ADVANCING A JUST ENERGY TRANSITION IN KENYA: LOCALIZING RENEWABLE ENERGY FOR INCLUSIVE GROWTH AND DECENT WORK

National Policy Dialogues Report

Eka Hotel, Nairobi

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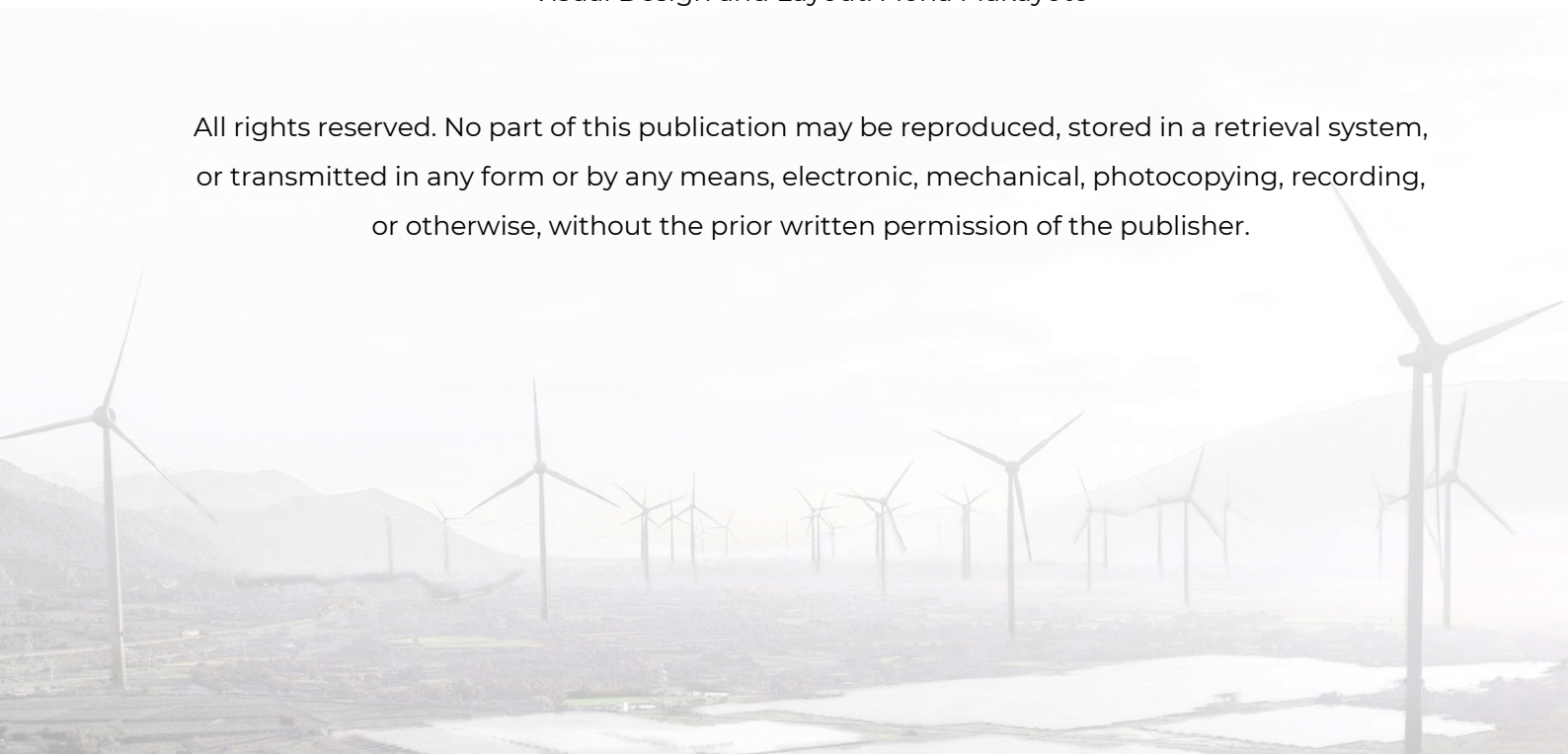

Table of Contents

Acronyms

AFCFTA	Africa Continental Free Trade Area
JET	Just Energy Transition
NHIF	National Health Insurance Fund
NSSF	National Social Security Fund
PPE	Personal Protective Equipment
PWD	Person With Disability
R&D	Research and Design
SMME	Small Micro and Medium Enterprise
TVET	Technical and Vocational Education and Training

List of Figures

List of Tables

Executive Summary

This report presents discussion from a National Policy Dialogue on Just Energy Transitions (JET) convened by the African Centre for Technology Studies (ACTS) as part of the Just Energy Transition (JET) project funded by International Development Research Centre (IDRC) and led by Institute for Economic Justice (IEJ) in partnership with African Centre for Energy Policy (ACEP). The dialogue brought together key stakeholders to discuss a critical challenge surrounding the ambition of transitioning from fossil fuels to clean energy. With its bountiful potential geothermal and hydro power energy, Kenya is a regional leader in the renewable energy space; however, this seeming success in use of clean energy has not translated into broad-based local economic benefits, quality job creation, or social equity. There are hardly any simple solutions to this challenge; the discussions however yielded insights into what the government and sectoral stakeholders need to do to make the transition truly just.

Through a series of participatory methodologies including, the national dialogue identified a consensus that Kenya and its regional peers are predominantly locked into low-value, downstream activities in the global renewable energy value chain, leading to import dependency in a precarious work environment. In response, stakeholders co-created and prioritized four strategic pathways to steer the transition towards justice and inclusivity: Localisation of Wind Turbines, Localisation of Policies/Laws/Regulation, Universal Energy Access for Industrialization and Poverty Eradication, and Localisation of Resources which entails sustainably harnessing Kenya’s domestic raw materials, developing its local workforce, and fully integrating SMMEs and entrepreneurs into the renewable energy supply chain.

The dialogue concluded that achieving JET requires a fundamental paradigm shift from simply deploying technology to actively building domestic industrial capacity. This report details critical findings that emerged during the dialogue, that Kenya's renewable energy sector is currently confined to low-value, downstream activities within the global value chain. This position has resulted in significant import dependency, the proliferation of precarious "gig economy" work characterized by short-term contracts and a lack of social benefits, and the persistent exclusion of women and marginalized groups due to cultural barriers and inadequate safeguarding policies.

In direct response to these challenges, the report provides a set of actionable, stakeholder-specific recommendations. These include calls for the Government of Kenya to develop and enforce robust sub-national regulations and to launch a targeted manufacturing incentive scheme for components like wind turbine towers. It urges Development Partners and Financial Institutions to create de-risking instruments for SMMEs and to fund regional value chain initiatives that leverage frameworks like the AfCFTA. Furthermore, it tasks the Private Sector, Civil Society, and Academia with a mandate to champion a culture of data democratization and to mobilize grassroots advocacy and structured mentorship programs.

1 Introduction

Kenya is a recognized leader in Africa for its high share of renewable energy in the national grid, with approximately 90% of its energy generated from renewable sources [IEA, 2025]. However, a critical challenge persists: the impressive expansion in generation capacity has yet to catalyze commensurate local economic benefits, widespread creation of quality jobs, or greater social equity. Consequently, while the transition to a green economy is essential for sustainability, there is a pressing risk that without deliberate and inclusive management, it could perpetuate or even deepen existing socio-economic inequalities. It is precisely to bridge this divide between clean energy generation and fair socio-economic outcomes that the Just Energy Transition (JET) Project was launched.

1.1 About the JET Project

The Just Energy Transition (JET) Project is a multinational research and policy engagement initiative implemented by a consortium including the African Centre for Energy Policy (ACEP) and the Institute for Economic Justice (IEJ). The project is focused on facilitating an inclusive and equitable transition to renewable energy in Kenya by addressing the shift from fossil fuels to low-carbon energy systems, including solar and wind, while simultaneously promoting gender equality, decent work, and sustainable livelihoods. The initiative aims to identify and inform public policy interventions required for a just transition, with a focused lens on women and youth, by localizing clean energy value chains. This involves fortifying small, medium, and micro-enterprises (SMMEs) and improving their capacities to engage effectively and competitively in Kenya's emerging green economy. In Kenya, the ACTS team adopted a phased and decentralized (having regional conversations) approach to implementation. The decentralized research approach was crucial for capturing the diverse challenges and opportunities faced by local communities, SMMEs, workers, and women in the energy sector.

Building directly on preliminary research findings, ACTS facilitated regional policy dialogues. These preliminary dialogues served as critical platforms to validate and contextualize the initial evidence, ensuring that the perspectives of grassroots stakeholders and county-level actors were firmly integrated into the discourse. The National Policy Dialogue in Nairobi was therefore the culmination of this phased approach. It was designed to discuss some of the evidence from the field and the insights from the regions, elevating the conversation to a national stage to forge a unified, multi-stakeholder consensus on the strategic pathways needed to advance a just and inclusive energy future for Kenya.

1.2 About the Dialogue

Building directly on the foundational research of the JET project, the National Policy Dialogue in Nairobi was convened as the culminating event of a comprehensive engagement process. This process began with extensive field research and was further enriched by preliminary Regional Policy Dialogues held in the Coastal and Western regions of Kenya. These regional consultations were instrumental in grounding the national conversation in local realities, ensuring that the perspectives of grassroots stakeholders, county-level actors, and marginalized communities were integrated into the national agenda. The primary goal of the National Dialogue was therefore to synthesize these diverse insights and forge a multi-stakeholder consensus on the strategic pathways needed to advance a just energy future for Kenya.

1.2.1 Dialogue Objectives

The key objectives of the dialogue included:

1. Synthesizing evidence from GPN, policy scan, regional dialogues, KIIs, to identify national priorities for a just energy transition.
2. Promoting multi-stakeholder knowledge exchange between policymakers, industry, civil society, academia, labour, and community representatives.
3. Developing actionable policy recommendations that support localization of renewable energy value chains, equitable participation, and inclusive growth.
4. Strengthening frameworks for SMMEs and community organizations, ensuring they play a central role in value creation and job creation.
5. Advancing equity and inclusion by embedding gender equality, decent work, and youth participation into national energy transition strategies

The dialogue brought together key stakeholders from government, renewable energy industry, labour, academia and civil society. Its primary goal was to shift the conversation from simply expanding renewable energy capacity to a discussion on making the transition is just and fostering local economic development through the creation of decent work, and empowering all segments of society.

This report summarizes the evidence, discussions, and co-created solutions that emerged from this pivotal dialogue, outlining a collective path forward for a truly inclusive energy future in Kenya.

Sustainable Energy Sources: Image by Proxima Studio

2 Dialogue Methodology

The policy dialogue employed a participatory approach using multiple tools designed to move beyond traditional presentations and extending to co-creation among stakeholders in collaborative sessions.

2.1 Informative Presentations

The process began with a moderated panel discussion that captured live perspectives from key actors, including engineers, women in energy, and human rights actors, thereby setting a contextual and urgent tone for the work ahead. This was followed by an evidence-grounded foundation, featuring presentations of primary research conducted in Kenya, Ghana, and South Africa, which illuminated the stark realities of the continent's position in the global renewable energy value chain and the persistent gaps in policy implementation, decent work, and gender inclusion.

2.2 Visualizing Change

The dialogue then transitioned into immersive, forward-looking facilitation techniques. The Seeds Approach was utilized, where participants were first asked to individually and then collectively identify and nurture "seeds" referring to innovative but nascent ideas or practices within the just energy transition space that, if deliberately scaled, could transform the ecosystem. These seeds were then envisioned in their fully matured state by the year 2063, with groups articulating the primary results and secondary societal impacts of their realization, thus crafting a tangible and aspirational vision for the future.

Building on this visioning exercise, the dialogue incorporated the three horizons framework to structurally map the transition from the current system to the desired future. This framework guided participants in a critical analysis of what practices must be stopped to dismantle the status quo, what new actions must be started to catalyze change, and what existing positive efforts should be continued and strengthened. To distill and prioritize the plethora of ideas generated, This culminated in a "Vote with Your Feet" exercise, a live, physical polling method where participants positioned themselves along a spectrum to indicate their level of agreement on how well each co-created pathway met four pre-defined criteria: improved regional integration, zero import of components from outside Africa, strong compliance with standards, and local profitability. This iterative and interactive process ensured that the final pathways were not only innovative but also critically assessed and collectively endorsed by the diverse assembly of stakeholders.

In addition to these structured tools, the dialogue also integrated creative participatory methods such as interactive appreciation exercises, poster walks with live voting, and informal coffee-break exchanges, which energized the sessions and ensured that participants' voices and lived experiences remained central throughout.

2.3 Dialogue Participants

The dialogue brought together a diverse group of 20 key stakeholders from public institutions, private sector associations, civil society, labour unions, and academia. This was essential for capturing a holistic view of the opportunities and barriers to a Just Energy Transition in Kenya.

Category	Organization
Government & Parastatals	Kenya Electricity Transmission Company Limited (KETRACO)
	Kenya Power and Lighting Company (KPLC)
	Rural Electrification and Renewable Energy Corporation (REREC)
Academia & Research	Strathmore University
	Strathmore Energy Research Centre
	APA Fellow
Civil Society & Advocacy	Network of Africa National Human Rights Institutions
	ACCESS Coalition
	Women in Renewable Energy
Private Sector & Entrepreneurship	Association Of Startup And SME Enablers Of Kenya (ASSEK)
	Vivify Incubation International
	Certificate of Cloud Auditing Knowledge (CCAK)
Labour Unions	Central Organization of Trade Unions (COTU)
	Kenya Electrical Trades and Allied Workers' Union (KETAWU)

Table 1: Table showing organizations and institution present.

The dialogue revealed a consistent and critical disconnect between Kenya's renewable energy ambitions and the on-the-ground realities of economic participation, social equity, and industrial development. The key findings, drawn from research presentations and stakeholder discussions, are presented in the subsequent sections.

3 Understanding the Just Energy Transition Project

The opening session set the stage for the dialogue by focusing on the need for an actionable, community-centered agenda to advance a just energy transition. Dr. Joel emphasized the importance of having clear, evidence-supported policy outputs that could guide Kenya and other African countries in addressing both energy and social justice concerns. Jezri introduced JET project which spans three countries (South Africa, Ghana, and Kenya) and focuses on renewable energy value chains, small and medium enterprises (SMEs), decent work, gender inclusion, and sustainability.

The project applies case studies to explore localized solutions that address climate change while tackling socio-economic inequalities. The speaker outlined the climate-related challenges Africa faces, including floods, droughts, and cyclones, which not only threaten lives but also destabilize economies. They emphasized that the energy transition must go beyond simply adding megawatts of renewable power; it must also deliver economic transformation, decent livelihoods, and gender equity. The discussion highlighted the risks of transition such as job losses in fossil fuel sectors, possible energy insecurity, exclusion of SMEs, and perpetuation of precarious labor conditions. At the same time, the opportunities were emphasized: industrialization through localization, the creation of decent and gender-equitable jobs, and the chance to correct historical economic imbalances by fostering African participation in global renewable value chains.

To strengthen conceptual clarity, the Just Energy Transition (JET) project applies the Global Production Network (GPN) framework through three linked concepts: value, power, and embeddedness. These concepts are used as an analytical lens to interpret evidence from research and dialogue discussions, even where participants did not use the terms explicitly.
Value refers to where economic benefits are created, enhanced, and captured along renewable energy value chains, including which actors access higher-value functions such as design, manufacturing, finance, and standards compliance versus lower-value functions such as distribution and installation. Power refers to the ability of actors and institutions to shape rules, allocate risks, and control market access, including through regulation, procurement, finance, and labour relations. Embeddedness refers to the extent to which renewable energy activities are locally rooted in territorial conditions (infrastructure, skills, supporting industries, and community acceptance) and in network relationships (learning, innovation, and durable inter-firm linkages).

With the transition, while openings are created for African countries to integrate into renewable energy value chains, it also raises the risk of being locked into low-value roles along the value chain such as installation, sales and distribution, without capturing the higher-value benefits of manufacturing, innovation and design. Overall, the session served as a framing conversation to align participants on the project's goals, the urgency of actionable outcomes, and the shared responsibility of researchers, policymakers, and practitioners to advance a just, inclusive, and localized energy transition.

4 The Kenyan Context: A Deep Dive into Sectoral Gaps Panel Discussion

Panelists: *Eng. Samatr Osman (REREC), Liz Mubari (Women in Renewable Energy), Wyclife Amakobe (Network of Africa National Human Rights Institutions)*
Moderator: *Charles*

The panel discussion brought together experts from diverse backgrounds engineering, gender advocacy, and human rights to deliberate on Kenya's path towards a just and inclusive energy transition.

Figure 1: A Deep Dive into Sectoral Gaps Panel Discussion

The first panelist from REREC was asked how they ensure that large-scale renewable energy projects actively create opportunities for local communities and businesses, beyond just energy generation: Eng. Osman outlined a multi-faceted approach. He stated that REREC focuses on local sourcing and skills development, prioritizing the use of local materials and providing training to community members. He also emphasized local employment, ensuring that a significant portion of the workforce is hired from the surrounding communities. Finally, he mentioned corporate social investment (CSI) initiatives, where projects dedicate a portion of their resources to community development programs, ensuring that the benefits of renewable energy projects extend beyond the fence of the power plant.

The second panelist, representing women in Renewable Energy, Was asked to highlight some of the specific barriers preventing women from fully participating in the renewable energy value chain, and how can we overcome them?: Liz identified three primary barriers, a significant information gap where women are simply unaware of the existing opportunities in the sector; a lack of financial capacity or access to capital to start or scale businesses; and a critical lack of mentorship from both men and women who are already established in the field. She stressed that overcoming these barriers requires deliberate efforts to provide information, financing, and guidance to women.

Liz Mubari recounted how, despite equal qualifications, she and her female peers were relegated to administrative and customer service roles, while male colleagues advanced into technical positions. Years later, she was still being trained alongside new entrants, while her male peer was the trainer. She also cited difficulties women face accessing finance and the lack of early exposure to technical training example woodworking and welding which was excluded from girls' schools Deep-seated stereotypes and cultural norms was also mentioned which excluded women from technical and leadership roles. For instance, it was mentioned that in some regions, women are discouraged from roles requiring travel to rural areas or riding motorcycles, which are essential for site visits.

The third panelist from Network of Africa National Human Rights Institutions provided a human rights perspective in the discussion, stressing that energy transition processes must uphold fundamental rights, Free, Prior and Informed Consent (FPIC)and benefit sharing. He noted that corporate projects often overlook community rights, which results in disputes, litigation, or exclusion. He emphasized the importance of inclusive legal frameworks such as the Climate Change Act (2016, amended in 2023), which provides clear benefit-sharing structures for communities. He remarked; "*Communities must be empowered through free, prior, and informed consent, clear benefit-sharing arrangements, and legal safeguards to avoid exclusion and exploitation*."

The fourth conversation was on the role of the labour movement in ensuring a Just Energy Transition, especially in the face of perceived inactivity or slow response: One of the panelists Wyclife Amakobe acknowledged the challenge of perceived inactivity and explained that the labour movement's role is to champion all workers. She emphasized that this requires reclaiming the narrative to ensure it originates from the workers themselves, not from other stakeholders. She stated, "It's not coming from us, it has to come from the workers." Furthermore, she highlighted their role in policy tracking and implementation, ensuring that once policies on just transition are made, they are actively followed through to their implementation on the ground.

A follow-up question on the labour movement's role was to understand how labour movement effectively champion the needs of workers and ensure their voices are central to the transition process: A Samson Ekuru from COTU stated that by focusing on capacity building and partnerships. He explained that the labour movement works with institutions like the National Industrial Training Authority (NITA) to empower youths and workers with the necessary skills to participate in the sector. He reinforced that the labour movement is "very active and it's in place," working to ensure workers' voices are heard and their capacities built.

The session also featured questions from the audience, which touched on issues such as limitations on renewable energy production, ensuring genuine technology transfer, competitive advantages in local manufacturing, strategies to overcome gender inequality, and how to strengthen professional networks for women. In closing, the panelists emphasized the need for stronger labor union involvement, clear policy enforcement, and collaborative approaches that bring together communities, government, academia, and industry to ensure the transition is equitable, rights-based, and inclusive.

5 Grounding in Evidence from Kenya, Ghana and South Africa

The dialogue was grounded in presentations of primary research from the three partner countries, revealing a common theme of being locked into low-value activities within the global renewable energy value chain, but also highlighting unique national contexts and strategic questions.

5.1 The Kenyan Context: A Detailed Diagnosis of Sectoral Gaps

The research from Kenya, drawing from policy analysis and 61 key informant interviews across the country, presented a stark picture of the gaps between policy and practice. While Kenya has a robust policy framework, including the Energy Act of 2019, its implementation is weak. The country is almost entirely dependent on imports for core renewable energy components, with local "manufacturing" limited to the assembly of imported parts, a situation exacerbated by competition from heavily subsidized foreign goods. This import dependency stifles local industry and is compounded by a technical training system misaligned with industrial needs, focusing on downstream installation rather than upstream manufacturing or R&D. The social dimension of the transition is also lacking, with the sector characterized by a "gig economy" of short-term contracts, a widespread lack of social benefits like SHA and NSSF, and disturbingly weak health and safety standards where workers often lack basic protective equipment. Furthermore, deep-seated cultural norms and stereotypes continue to exclude women from technical roles, and marginalized groups like youth and persons with disabilities face significant barriers to entry due to high costs and a lack of targeted support.

5.2 The South African Perspective: A Call for Strategic Agency and Learning

The presentation from South Africa served as a powerful call to reframe the continent's challenge from one of helplessness to one of strategic agency. While confirming a similar position of engaging in low-value, downstream activities, the research challenged the narrative of surrender. It pointedly asked what African nations can learn from China's own rapid ascent two decades ago from a similar position to a global leader. The research highlighted community protests in areas like Gqeberha, where local communities demonstrated against wind farms and component factories for not providing jobs, underscoring that the justice conversation must extend to communities where investments are sited, not just those where fossil fuels are phased out. The findings also urged a more nuanced look at different technologies, suggesting that for wind, the foundation and tower represent high-value, job-intensive opportunities that align with local capabilities, while cell production for solar is highly automated and may not be the most strategic entry point. The core message was that this research should be diagnostic, enabling the continent to think critically and learn from global precedents to craft its own homegrown solutions rather than accepting a peripheral role in the global energy transition.

5.3 The Ghanaian Case: Policy Existence Versus Effective Implementation

The evidence from Ghana echoed many of the challenges identified in Kenya, particularly concerning the chasm between policy intent and tangible outcomes. Ghana has a clear policy goal of reaching 10% renewable energy in its generation mix and has enacted a local content law requiring 51% Ghanaian ownership of energy projects within ten years. However, this ambition is undermined by a VAT waiver on solar PV imports, which, while incentivizing uptake, makes it economically irrational to build local manufacturing capacity, effectively "exporting jobs to China." The research found that Ghanaian labour in the renewable sector is predominantly project-based and precarious, mirroring the "gig economy" model seen elsewhere. On gender, while a national gender policy exists, it lacks concrete pathways for women's industrial participation and is hampered by a critical lack of disaggregated data, making it impossible to measure impact or tailor solutions effectively. Finally, despite SMMEs constituting the backbone of the economy, government support remains uncoordinated and driven by short-term political cycles, with high costs of credit and a lack of harmonized industrial policy preventing these vital businesses from thriving in the renewable energy sector.

5.4 Reframing the Challenge: From Deficit to Strategic Opportunity

A pivotal moment in the discussion was the reframing of Africa's position in the global value chain. While the research clearly outlined a "low-value" status, a compelling counter-narrative was presented, urging participants to view the situation not as a hopeless deficit but as a diagnostic starting point for strategic action. As one participant argued, "China 20 years ago was in a similar position... The aim of this research is not to make us surrender, but to think hard and ask ourselves: if China is there, what did they do?" This shifted the dialogue towards learning from global precedents and identifying homegrown, strategic entry points rather than succumbing to a narrative of perpetual dependency.

5.5 Emerging Discussions Highlights

5.5.1 Localization and Manufacturing

Import Dependency: Kenya has the potential to produce small-scale wind turbines and battery storage locally. Investment in training programs, innovation labs, and supportive policies is key to scaling local capacity. One engineer explained how Kenya could manufacture small wind turbines and battery storage locally, provided there is targeted investment in training programmes, innovation labs, and policy incentives to reduce VAT on raw materials while encouraging local assembly.

Uncompetitive Local Industry: Local manufacturers face insurmountable competition from heavily subsidized imports, making it economically unviable to establish local production lines. High capital costs and an unstable economic environment further deter investment.

Misaligned Skills Training: Technical and vocational training (TVET) programs were found to be misaligned with industry needs, focusing overwhelmingly on downstream skills like installation rather than the engineering and technical expertise required for upstream manufacturing and R&D.

5.5.2 SMME Participation

Financing Barriers: Small, Micro, and Medium Enterprises (SMMEs), which are critical for last-mile distribution, face severe challenges in accessing affordable capital. Banks are often reluctant to lend, and SMMEs lack the business acumen to navigate complex application processes for available funds.

Unfair Competition: In procurement processes, local SMMEs are consistently outcompeted by large multinational corporations or well-funded foreign entities that can leverage economies of scale and donor funding.

5.5.3 Decent Work

Importance of Labor Unions: Labor representatives stressed that workers' voices must not be sidelined. They called for stronger union involvement in renewable energy policymaking, and for capacity building to ensure workers are not trapped in informal or unsafe roles.

Precarious Employment: The renewable energy sector is characterized by a "gig economy" model. Work is largely project-based, with short-term contracts that offer no job security. As one presenter noted, "Once that contract is over, three months, it's done. You don't know when your next job is going to come."

Lack of Social Protection: Most workers in the sector, especially in technical and installation roles, lack basic social benefits such as health insurance (NHIF) and pension schemes (NSSF).
Weak Health and Safety Standards: Evidence pointed to a blatant disregard for worker safety. Participants heard accounts of technicians not being provided with essential Personal Protective Equipment (PPE) like helmets or ladders, leading to injuries that are then addressed through community fundraising rather than employer liability.

5.5.4 Gender Inequality and Social Exclusion

Role of Professional Networks: Women-focused networks and mentorship programs play a critical role in building confidence, skills, and employment opportunities for women in renewable energy. Scaling them requires visibility, private sector partnerships, and integration into national policy.

Inadequate Safeguarding for Women: Sexual harassment in places of work was identified as a persistent and systemic barrier to women's participation and advancement in the sector. Even though in some cases there are policies on sexual harassment, as pointed out by a labour representative of the Central Organization of Trade Unions (COTU), enforcement of the said policies remains a challenge.

Inclusion of Exclusion of Marginalized Groups: People with Disabilities (PWDs) and youth from underserved communities face significant barriers, including high upfront costs to enter the sector, a lack of targeted training programs, and an absence of mentorship opportunities.

5.5.5 The Policy-Practice Chasm

Enforcement Gaps: A recurring theme was the significant gap between well-articulated policies and their implementation. While Kenya has progressive frameworks like the Energy Act (2019) and the Gender in Energy Policy (2019), their enforcement is weak. Participants noted that policies exist on paper but are routinely "undermined" at the implementation level. For example, local content requirements are circumvented, and labour standards are ignored by employers with impunity. This chasm was identified as a primary reason for the slow progress on localization and decent work.

Renewable Energy Value Chain Analysis: Evidence from Kenya's solar and wind sectors shows the country remains at the low-value end of global production networks. Upstream R&D is underdeveloped; over 90% of solar panels are imported from China; "local manufacturing" often means final assembly of imported cells; wind projects rely on imported blades and nacelles; and recycling systems for solar/wind components are absent. Kenya's strengths lie mainly in downstream distribution and installation, which generate jobs but with limited value addition.

6 Co-Creation of Pathways

The participants engaged in a structured, multi-stage creative process to generate and develop the ideas. The SEEDS Approach was used in this session to help move from individual reflection to collective, visionary storytelling.

The facilitator began by asking participants to individually reflect on a central question: "What is an innovative idea or practice currently happening in the just energy transition space that is small and nascent now, but if scaled, would be transformative for the ecosystem?" These ideas were termed "Jet Seeds." Participants were given one minute of silent reflection to identify their own "seed," such as one participant's idea of "100% localization."

Participants then formed groups to share their individual seeds and converge on a single, most compelling "seed" to develop further. The groups were tasked with a creative exercise: to envision what that seed would look like once it had fully matured and blossomed by the year 2063, aligning with Africa's Agenda 2063. They were to tell a story about this mature idea, outlining: The Mature Seed which is a description of the fully realized idea like 100% localization of solar systems. Primary Results which were, the immediate, direct outcomes of this maturity like high GDP growth, value retention within the country and Secondary Implications which are the broader, systemic effects of those primary results.

This was a visionary exercise, pushing groups to think beyond current constraints and articulate a desirable future state Which resulted in the development of four strategic pathways. The "Vote with Your Feet" exercise served as a live, physical barometer of stakeholder consensus and concern, generating rich, real-time feedback on the pathways.

6.1 Pathway 1: Localisation of Wind Turbines

This pathway generated widespread, though cautious, agreement. A majority of participants were only moderately convinced (slightly agreed), reflecting the discussion where it was identified as a logical "low-hanging fruit" but faced tough questions. Proponents highlighted the potential in manufacturing turbine foundations and towers, which use locally available materials like cement and steel. However, a significant number of neutral or indifferent voters underscored the critical need for greater clarity on how this would lead to improved regional integration. The discussion evolved to envision a regionalized value chain under treaties like African Continental Free Trade Area (AfCFTA), acknowledging that a purely national approach might be insufficient. The graph below show the voting distribution of the participants on localization of wind turbines pathway.

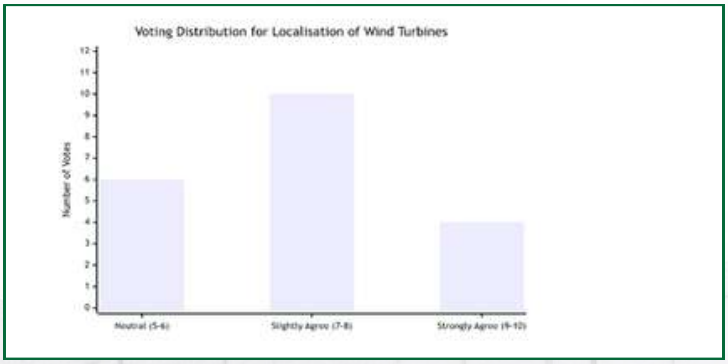

Figure 2: Voting on Localisation of Wind Turbines

6.2 Pathway 2: Localisation of Policies/Laws/Regulation

The voting on this pathway revealed a clear divide in stakeholder confidence. While a significant bloc strongly agreed with its foundational importance, an equal number of participants were indifferent or neutral. This split mirrors the nuanced debate on what "localization" truly means. It goes beyond translating documents; it involves contextualizing policies to county-level economies and communicating them accessibly. The skepticism likely stemmed from deep-seated concerns about the government's capacity and will to implement such nuanced reforms, a theme echoed throughout the dialogue. The consensus was that while the goal is critical, most participants were not entirely convinced that policy localization alone was adequate without a fundamental shift in enforcement and accountability. The graph below shows the voting distribution of the participants on Localisation of Policies pathway.

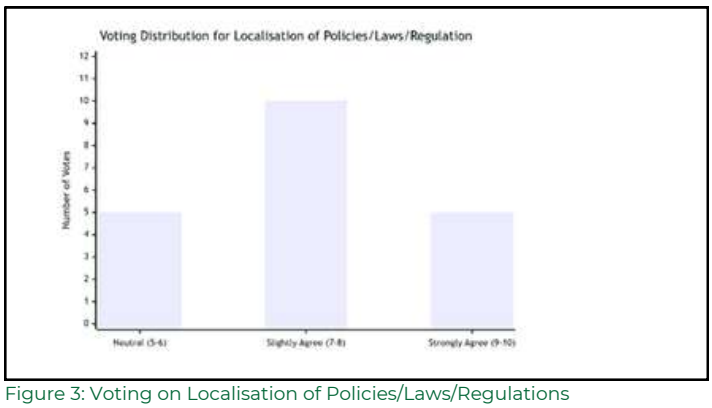

Figure 3: Voting on Localisation of Policies/Laws/Regulations

6.3 Pathway 3: Energy Access for Industrialization and Poverty Eradication

This pathway produced the most balanced spread of votes, indicating it was the most debated. A solid bloc strongly agreed with its dual mission, embracing the argument that grid power for industry and decentralized solutions for poverty are not mutually exclusive. However, an equally large group of neutral and slightly agreeing voters highlighted concerns about implementation. A powerful point from the discussion, that this agenda must be "owned by the communities" and not driven top-down by NGOs resonated but also created uncertainty about its operationalization, leading to a more cautious overall assessment.

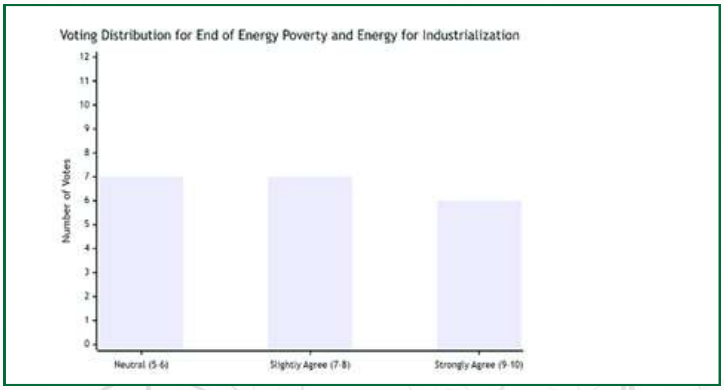

Figure 4: Voting distribution on End of Energy Poverty and Energy for Industrialization

6.4 Pathway 4: Localisation of Resources

This pathway received the most tentative support, with the highest proportion of neutral voters. The "Buy Kenya, Build Kenya" ethos was emotionally compelling, but the voting reflected the practical hurdles identified. The central critique, which suppressed stronger agreement, was the issue of energy security. As one participant pointedly asked, "How can you get localization if we don't have energy security?" The pathway was seen as a virtuous but challenging cycle, where localizing manufacturing requires affordable energy, the very problem the JET seeks to solve. This circular dependency made it difficult for participants to endorse it as a primary, standalone solution. The graph below show the voting distribution of the participants on Localisation of Resources pathway.

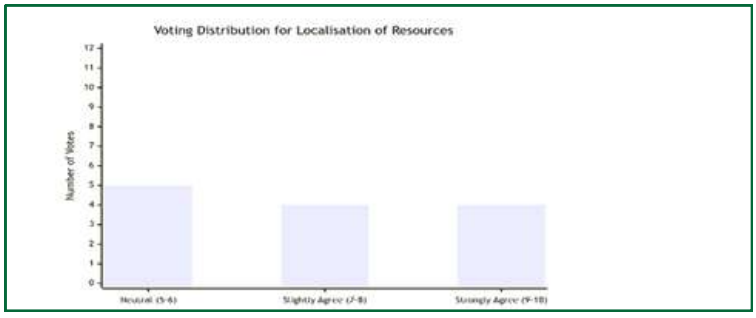

Figure 5: Voting on Localisation of Resources

6.5 Cross-Cutting Themes: Data, Compliance and Language

Throughout the pathway debates, several cross-cutting issues were repeatedly stressed.

- **Data Democratization:** The group advocating for open data powerfully argued that it is the "silent thread that ties all the pathways together." Without transparent data on resources, markets, and impacts, effective policy-making, certification, monitoring, and regional integration are severely hampered. The hoarding of data by companies and institutions was identified as a critical barrier to progress.
- **The Compliance Dilemma:** A consistent discussion point was the gap between having standards and ensuring compliance. As one participant clarified regarding health and safety, "The policies are there... the only concern is compliance." The dialogue explored how to move from creating policies to enforcing them, including through better monitoring, closing loopholes exploited by multinational firms, and empowering regulatory bodies.
- **Language and Technical Documentation Barriers:** A critical finding, reinforced by the South African case study and Kenyan experiences, is that technological dependency is enforced not only by cost and strategic control of manufacturing machinery but also by profound language and documentation barriers. Key technologies, components, and their accompanying manuals often feature interfaces and instructions exclusively in Mandarin. This creates a dual-layer dependency: it limits the ability of local technicians in Kenya to independently install, maintain, and repair equipment, and it systematically hinders true technological transfer and local innovation by locking critical operational knowledge behind a language barrier. This necessitates the continuous reliance on foreign expertise for basic operations, stifling local capacity building and the ability to adapt, reverse-engineer, or improve upon imported technologies

7 Conclusion

The National Policy Dialogue on Just Energy Transitions made it unequivocally clear that Kenya's current trajectory in the renewable energy sector, while successful in increasing generation capacity, has been deficient in securing a truly just and transformative future. The transition, as it stands, risks perpetuating a neo-colonial model where Kenya remains a consumer of imported technology and a provider of cheap, precarious labour, thereby forfeiting the immense socio-economic benefits of a localized green economy.

The discussions confirmed that the primary challenge is not a lack of policies, but a systemic failure in their implementation, enforcement, and strategic alignment. The co-created pathways localizing manufacturing, contextualizing policies, universalizing energy access, and empowering SMMEs are not standalone solutions but are deeply interconnected. The success of one is hinged on the progress of the others. Ultimately, achieving a Just Energy Transition requires a fundamental paradigm shift: from a focus on deploying technology to a deliberate, industrial strategy focused on building domestic capacity, fostering regional collaboration, and placing social equity and decent work at the very core of the energy agenda. The dialogue concluded with a resolute consensus that the time for rhetoric is over; the path forward demands actionable commitment, stringent accountability, and an unwavering focus on capturing value for the benefit of Kenya and Africans at large.

8 Recommendations

To translate the dialogue's insights into tangible action, the following recommendations are proposed for specific stakeholder groups:

8.1 For the Government of Kenya (National and (County Levels)

1. Develop national and sub national regulations and empower various state organs or county organs to enforce them.
2. Launch a Targeted Manufacturing Incentive Scheme: Create predictable, long-term fiscal and policy incentives (e.g., tax holidays, production credits, subsidized industrial energy rates) specifically for the manufacturing of identified "low-hanging fruit" renewable energy components, such as wind turbine towers and solar panel mounting structures.
3. Bridge the Skills Gap through Curriculum Reform: Mandate and fund the reform of TVET and university curricula in close collaboration with industry to produce a workforce skilled in renewable energy manufacturing, R&D, and quality control, not just installation and maintenance.
4. Strengthen Regulatory Enforcement: Augment the capacity and funding of regulatory bodies like the directorate of occupational safety and health and energy regulators to proactively monitor and enforce compliance with labour laws, health and safety standards, and gender inclusion policies within the sector.

8.2 For Development Partners and Financial Institutions

5. Develop De-risking Instruments for SMMEs: Create and fund tailored financial products such as guarantee schemes, patient capital loans, and blended finance facilities specifically designed to address the high capital and collateral requirements that lock SMMEs out of the market.

6. Fund Regional Value Chain Initiatives: Prioritize funding for programs, studies, and pilot projects that promote cross-border renewable energy value chains within the East African Community, aligning with the African Continental Free Trade Area (AfCFTA) to create a market of scale that can attract manufacturing investments.

8.3 For Private Sector, Civil Society, and Academia

7. Champion a Culture of Data Democratization: Companies, research institutions, and government agencies should collaborate to create open-data platforms for non-proprietary sector information. This will enhance transparency, fuel innovation, research capacities and enable evidence-based advocacy and policy-making.
8. Mobilize Grassroots Advocacy and Mentorship: Civil society organizations should lead campaigns to mobilize communities and workers to demand their rights and benefits from energy projects. Furthermore, established industry players and professionals should create structured mentorship programs to foster skills transfer and empower women, youth, and marginalized groups to participate meaningfully in the sector.

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