (ACTS), Kenya

3 - Kenya Climate Innovation Centre, Kenya



PROJECT BACKGROUND

Electric mobility (e-mobility) technology presents a significant opportunity for socio-economic transformation in Kenya, particularly given the country's reliance on renewable energy sources. However, the e-mobility sector is predominantly male-dominated, with women comprising only 1 in 25 employees globally. This underrepresentation hinders gender equality and economic empowerment for women, who face institutional, cultural, and technical barriers to entry. This project explored the business pathways for women entrepreneurs in the e-mobility sector by assessing their needs and generating evidence through quantitative and qualitative research, to enhance their skills. Key activities include conducting large-scale surveys and in-depth interviews with women and men in e-mobility for a comparative assessment. Ultimately, this initiative aspires to increase awareness of gender gaps in e-mobility entrepreneurship and contribute to a more inclusive socio-economic landscape, thereby enhancing individual empowerment and societal well-being across Kenya. By addressing systemic barriers and fostering an inclusive entrepreneurial ecosystem, this project aspires to create lasting socio-economic benefits for women, aligning with Sustainable Development Goals (SDGs) such as Gender Equality (Goal 5) and Decent Work and Economic Growth (Goal 8) while contributing to Kenya's Vision 2030 objectives.

Over a 24-month period, this initiative generated:

1. Mapped the transformative pathway of electric mobility technology in Kenya for business opportunities through a gender and inclusivity lens (Report 1)
2. Identified individual and systemic factors that enhance or constrain high-growth e-mobility entrepreneurship activities related to women within Kenya's unique institutional and cultural context, by focusing on women's needs and challenges and collected quantitative and qualitative evidence (Reports 2 and 3)
3. Developed e-mobility focused entrepreneurship training programme for pre-startups and early startups for incubators, pilot trained 18 women entrepreneurs and assessed short-term impact of the training (Report 4)
4. Developed policy and industry focused report on e-mobility and women's entrepreneurship that outlines necessary support mechanisms and recommendations (Report 5)

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Report 2

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Esin Yoruk

Centre for Resilient Business and Society
Coventry University, UK

Ann Kingiri, Catherine Kilelu and Yvonne Gitu

African Centre for Technology Studies, Kenya

Ernest Chitechi

Kenya Climate Innovation Centre, Kenya

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1. Introduction

1.1. Background and Aim of the Report

Electric mobility technology is a transformative technology not only for its environmental but also socio-economic effects on individuals and the society in low-income countries (LICs). Kenya, most of its energy sourced from renewables, has great potential to exploit the production and effective consumption of e-mobility technology in all sectors through entrepreneurial activity. E-mobility technology can be catalyst in achieving Kenya Vision 2030 targets of macroeconomic and social pillars. Although the sector has been thriving in Kenya in recent years supported by the Kenyan Government, the sector is almost wholly male dominated with only 1 in 25 employees being woman, globally this is 1 in 5 (ILO, 2024). This suggests that in Kenya large proportion of female workforce that can add value through production and use of e-mobility remains untapped, increasing gender inequality, and hindering alleviation of poverty. Moreover, women entrepreneurs in Kenya often lack adequate support, facing institutional, cultural and technical barriers that hamper their success. As it seems now, the e-mobility sector is poised to grow fast, however without the inclusivity aspect in the design of emerging policy which is likely to skew the positive socio-economic outcomes.

Driven by these gaps, this report aims to explore and map the e-mobility value chain and entrepreneurial ecosystem in Kenya. To do that, it utilises unique and original survey data that focuses on the perceptions of entrepreneurs and employees in the sector to assess their own needs, skills levels and perceptions on the e-mobility ecosystem. Furthermore, the report compares women entrepreneurs and employees to their male counterparts and proposes policy and practical implications for inclusive e-mobility value chain and entrepreneurial ecosystem in Kenya. It identifies the strengths and weaknesses in the e-mobility ecosystem based on 280 entrepreneurs' and employees' perspectives.

To our knowledge, this dataset and the report is the first study in mapping Kenya's e-mobility sector using a large survey and in a comparative setting from a gender perspective.

1.2. Structure of the Report

The report is structured as follows. Section 2 describes the concepts of value chain, entrepreneurial ecosystem concepts very briefly, and presents the conceptual framework which guided the survey design. Section 2 also describes the methodology of the study, i.e. survey design, concepts operationalisation, the sample and how the data are collected. Section 3 presents the sample characteristics. Section 4 provides the results from the survey on the micro foundations of the e-mobility ecosystem focusing the agency whereas sections 5 and 6 present results for the ecosystem support at meso level such as finance, skills, networking and incubation support, and macro level determinants of the ecosystem such as institutions, infrastructure, culture and markets.

2. The Conceptual Framework and Methodology

2.1. The Conceptual Framework: E-mobility Value Chain and Entrepreneurial Innovation Ecosystem

E-mobility sector in Kenya is a newly emerging and nascent sector with its value chain and entrepreneurial ecosystem currently in formation. This report informs on the current state of e-mobility value chain where business activities by employees and entrepreneurs take place. It also informs on the current state of e-mobility entrepreneurial and innovation ecosystem where entrepreneurs operate within.

A value chain describes the sequence of activities involved in producing and delivering a product or service with a focus on how value is created within a firm or industry through (i) primary activities of input procurement, production/operations, marketing and sales, distribution and after-sales services, and (ii) support activities of technological development and R&D, human resources, firm infrastructure on finance, legal, management. It is linear, process-oriented, and concerned with efficiency, coordination, and capturing value at each step.

An entrepreneurial ecosystem is the set of interconnected entrepreneurial actors and processes which formally and informally coalesce to connect, mediate and govern the performance within the local entrepreneurial environment (Mason & Brown, 2014; Spiegel, 2017, Stam, 2015). These actors are: (i) Organisations (e.g., firms, venture capitalists, business angels, banks, universities, public sector agencies, support organisations: incubators, accelerators), (ii) Structure, institutions (e.g., culture, norms, policy, innovation system, etc.), and (iii) Entrepreneurial processes (e.g., the business birth rate, numbers of high growth firms). It is non-linear, systemic, dynamic, and focused on the conditions and the holistic environment that allow entrepreneurs to start, grow, and scale businesses.

Whereas a value chain is an organisation and industry-focused concept, an entrepreneurial ecosystem is broader concept with emphasis on the environmental conditions that support a firm and an industry. As such, a value chain can be considered a subset of an ecosystem. They are, however, closely related and co-evolve. Strong ecosystems support the creation of efficient value chains; efficient value chains strengthen ecosystems.

The purpose of this report is to map the transformation of e-mobility value chain to a newly emerging e-mobility ecosystem through the viewpoints of employees and entrepreneurs. The report does not aim to investigate any relationships between the agency and structure that shapes an ecosystem.

This report maps e-mobility value chain in Kenya through the perceptions of e-mobility employees and maps e-mobility entrepreneurial ecosystem through the perceptions of entrepreneurs. It puts the employee in the core of the value chain and the entrepreneur in the core of the entrepreneurial ecosystem. By this way, it develops an agency/structure conceptualisation and interprets the value chain and ecosystem from the eyes of the core actors, i.e. the employee and the entrepreneur. This way, the report compares the viewpoints of employees and entrepreneurs by differentiating between women and men, also considering gendered viewpoints which inform on the inclusivity of e-mobility value chain and entrepreneurial ecosystem in Kenya.

The conceptual framework is proposed as below:

1. AGENCY (The Entrepreneur, The Employee)

- a. Entrepreneurial orientation: Autonomy, Competitiveness, Innovativeness, Proactiveness, Risk taking
- b. Motivation: Necessity, Opportunity, Wealth, Family tradition, Independence, Impact: Environmental and Social
- c. Skills: Technical, Finance, Marketing, Networking

2. STRUCTURE/SYSTEM

- a. E-mobility System Support (Meso level): Finance, Human capital, Networks, Incubation
- b. Framework Conditions (Macro level): Institutions & Regulations, Infrastructure, Culture, Markets

2.2. Survey Design and Indicators

The above conceptual framework guided the design of a large-scale survey instrument. Statements were posed to the participants to capture their perceptions. The response format was designed in the form of Likert scale ranging from 0 to 10, i.e. strongly disagree to strongly agree. The survey statements/questions are provided in the Appendix, and the data are available upon request.

2.3. Sampling

Purposive sampling of women and men who work or run companies in the e-mobility sector was applied. NGOs and networks in the Ministry of Transport and Energy have been used to reach out potential participants in the first place. Then after, snowballing technique was used to reach out more respondents by way of being put into contact by the participants.

2.4. Data collection

Data were collected in June-August 2025 via online survey administration platform Qualtrics and in-person. Data collection process strictly abided by the ethics procedures and rules of Coventry University that provided ethical approval for anonymous data collection via survey tool. Although some participants answered the survey in their own time and online, most of the responses were gathered by a team of enumerators who implemented the survey in-person with the participants and helped them understand the statements correctly. During a two-day training workshop in June 2025, enumerators were trained for how to implement the survey, and how to respond any questions from the participants. Data collection commenced after a pilot of around 15 responses. No major modifications have been made to the survey after the pilots which seemed to work well. In total, around 300 responses were collected. After checking responses for credibility and cleaning of repetitive responses, very short response duration, incomplete responses, etc. 280 participants were retained in the survey.

2.5. Key to presentation of data

Data are collected from four distinct categories of actors in the e-mobility ecosystem considering gender differences, i.e. women and men and job roles, i.e. employees who work in an e-mobility company and entrepreneurs who own an e-mobility company. Employees capture actors in the value chain with different job roles such as managers, sales representatives, researchers, engineers, technicians, riders, drivers, etc. Entrepreneurs are core actors in the e-mobility entrepreneurial ecosystem which is a subset of e-mobility value chain. Both employees and entrepreneurs are broken down to male and female categories. When reporting results in the next sections, this report follows these four categories of women employees, women entrepreneurs, men employees and men entrepreneurs, for robust comparison.

3. Sample Demographics

3.1. Gender, job roles, age

Table 1 informs on sample characteristics by gender, job role, age, occupation, level of education of respondents and the type of activity respondents are engaged in the value chain. Charts in Figure 1 visually show that out of 280 respondents, 55.4% of the sample are men and 44.6% are women with both groups well represented. 63.9% are employees and 36.1% are entrepreneurs. Employees make up nearly two-thirds of the sample, indicating that entrepreneurs are a smaller but still significant group.

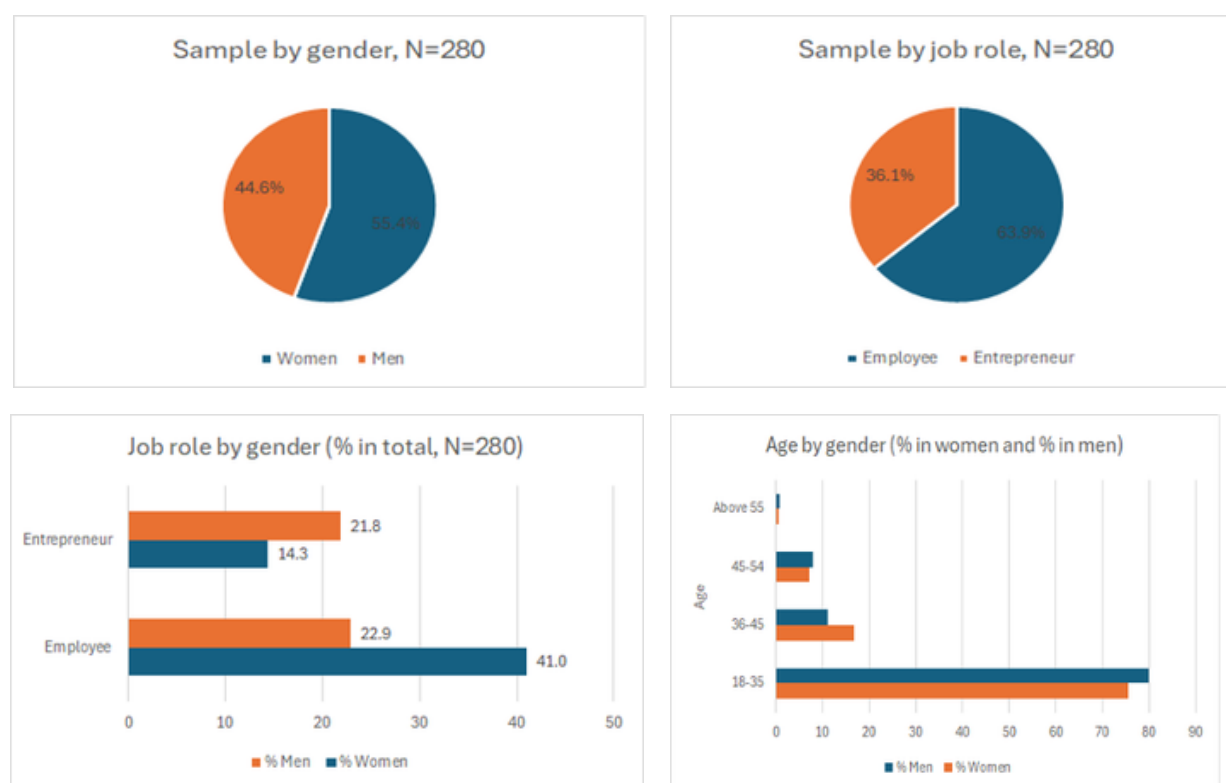


Figure 1. The sample by gender, job role, age by gender and job role by gender.

		Total		Women		Men	
	Category	Count	%	Count	%	Count	%
Gender	Women	155	55.4				
	Men	125	44.6				
Age	18-35	217	77.5	117	41.8	100	37.5
	36-45	40	14.3	26	9.3	14	5
	45-54	21	7.5	11	3.9	10	3.6
	Above 55	2	0.7	1	0.4	1	0.4
Job role	Employee	179	63.9	115	41.1	64	22.9
	Entrepreneur	101	36.1	40	14.3	61	21.8
Occupation	Rider	107	37.9	35	12.5	72	25.7
	Driver	51	17.9	26	9.3	25	8.9
	Technician	32	11.6	21	7.5	11	3.9
	Sales representative	28	10.9	22	7.9	6	2.1
	Manager	27	9.5	21	7.5	6	2.1
	Engineer	16	5.6	13	4.6	3	1.1
	Administration staff	8	2.8	7	2.5	1	0.4
	Researcher	4	1.4	4	1.4	0	0
	Swap station agent	3	1.1	2	0.7	1	0.4
	Other	4	1.4	4	1.4	0	0

Table 1. Sample characteristics by gender, age, job role, occupation, level of education and the type of activity in e-mobility sector.

		Total		Women		Men	
	Category	Count	%	Count	%	Count	%
Level of education	Master's Degree	16	5.6	15	5.4	1	0.4
	University Degree	51	18.6	44	15.7	7	2.5
	Some university education	23	8.4	13	4.6	10	3.6
	College certificate	59	20.7	33	11.8	26	9.3
	Some college training	45	16.1	24	8.6	21	7.5
	Secondary certificate	43	15.4	12	4.3	31	11.1
	Some secondary education	32	11.2	10	3.6	22	7.9
	Primary certificate	7	2.5	2	0.7	5	1.8
	Some primary education	2	0.7	1	0.4	1	0.4
	No education	2	0.7	1	0.4	1	0.4
Total		280	100	155	55.4	125	44.6
Type of activity in the value chain*	Deliveries of products	113	31.3	42	11.6	71	19.7
	Transportation of passengers	82	22.7	37	10.2	45	12.5
	Maintenance/Service/Repairs	46	12.7	37	10.2	9	2.5
	Sales	41	11.4	30	8.3	11	3
	Battery charging/swapping	29	8	20	5.5	9	2.5
	Assembling	14	3.9	11	3	3	0.8
	Manufacturing/Production	11	3	11	3	1	0.3
	Management	10	2.8	9	2.5	1	0.3
	Administration	8	2.2	6	1.7	2	0.6
	Research and Development	6	1.7	6	1.7	0	0
	Education	1	0.3	1	0.3	0	0
Total		361	100	210	58.2	152	42.1

Table 1. Sample characteristics by gender, age, job role, occupation, level of education and the type of activity in e-mobility sector.

Total activities add up to more than 280, since respondents conduct multiple activities.

When the sample is broken down by gender and job role, out of 280 respondents 155 are women employees (41%), 40 are women entrepreneurs (14.3%), 64 are men employees (22.9%) and 61 are men entrepreneurs (21.8%). Whereas women are more in employment, entrepreneurship or self-employment in e-mobility appears to be a challenging route for women. There are not many women entrepreneurs in e-mobility in Kenya, and it has been quite challenging to reach out to entrepreneur women for the purposes of the survey.

The sample is dominated by younger participants (aged 18–35), 75% of women and 80% of men are in this age group. 10% of men and 15% women are aged 36–45, only 10% are above 45. This suggests e-mobility workforce is very young in Kenya. 85% women and 94% of men are located in Nairobi, and the rest in Mombasa, Makeni, Kajiado, Uasin Gishu.

3.2. Level of education and occupation

What does educational attainment of women in e-mobility look like?

What occupational roles do women hold in e-mobility?

How are education levels and occupational roles related across genders in e-mobility in Kenya?

Charts in Figure 2 inform on the level of education and occupation. Women in the dataset tend to have higher formal education levels than men, especially at university and postgraduate levels. 60% of women in the sample have college, university and Master's degrees, whereas 45% of men have college and secondary school. In terms of occupational roles, men dominate riding, driving and technical roles. The rider category is overwhelmingly male (close to 58%). Men also hold driver, technician, and engineer roles. Women are more visibly represented in administrative and service roles. Higher proportions of women are in administration staff, sales representatives and managers.

Table 2 breaks down occupations by level of education. Highly educated women in e-mobility are in manager, administrative and sales representative roles suggesting their educational subject areas are more about management than technical area of e-mobility. However, women with university and college degrees are also in technician and engineer roles suggesting there is scope for women to get onto technical roles in e-mobility once they achieve appropriate technical educational attainment. As the level of education decreases, i.e. college degree and below, more men are seen to take up roles as riders and drivers suggesting within rider and driver roles less educated men have advantage over less educated women. Overall, the occupational distribution in e-mobility reflects somewhat traditional gender patterns, i.e. men in mobility operation and technical roles, women in administrative and service functions; but when interpreted together with educational attainment, statistics show that there is room for women with high level of education in technical e-mobility areas can contribute to technician and engineer roles. This is important point since such roles will take women further onto leadership and decision-making roles in the e-mobility sector. Additionally, the significantly less proportion of women in rider roles in medium education levels calls for more action for women's challenges and needs in these areas and why they are highly disadvantaged. The next sections in this report provide some explanations for these issues.

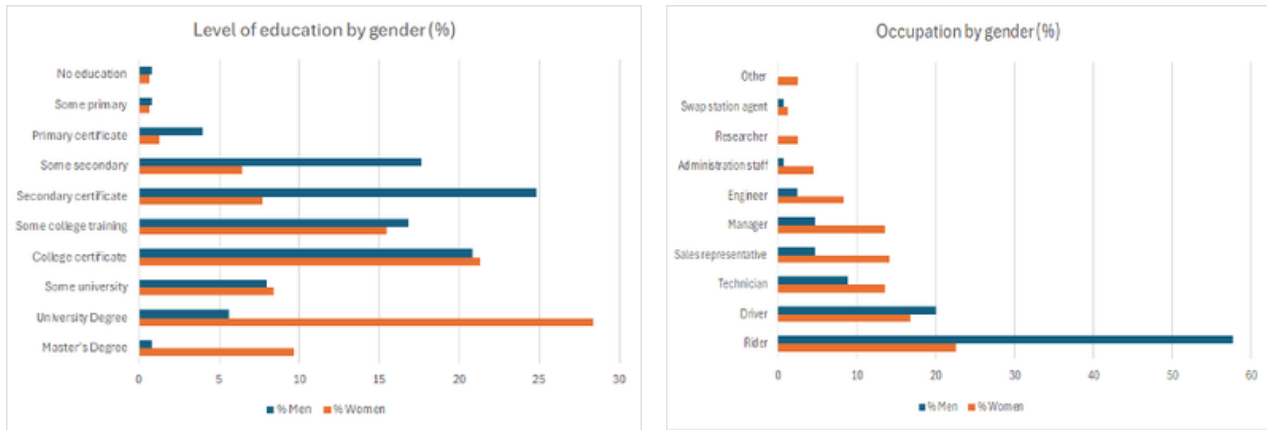


Figure 2. Level of education and occupation by gender.

	Master's Degree		University Degree		Some university		College certificate		Some college training		Secondary certificate		Some Secondary		Primary certificate	
	Women	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women	Men
Administration	1		6	1												
Advisor			1													
Driver	1		1	2	3		8	4	6	6	2	3	4	9	1	1
Educator			1													
Engineer	3		6		2		1	3					1			
Manager	7	1	10		2	1	1	4			1					
Researcher	1		3													
Rider	2		2	1	1	4	5	12	13	11	6	26	5	12		4
Sales representative			9	1	2	1	6	1	3	2	1	1			1	
Swap station agent			1							1	1					
Technician			4	2	3	4	12	2	2	1	1	1		1		

Table 2. Occupation by educational attainment and gender (count, N=280).

3.3. Type of activity and type of e-vehicle engagement

What type of activities are women engaged in e-mobility value chain?

What kind of e-vehicles do women engage with?

How do these differ across genders?

Charts in Figure 3 present e-vehicle engagement and type of activity in e-mobility by gender. In correspondence with male dominance in occupational roles of riders and drivers, among types of e-mobility activities, delivery of products and transportation of passengers are heavily male-dominated. Women take part in a balanced proportion in administrative, sales, management-related e-mobility activities as well as battery charging/swapping, maintenance/servicing and manufacturing/production. Women's roles in these activity types, however, are more office-based or coordination roles than operational or technical. In terms of type of e-vehicle engagement, women seem to have engaged in all e-vehicle types of e-bike, e-motorbike, e-taxi and e-bus/jeep/van. E-motorcycle use is much higher among men, with male participation approaching 50%, compared with around 35% for women. Women, on the other hand, have higher engagement in e-taxi use than men, perhaps indicating preferences linked to better safety. This division in activity types and e-vehicle engagement may reflect employers' assumptions about physical capability, safety concerns, or cultural expectations that shape gendered participation in mobility-related work

Taken together, the findings highlight a sector in transition: women entering e-mobility with stronger academic credentials but concentrated in lower-paid less technical or middle management roles, while men dominate operational and vehicle-based work that may offer higher earning potential in the long term. These patterns underscore the need for targeted interventions to address gendered barriers in recruitment, training, and asset access to ensure women can participate more fully in the emerging e-mobility economy in high level technical roles, with full access to widely used e-vehicles such as e-motorbikes and e-taxi/cars.

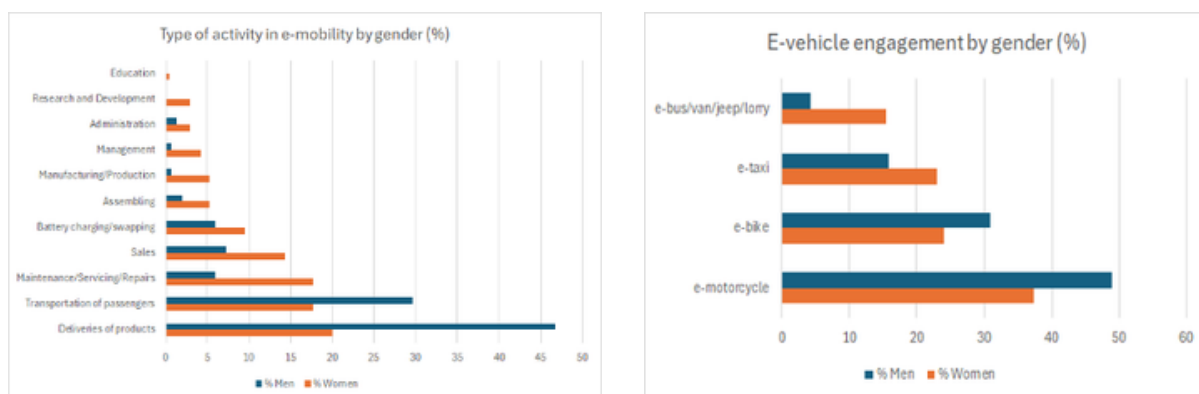


Figure 3. E-vehicle engagement and type of activity in e-mobility by gender.

4. Agency (Micro level)

4.1. Entrepreneurial Orientation

How entrepreneurially oriented are women in e-mobility in Kenya?

Are there any gender-based differences in entrepreneurial orientations of women and men in e-mobility in Kenya?

Entrepreneurial Orientation (EO) is well-established concept in entrepreneurship studies. Originally it was developed and applied at firm level whereby an organisation demonstrates innovative, proactive, competitive, risk-taking and autonomous behaviour in their approach to exploiting opportunities and new value creation (Miller, 1983; Lumpkin and Dess, 1996). Recently, the concept gained attention at individual level whereby it represents certain characteristics that define an entrepreneur and lead to act, i.e. setting up a company or leading in a company to generate new ideas/products. As such, Clark et al. (2024: 351) define individual entrepreneurial orientation as ‘autonomous, proactive, innovative, competitive, and risk-taking dispositions and behaviours that individuals exhibit when pursuing value-creating opportunities’, and Clark et al. (2025) developed a scale for measurement of the concept.

In this report, item statements from Clark et al. (2025), posed on a Likert scale of 0 to 10, have been used to assess the degree of entrepreneurial orientation in women and men employees and entrepreneurs in e-mobility sector (see Table 3). Table 4 shows the average scores for each sub-group of respondents on the dimensions of EO. On average, across all four groups, respondents rate themselves at a scale of 7, from 0 to 10, suggesting a relatively high degree of EO. Moreover, there is no significant difference between men and women regarding entrepreneurial orientation, and aspirations to become an entrepreneur.

Across all respondents, **autonomy** emerges as the strongest personal characteristic, underscoring the central role of independence, self-direction, and personal control as core motivators for entrepreneurship. The dominance of autonomy over other traits suggests that entrepreneurial entry may be driven less by competitive pressures or innovation pursuits and more by the desire for self-determination. **Risk-taking** and **proactiveness** follow autonomy, pointing to inclination among participants to anticipate opportunities and accept uncertainty, i.e. behaviours commonly associated with entrepreneurial success. **Competitiveness** appears weaker in comparison, perhaps reflecting a shift toward collaborative and purpose-driven venture styles increasingly observed in modern entrepreneurial ecosystems. A notable finding is that **innovativeness** ranks lowest for both women and men, with an identical mean rating of 6.3. This symmetry reinforces the broader conclusion of gender similarity and indicates that both groups perceive gaps in creativity, novelty generation, or the pursuit of new solutions. Low perceived innovativeness may reflect limited exposure to innovation-oriented training, restricted access to technology-driven ecosystems, or cultural norms that do not emphasise experimentation.

Finally, these findings suggest that gender does not significantly shape entrepreneurial orientation or aspirations to engage in entrepreneurship, indicating a convergence in how men and women perceive their entrepreneurial potential and intentions. This challenges long-standing assumptions that women are inherently more risk-averse or less entrepreneurially driven. Instead, both groups display broadly similar entrepreneurial mindsets.

EO dimension	Item statement
Autonomy	I believe it's within my power to realize the changes in the life I desire.
	There are no significant constraints on my ability to be autonomous in how I might respond to opportunities.
	I can create the future I want for myself based on factors I can control.
	I can make decisions without needing approval or consent from others (e.g., family members, spouse).
	I participate in community activities or decision-making bodies (e.g., local councils, women's groups) to change things in the community.
Competitiveness	I can make my political decisions independently, such as choosing a candidate or supporting a cause.
	I always know what my competitors are doing and take actions to compete with them.
	I typically respond vigorously to competitive assaults/challenges by others.
Innovativeness	I believe that being competitively assertive is a virtue.
	I'm an innovator when it comes to how I approach life's opportunities and threats.
	My business is usually the first to introduce new products/services in the market.
Proactiveness	I experiment with novel, innovative ideas to make my customers happy.
	I typically anticipate which actions will be beneficial and take them before most people realize their value.
	I often pursue opportunities based on envisioned futures, preferring to not "miss the boat".
Risktaking	I often act in advance of others when responding to opportunities and threats.
	I prefer high-risk/high-reward opportunities over low-risk/low-reward opportunities.
	My decisions and actions reflect my venturesome/exploratory nature.
	I tend to act confidently in situations where risk is involved.

Table 3. Measurement of entrepreneurial orientation. (Strongly disagree to Strongly agree on a scale of 0 to 10) (Source: Clark et al., 2025)

EO dimensions	Full sample (N=280)			Women employees (N=115)			Women entrepreneurs (N=40)			Men employees (N=64)			Men entrepreneurs (N=61)			Group
	Min	Max	Mean	Min	Max	Mean	Min	Max	Mean	Min	Max	Mean	Min	Max	Mean	AVG
Autonomy	3.2	10	7.7	3.2	10	7.8	3.5	10	7.8	3.7	10	7.3	4.7	10	7.7	7.7
Competitiveness	1.7	10	6.9	1.7	10	6.9	2.0	10	6.9	1.7	9	6.7	2.7	10	7.3	7.0
Innovativeness	0.7	10	6.5	0.7	10	6.6	3.0	10	6.3	2.0	10	6.6	2.7	10	6.3	6.5
Proactiveness	1.3	10	7.0	1.3	10	6.9	2.7	10	7.4	1.3	10	6.8	3.7	10	7.2	7.1
Risk taking	1.3	10	7.2	2.0	10	7.0	3.3	10	7.7	1.3	10	7.0	3.7	10	7.7	7.3
EO average			7.1			7.0			7.2			6.9			7.2	7.1

Table 4. Entrepreneurial orientation of women and men entrepreneurs and employees in e-mobility (Strongly disagree to Strongly agree on a scale of 0 to 10).



4.2. Motivation

What drives women in working and starting up a business in e-mobility?

How do women's motivations compare to those of men?

Figure 4 presents findings for respondents' motivations for engaging in entrepreneurship or employment in e-mobility, broken down by gender (women, men) and job role (employee, entrepreneur). GEM (2023, 2025a) does not observe significant differences between men and women when it comes to motivations for starting a business. Across low-income economies,[1] GEM finds that around 87.5% of women start a business to build wealth and for necessity since jobs are scarce. 40-50% aim to make a difference whereas slightly over 30% pursue the family tradition.

[1] Kenya does not participate in the GEM exercise.

Profit/wealth, necessity and opportunity motives

In Kenya's e-mobility sector, both women and men show high levels of agreement with the wealth motive, with employees of both genders agreeing slightly more strongly than entrepreneurs. On average 54% of women and 60% of men agree that they started their job or business to generate wealth with a profit motive. 60% of employees and 53% entrepreneurs agree so. This suggests e-mobility sector, being in its infant phase, provides better earnings for employees than entrepreneurs. 66% of men employees and 55% women employees are driven by the profit motive whilst these rates are 54% and 52% for men and women entrepreneurs, respectively.

The necessity motive reflects starting a business or working due to lack of alternatives. The necessity motive is more prominent among entrepreneurs (55% stating that they started their business because they couldn't find a better job), while employees report lower levels of agreement (39%), suggesting that they are less driven by a lack of alternatives. This is an expected finding in a low-income country where better educated workforce can find jobs at established companies. Overall, 62% of men entrepreneurs and 48% women entrepreneurs are driven by the necessity motive whilst these rates are 44% and 35% for men and women employees, respectively. The high rate of necessity motive among men entrepreneurs is closely associated with the low level of education in this cohort. Necessity motive is markedly lower (48%) in women e-mobility entrepreneurs in Kenya compared to women in low-income countries (87.5%) (GEM, 2025a: 27). This highlights the emerging sector nature of e-mobility with opportunities for entrepreneurship that women are choosing to become entrepreneurs in this are by choice. The market and technology opportunity driven motives discussed below further support this.

The market opportunity motive reflects identifying a promising market opportunity. The technological opportunity motive is based on sensing technological innovations advance the e-mobility field. Both market opportunity and technological opportunity motives show substantially higher agreement among entrepreneurs compared with employees. On average, 70% of women and 57% of men state they sensed a market opportunity, whereas 62% of women and 65% of men stated that they sensed a viable technological opportunity. As expected, entrepreneurs are considerably more driven by market opportunities (74%) than employees (53%), and they are slightly more driven by technological opportunities than employees, 66% and 61% respectively. Women entrepreneurs, in particular, display the strongest market opportunity-driven motivations (80%). This is very interesting finding suggesting a readiness and confidence in entrepreneurship for women workforce. On the other hand, men entrepreneurs score the highest rates in technological opportunity motive (72%). When combined with the wealth motive, these findings suggest an emerging and opportunity offering e-mobility sector in which women want to take part.



Figure 4. Wealth, necessity and opportunity motives of employees and entrepreneurs in e-mobility

BOX 2. NECESSITY VS OPPORTUNITY MOTIVE. In E-Mobility, Kenyan women entrepreneurs defy the odds. Contrary to the other LICs in the world where women are driven by the necessity motive, Kenyan women are driven by market opportunities when it comes to e-mobility entrepreneurship. Technological opportunity motive, slightly lower, suggests women need technical skills support.



Environmental and societal impact motive

According to GEM (2025b), across the globe, women consistently demonstrate a stronger commitment to integrating social and environmental goals into their businesses than their male counterparts, positioning them as critical agents of change in achieving sustainable development goals. For instance, globally, women were about 5% more likely than men to prioritise sustainability over economic goals. GEM (2025b), moreover, observes that whereas 72% of entrepreneurs in low-income countries prioritise environmental and social sustainability over economic goals, this rate is 58% in high-income countries, suggesting a response to pressing environmental and societal needs, resource constraints, or community-driven priorities in low-income countries.

A similar pattern is observed in Kenya's e-mobility sector. Figure 5 shows that both environmental and societal motives are widely valued across all respondents with strong agreement rates of 65% on average. However, women—both employees and entrepreneurs—show a more consistently strong endorsement than men, who tend toward more neutral positions. Whereas, on average, 72% of women state that they started their job or business to make a positive environmental impact, 57% of men state the same reason. For social impact these rates are 73% and 59%, respectively.

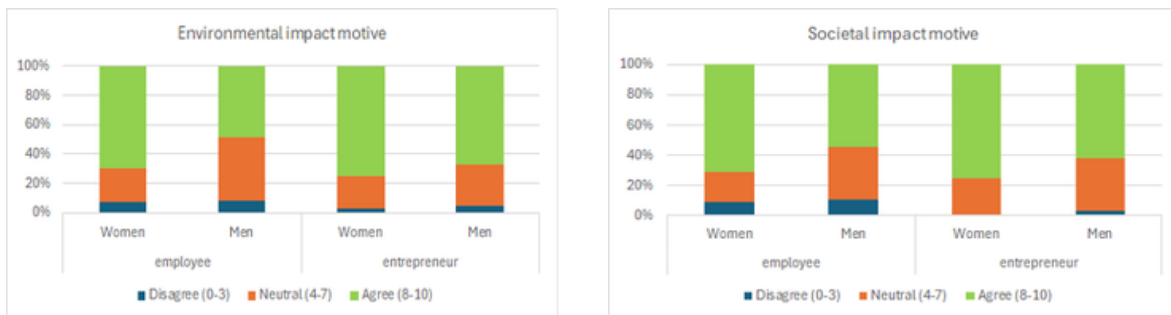


Figure 5. Environmental and social impact motives of employees and entrepreneurs in e-mobility



Family tradition and independence motive

GEM (2023, 2025a) observes that in low-income settings one motive is to pursue family tradition and take over family businesses (around 40-50% in low-income countries, 27% in middle-income economies). In e-mobility in Kenya this trend is not observed. Figure 6 reveals a striking asymmetry between the influence of family tradition and the pursuit of independence in shaping career trajectories in e-mobility. Across all groups, respondents consistently downplayed the role of family background, i.e. no more than 25% of respondents agreeing that they follow family tradition, suggesting that intergenerational pressures or expectations are not central determinants of their employment or entrepreneurial decisions. This contrasts with prior work that highlights the transmission of occupational values within families (Zellweger et al., 2011). In the present context, such effects appear considerably weaker highly likely due to the emergent and nascent phase of e-mobility technology sector providing ample opportunities for the young workforce in a low-income economy.

Complementary to not following the family tradition, independence emerges as a dominant and uniform motivator, particularly among entrepreneurs. 75% of entrepreneurs and 64% of employees, 77% of women and 62% of men are driven by the independence motive. Women entrepreneurs depict the highest degree by 80% agreeing with this motive being major driver in their business, compared to 62% of men entrepreneurs. This reinforces long-established theories that emphasise autonomy as a foundational driver of entrepreneurial behaviour (Covin et al., 2020; Clark et al., 2025), while also showing that independence is valued—even if to a lesser degree—among employees (64% on average, 75% for women and 53% for men employees). The consistency of this finding across gender groups indicates that independence is a broadly shared career aspiration rather than a gender-specific orientation. Collectively, the results suggest that contemporary career motivations may be shifting away from lineage-based influences and toward personal agency and self-determination and a newly emerging opportunity-providing e-mobility sector helps shape this formation.

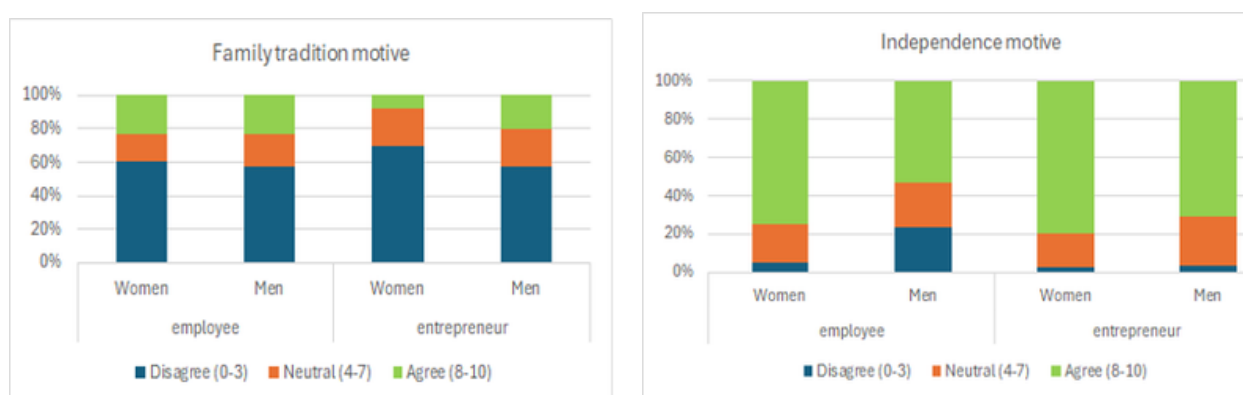


Figure 6. Family tradition and independence motives of employees and entrepreneurs in e-mobility.

BOX 4. INDEPENDENCE OR FAMILY TRADITION? The newly emerging and opportunity-providing e-mobility sector in Kenya provides a favourable environment for young entrepreneurs to follow their aspirations for independent agency and generate novel ideas rather than getting stuck in traditional family values with the incumbent ideas.



Motivations: Summary

Figure 7 summarises the motives for engagement in e-mobility sector in Kenya by job role and gender. Women entrepreneurs are mainly driven by market opportunities, independence, environmental and social impact generation at a scale of around 8. For women employees these seem to be the drivers except for market opportunities. For men entrepreneurs, technological opportunities and necessity motives are the highest, but they are also driven by making social and environmental impact. Men employees score the lowest across all motives compared to the other three job categories.

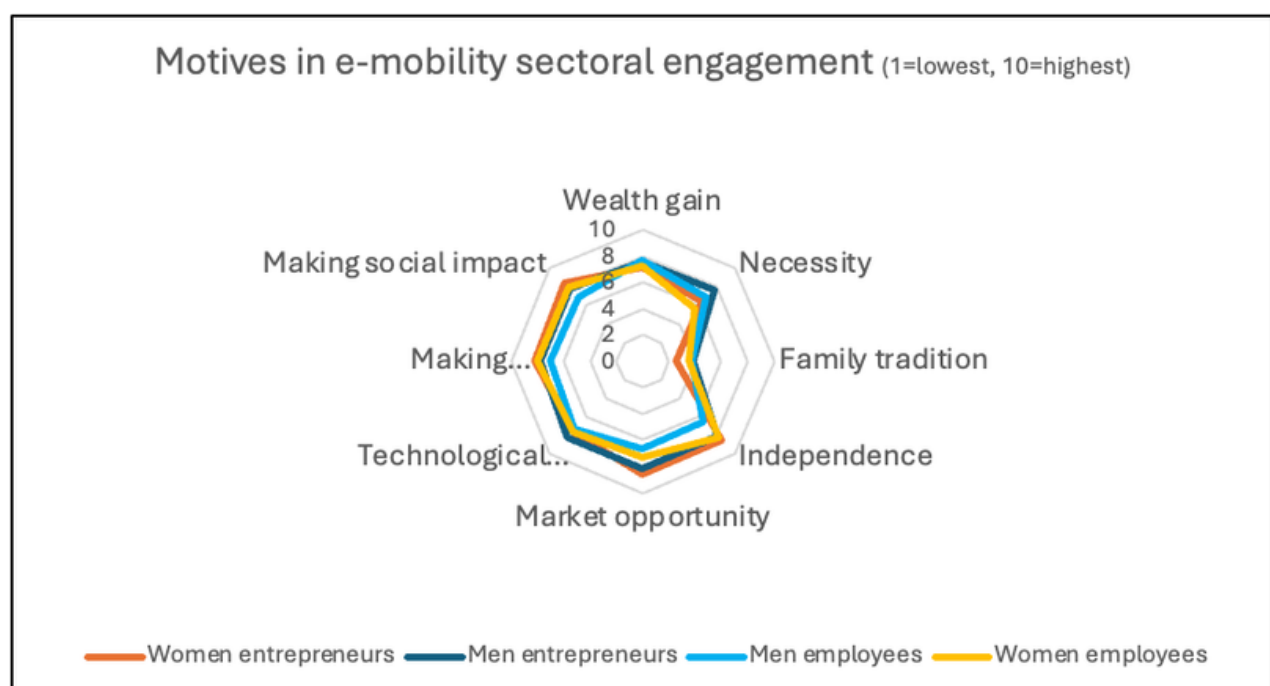


Figure 7. Motivations in e-mobility engagement by gender and job role.

Motivations: Practice and Policy Recommendations

1. Encourage and support opportunity-driven entrepreneurship in e-mobility.

- Support programmes should prioritise opportunity recognition training at innovation-focused pre-startup and startup incubators.
- Policies that expand affordable digital tools - based on Kenya's effective digital capacity in urban areas -, R&D incentives, and collaborative platforms would further strengthen opportunity-led entrepreneurship.

2. Implement policies that improve education and upskilling in e-mobility to reduce necessity-driven entrepreneurship at the early phases of sector development.

- Education for e-mobility technicians at colleges, e-mobility engineers at the universities, apprenticeships at large and small domestic e-mobility companies must be introduced as targeted interventions.
- These programs should include quotas for women for a gender inclusive sector.

3. Encourage and support sustainability-led entrepreneurship in e-mobility through higher rates of women participation to generate impact.

- Tailored support programmes through entrepreneurship training at universities and incubators should integrate sustainability, social value creation, purpose-driven business models and impact measurement.
- Generate green and social innovation funding available to entrepreneurs.
- Apply quotas for women entrepreneurs in support programs, and green and social funding to increase aggregate environmental and social impact.
- Training of men entrepreneurs for sustainability-led entrepreneurship to increase their awareness and environmental and social impact of their businesses.
- Harness these motives by expanding incentives for environmentally and socially responsible businesses with incentives such as tax benefits, grants, certification programmes, or procurement advantages for impact-driven organisations.

4.3. Skills

How skilled are women in e-mobility and in entrepreneurship? How do women's skills compare to men?

What are the challenges for and needs of women in e-mobility?

Technical skills

Figure 8 presents self-assessed technical skill levels across all groups in five areas related to e-mobility and digital competence:

- (1) technical knowledge in e-mobility,
- (2) ability to keep up with new e-mobility technologies,
- (3) IT/computer skills,
- (4) e-vehicle repair skills, and
- (5) e-vehicle maintenance skills.

Across all groups, the confidence levels for very good skills in all five technical areas are lower than 50%. Possession of soft skills in e-mobility technical knowledge are rated higher than hard skills such as e-vehicle repair and maintenance. Indeed, the e-vehicle repair and maintenance skills are the lowest with only 25% of respondents agreeing they have very good skills, but around 35% saying they have few skills in these areas, suggesting a serious skills deficiency in the e-mobility area.

Across all five skill domains, a consistent pattern emerges: employees rate their skills more highly than entrepreneurs, i.e. almost at the rates double, which may reflect greater practical exposure into e-mobility by individuals with stronger education or technical backgrounds. As is in any low-income country setting, educated workforce prioritises higher paid and secure jobs in established companies. Women entrepreneurs, in particular, appear to outperform or match men entrepreneurs in several domains, i.e. in e-vehicle repair (18% of women reporting very good skills vs 15% of men) and IT skills (38% of women reporting very good skills vs 28% of men), challenging typical gender assumptions and suggesting that women starting e-mobility ventures are a highly skilled subgroup. However, women entrepreneurs are outperformed by men in e-vehicle maintenance (22% vs 26%, respectively) and entrepreneurs are highly outperformed by employees (43% employees reporting very good skills compared to 14% of entrepreneurs).

Thus, repair and maintenance skills remain weak across the entire sample with around 65% of respondents stating they have some or few skills, highlighting a systemic shortage of advanced technical capabilities in the e-mobility workforce. The skills gap is particularly pronounced among entrepreneurs, but also among employees indicating insufficient training opportunities in workplaces.

Meanwhile, IT/computer skills are relatively strong, suggesting that digital competence is more widely accessible or emphasised in education and employment. Indeed, Kenya has taken some important steps in digitalisation across the country contributing to these results. Still, women employees are higher skilled (62% reporting very good skills) than men employees (42%) and women entrepreneurs (38%) than men entrepreneurs (28%) owing to the higher education levels among women employees and entrepreneurs employed in the sector.

Gender differences persist but vary by context: women employees report lower confidence across several domains, whereas the gap narrows substantially among entrepreneurs. This suggests structural rather than intrinsic causes—such as access to training, workplace culture, or role expectations.

Overall, e-mobility workforce in Kenya is somewhat digitally capable but underprepared for hands-on technical demands of the e-mobility transition.

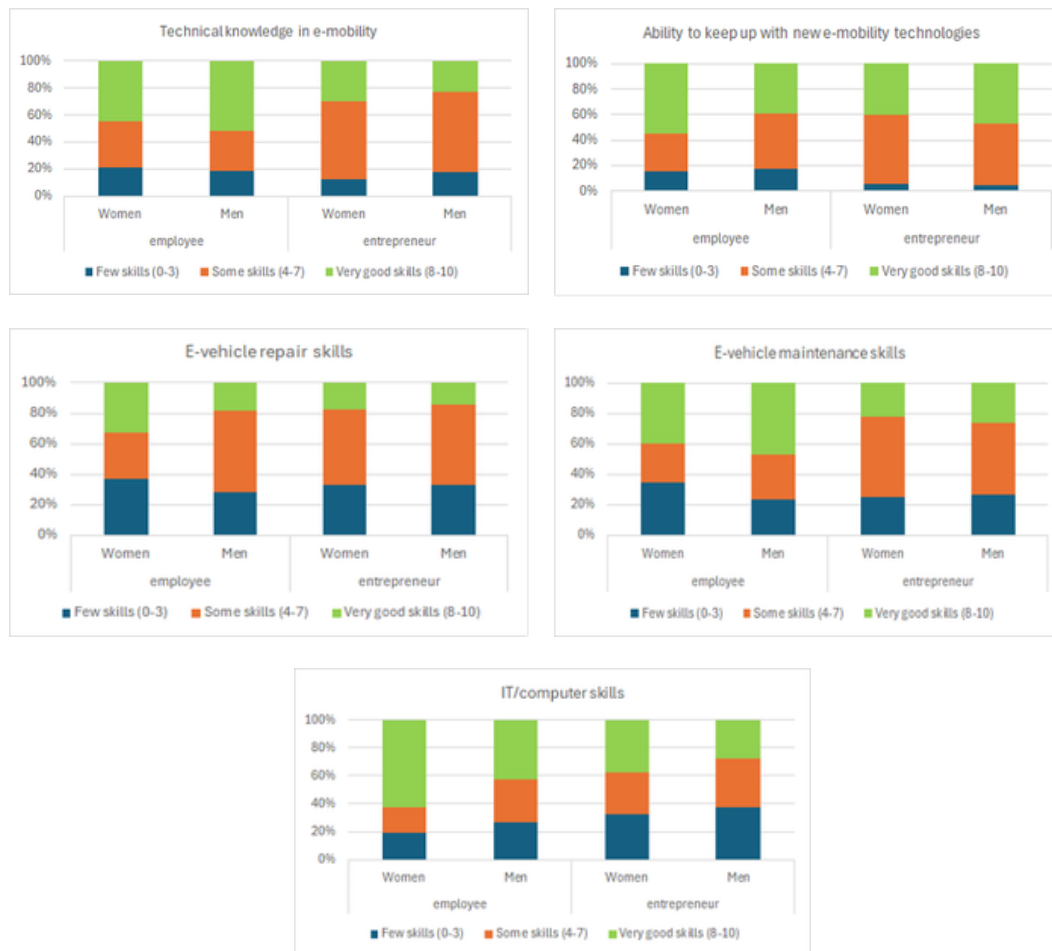


Figure 8. Technical skills in e-mobility by gender and job role.

E-vehicle maintenance skills of women in e-mobility by e-vehicle type

Table 5 demonstrates women employees' and women entrepreneurs' self-assessed e-vehicle maintenance skills across different types of electric vehicles. Women may be engaged in several e-vehicle types; hence the sample size is determined by the number of e-vehicles women reported that they are engaged with, i.e. 164 for women employees and 52 for women entrepreneurs.

For women employees, e-motorcycles and e-bikes are the most common vehicle types they feel equipped to maintain. Among the employees, 67 respondents report having few skills, 41 report some skills, and 56 indicate very good skills. Skill levels vary across vehicle types: for example, 23 women employees report few skills for e-motorcycles, while 19 report very good skills; similarly, 17 report few skills for e-taxis, but 12 feel highly skilled. This suggests that while a considerable number have limited skills, a comparable number possess strong maintenance capabilities, particularly for e-motorcycles and e-bikes.

For women entrepreneurs, a notable share reports some skills (26), compared with 15 reporting few skills and 11 reporting very good skills. Again, skill distribution differs by vehicle type: e-motorcycles (22 total) and e-bikes (12 total) are the most commonly maintained vehicles. Compared with employees, entrepreneurs show fewer individuals with very good skills, and a larger share in the mid-range skill category.

Overall, firstly, women employees tend to report higher maintenance skill levels than women entrepreneurs, particularly in the “very good skills” category. Women entrepreneurs are more likely to rate themselves in the moderate skill range, suggesting that while they possess functional maintenance knowledge, fewer have advanced technical expertise indicating continued barriers to acquiring strong technical knowledge. These might include lack of affordable training opportunities, gendered norms limiting women’s exposure to mechanical work, or insufficient on-the-job learning structures. The presence of low-skill reports among entrepreneurs also raises questions about business vulnerability, as limited technical knowledge may affect operational efficiency, cost control, and reliance on external services.

Secondly, technical skills level decreases as the complexity of the e-vehicle increases, i.e. less confidence in maintenance skills in e-taxi and e-bus, van, jeep. Whereas 65% of employees rate themselves less skilled overall, i.e. at few and some skills; for entrepreneurs this rate is higher, i.e. 78%, suggesting women need support in upskilling in technical aspects of e-mobility technologies. These results suggest women entrepreneurs require more targeted technical support to strengthen their capacity to manage and sustain e-vehicle businesses and take it to the next level with more complex e-vehicles.

In nutshell, women entrepreneurs need more support in the training of advanced e-mobility technical skills. Overall, women in e-mobility need to acquire technical skills to engage with more complex e-vehicle types such as e-motorbikes, e-taxis and e-buses. Technical capacity-building of women in these areas will allow them to progress to job roles such as technicians, engineers and set up their own companies.

	type of e-vehicle	E-vehicle maintenance skills			Total* (count)
		Few skills (0-3)	Some skills (4-7)	Very good skills (8-10)	
Women employees	e-motorcycle	23	14	19	56
	e-bike	15	13	15	43
	e-taxi	17	10	12	39
	e-bus/van/jeep	12	4	10	26
	Total* (count)	67	41	56	164
Women entrepreneurs	e-motorcycle	5	12	5	22
	e-taxi	4	4	3	11
	e-bus/van/jeep	3	2	2	7
	e-bike	3	8	1	12
	Total* (count)	15	26	11	52
*Total count adds up to more than 115 and 40 for employees and entrepreneurs respectively, since respondents are engaged in multiple e-vehicles.					

Table 5. Women employees and entrepreneurs by e-vehicle engagement and vehicle technical maintenance skills

E-vehicle maintenance skills of women in e-mobility by value chain activity type

Table 6 presents women employees' and women entrepreneurs' self-assessed e-vehicle maintenance skills across different activities in the e-mobility value chain. Women may be engaged in different e-mobility value chain activity types; hence the sample size is determined by the number of value chain activities they are involved in, i.e. 156 for women employees and 48 for women entrepreneurs.

Women employees are identified with high levels of e-vehicle maintenance skills, particularly in roles closer to technical or operational functions. Across all activities, 87 skill ratings fall into the very good skills category, compared with 50 in few skills and 19 in some skills, suggesting that women employees feel generally confident and competent in e-vehicle maintenance-related tasks.

The largest concentrations of very good skills appear in *Maintenance/Servicing/Repairs* (20 out of 30), *Assembling* (7 out of 11), *Battery charging/swapping* (9 out of 18), *Deliveries of products* (12 out of 25), *Sales* (12 out of 24), and *Transportation of passengers* (12 out of 27). Skill levels are particularly low in *Manufacturing/Production* (2 out of 5), *Education/Research & Development* and *Administration*, where nearly all respondents fall into the few skills category. Overall, women employees show a strong cluster of high skill levels in customer-facing and operational roles, with more limited capabilities in technical development or administrative functions.

Women entrepreneurs, on the other hand, rated themselves more in the lower categories of vehicle maintenance skills: 15 few skills, 24 some skills, and 9 very good skills. *Deliveries of products* and *Transportation of passengers* record the highest counts in some skills, with 10 and 6 women respectively. Only a small number report very good skills, mainly in *Deliveries of products* (3) and *Management* (3). Across most activities, i.e. *Manufacturing/Production*, *Research and Development*, and *Battery charging/swapping*, numbers remain low, with few women entrepreneurs assessing themselves as highly skilled. This suggests that entrepreneurial women tend to perceive their e-vehicle maintenance abilities as modest, with fewer reporting advanced technical or operational expertise. This indicates that entrepreneurs, although active in the sector, feel less technically confident compared with employees.

Overall, women employees are not only present in a wide range of operational and technical roles but also report high levels of competence, particularly in maintenance, repairs, passenger transport, deliveries, and sales. The high concentration of very good skills in these areas suggests that women working within established organisations have greater access to structured training, hands-on experience, and organisational support systems that help build technical proficiency. This may reflect formal upskilling pathways and clearer task specialisation inside firms.

In contrast, women entrepreneurs report more varied and generally lower technical skill levels. This pattern likely reflects the challenges faced by entrepreneurs who must manage multiple aspects of their business, often with limited resources, fewer training opportunities, and less access to technical mentorship. Entrepreneurs appear to cluster in activities with lower technical entry barriers, such as deliveries, basic transportation, and sales, while activities requiring specialised technical expertise—such as assembling, manufacturing, or R&D, are far less represented among them.

The comparison suggests a structural divide: women employees are more embedded in technical functions, while women entrepreneurs engage in more flexible but less technically demanding roles. This could have implications for the sector's capacity-building needs and for women's career progression. If technical expertise becomes increasingly central to e-mobility value creation, women entrepreneurs with lower technical skill confidence may be at risk of exclusion from high-value segments of the market. Conversely, the strong skills.

	Type of activity in e-mobility value chain	E-vehicle maintenance skills			Total* (count)
		Few skills (0-3)	Some skills (4-6)	Very good skills (7-10)	
Women employees	Maintenance/Service/Repairs	4	6	20	30
	Transportation of passengers	10	5	12	27
	Deliveries of products	6	7	12	25
	Sales	8	4	12	24
	Battery charging/swapping	6	3	9	18
	Assembling	1	3	7	11
	Management	3	1	2	6
	Administration	5	0	0	5
	Education and Research & Development	5	0	0	5
	Manufacturing/Production	2	1	2	5
	Total*	50	19	87	156
Women entrepreneurs	Deliveries of products	4	10	3	17
	Transportation of passengers	2	6	1	9
	Maintenance/Service/Repairs	2	2	2	6
	Sales	2	3	0	5
	Manufacturing/Production	3	1	0	4
	Management	1	0	3	4
	Battery charging/swapping	1	1	0	2
	Research and Development	0	1	0	1
	Total*	15	24	9	48

*Total count adds up to more than 115 and 40 for employees and entrepreneurs respectively, since respondents are engaged in multiple activities.

Table 6. Women employees and entrepreneurs by e-vehicle engagement and vehicle technical maintenance skills

BOX 5. TECHNICAL SKILLS. E-mobility workforce in Kenya is not confident in digital and hands-on technical e-mobility skills for demands of the e-mobility transition. The comparison between women employees and entrepreneurs suggests a structural divide: women employees are more embedded in technical functions, while women entrepreneurs engage in more flexible but less technically demanding roles. Women entrepreneurs need more support in the training of advanced e-mobility technical skills.



Finance skills

Finance skills are self-assessed in Figure 9 for (1) finance and budgeting skills to manage a business, and (2) confidence in the use of digital finance platforms.

The patterns observed across both charts suggest that employment is associated with stronger self-reported financial and digital finance capabilities compared with entrepreneurship. In terms of finance and budgeting skills, 36% of employees state that they have very good skills compared to 19% of entrepreneurs. Similarly, skills in the use of digital finance platforms, is reported slightly higher among the employees (35%) compared entrepreneurs (32%). Overall, 80% of entrepreneurs report medium and low-level skills in finance and this rate is 70% in digital finance skills. This suggests employees with higher concentration of high-skill ratings in finance, have slightly better opportunities or incentives to build these competencies in organisational roles. Entrepreneurs, in contrast, need support in developing skills that require active engagement with budgeting, financial planning, and digital finance tools.

Gender differences appear modest overall with women and men across both job roles reporting very good skills (25-30% range), but the relatively stronger performance of women entrepreneurs compared to men entrepreneurs in digital finance (38% vs 28%, respectively) challenges common assumptions about women being less confident in financial domains.

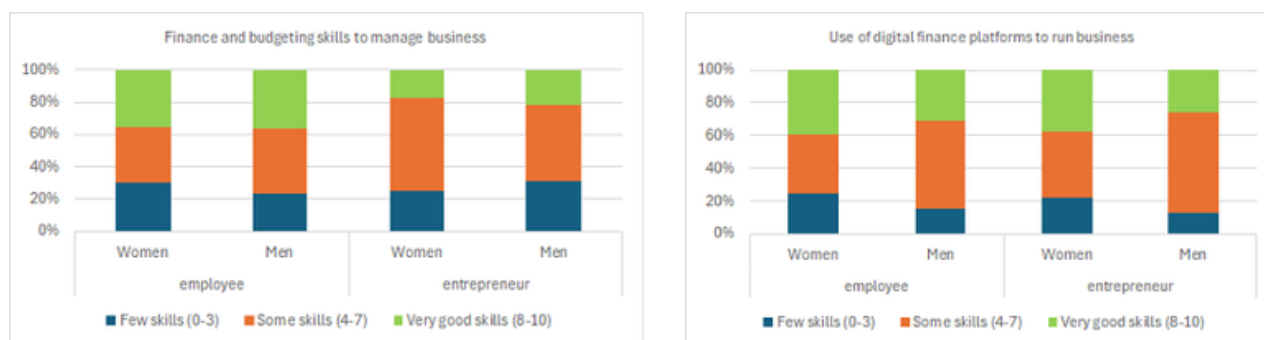


Figure 9. Finance skills in e-mobility by gender and job role.

BOX 6. FINANCE SKILLS. E-mobility employees benefit the opportunities at workplace to gain financial proficiency compared to entrepreneurs, yet women entrepreneurs in particular feel stronger in digital finance skills compared to men, an area that can be further improved for women to leapfrog in finance skills in the advent of fast digitalisation.

UNLOCKING FINANCIAL PROFICIENCY IN E-MOBILITY: Role and Gender Insights.



Marketing Skills

Marketing skills are self-assessed in Figure 10 for (1) marketing skills to manage a business, and (2) confidence in the use of digital marketing platforms.

Across all four groups, around 40% of respondents in each group state that they have very good skills both in marketing skills to manage their business and efficient use of digital marketing platforms. The patterns observed across both charts suggest that employment is associated with slightly stronger self-reported marketing and digital marketing capabilities compared with entrepreneurship indicating that employees benefit the opportunities at workplace to gain marketing skills compared to entrepreneurs. Additionally, women feel slightly stronger in these skills compared to men, but the differences between men and women is very minor.

Gender differences appear modest overall with women and men across both job roles reporting very good skills (35-40% range), but the relatively stronger performance of women entrepreneurs compared to men entrepreneurs in both marketing and digital marketing (on average 40% vs 30%, respectively) challenges common assumptions about women being less confident in marketing domains and indicating that women who pursue entrepreneurship may invest more in skill development or rely more heavily on marketing proficiency to compensate for structural constraints.



Figure 10. Marketing skills in e-mobility by gender and job role.

BOX 7. MARKETING SKILLS. Marketing skills of workforce are relatively high in e-mobility. Gender differences appear modest overall with women and men across both job roles reporting very good skills. This calls for intermediate-to-advanced skill-building interventions rather than basic awareness programmes related to marketing skills capacity formation.

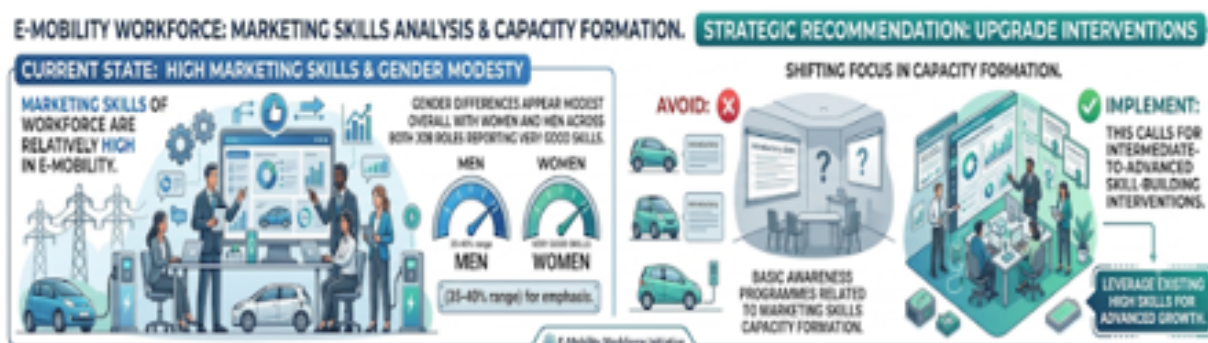


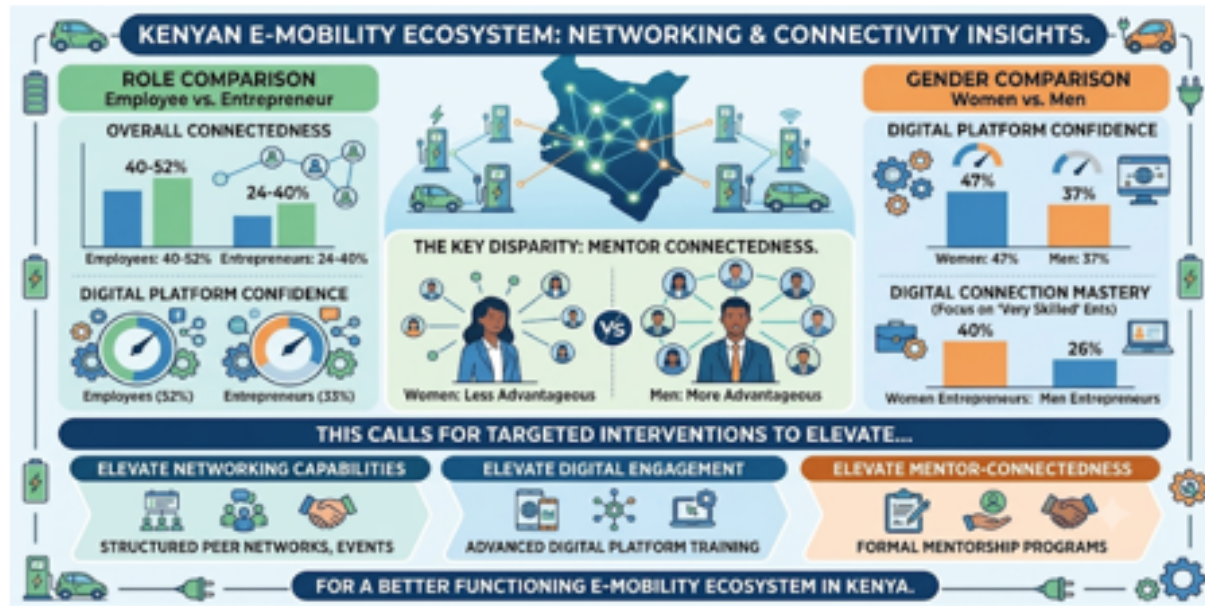
Figure 11 presents self-assessment of all groups of respondents on their networking skills: (1) networking skills to manage business, (2) use of digital platforms for networks, and (3) connectedness to mentors and peer support. Across all groups, employees are consistently better connected than entrepreneurs (40-52% vs 24-40%, respectively) and women are better connected than men (37-47% vs 28-42%, respectively). Although a higher proportion of employees state very good skills in networking, the proportion of entrepreneurs who are the least confident in their networking skills is lower than that of employees (20% vs 10%, respectively). Confidence in use of digital platforms for networking is considerably higher in the employee cohort than in entrepreneurs (52% vs 33%, respectively) and in women than men (47% vs 37%, respectively). Women entrepreneurs (40% rated themselves as very skilled) are ahead of men entrepreneurs (26%) in digital connection skills, aligning with the idea that entrepreneurial roles demand more active networking and digital engagement.

However, the differences are modest, indicating that structural or contextual factors may shape networking skill development more than gender. The near-identical distributions across groups also highlight how networking-related competencies may be widely accessible yet not extensively cultivated to advanced levels. These findings suggest that while there are gender gaps, overall skill enhancement remains a shared need across the workforce.



Figure 11. Networking skills in e-mobility by gender and job role.

BOX 8. NETWORKING SKILLS. Networking skills cluster predominantly in the mid-range of self-rated skills, but this is more so for men entrepreneurs suggesting broad confidence but limited mastery in these areas. This calls for targeted interventions to elevate networking, digital engagement, and mentor-connectedness capabilities across the workforce for a better functioning e-mobility ecosystem.



Skills: Summary

Figure 12 presents a summary of skills by job role and gender. All types of skills (i.e. technical, finance, marketing, networking) are rated not lower than 5.4 but also not higher than 6.5 on a scale of 0-10 across all groups of participants suggesting necessity for design and implementation of upskilling programmes in e-mobility. Women entrepreneurs rate themselves best at marketing but least skilled at finance. For women employees, networking is their best skill due to the nature of their work environment and in finance they are least skilled. Men entrepreneurs consider themselves best positioned in networking but least at finance; whereas men employees marketing skills are highest and finance is the lowest.

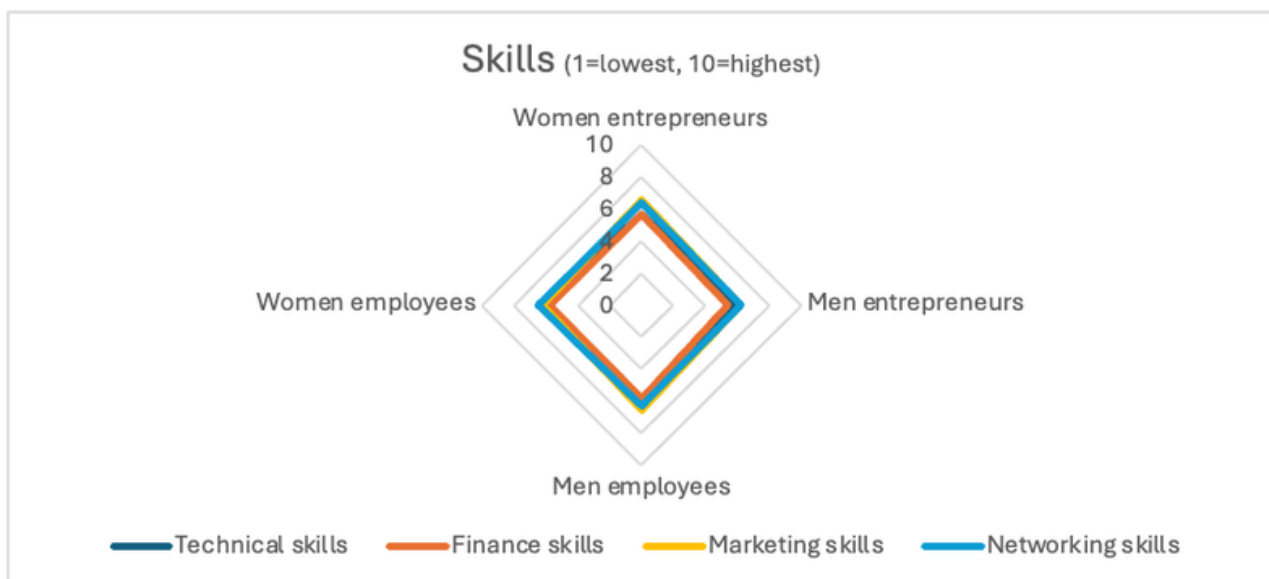


Figure 12. Skills by gender and job role.

Skills: Practice and Policy Recommendations

1. Training programmes in e-vehicle repair and maintenance, and continuous learning in e-mobility technologies are needed widely across Kenya.

- Launch public-funded programmes in vocational education, apprenticeship models, and reskilling programmes in e-mobility.
- Government could create subsidised micro-credential systems and partnerships with public and private sector companies to ensure up-to-date training in e-mobility. Policies enabling co-funded company training or tax credits could ensure that workforce develop advanced practical skills.
- Government should support employers to invest in structured technical training, through workplace training pathways in e-mobility. Experiential learning based on hands-on practice, shadowing technicians, and real-life problem-solving exercises accelerate skill development. Entrepreneurs located in incubators can benefit from such arrangements where factories can provide experiential learning opportunities.
- Entrepreneurs need leveraging digital strengths for technical learning. IT skills need to be incorporated into college and university education in e-mobility.

2. Women's participation in e-mobility sector needs more support for women entrepreneurs' capacity building in advanced e-mobility technical skills.

- Women entrepreneurs demonstrate medium-to-strong skills, indicating high potential. Policy incentives—such as grants, incubators, and mentorship—could broaden access and reduce gender disparities among employees. All programmes should involve quota for women.
- Provide targeted, subsidised maintenance training for women entrepreneurs. Offer flexible, low-cost upskilling in key technical areas (maintenance, batteries, assembly).
- Integrate hands-on technical modules into entrepreneurship support programmes.
- Standardise and expand workplace-based technical training. Ensure manufacturers provide accessible, gender-inclusive training to women operators.
- Establish accredited e-vehicle maintenance certification pathways.
- Offer financial and tool support for women to start repair or service enterprises.
- Support transitions from skilled women employees into entrepreneurship.
- Incentivise women-led participation in high-value segments (manufacturing, R&D).
- Strengthen industry–training provider partnerships for relevant skill development.

3. There is need for targeted capacity-building interventions, particularly for entrepreneurs, to develop financial and digital finance skills.

- For future impact on nascent and potential entrepreneurs, financial literacy and digital finance training can be introduced into college and university programmes.
- For immediate impact, policy initiatives, i.e. incubator grants, require integrating financial literacy and digital finance training into incubation programmes.
- For entrepreneurs, who already demonstrate strong financial capabilities, policy efforts could emphasise scaling support, such as access to advanced digital financial tools, business advisory services, and mentorship programmes that help sustain and grow their ventures. Engagement with financial institutions and business support organisations can play a practical role by offering tailored training modules, simplified digital finance interfaces, and inclusive outreach strategies.

4. There is need for intermediate-to-advanced skill-building interventions rather than basic awareness programmes related to marketing skills capacity formation in e-mobility.

- In specific entrepreneurship readiness programmes, enhancing digital skills in marketing should be prioritised. Incubators and enterprise support organisations should emphasise marketing analytics, platform management, and customer-facing digital skills as core components of early-stage business development.

5. There is need for targeted interventions to elevate networking, digital engagement, and mentor-connectedness capabilities across the workforce.

- Organisations and support agencies such as incubators, chambers of commerce, and employer associations should embed structured mentoring schemes and peer-support networks to enhance connectedness.
- Organisations and support agencies such as incubators should offer accessible modular training programmes that strengthen advanced networking and digital-platform competencies.
- Policy initiatives should require organisations and incubators to offer accessible modular training programmes that strengthen advanced networking and digital-platform competencies.

5. Ecosystem Support and Dynamics (Meso level)

5.1. Finance availability and accessibility

To what extent finance is available for women in e-mobility?

To what extent women can access finance?

How does this compare to men?

Figure 13 presents perceptions of funding availability and accessibility across four groups and across four statements: sufficiency of government financial support, ease of accessing bank loans, availability of venture capital for innovation, and support from funders. Across all groups, the most prominent pattern is the consistently high levels of disagreement, on average more than 40%, signalling that respondents, regardless of gender or employment status, tend to view the funding environment as insufficient.

For government financial support, both women and men rate funding as inadequate, with disagreement levels dominating particularly among women. 58% of women are dissatisfied, whilst this is 42% for men. Women entrepreneurs appear the most negative, with 60% of them disagreeing that sufficient finance is available to them. A similar pattern is observed for availability and accessibility of bank loans: disagreement is highest among women entrepreneurs and employees (53%), followed by men entrepreneurs (41%). Women of both job roles and entrepreneurs of both genders show predominantly negative views. This pattern repeats for perceptions of venture capital availability.

On the issue of whether companies are supported by funders, 45% of all respondents state strong disagreement, with 58% of women entrepreneurs and 38% of men entrepreneurs, with only small proportions reporting agreement.

Kenya is highly digitalised country in finance. Finance instruments and apps such as MPESA and MKPOA are widely used. However, when entrepreneurs were asked about the support of MKPOA for setting up of their business and funding of innovative ideas, more than more than 30% of women entrepreneurs disagreed that MKPOA was supportive. Disagreement rates among men were less than 10%.



Figure 13. Availability and accessibility of finance in e-mobility.

The findings highlight a widespread sense of financial constraint across all respondent groups, but more so for women, suggesting that Kenya's e-mobility ecosystem suffers from systemic gaps in funding accessibility. Both employees and entrepreneurs, irrespective of gender, perceive government support, bank loans, venture capital, and funder backing as largely insufficient. Women report the highest levels of disagreement, indicating that gendered barriers may compound structural financial challenges. Entrepreneurs, and especially women entrepreneurs, exhibit more pessimism, their responses reflect limited confidence in the availability of formal funding channels. These patterns suggest that current financial mechanisms are not effectively reaching early-stage or small-scale actors in the sector. They also point to a potentially fragmented financial landscape in which institutional support is either inconsistent, poorly communicated, or difficult to access.

BOX 9. FINANCE AVAILABILITY AND ACCESSIBILITY. Financial constraints remain a critical bottleneck for businesses to participate, innovate and scale up in the e-mobility sector. Women are disproportionately affected from adverse conditions in finance availability.



5.1 Finance availability and accessibility: Recommendations for Policy and Practice

1. Strengthen targeted financial support mechanisms.

The consistently high disagreement regarding government and bank-based funding indicates a need for more accessible, transparent, and streamlined financial programmes. Policymakers should consider subsidised loans, guarantee schemes, and grant programmes specifically designed for e-mobility start-ups and SMEs.

2. Address gendered disparities in access to finance.

Women report the most negative perceptions. Policymakers and practitioners can respond by offering gender-responsive financing instruments, mentorship schemes, and capacity-building programmes that reduce barriers created by network gaps, or discriminatory lending practices.

3. Expand venture capital (VC) and private-sector involvement.

Low levels of agreement about venture capital availability suggest that investors have not yet fully engaged with the e-mobility sector. Investment promotion agencies and industry associations could incentivise VC participation through tax incentives, co-investment funds, and platforms that link start-ups with investors.

4. Improve visibility and communication of existing funding opportunities.

Part of the low confidence may stem from a lack of awareness or clarity. Government agencies and ecosystem intermediaries (incubators, accelerators, NGOs) should amplify information flows, provide structured guidance on application processes, and simplify administrative requirements.

5. Encourage ecosystem-level support for early-stage ventures.

Interventions should support not only growing firms but also pre-commercial start-ups. Stronger pre-incubator, incubator and accelerator programmes, technical assistance, and public-private partnerships can provide support in finance areas.

6. Build trust and credibility in financial institutions.

The widespread perception that companies lack funder support signals a confidence gap. Improving transparency in funding decisions, establishing clearer eligibility frameworks, and ensuring fair treatment across gender and business size will enhance trust in formal financial systems.

52. Human capital provision

Skilled labour provision and availability

How readily available is skilled labour in e-mobility sector?

What does skilled labour provision look like in the e-mobility ecosystem?

Figure 14 presents perceptions of skilled labour availability and college/university entrepreneurship support in e-mobility across four groups studied. Regarding Skilled labour availability, perceptions are negative among the employees with 40% on average disagreeing compared to entrepreneurs on average 20% disagreeing. Women employees report slightly higher disagreement (43%) than men employees (38%), while men entrepreneurs show the lowest level of disagreement (15%) compared to women entrepreneurs (30%). The somewhat more confident perception of men entrepreneurs in labour availability might be attributable to the lower education levels of this group in the sample, whereas women, a highly educated subgroup, report more challenges suggesting structural issues and inclusivity.

Regarding entrepreneurship support from colleges and universities, perceptions are mostly negative with around 50% of employees and 40% of entrepreneurs on average disagreeing. Among women entrepreneurs this proportion is the highest with 52%. When combined with the high share of neutral responses, this suggests mixed or moderate views about the adequacy of entrepreneurship support in the e-mobility sector. Especially women report disagreement higher than men, indicating more negative experiences or expectations of support from higher-education institutions. This finding calls for more inclusivity starting with human capital training in the sector.

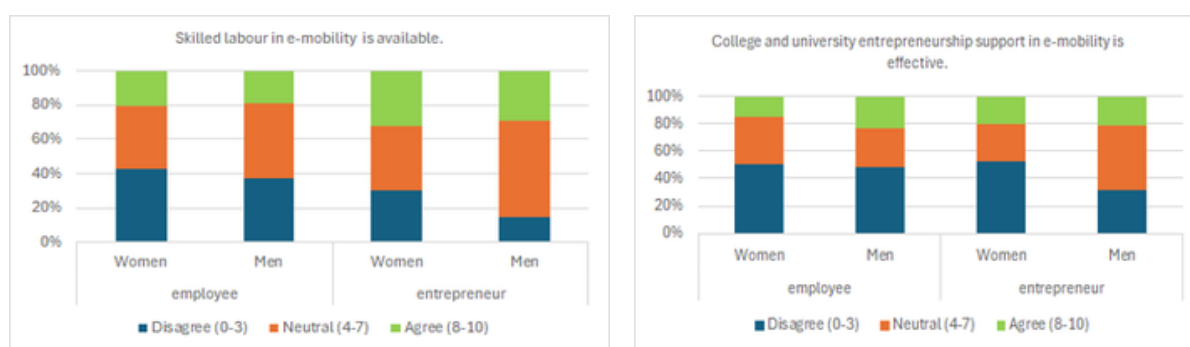


Figure 14. Perceptions on skilled labour availability and provision in e-mobility.

Gender inclusivity in human capital provision and availability

How does skilled labour provision differ across genders in e-mobility?

Figure 15 compares perceptions of gender inclusion and support in the e-mobility sector across employees and entrepreneurs and two gender groups, i.e. women and men. Across all groups, a relatively small proportion agree (on average 25%) that the number of women employees in e-mobility is sufficient. Both women and men—employees and entrepreneurs—show broadly similar patterns: disagreement and neutrality occupy the majority of responses, indicating widespread recognition that women remain underrepresented in the field.

However, respondents, especially women entrepreneurs, generally perceive education related to e-mobility and entrepreneurship as somewhat more inclusive than actual employment representation, though a substantial share of neutral responses indicates that inclusiveness is not consistently experienced across groups.

In terms of support for women entering technical roles such as technicians, mechanics, and engineers, across all groups, agreement levels are low, and neutral or disagree responses prevail. This indicates that targeted support for women in technical e-mobility roles remains limited and there are persistent gaps in targeted support for women in hands-on technical positions within e-mobility. Compared with technical-role support, access to training in finance, marketing, and entrepreneurship is viewed more positively. Agreement is strongest among women entrepreneurs. Nevertheless, neutral responses remain substantial, and there is still a notable share of disagreement—highlighting ongoing needs for more inclusive training opportunities.

Overall, the results reflect a sector that acknowledges gender imbalances but has not yet translated awareness into fully inclusive structures or systematic support. Particularly in technical roles women encounter substantial barriers. While education and training are perceived as somewhat more inclusive, many individuals experience ambiguity, inconsistency, or limited visibility of gender-supportive initiatives. Taken together, the findings suggest that progress in inclusivity has been uneven: although some mechanisms supporting women’s participation exist—especially in non-technical domains—structural, cultural, and institutional challenges seem to constrain women’s full engagement in the e-mobility sector in technical roles for wider inclusivity.



Figure 15. Perceptions on gender inclusivity by e-mobility and entrepreneurship education

BOX 10. HUMAN CAPITAL PROVISION. Skilled labour provision and availability is a serious concern for businesses in the e-mobility sector. There is need for colleges and universities to raise skills in e-mobility and in an inclusive way. Additionally, number of women working in e-mobility is not sufficient. Gender inclusivity for education in e-mobility and entrepreneurship is not sufficient.



Human capital provision, availability and inclusivity: Recommendations for Policy and Practice

1. **Prioritise strengthening the talent pipeline in the e-mobility sector by investing in targeted skills programmes that benefit underrepresented groups, particularly women.**
 - Introduce e-mobility technical programmes into state colleges and universities.
 - Implement workforce-oriented policies that improve access to training, apprenticeships, and upskilling pathways. Enhanced collaboration between government, universities, and industry could help align curricula with evolving technological needs, reducing mismatches between the skills demanded by firms and those supplied by graduates.
 - Gender-sensitive policy design is essential to ensure that support interventions address the specific barriers faced by women in both employment and entrepreneurship.
2. **Private organisations and private universities should take initiative and adopt more proactive strategies to strengthen support for individuals entering or operating in the e-mobility sector.**
 - Employers can improve perceptions of skilled labour availability by investing in internal training, mentorship schemes, and clearer career development pathways.
 - Universities can enhance their entrepreneurship support through more accessible in-resident incubators, targeted innovation programmes, and stronger outreach to women participants.
3. **Increase the number of women in e-mobility.**
 - Policies should focus on targeted recruitment with quotas for women, visibility of role models, and organisational policies that address gendered barriers to entry and progression.
 - The lack of support for women in technical roles underscores the need for specialised training programmes, gender-responsive vocational pathways, and partnerships with technical institutes to strengthen women's skills pipelines. Colleges and universities can apply quotas for women applicants in STEM roles.
 - Policymakers should monitor frameworks by measurable indicators to evaluate gender inclusiveness

5.3. Networks and ecosystem connectedness

Connectedness

How well-connected are women in e-mobility ecosystem?

How does this differ across genders?

As shown in Figure 16, across all groups, the majority agree that their company or business is part of a supportive e-mobility network, with the noticeable exception of women entrepreneurs (40%) suggesting that they may face more structural or relational barriers in accessing beneficial networks within the e-mobility sector. This contrasts sharply with men entrepreneurs, who express the strongest disagreement (8%), and with employees of both genders, whose disagreement levels remain comparatively low (21%).

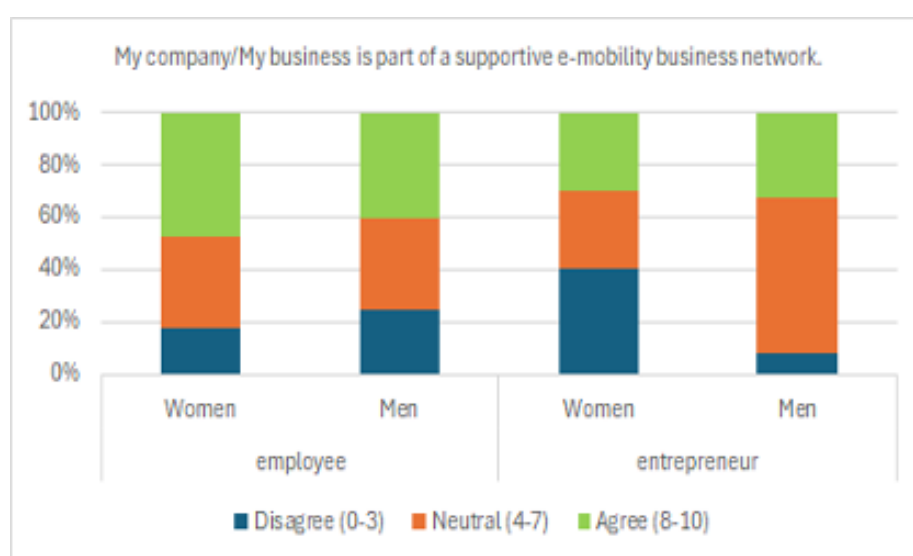


Figure 16. Connectedness in e-mobility networks.

Effectiveness of networks

What do women gain from networks in e-mobility ecosystem?

How do the gains from networks differ across genders?

Figure 17 informs on what women gain from being in professional networks. Gains from networks are assessed by learning new technological advancements, finding skilled employees, access to different markets and funding through networks. The pattern is similar across all gender and role groups (40-50% reporting strong agreement) with men entrepreneurs reporting the lowest rate of disagreement (3-9%) suggesting they make the most of their connections and women entrepreneurs slightly less than men. The divergence in perceived basic network inclusion indicates that women entrepreneurs may be starting from a disadvantaged position, which may shape their ability to benefit fully from other network functions. Access to funding is the area where both women and men entrepreneurs find challenging even through networks, with women in disagreement double the rate of men entrepreneurs (43% to 22%, respectively).

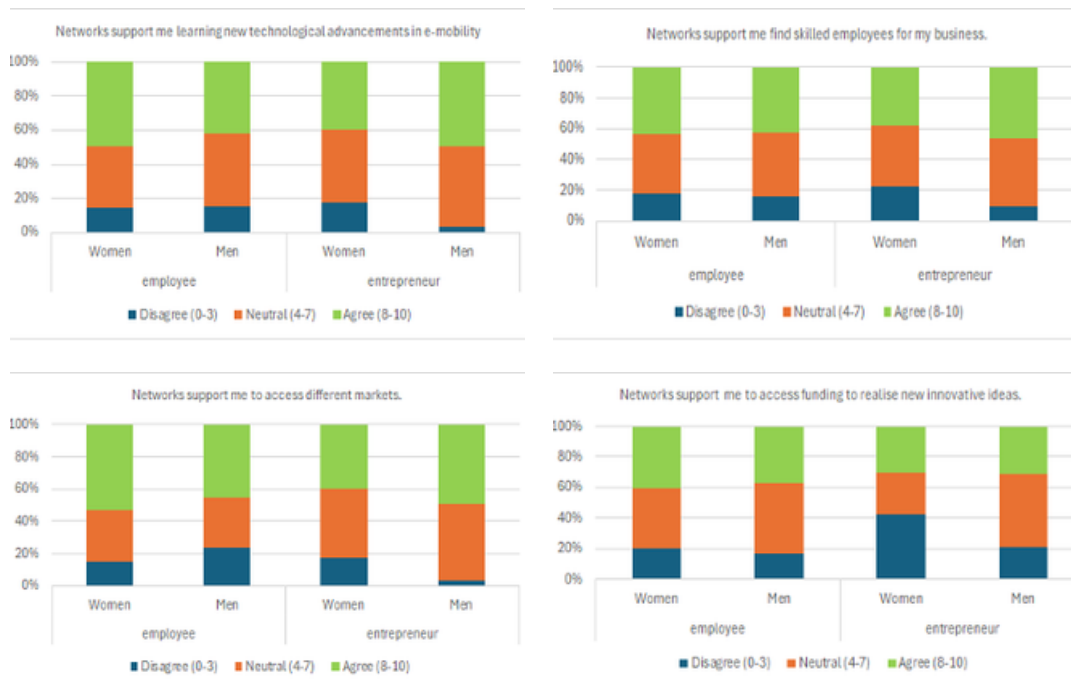
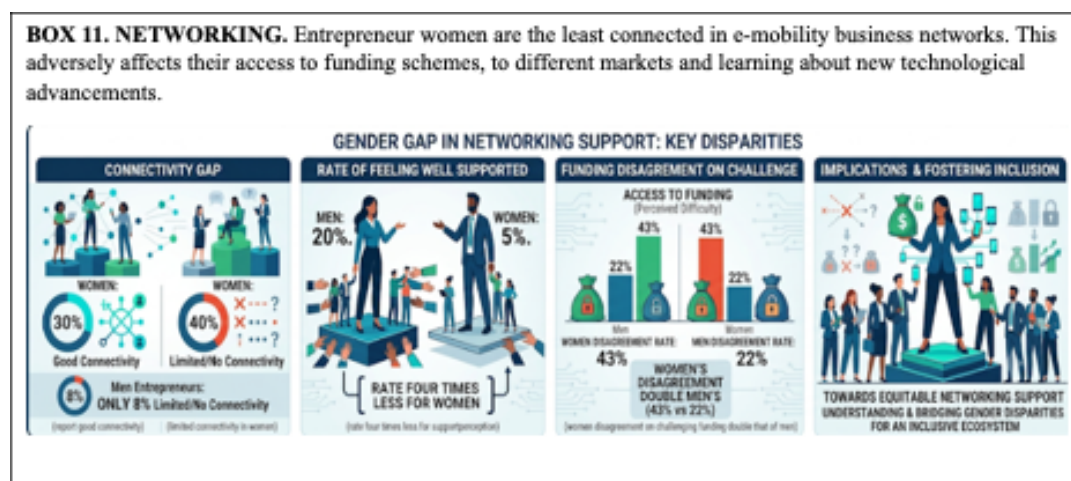


Figure 17. Gains from networks



Networks: Recommendations for Policy and Practice

- Government should prioritise interventions that strengthen equitable access to e-mobility networks, especially for women entrepreneurs who appear disproportionately excluded or unsupported.**
 - Government should implement funded programmes that help women-led firms integrate into existing industrial networks, dedicated matchmaking initiatives, or the creation of gender-inclusive innovation and accelerator spaces.
 - Government should ensure policies that mandate or incentivise inclusive governance structures within networks, require transparent membership processes, and promote gender-balanced leadership.
 - Strengthening cross-sector collaboration among firms, universities, municipalities, and industry associations would further ensure that underrepresented groups can tap into the knowledge flows essential for competitiveness in the e-mobility sector.

2. Practitioners and network organisers should take proactive steps to recognise that women entrepreneurs face distinct barriers to network involvement and address them.

- Practitioners should design outreach strategies that specifically engage women-led businesses, creating low-barrier entry points to network activities, and ensuring that communication channels, events, and knowledge-sharing platforms are accessible and welcoming.
- Incubators, firms and industry bodies can embed inclusive practices by establishing mentorship schemes, peer-support communities, and leadership opportunities tailored to women entrepreneurs.

5.4. Business-incubation support for e-mobility entrepreneurship

Because resources are incessantly restricted in the emerging market context, policy tools are important in supporting start-ups to enhance their capabilities in technological, market, and organizational domains (Theodoraki et al., 2020; Voisey et al., 2006; 2013). One such policy tool is start-up or business incubators. Business incubation centres are unique institutional arrangements that offer shared office space and business assistance in a supportive environment conducive to growth while minimizing the risk of failure in start-ups (Braun & Suoranta, 2025). Recently, business incubators have been extensively used as policy tools to encourage start-up formation in emerging markets (Scaramuzzi, 2002; Gao et al., 2021; Leitao et al., 2022).

The first business incubator was established at the Batavia Industrial Centre in New York in 1959 (Sohail et al., 2023). The concept then became very popular as attached to universities in supporting technology-based startups (Mian, 1997). In the UK, it has been a state-led policy implemented by then lead organization for business incubation, United Kingdom Business Incubation (UKBI), that gave the 'national definition' of business incubation as 'a unique and highly flexible combination of business development processes, infrastructure and people, designed to nurture new and small businesses by helping them to survive and grow through the difficult and vulnerable early stages of development' (Voisey et al. 2005). Back then, USA's lead incubation organisation the National Business Incubation Association (NBIA) reported that there were about 4,000 business incubators worldwide, including 1,000 in North America (NBIA, 2005). Today, both advanced and emerging countries provide support to start-ups and early-stage businesses through sector-specific incubators. India implements a remarkable project in Kerala called the Kerala Start-up Mission (<https://startupmission.kerala.gov.in>) with 63 sector-specific incubators hosting more than 8000 start-ups.

For a new enterprise to survive and thrive, access to incubation would seem to offer a distinct advantage and is particularly necessary for establishment and legitimization niche and new sectors such as e-mobility entrepreneurship. Today, business incubation is not merely about providing office space but involves becoming part of a network of agents or actors in the incubation centre and in the surrounding ecosystem—including incubation managers, government bodies, professional organizations, and universities—working together to nurture early-stage ventures and ready them for scaling up through ensuring that the start-ups gain certain capabilities (Hackett and Dilts, 2004; Gao et al., 2021).

[2] Conceptual part of this section is heavily based on Yoruk, E. Paramba, J. N., Jones, P. and Salamzadeh, A. (2026).

Business incubation is perceived as a powerful policy tool to overcome the liabilities of newness and smallness by implementing unique strategies that help firms become competitive, profitable, and sustainable (Amezcu et al., 2011). Importantly, business incubation centres also aim at attaining objectives such as fostering a climate of entrepreneurship (Thomas & Ki, 2020), fostering technology development (Theodoraki et al., 2020), increasing university–incubation–firm–government interaction (Hassan, 2020), and development of human and social capital (Tötterman & Sten, 2005). University and business incubation centres provide various forms of support to newly established ventures, especially in the form of knowledge transfer, incubation space, R&D services, and connecting with various financial investors (Theodorakopoulos et al., 2014).

All in all, business incubation is a complex policy tool that has external and internal determinants, as well as the quality of tenants at the entrance to the incubator. The external determinants are closely linked to resource endowments of the geographical context. Business incubation, in that sense, strengthens incubated start-up's resources and new venture performance. Newly established ventures face resource constraints, difficulty in attracting investors, and scaling their ventures (Albort-Morant & Oghazi, 2016), and this effect is even stronger in the emerging markets. In such situations, in emerging markets with incubator policies, start-up firms always strive to attain their competitive position through the advice received from the experts in the business incubation centres. In addition, start-up firms incubated in business incubation centres have straightforward access to networking with other start-up communities through which they can reduce resource constraints and access more resources to develop dynamic capabilities (Ebbers, 2014).

Business-incubation is a very new phenomenon in Kenya. Currently the concept is premature with limited examples and confined mostly to Nairobi. A rather new initiative is Innovation Hubs which are frequently mentioned by industry experts and policymakers and mostly an outcome of weak but newly emerging entrepreneurial ecosystems (Züfle and Von Carlowitz, 2026). Whilst both tools highly benefit business and especially new start-ups, an Innovation Hub can be considered as the preceding stage of a Business Incubator. Whereas the former is mostly focused on a new business idea development phase providing favourable environment for collaborations and brainstorming of ideas between knowledge holders; a business incubator is focused on start-ups and to put them on track to growth with providing them with necessary infrastructure such as office space, fast internet, training in entrepreneurship, marketing, finance, links to an experienced mentor and support for networking.

	My business/company is/was located at/supported by an incubator.	The incubator my company is/was located in:	My company started at the incubator in:	My company is still located in the incubator.	I had many incubator options to choose from.	My incubator supported me to develop my novel idea into my business.	My incubator supported me to access finance to start my business.	My incubator supported me with financial management training.	My incubator supported me with entrepreneurship education and training (i.e. finance management and access, marketing, networking, etc.)	My incubator supported me with office space, office hardware and fast internet access.	My incubator supported me to get access to a mentor.	My incubator supported me to access business networks.	My incubator supported me to access business networks.	I feel I belong to my incubator, and I am fully supported.	Because my business is located in an incubator, I believe my business is doing much better than it would have.
Women entrepreneurs	Yes	Laikipia	2024	Yes	5	6	0	0	0	0	2	1	1	0	0
	Yes	Nairobi	2024	Yes	3	5	1	1	3	5	7	4	5	5	6
	Yes	Nairobi	2018	Yes	5	4	7	4	6	4	5	6	5	5	5
	Yes	Nairobi	2022	No	8	7	8	6	7	8	6	9	6	7	7
	Average				5.25	5.5	4	2.75	4	4.25	5	5	4.25	4.25	4.5
Men entrepreneurs	Yes	Nairobi	2025	Yes	3	10	10	10	10	1	8	8	9	10	10
	Yes	Kiambu	2021	No	10	10	10	10	10	10	10	10	10	10	10
	Yes	Nairobi	2023	Yes	5	1	6	7	8	7	6	7	7	7	7
	Yes	Nairobi	2021	Yes	7	6	9	9	8	8	7	8	4	3	4
	Yes	Nairobi	2023	No	4	9	8	10	10	10	10	4	10	10	10
Average					5.8	7.2	8.6	9.2	9.2	7.2	8.2	7.4	8	8	8.2

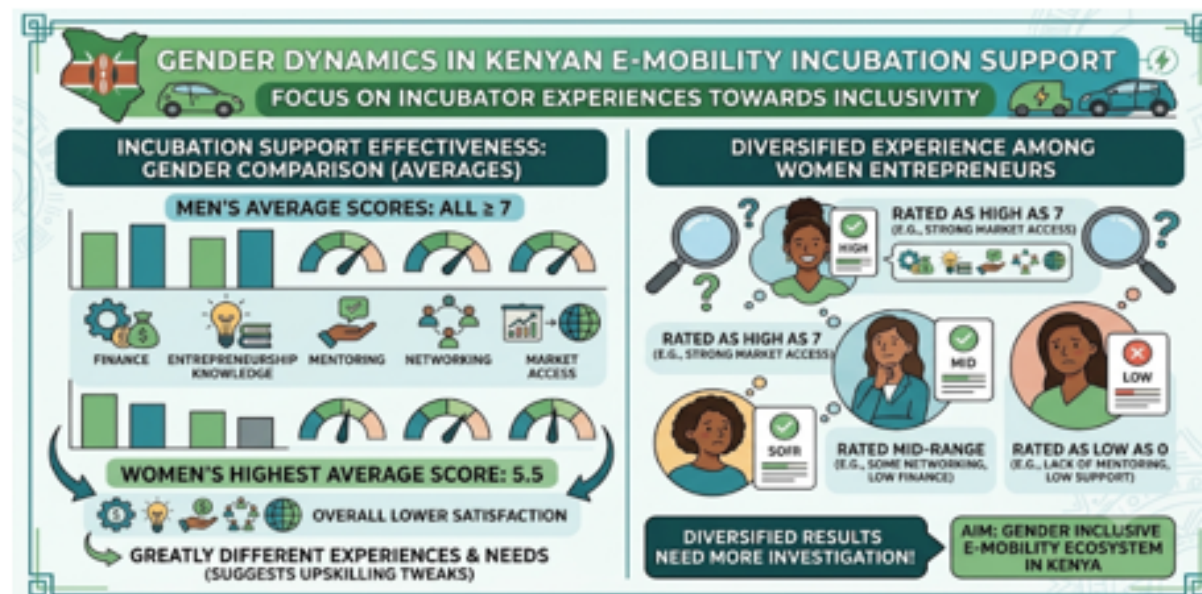
Statements posed to the entrepreneurs range from 0= strongly disagree to 10= strongly agree.

Table 7. Start-ups supported by incubators and perceptions on incubation process in Kenya.

Table 7 informs on the entrepreneurs in our sample whose companies is or had been incubated. From among 101 entrepreneurs only 9 have been associated with an incubator. 4 out of 40 women entrepreneurs and 5 out of 61 men entrepreneurs, a mere 10%, are in an incubator. All except one start-up is in an incubator in Nairobi, the capital of Kenya. These suggest that incubation process among e-mobility start-ups is very limited and confined to most developed urban regions. One major reason for this is the non-existence of incubators. Incubation must be one widely used policy tool in encouraging women and youth in entrepreneurship activity in e-mobility. However, this has not been mentioned in E-Mobility Policy Document (MoRT, 2026).

Entrepreneurs were asked for their assessment of support types and their effectiveness. Responses to finance related, entrepreneurship knowledge related, mentoring, networking, market access support from the incubator entrepreneurs' responses widely vary. Firstly, on average, women are less satisfied whose highest average score is 5.5 when compared to their male counterparts whose scores for incubation support types are not lower than 7. These overall results strikingly show that women entrepreneurs' incubation experience and hence their needs are greatly different from those of men suggesting that slight tweaks may be necessary in upskilling of women entrepreneurs. Secondly, satisfaction rates of women vary between themselves. Whereas some women entrepreneurs rate incubator support as high as 7, others may rate as low as 0. These may be for different incubators; however, such diversified results need more investigation as to why if a gender inclusive e-mobility ecosystem is aimed in Kenya.

BOX 12. BUSINESS INCUBATION. Business incubation concept is almost non-existent in Kenya. Entrepreneurship training support is in its infancy for other strategic sectors such as agriculture and clean energy but lacks for e-mobility. Currently, the dominant entrepreneurship support tool is the 'Innovation Hub' which provides support for idea generation. A comprehensive approach to entrepreneurship is necessary by way of business incubation targeting pre-startups, early startups and scale ups for sustained success in e-mobility. This also necessitates tailored support for women entrepreneurs.



5.5. Summary

Figure 18 provides a summary of participants' perceptions on the meso level aspects of entrepreneurial ecosystem, (i.e. support in finance provision, human capital and networking). On a scale from 0 to 10, these ecosystem elements are rated at most 6 suggesting at the meso level support needs to be increased. Finance related support is the most lacking across all groups of participants, followed by human capital and then networking.

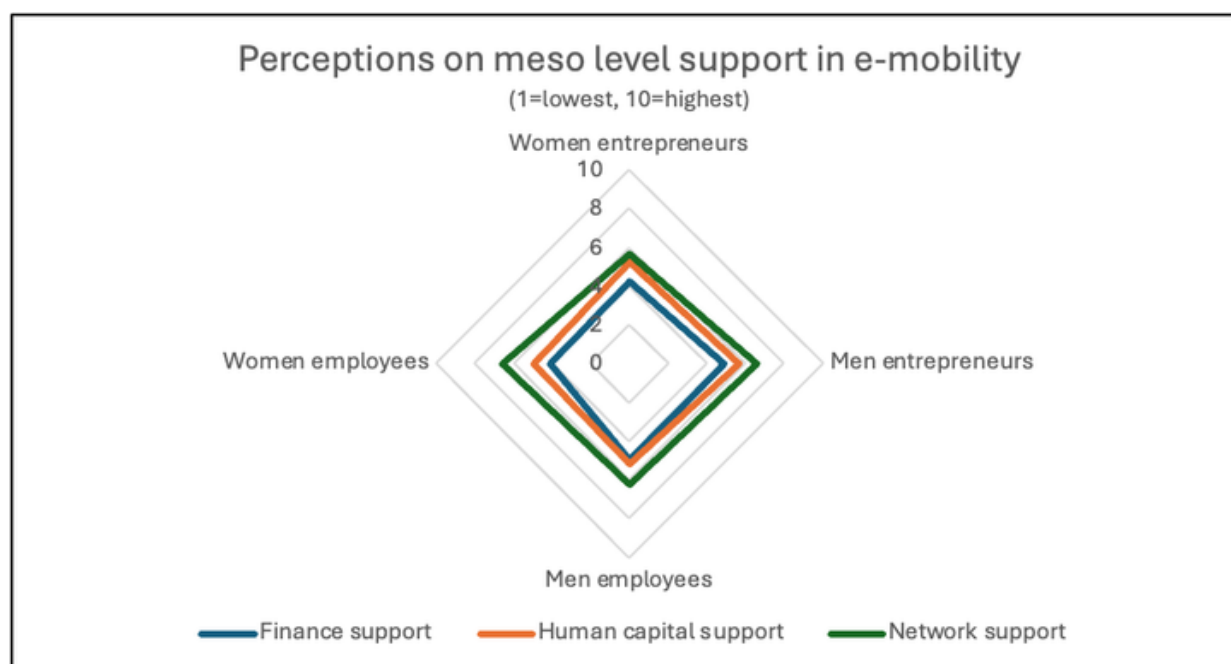


Figure 18. Meso level support by gender and job role

6. Framework Support and Dynamics (Macro level)

6.1. Institutions

Government support and regulations in e-mobility

What are women's perceptions about the institutional environment in e-mobility in Kenya?

Do the perceptions differ across genders?

Figure 19 presents perceptions of women and men employees and entrepreneurs on government policy and support to businesses in e-mobility.

When asked whether the government implements effective policies to support businesses in e-mobility, in general, around 30% of respondents strongly disagree whilst only 20% strongly agree that the policies are effective. Entrepreneurs (especially women 35%) show the highest disagreement. There is also a widespread perception that government responsiveness in updating ineffective e-mobility laws is slow. Women employees (38%) and women entrepreneurs (40%) show the highest disagreement, indicating greater dissatisfaction with the speed of regulatory change. The agreement level on average is only 22% across all groups.

Kenyan Government is proactive in renewable energy policies. On the issue whether this benefits their companies or not, the views differ widely among the women and men entrepreneurs. Whereas women entrepreneurs strongly disagree (43%), men feel slightly more positively about renewable-energy-related policies. Overall, participants do not strongly perceive that renewable energy policies directly benefit their companies, suggesting that any policy reform on the energy front has not yet been fully reflected on the related business activities. Similarly, respondents overwhelmingly feel that accessing government support is not easy. Especially, entrepreneurs find that access to government support is very difficult with 55% of women entrepreneurs and 44% of men stating so.

The findings reveal a pattern of ambivalence and dissatisfaction regarding the policy environment for e-mobility businesses. Many respondents perceive government policies as inconsistent, insufficiently visible, or difficult to interpret. Substantial disagreement emerges in the perceived ease of accessing public support. These negative perceptions indicate friction points in the regulatory landscape and potential administrative barriers that may discourage stakeholder engagement and hinder progression.

Gendered patterns are also evident. Women—especially women entrepreneurs—tend to express higher disagreement, signalling that structural and informational barriers may affect their access to and benefit from policy mechanisms more acutely than men. This aligns with existing evidence highlighting that women-led ventures often face more challenges navigating institutional structures and securing resources. Meanwhile, men show relatively higher neutrality, indicating a more distanced or less critical stance but not necessarily greater satisfaction. Overall, the charts point to a policy environment that is perceived as slow-moving, opaque, and uneven in the support it provides to different groups within the e-mobility ecosystem.

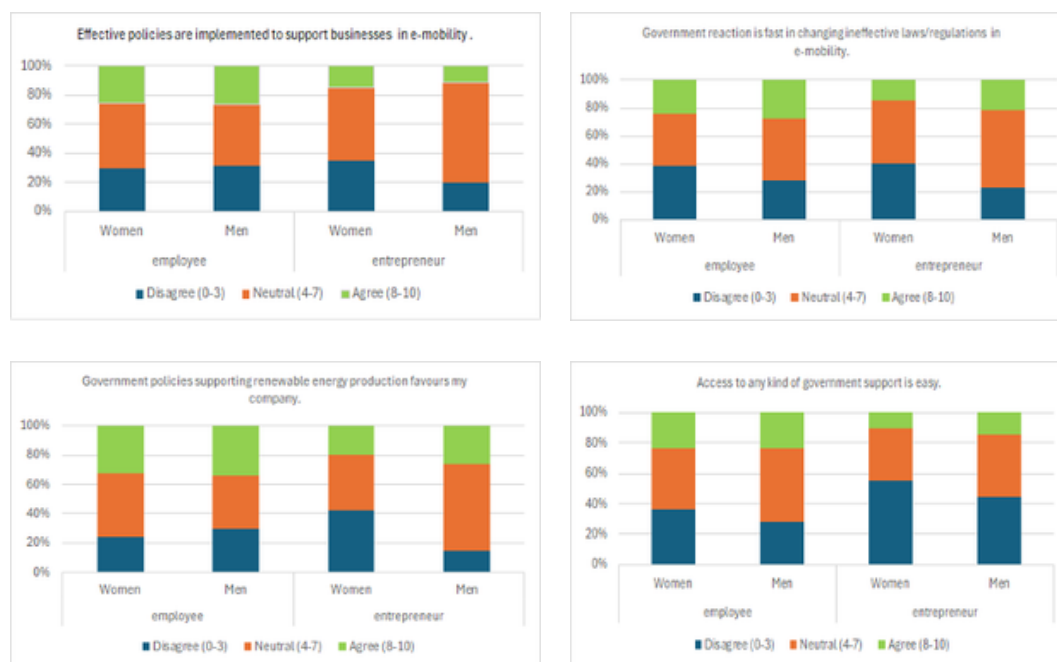


Figure 19. Government policy and support to businesses in e-mobility.

Ease of doing business in e-mobility

What do women think about ease of doing business in e-mobility in Kenya?

Do these views differ across genders?

Figure 20 present employees' and entrepreneurs' perceptions, disaggregated by gender, regarding ease of doing business in e-mobility sector.

Regulations, permits and licenses that enable setting up a company within a week is considered one important aspect of competitive and efficient markets. When respondents are asked about it, across all groups, the dominant response category is disagreement with 48%, indicating that most respondents perceive the process of establishing an e-mobility company as not easy or swift. Women entrepreneurs show the highest level of perceived difficulty (63%), with a larger share of disagreement compared to men entrepreneurs (44%). Among employees, women also report more difficulty (46%) than men (38%). Agreement levels are generally low in all groups, reflecting widespread challenges with administrative speed and ease of business registration in the e-mobility sector.

Tax burden and bureaucracy that the new firms face, in all four groups, a substantial share of respondents disagree (48% on average) that new firms face manageable tax and bureaucratic requirements. Women employees (46%) and women entrepreneurs (65%) report the highest levels of disagreement, followed by men entrepreneurs (46%).

In terms of favourable labour/employment regulations, a similar pattern repeats for particularly women entrepreneurs, of whom 63% report disagreement, whereas overall disagreement across all groups is 37%.

The findings reveal clear and persistent concerns among both employees and entrepreneurs regarding the regulatory environment in ease of doing business for e-mobility ventures. High rates of disagreement predominate, indicating that respondents generally perceive the institutional context for doing business as challenging rather than enabling. Women, particularly women entrepreneurs, consistently express more negative perceptions than their male counterparts. This pattern suggests that gendered experiences shape how individuals navigate administrative procedures and regulatory demands, echoing prior research showing that women entrepreneurs often face greater informational, procedural, and network-related barriers when engaging with institutional actors (Brush et al., 2019).

Entrepreneurs, regardless of gender, tend to be more critical of the regulatory environment than employees. This distinction is intuitive, as entrepreneurs directly engage with business registration processes, compliance requirements, and labour policies, whereas employees experience these structures more indirectly. Notably, women entrepreneurs display the highest levels of disagreement across all three indicators, suggesting that the institutional landscape may amplify existing gender inequalities by placing disproportionate administrative burdens on female-led ventures. These results underscore the need for more gender-responsive regulatory frameworks, especially in emerging sectors such as e-mobility where supportive environments are crucial for fostering innovation and sustainable growth with inclusivity.



Figure 20. Ease of doing business in e-mobility.

Inclusive regulations in e-mobility

Do women think institutional regulations are inclusive enough in e-mobility in Kenya?

How do these views differ across genders?

Inclusivity of legislations in e-mobility was assessed through Kenyan Government's approach to protection of women in the sector, whether existing labour regulations allow for work-life balance, family and tax policies from a gendered perspective, childcare support, workplace safety and absence of discrimination and harassment.

Figure 21 shows respondents' perceptions on the inclusivity of institutional regulations. 38% of respondents across all groups disagree that women are sufficiently protected in the e-mobility sector through government policies and legislations. Women entrepreneurs feel the less protected by government policies and regulations, i.e. 48%. This pattern repeats in existing in whether labour regulations provide work-life balance for women, where 33% of women entrepreneurs disagree compared to 24% average stated by all groups.

Similarly, in family and tax policies favouring women perceptions are again mixed, but disagreement is more pronounced among women, especially women entrepreneurs with 60% and women employees 44% disagreement rates. This pattern suggests that women perceive current family and tax policies as insufficiently supportive for their professional or entrepreneurial roles. Moreover, above 40% of men also disagree with family and tax policies favouring women. In terms of childcare support, whilst 39% of women on average disagree that there is adequate support available for them in terms of childcare, this rate is 21% for men, suggesting great gender disparity in an area which directly affect women as primary child carers.

Similarly, Figure 22 informs on the perceptions of safety at workplace and perceptions of harassment and discrimination, and they showed somewhat similar but a more positive pattern to the above about inclusivity perceptions. Overall, these are two of the areas with relatively higher agreement for all groups, over 30% agree that work environments are safe with only 25% disagreeing. Agreement with the absence of discrimination and harassment is higher with 39% agreement and 22% disagreement on average across all groups. However, 33% of women entrepreneurs think that their work environment is not safe, compared to 15% of men entrepreneurs. Whereas 28% of women entrepreneurs report presence of discrimination and harassment, only 13% of men entrepreneurs do so. These suggest a gendered difference: women appear less confident about safety conditions within the e-mobility workplace, and they are also less likely to perceive the sector as free from discrimination and harassment.

The findings reveal a consistent pattern of gendered differences in perceptions of the gendered policy environment within the e-mobility sector. Women experience the regulatory and institutional landscape as less supportive, less protective, and less inclusive.

Entrepreneur women face compounded structural barriers: they lack institutional protections afforded to employees and operate within less regulated or more precarious business environments.

This divergence suggests that men benefit from more positive workplace experiences or expectations, while women confront gendered constraints that shape their overall perceptions of the sector. Women's stronger disagreement highlights persistent challenges that undermine their sense of inclusion, safety, and equal opportunity. Collectively, these findings illustrate not only gender-based disparities but also differences between employees and entrepreneurs, showing that entrepreneurial women experience the least supportive conditions. This pattern underscores the need for more targeted interventions to strengthen gender equity within the rapidly expanding e-mobility sector.



Figure 21. Perceptions on the inclusivity of regulations in e-mobility.

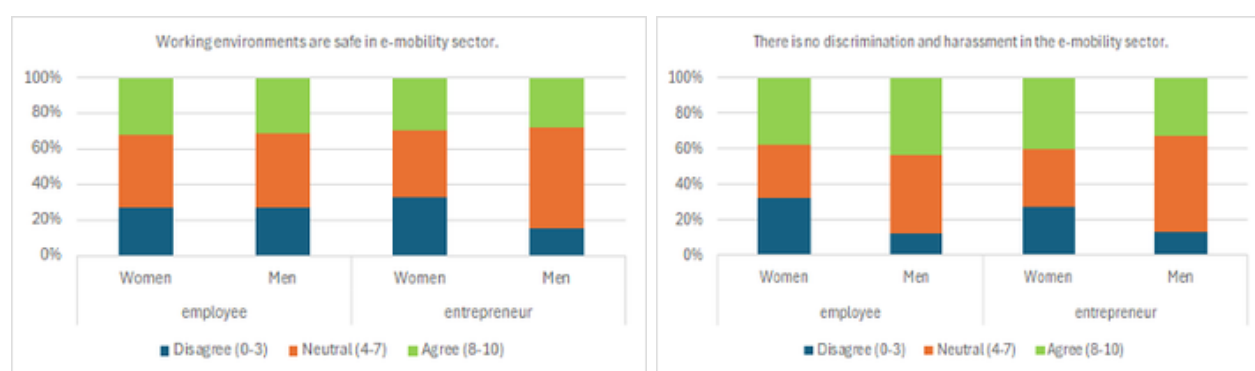
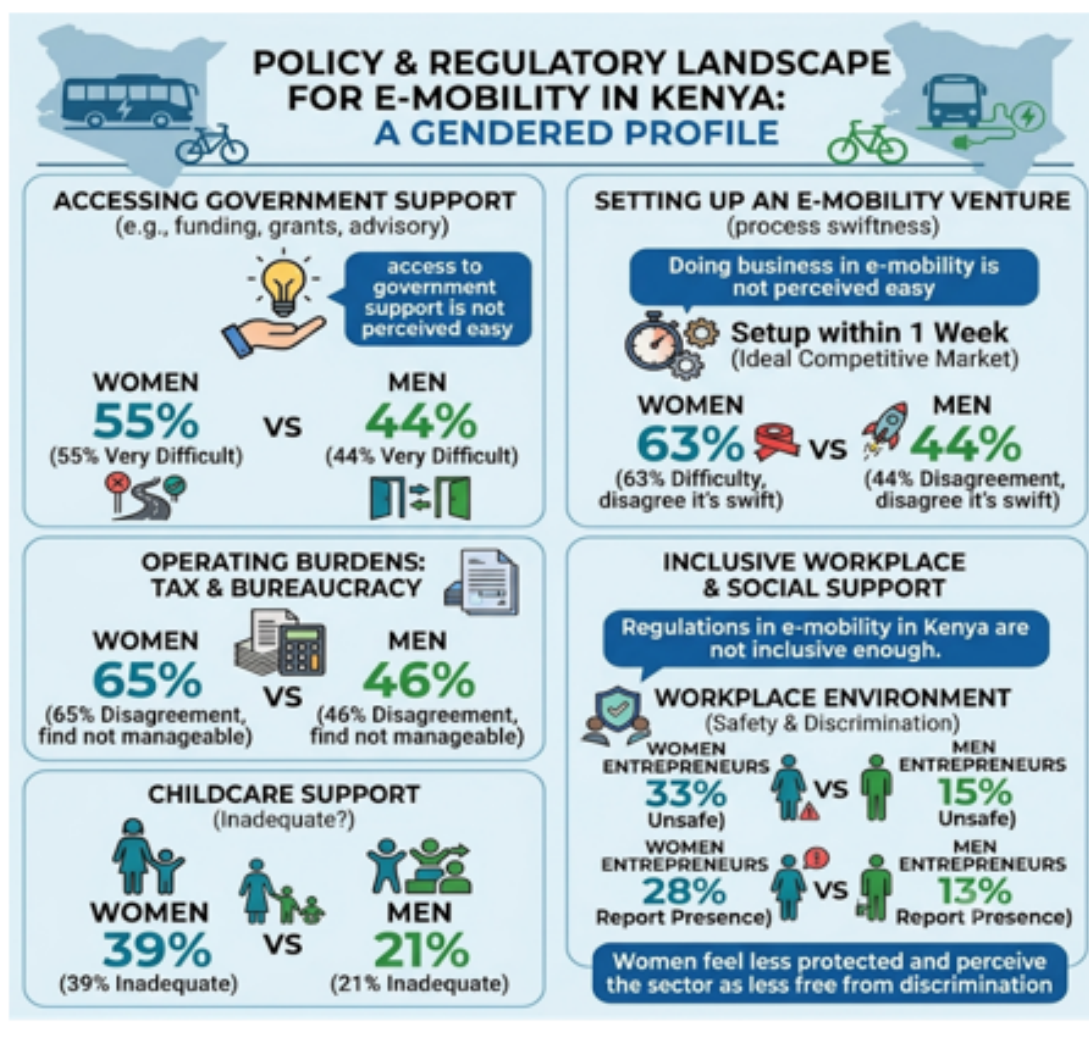


Figure 22. Work environment safety, discrimination and harassment in e-mobility.

BOX 13. PERCEPTIONS ON THE INSTITUTIONAL FRAMEWORK. Government support and policy framework in e-mobility is not favourable for e-mobility businesses. Women entrepreneurs are disproportionately affected from unfavourable regulations. Doing business in e-mobility is not perceived easy and women are disproportionately affected. Regulations in e-mobility in Kenya are not inclusive enough. Women need concrete support in family-work-life balance, childcare, workplace safety and discrimination, labour and tax related legislations.



Institutions: Recommendations for Policy and Practice

1. Streamline administrative procedures for new business formation and ease of doing business.

- Government should simplify registration processes, improve the transparency of requirements, and expand digital platforms that Kenya is strong at. Reducing the time and complexity of administrative tasks would lower entry barriers, particularly for new and resource-constrained founders.
- For better transparency of e-mobility support schemes and easy navigation of legislations, simplified processes, centralised information portals, and clearer communication channels are necessary.
- To enhance the responsiveness and adaptability of regulations, agile policy-making structures are necessary by introducing regular regulatory reviews, stakeholder consultations, and fast-track mechanisms for policy updates can help address emerging technological and market needs swiftly.

2. Increase direct engagement with industry and workforce stakeholders.

- Governments and agencies could establish more proactive engagement platforms, such as advisory boards, public-private partnerships, and industry-specific capacity-building programmes to ensure e-mobility workforce is informed about the regulation process and for their input.

3. Reduce bureaucratic burdens.

- Policymakers should improve tax clarity by revising compliance procedures, consolidating forms, and offering sector-specific guidance for e-mobility ventures. Clearer communication channels and tailored support services, especially those targeting women-led businesses, could mitigate the perceived bureaucratic overload.
- For fairness and labour flexibility, labour legislations need for more responsive and adaptable employment policies. Measures such as streamlined hiring processes, clearer guidelines for contract types, and greater support for start-ups employing specialised e-mobility talent may help reduce regulatory tension. Incorporating the perspectives of entrepreneurs into labour policy consultations could improve alignment with real-world business needs.

4. Address gender-specific barriers and strengthen gender-sensitive policy design.

- Develop organisation-level gender equity strategies: Targeted outreach for training of women on regulatory navigation, mentorship schemes, simplified application pathways with dedicated support desks for women founders, and improved access to bureaucratic information through women-focused entrepreneurship networks. Firms should conduct gender audits and implement policies that ensure equal treatment and opportunities for women.
- Promote inclusive leadership and culture: Employers should foster work environments where women feel safe and valued, including leadership development programs, mentoring opportunities, and active promotion of women into decision-making roles.
- Enhance labour regulations that support work-life balance: Policymakers should enhance existing labour regulations to ensure they genuinely enable flexible and family-friendly working arrangements, particularly for women.
- Improve family and tax policies to better support women entrepreneurs: Targeted financial incentives, tax benefits, and grant schemes should be developed to reduce gender inequalities in business ownership.
- Expand public childcare support: Investments in accessible, affordable, and high-quality childcare services are critical, as women indicate greater dissatisfaction with current infrastructure and support programs.
- Implement mandatory anti-harassment standards across the sector: National guidelines or sector-specific codes of conduct can help ensure organisations adopt stronger reporting mechanisms, training programs, and enforcement structures. Companies should adopt strong internal policies, create confidential reporting channels, and ensure accountability for misconduct.

6.2. Infrastructure

Perceptions of respondents across all groups were observed by digital, electricity, charging, battery swap and vehicle maintenance infrastructure.

Digital and electricity infrastructure and vehicle maintenance

How do women in e-mobility assess digital and electricity infrastructure in Kenya?

Do women's views differ from those of men?

The findings in Figure 23 demonstrate a consistent and robust perception across all respondent groups that infrastructural barriers that directly affect e-mobility, i.e. electricity unreliability, high electricity cost, weak digital infrastructure, and costly e-mobility maintenance services, that infrastructure-related constraints significantly hinder the success of e-mobility businesses. Overall, at least 50% of respondents strongly agree that these barriers exist and hinder the success of e-mobility businesses and create substantial operational challenges. Disagreement rates are no more than 10%. Overall, the results emphasise that e-mobility businesses operate within structurally challenging environments where basic enabling conditions remain weak.

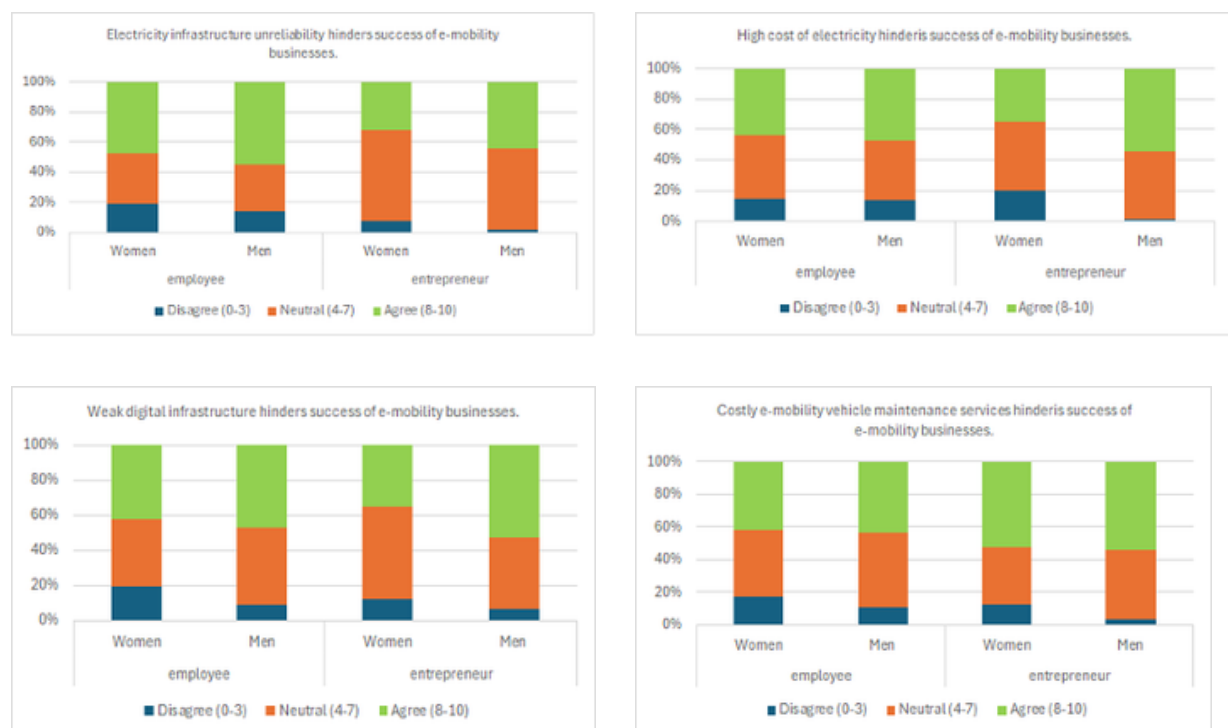


Figure 23. Electricity, digital and maintenance infrastructure

Charging and battery swap infrastructure

How do women in e-mobility assess charging and battery swapping infrastructure in Kenya?

Do women's views differ from those of men?

Enhanced charging and battery swapping infrastructure is crucial in development of e-mobility technology and widespread entrepreneurship. Respondents were asked about their views on the sufficiency of e-vehicle charging stations, availability of charging at homes, safety and services at battery swap stations.

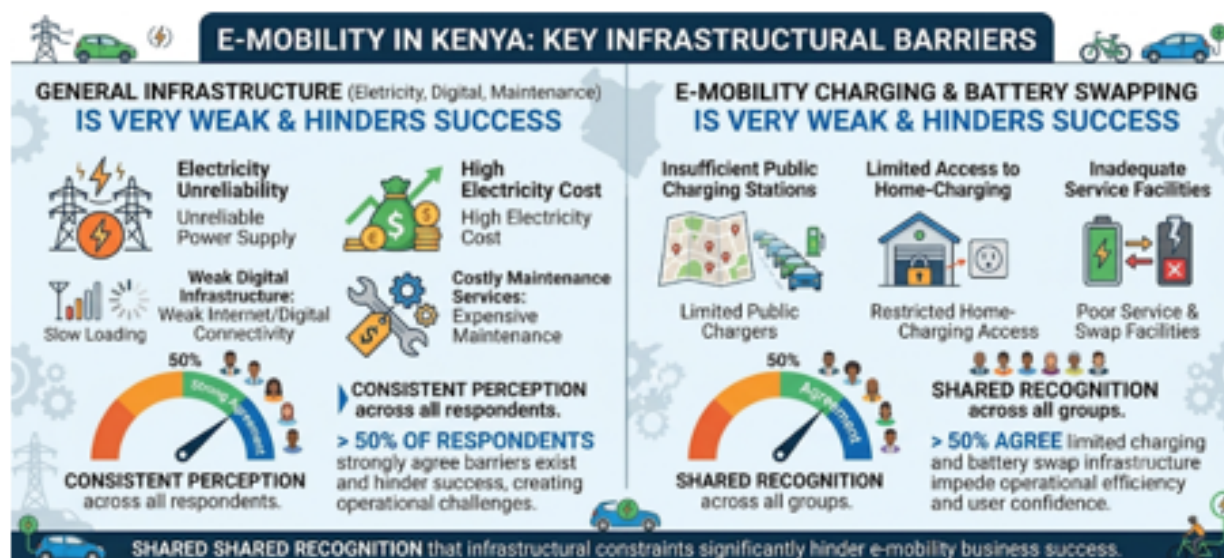
The findings in Figure 24 across the four indicators consistently show that both employees and entrepreneurs perceive infrastructure-related barriers as significant constraints on the growth of e-mobility businesses. Agreement levels are high across all groups with more than 50% agreeing to limited charging and battery swap infrastructure, suggesting a shared recognition that insufficient public charging stations, limited access to home-charging, and inadequate service facilities at charging or battery-swapping locations impede operational efficiency and user confidence. Notably, women tend to express slightly stronger agreement with statements related to insufficient infrastructure and safety concerns. This pattern aligns with broader evidence that women often experience mobility systems differently, with heightened sensitivity to safety, convenience, and service reliability.

Similar to digital and electricity infrastructure, the consistency of high agreement across all respondent categories underscores that these infrastructural deficits are systemic rather than group-specific. As such, the results highlight that the current charging ecosystem does not adequately meet the functional, safety, and operational needs required to support the scale-up of e-mobility businesses, particularly those relying on delivery fleets and high-utilisation use cases.



Figure 24. Charging and battery swap infrastructure

BOX 14. INFRASTRUCTURE FOR E-MOBILITY. Electricity, digital and e-mobility maintenance infrastructure is very weak hindering the success of e-mobility businesses in Kenya. E-mobility charging and battery swapping infrastructure is very weak hindering the success of e-mobility businesses.



Infrastructure: Recommendations for Policy and Practice

- 1. Strengthen electricity reliability and affordability:** Investments in grid stability, localised renewable energy systems, and targeted subsidies for electricity-intensive industries can reduce operational disruptions for e-mobility businesses.
- 2. Improve digital infrastructure and connectivity:** Expanding broadband coverage, improving network reliability, and reducing connectivity costs would directly enhance the efficiency of digital platforms used for payments, fleet management, and customer communication.
- 3. Reduce the cost of maintenance services:** Governments and industry associations should support technician training, promote local supply chains for e-mobility components, and incentivise maintenance service centres to lower costs.
- 4. Implement different business models for charging and battery swapping stations.**
 - Expand public charging infrastructure:** Governments and urban authorities should prioritise the development of more accessible, well-distributed charging and battery swapping stations to alleviate the commonly reported limitation of insufficient availability. The business model for charging and battery swapping stations should be very well assessed to benefit the businesses and support climate policies.
 - Support home-charging accessibility:** Policies enabling residential charging—such as subsidised home-charger installation, landlord incentives, or building-code requirements—would directly address one of the most widely agreed-upon barriers.
- 5. Upgrade service amenities, strengthen safety and security at charging and swapping sites:**
 - Operators should integrate restrooms, food options, seating, and well-maintained facilities to support delivery drivers who rely on these locations as part of their daily workflow.
 - Enhancing lighting, surveillance, staffing, and real-time monitoring at charging locations can address the pronounced safety concerns, especially relevant for women users.
 - Charging and battery swapping infrastructure planning should explicitly incorporate gender-responsive design principles, ensuring safer, more comfortable, and more predictable charging environments.

6. **Target support for women-led enterprises:** Given their disproportionately high levels of perceived constraint, women entrepreneurs may benefit from tailored support, including energy cost relief, infrastructure grants, and improved access to technical assistance.
7. **Encourage collaboration between policymakers, operators, and businesses:** Coordinated approaches—such as public–private partnerships and industry standards for service quality and safety—can accelerate improvements across the charging ecosystem

6.3. Culture

Normative (Collective social pulses of what is acceptable)

How do women assess cultural and social judgements for e-mobility workers in Kenya?

Do women's views differ from those of men?

Normative culture is about the collective social pulses of what is acceptable in the society (Ahl, 2006; Baughn et al., 2006; Brush et al., 2019). Respondents were asked about their perceptions of what is acceptable in their society regarding their involvement in e-mobility and entrepreneurship. Overall, responses in Figure 25 show a broadly positive perception for e-mobility entrepreneurship/employment being encouraged and celebrated in the society, respondents' roles being well accepted in the society, and the respondents feeling they are respected for their roles in the society. Disagreement levels are very low, on average around 15%, illustrating that societal support is perceived as generally adequate. It is as low as 3% among men entrepreneurs, whilst 10-20% of women entrepreneurs still report challenges for acceptance in their roles. Men entrepreneurs show the strongest sense of societal respect.

All groups share similar views on whether women employees/entrepreneurs can easily thrive in e-mobility. Agreement remains high across all groups, including male respondents, suggesting general belief in women's ability to thrive. A small but noticeable percentage express disagreement, slightly higher than in prior charts, indicating that some respondents perceive barriers for women in e-mobility.

The findings reveal broadly positive perceptions of societal support, acceptance, and respect for roles within the e-mobility sector across gender and employment type. Both women and men, whether employees or entrepreneurs, predominantly report neutral-to-positive experiences, suggesting a social environment that is largely conducive to participation in the sector. Entrepreneurs, in particular, consistently express higher agreement levels across all items. This may reflect the greater visibility or perceived legitimacy of entrepreneurial roles within emerging industries, where innovation and independence are often celebrated.

Gender differences are present but subtle. Women's responses generally mirror those of men, with women entrepreneurs showing strong perceptions of societal encouragement and acceptance. However, the item measuring perceptions of whether women can easily thrive in e-mobility reveals the highest neutrality and slightly elevated disagreement.

This indicates a lingering degree of uncertainty or recognition of persistent gendered barriers, even among male respondents who otherwise express high levels of societal acceptance. The prevalence of neutral responses across items also highlights an underlying ambivalence—respondents neither strongly rejecting nor fully endorsing the idea that society actively supports and respects these roles. This may reflect the transitional nature of the e-mobility sector, which is still forming its norms, identity, and gender dynamics.

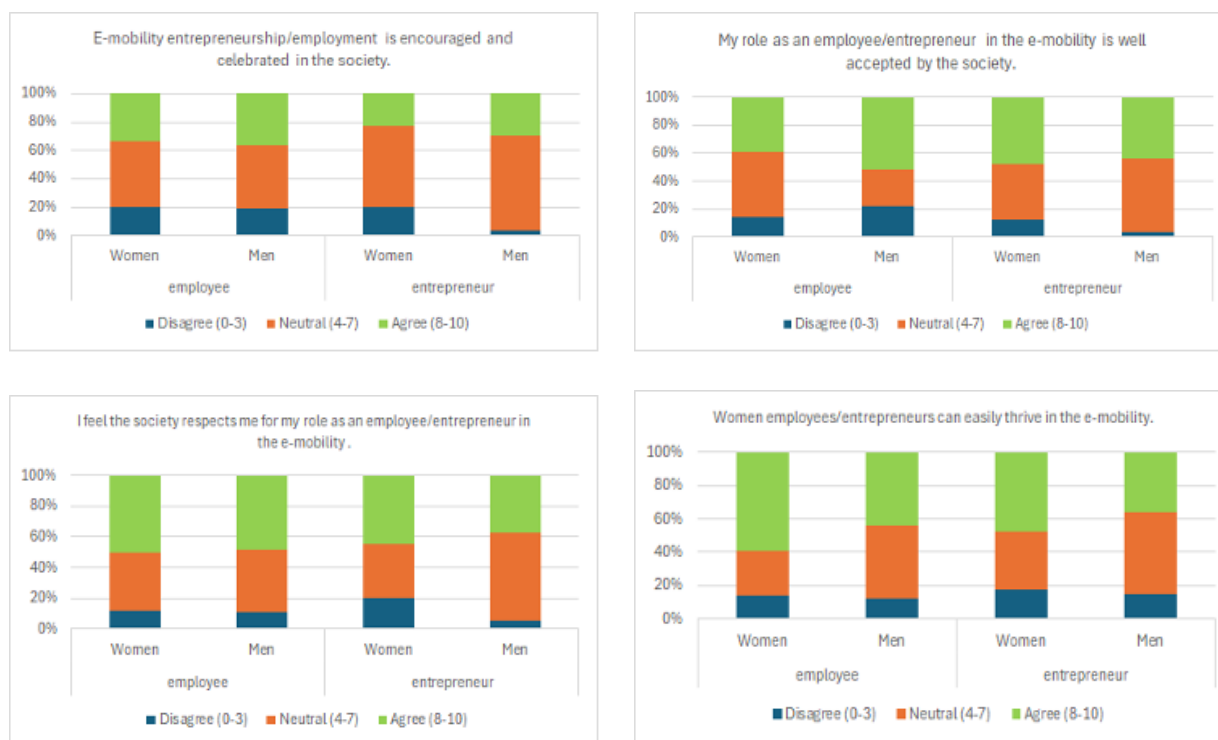


Figure 25. Normative shaping of culture and societal acceptance of entrepreneurship and e-mobility

Cognitive (Cultural concepts that drive individuals)

How are women driven by cultural and social convictions regarding e-mobility in Kenya?

Do women's views differ from those of men?

Cognitive culture represents the cultural concepts that drive individuals to act on tasks they think are accepted by the society (Brush et al., 2019). Respondents were asked about equal opportunities to men and women in e-mobility, family support and how a failure will be judged by their immediate environment. Figure 26 shows the responses from the participants. Equal opportunity in e-mobility is widely agreed phenomenon across all groups, on average 55% of respondents strongly agree that equal opportunities exist in the sector and agreement rates do not differ between sub-groups. 51% of all respondents state they have family support in their job roles with 60% of employees and 42% of entrepreneurs strongly agreeing. Women express more confidence in family support than men employees.

On societal judgement for business failures, men (with only 10% disagreeing that they will be negatively judged in case of failure) seem more confident than women (25%, respectively). This difference is stark between women entrepreneurs, of whom 30% think they will be judged negatively if they fail, and men entrepreneurs (7%, respectively). Respondents generally believe that their family would support them in case of failure, on average 40%. This rate is higher among the employees (50%) than entrepreneurs (31%) and higher in women entrepreneurs (38%) than in men entrepreneurs (25%). Confidence in friends' support is slightly lower than that of family. On average, 28% of respondents believe they will be supported by friends in case of job failure. This rate is higher among employees (37%) compared to entrepreneurs (20%) and does not differ radically between genders. The largest gender and role differences appear in business networks' support. Despite an average of 27% overall stating that they think they will receive support from their business networks, men entrepreneurs show the lowest agreement (5%) whereas for women entrepreneurs this rate is 23%. This indicates that women perceive business networks as more reliable sources of support.

Overall, respondents generally believe the cultural support environment around them is understanding and encouraging. However, subtle yet meaningful differences emerge. Women tend to show slightly higher disagreement across equal opportunities, network support, and reactions to failure. Especially women entrepreneurs consistently express higher disagreement and feel less embedded in supportive social structures including family.

The strongest gender divide is visible in perceptions of business network support, where women report notably higher disagreement than their male counterparts. This implies that women perceive professional networks as less accessible or less dependable, especially in the context of business setbacks. Meanwhile, societal judgment of failure is met with ambivalence across groups, reflected in large neutral segments. This suggests uncertainty about whether society truly accepts entrepreneurial risk-taking, a sentiment that may have implications for willingness to start or expand ventures. Overall, the patterns point to an environment that is broadly supportive at the family level but uneven in professional and societal domains, especially for women.



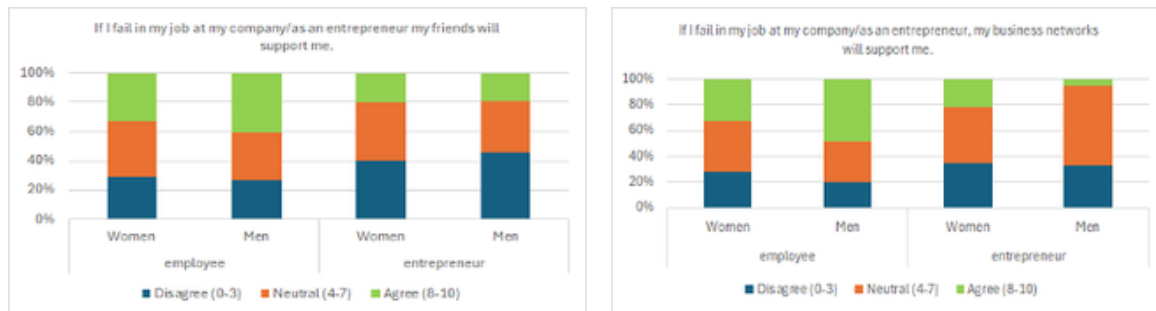
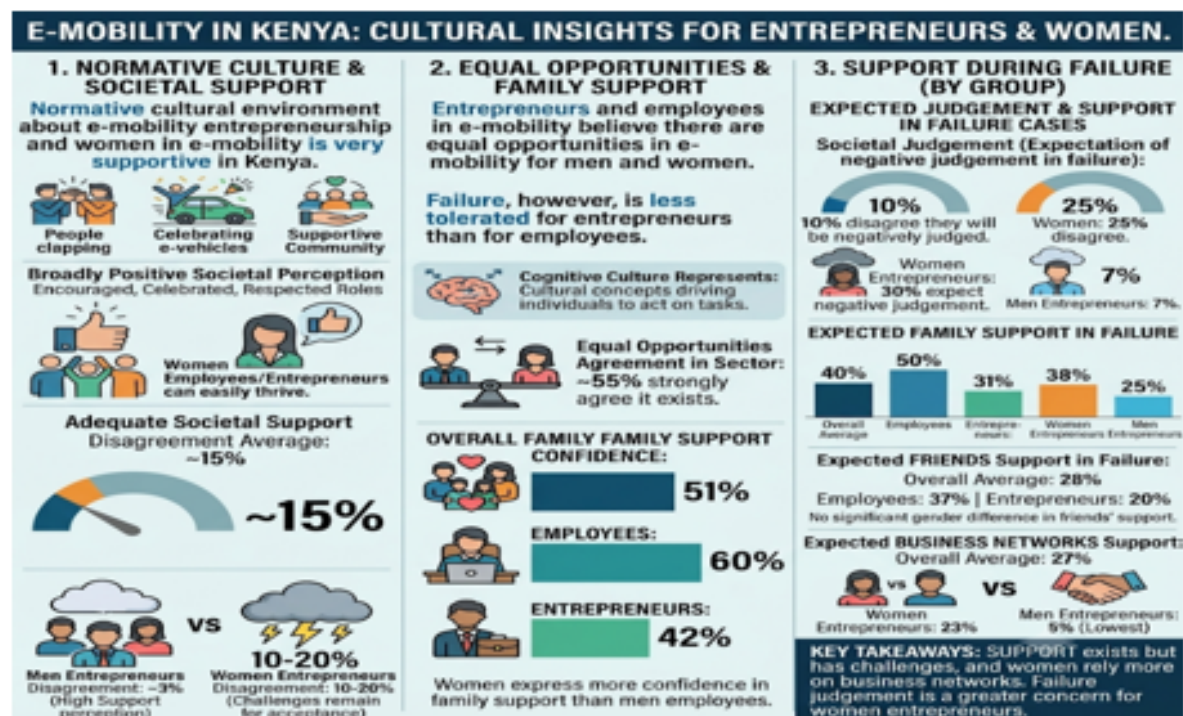


Figure 26. Cognitive shaping of culture to drive entrepreneurship and employment in e-mobility and societal approach to failure

BOX 15. CULTURAL ENVIRONMENT. Normative cultural environment about e-mobility entrepreneurship and women in e-mobility is very supportive in Kenya. Entrepreneurs and employees in e-mobility believe there are equal opportunities for men and women. Failure, however, is less tolerated for entrepreneurs than for employees.



Cultural environment: Recommendations for Policy and Practice

1. Increase public awareness and representation of women in e-mobility, normalise failure to increase entrepreneurship rates.

- Campaigns highlighting women's contributions—as engineers, entrepreneurs, and leaders—can shift societal narratives and reinforce acceptance and respect for women's roles.
- Targeted interventions for strengthening professional networks for women, such as women-led e-mobility associations, mentorship schemes, and structured networking platforms, could reduce perceived exclusion and increase access to critical resources.
- Promotion of a cultural narrative that normalises failure is helpful to encourage especially entrepreneurship in e-mobility. Public campaigns, role models, and community storytelling could help normalise business failure as part of the innovation and learning process, thereby encouraging more risk-taking in new sectors such as e-mobility.

- Given lower confidence in friends and networks after failure, creating peer support communities, alumni groups, or local entrepreneur circles could help especially women entrepreneurs to access emotional and practical guidance during downturns for setback recovery.
- Data-driven decision-making within the sector should be enhanced. Public and private stakeholders should continuously collect gender-disaggregated data to monitor perceptions, workforce composition, and entrepreneurial participation. Such evidence supports more responsive policy design and helps track progress toward gender equity.

6.4. Markets

What are the opinions of women for market opportunities availability in e-mobility in Kenya?

Do these views differ from those of men?

Figure 27 presents perceptions of women and men employees and entrepreneurs on e-mobility market opportunities in Kenya. Respondents are asked about ease of entry to e-mobility markets, opportunity to scaleup, sufficiency of demand and ease of selling products/services. The results reveal a broadly optimistic outlook on the e-mobility market across all respondent groups, but with nuances that highlight where entrepreneurial and employee perceptions diverge.

A new firm's entry to e-mobility market is perceived seemingly harder for entrepreneurs (28% disagree that markets are easy to enter) than for employees (12%). Men entrepreneurs (20%) regard entry of new firms to e-mobility markets easier when compared to women entrepreneurs (30%). On opportunities for new firms to grow in e-mobility once they have entered the market, all groups are very positive with agreement rates over 50% for employees and over 40% for entrepreneurs, indicating strong confidence in the sector's growth opportunities. The rates do not differ between genders.

Respondents again tend to agree with the existence of sufficient market demand for products and services in e-mobility market. However, women entrepreneurs find it quite challenging to sell their products and services, with almost 50% disagreeing that it is an easy task, compared to men entrepreneurs (20% only disagreeing). This suggests a notable gendered barrier in commercialisation and market access for women entrepreneurs. It also suggests that while structural conditions for innovation and entry may be favourable, operational and market-facing challenges persist. These findings underscore the importance of looking beyond entry conditions and considering the practical realities entrepreneurs face in bringing e-mobility solutions to market.



Figure 27. Perceptions on e-mobility market opportunities.



Markets: Recommendations for Policy and Practice

1. Strengthen market access and commercialisation support especially for women entrepreneurs.

- Targeted sales training, marketing support, and procurement opportunities could reduce these barriers. Pre-start up and start-up incubators should be supported to provide tailored marketing training to e-mobility women entrepreneurs.
- Address sector-specific commercialisation bottlenecks, such as distribution channels, after-sales services, or regulatory barriers, that may make selling more difficult than entering or growing within the sector.
- Improve information flows and market intelligence, particularly for women employees and early-stage entrepreneurs, to help them better understand market trajectories, customer segments, and competitive dynamics.

2. Expand demand-stimulating policies.

- Government should implement policies such as consumer incentives, awareness campaigns, and public procurement schemes, to reinforce perceptions of sufficient market demand and boost confidence among hesitant groups.

6.5. Summary

Figure 28 summarises support for macro level elements of e-mobility entrepreneurial as perceived by the participants on a scale from 1 to 10. Across all four groups, markets are perceived as the highest with a score of around 6, followed by cultural environment. Institutions and infrastructure are the lowest scored dimensions, with the former rated at most 5 and the latter at most 3.5. Especially women entrepreneurs rate infrastructural conditions and markets as the lowest among all groups.

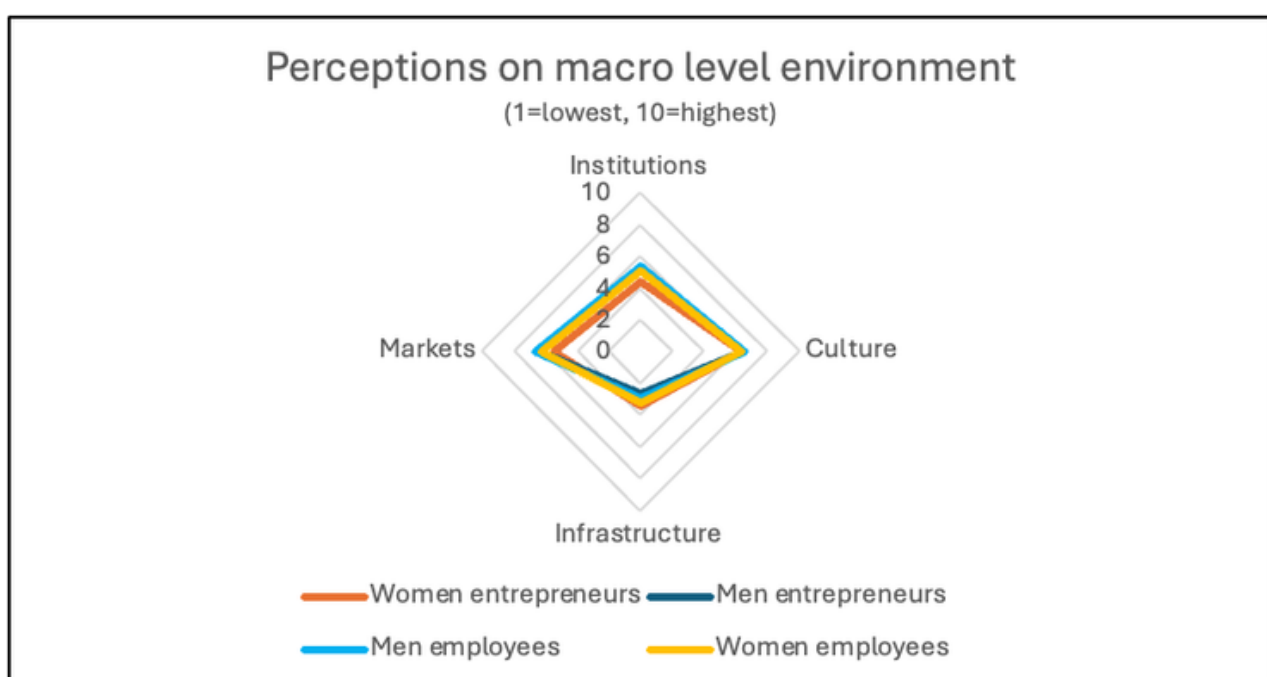


Figure 28. Macro level support by gender and job role.

Institutions: Government support, legislations, ease of doing business, inclusive regulations. **Culture:** E-mobility sector and entrepreneurship culture. **Infrastructure:** Digital, electricity, battery charging, battery swapping.

7. Conclusion

7.1. Main Findings

This report presented results from a large-scale quantitative survey conducted on the e-mobility sector in Kenya. The survey was responded to by employees and entrepreneurs in e-mobility. The data were analysed in four subsamples of women employees and entrepreneurs and men entrepreneurs and employees.

In nutshell, the e-mobility ecosystem in Kenya can be characterised by high level agency as reflected in the self-assessment of all participants for their entrepreneurial orientation, and motivation for operating in the e-mobility sector. There are no major differences men and women for entrepreneurial orientation. Women, on the other hand, have been found to be more market opportunity and impact oriented than men who are more technology-opportunity oriented. These results suggest there is a ready and goal-oriented workforce in Kenya's e-mobility sector to tap into and contribute to socio-economic growth in the country. Participants, however, self-assessed their skill levels (i.e. technical, digital, financial, marketing, networking) in the medium ranges, with women assessing themselves lower than men.

The lack of high-level skills points to the very necessity of upskilling of e-mobility workforce within tailored and targeted programmes. Such e-mobility upskilling programs led by public and private sector is very important, since this is the area where meso level ecosystem support can be provided. Currently, NGOs such as GIZ, UN and domestic organisations such as EMAK are working hard on the ground to provide e-mobility training. There are wider calls to embed e-mobility into engineering curriculum at the universities and technical colleges. The National E-Mobility Policy (Feb 2026) stresses the need for upskilling of the e-mobility workforce. A structured, focused and multilevel e-mobility training programme has to be designed and implemented. A technical e-mobility education needs to be complemented by training of large and domestic e-mobility company employees and particularly entrepreneurs who need different kinds of skills. Given the large population of youth in Kenya, entrepreneurship emerges as an attractive opportunity in e-mobility. A specific entrepreneurship policy should start with creation and inclusion of pre-startup and early startup incubators and scaling up accelerators into the ecosystem to specifically support nascent entrepreneurs in e-mobility and help grow successful entrepreneurs. These efforts should give priority and where necessary implement quotas for women entrepreneurs. Incubation process should go beyond the concept of 'Innovation Hubs' where potential entrepreneurs can learn about entrepreneurship skills as well as technical e-mobility knowledge in cooperation with large foreign and domestic e-mobility companies, collaborate with them for any activity in the e-mobility value chain to generate new ideas and value.

At the macro level of institutions (legislations), infrastructure, culture and markets, this study found and evidenced that there is need to improve institutional, and physical and digital infrastructure in Kenya to help entrepreneurs set up and grow their companies in e-mobility. Most importantly, the study observed that entrepreneurship and especially women in e-mobility are not stigmatised or harassed in Kenya. On the contrary, women report they are well supported for their roles in e-mobility and not judged. Women are also well aware of the opportunities brought forward by the fast-transforming e-mobility technology in the country.

7.2. Main Recommendation

In the light of evidence for high level of entrepreneurial orientation and motives of individuals engaged in e-mobility and a favourable market and cultural environment for e-mobility in Kenya but a lack of (entrepreneurial and technical) skills, this report proposes that e-mobility policy should have an entrepreneurship dimension and employ the 'incubator' tool into e-mobility policy. This means supporting the existing innovation hubs to progressively move into incubator status and setting up new incubators that will deliver dedicated e-mobility entrepreneurship training to nascent and established entrepreneurs. These efforts can start in urban areas but must move into the rural areas where there is wide appetite for adoption of e-mobility technologies.

Report 4[1] of this British Council and UK Department of Science, Innovation & Technology funded project developed and pilot implemented two e-mobility entrepreneurship training programs for prestart-up and early start-up e-mobility entrepreneurs (specifically designed for women) and assessed the short-term impact of the pilot training on 18 women. We recommend deployment of such e-mobility focused entrepreneurship training programmes delivered through a sustained incubation process to women-led startups supported in public-private partnerships.

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Appendix. Survey questions and statements

Construct	Code	Item
AGENCY		
1. Entrepreneurial Orientation		
1.1. Autonomy		
	AUT1	1) I believe it's within my power to realize the changes in the life I desire.
	AUT2	2) There are no significant constraints on my ability to be autonomous in how I might respond to opportunities.
	AUT3	3) I can create the future I want for myself based on factors I can control.
	AUT4	4) I can make decisions without needing approval or consent from others (e.g., family members, spouse).
	AUT5	5) I participate in community activities or decision-making bodies (e.g., local councils, women's groups) to change things in the community.
	AUT6	6) I can make my political decisions independently, such as choosing a candidate or supporting a cause.
1.2. Competitiveness		
	COMP1	1) I always know what my competitors are doing and take actions to compete with them.
	COMP2	2) I typically respond vigorously to competitive assaults/challenges by others.
	COMP3	3) I believe that being competitively assertive is a virtue.

Construct	Code	Item
AGENCY		
1. Entrepreneurial Orientation		
1.3. Innovativeness		
	INNOV1	1) I'm an innovator when it comes to how I approach life's opportunities and threats.
	INNOV2	2) My business is usually the first to introduce new products/services in the market.
	INNOV3	3) I experiment with novel, innovative ideas to make my customers happy.
1.4. Proactiveness		
	PROACT1	1) I typically anticipate which actions will be beneficial and take them before most people realize their value.
	PROACT2	2) I often pursue opportunities based on envisioned futures preferring to not "miss the boat".
	PROACT3	3) I often act in advance of others when responding to opportunities and threats.
1.5. Risk taking		
	RISK1	1) I prefer high-risk/high-reward opportunities over low-risk/low-reward opportunities.
	RISK2	2) My decisions and actions reflect my venturesome/exploratory nature.
	RISK3	3) I tend to act confidently in situations where risk is involved.

Construct	Code	Item
AGENCY		
2. Entrepreneurial Motivation		
	MOT_WEALTH	1) I work in my job/started my business to build great wealth or a very high income.
	MOT_NECESSITY	2) I work in my job/started my business to earn a living because jobs are scarce, and I cannot find a better job.
	MOT_FAMILY	3) I work in my job/started my business to continue a family tradition.
	MOT_INDEPEND	4) I work in my job//started my business to be more independent and self-sufficient as a woman/man.
	MOT_MARKETOPP	5) I work in my job/started my business because I sensed a market opportunity.
	MOT_TECHOPP	6) I work in my job//started my business because I sensed a technological opportunity.
	MOT-ENVIMPACT	7) I work in my job//started my business to make positive impact on environmental problems facing my country.
	MOT-SOCIMPACT	8) I work in my job//started my business to make positive impact on my community/society in my country.
3. Entrepreneurial Skills		
3.1. Technical skills		
	SKILL_TECH1	1) I have sufficient technical skills and knowledge related to e-mobility technologies.
	SKILL_TECH2	2) I have the skills to repair my/an e-vehicle.
	SKILL_TECH3	3) I have the skills about the maintenance of an e-vehicle.
	SKILL_TECH4	4) I keep my knowledge up to date about the recent advances in e-mobility technologies.
	SKILL_TECH5	5) I have sufficient IT/computer skills to facilitate my skills in running/working in my business.

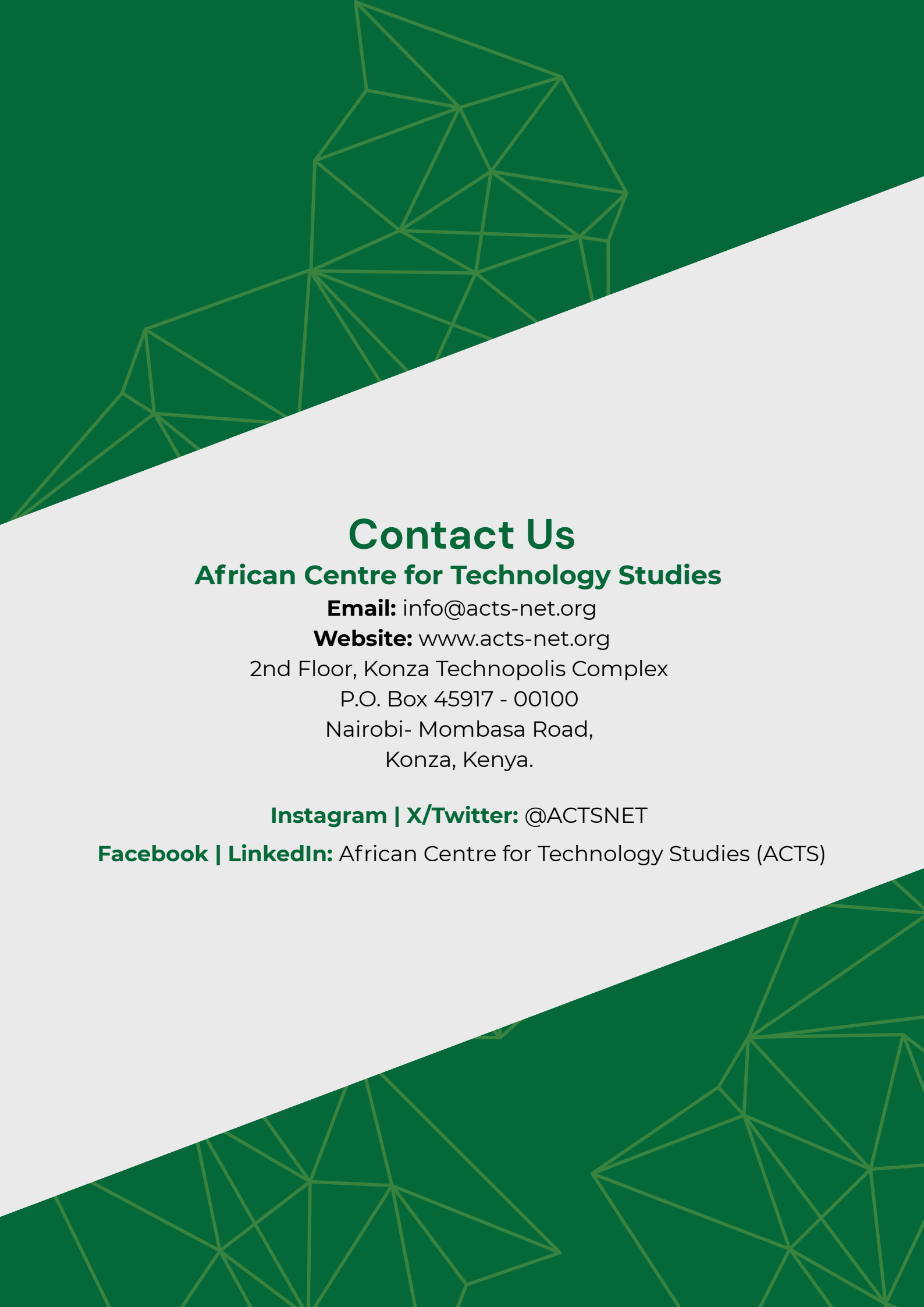
Construct	Code	Item
AGENCY		
3.2. Financial skills		
	SKILL_FIN1	1) I have sufficient finance and budgeting skills to manage my business.
	SKILL_FIN2	2) I efficiently use digital finance platforms to run my business.
3.3. Marketing skills		
	SKILL_MKT1	1) I have sufficient marketing skills to manage my business.
	SKILL_MKT2	2) I efficiently use digital marketing platforms to run my business.
3.4. Networking skills		
	SKILL_NTW1	1) I have sufficient networking skills to manage my business.
	SKILL_NTW2	2) I am well-connected to other businesses and organisations in my sector for mentorship and peer-support to share experiences and overcome challenges
	SKILL_NTW3	3) I use digital platforms to connect with other businesses and organisations that can support my business.
STRUCTURE/SYSTEM		
2.Support Organisations (Meso Level)		
2.1. Finance		
	FIN1	1) There is financial support from the government to set up/run a business in e-mobility.
	FIN2	2) Venture capital funding in Kenya is widely available to set up a business in e-mobility/to e-mobility companies.
	FIN3	3) Bank loans in Kenya are easily available to set up a business in e-mobility/to e-mobility

Construct	Code	Item
AGENCY		
STRUCTURE/SYSTEM		
2.Support Organisations (Meso Level)		
2.1. Finance		
	FIN4	4) Accessing (micro)finance digitally enabled financing models such as MKOPA to set up my business as an entrepreneur has been easy. (only posed to entrepreneurs)
	FIN5	5) Accessing (micro)finance digitally enabled financing models such as MKOPA to fund innovative ideas as an entrepreneur has been easy. (only posed to entrepreneurs)
	FIN6	6) My company is supported by funders.
2.2. Human Capital		
	HUMC1	1) Colleges and universities offering courses in e-mobility technologies in Kenya offer support in entrepreneurship in e-mobility.
	HUMC2	2) Skilled labour in e-mobility is readily available to recruit in Kenya.
	HUMC3	3) Entrepreneurship and e-mobility education in Kenya is very inclusive of women.
	HUMC4	4) There are sufficient number of women in e-mobility in Kenya.
	HUMC5	5) Women are supported to become technicians, mechanics, engineers in e-mobility sector in Kenya.
	HUMC6	6) Women in e-mobility sector have access to sufficient training in finance, marketing, e-mobility and general entrepreneurship.

Construct	Code	Item
AGENCY		
STRUCTURE/SYSTEM		
3.Framework Conditions (Macro Level)		
3.1. Institutions		
	INST1	1) The government implements effective policies promoting and supporting new ventures in e-mobility sector.
	INST2	2) Government is quick and effective in changing laws/regulations in e-mobility sector if they do not work effectively.
	INST3	3) Access any kind of support is easy for my business.
	INST4	4) Government policies supporting renewable energy production in Kenya favours my business.
	INST5	5) Existing labour regulations in Kenya allow me to perfectly harmonize my personal, family and working life.
	INST6	6) Favourable childcare infrastructure, support programs and policy in my country support women.
	INST7	7) Companies and government ensure that working environments are safe in the e-mobility sector in Kenya.
	INST8	8) Companies and government ensure that there are no discrimination and harassment in the e-mobility sector in Kenya.
	INST9	10) The government protects especially women in the niche sector of e-mobility by specific policies and regulations.
	INST10	11) In Kenya, new firms can get most of the required permits and licenses in about a week.

Construct	Code	Item
AGENCY		
STRUCTURE/SYSTEM		
3.Framework Conditions (Macro Level)		
3.1. Institutions		
	INST11	12) In Kenya, new businesses are not over-burdened with taxes and bureaucracy in e-mobility sector.
	INST12	13) In Kenya, the labour/employment legislations are favourable to start and grow my business.
	INST13	14) Family and tax policies favour women in Kenya.
3.2. Culture		
	CUL1	1) E-mobility entrepreneurship/employment is encouraged and celebrated in Kenya.
	CUL2	2) My role as an employee/entrepreneur in the e-mobility sector is well accepted by the society.
	CUL3	3) I feel respected for my role as an employee/entrepreneur in the e-mobility sector.
	CUL4	4) I feel the society does not judge me for my failures as an entrepreneur/employee in e-
	CUL5	5) Women employees/entrepreneurs can easily thrive in the e-mobility.
	CUL6	6) E-mobility entrepreneurship/employment opportunities are available for both men and women.
	CUL7	7) My family shows a lot of support to me in running/working in my business/company.
	CUL8	8) If I fail in my business/job in e-mobility my family will support me.
	CUL9	9) If I fail in my business/job in e-mobility my friends will support me.
	CUL10	10) If I fail in my business/job in e-mobility my business networks will support me.

Construct	Code	Item
AGENCY		
STRUCTURE/SYSTEM		
3.Framework Conditions (Macro Level)		
3.3. Infrastructure		
	INFR1	1) Electricity infrastructure being not very reliant in Kenya hinders the success of e-mobility businesses.
	INFR2	2) High cost of electricity in Kenya hinders the success of e-mobility businesses.
	INFR3	3) Limited digital infrastructure in Kenya hinders the success of e-mobility businesses.
	INFR4	4) Limited and costly maintenance services for e-mobility vehicles in Kenya hinders the success of e-mobility businesses.
	INFR5	5) Limited number of e-mobility vehicle charging stations hinders the success of e-mobility businesses.
	INFR6	6) Difficulty in charging e-mobility vehicles at homes in Kenya hinders the success of e-mobility businesses.
	INFR7	7) Safety concerns in charging e-mobility vehicles at charging stations at night hinders the success of e-mobility businesses.
	INFR8	8) Battery swapping/charging stations need improvement in services (restrooms, toilets, food, etc.) necessary for delivery drivers.
3.4. Market		
	MRK1	1) There is sufficient demand for e-mobility products/services in the market.
	MRK2	2) My company doesn't have any difficulty in selling e-mobility products/services in the market.
	MRK3	3) New and growing firms can easily enter new markets Kenya.
	MRK4	4) There is good opportunity for new firms in e-mobility sector to grow.



Contact Us

African Centre for Technology Studies

Email: info@acts-net.org

Website: www.acts-net.org

2nd Floor, Konza Technopolis Complex

P.O. Box 45917 - 00100

Nairobi- Mombasa Road,

Konza, Kenya.

Instagram | X/Twitter: @ACTSNET

Facebook | LinkedIn: African Centre for Technology Studies (ACTS)