

Terms of Reference: Strengthening the data ecosystem for AI use cases for impact in Kenya

The GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Solutions and Events.

GSMA Mobile for Development

The GSMA Mobile for Development Foundation, Inc. (“GSMA”) is a U.S. 501(c)(3) charitable organisation. The Mobile for Development team (M4D) operates at the intersection of the mobile ecosystem and the development sector. Our aim is to stimulate digital innovation and deliver both sustainable business and large-scale socio-economic impact. Our research and insights platform, in-market expertise and community of partners push forward digital innovations and implementations that empower underserved populations. To date, we have impacted the lives of over 220 million people.

Central Insights Unit

The [Central Insights Unit](#) (CIU) sits at the core of GSMA M4D. It produces thought-leading research on frontier technologies, digitalisation and society and the impact of mobile and digital technologies in sustainable and inclusive development. The CIU works closely with the UK Foreign, Commonwealth and Development Office (FCDO) and the rest of M4D to ensure that research highlights the role of mobile technology as an enabler, draws on the expertise GSMA holds and builds capacity within the FCDO.

Research context

The GSMA Mobile for Development's Central Insights Unit is seeking a research supplier to examine Kenya's data ecosystem for Artificial Intelligence (AI) at a high level, and then for specific use cases. Data underpins AI systems, but many LMICs face "data poverty," limited access to quality, locally relevant data and capacity to use it. This constrains AI development.

Kenya is a leading African tech hub with high mobile penetration, rising smartphone adoption, and an expanding digital economy. In 2024, GSMA research highlighted AI's potential in agriculture, energy, and climate, stressing the role of data. Kenya's *National AI Strategy 2025–2030* identifies data, infrastructure, and innovation as pillars for AI advancement, with priority sectors including agriculture, healthcare, education, MSMEs, security, sustainability, public services, and the creative economy. Kenya has growing data assets through KNBS, the Kenya Open Data Initiative, Earth observation programs, and startups like Amini.

Yet, challenges persist: uneven digitisation, fragmented and poor-quality datasets, lack of metadata and standards, and especially the shortage of local language resources for training AI and LLMs. Global efforts (e.g., Mozilla Common Voice, Lacuna Fund) are helping build Swahili and other local datasets but face sustainability issues. Reliance on foreign data centres further raises sovereignty concerns. Strengthening Kenya's data ecosystem, i.e. improving access, quality, representativeness, and sovereignty, is essential for advancing AI applications in priority sectors and supporting national development.

Project overview and objectives

Improving the data ecosystem for AI development in Kenya's priority sectors is critical to overcoming one of the biggest barriers to its ambition of becoming a regional AI leader. The proposed research, to be delivered by GSMA M4D's Central Insights Unit for the FCDO in Kenya, will investigate how the data ecosystem can be strengthened to support domain-specific AI use cases in two of the eight priority sectors, namely:

1. **Micro-, small and medium-sized enterprises (MSMEs)**
2. **Public service delivery**

The target use cases will be selected and defined based on their impact potential and existing infrastructural support. While the research will centre on the two sectors

detailed above, we will explore a third priority sector, climate action and sustainability, if resources and timelines allow.

For each use case, the research will capture county-level needs, challenges and opportunities. Rather than isolate specific counties for analysis, the research will explore county perspectives at a high-level, across a range of counties (covering a mix of digital maturity, infrastructure and socio-economic development), and highlight how the different structural features of a county can impact their data ecosystem.

Specifically, the research will meet the following objectives:

- Provide a high-level ecosystem level assessment of data for AI in Kenya to ground the discussion.
- Identify 3–4 high-impact AI use cases in each of the two priority sectors.
- Map the key domain-specific and cross-cutting datasets and relevant actors and infrastructure required to support these use cases.
- Assess the current status of these datasets, including perceptions of availability, accessibility, usability, shareability, localisation, and quality.
- Identify barriers such as lack of standardisation, metadata, and interoperability, as well as gaps in local language resources.
- Propose targeted solutions and recommendations for key actors in the AI ecosystem in Kenya, including the national and county government, donor and development partners, startups, and research institutions, to advance data readiness for AI.

Research questions and methodology

The research supplier will conduct research to answer the following questions:

1. What are the most relevant domain-specific and cross-cutting data(sets) needed to enable high-value AI use cases in the two of Kenya’s eight priority sectors identified for this study, as highlighted in its AI strategy?
2. To what extent is this data available, accessible, usable, and trusted by AI practitioners in Kenya?
3. What practical steps could strengthen data generation, access, quality, and sharing safely and ethically to support the development of AI-enabled solutions, and what are the associated trade-offs?
4. What lessons from comparative markets can inform Kenya’s approach to data standards, governance, and sharing for AI?

Proposed methodology

While the research supplier may propose alternative / additional methods, the GSMA M4D proposes taking a mixed methods approach to conduct this research, including:

1. Desk research

Literature review, mapping and analysis of existing datasets, and secondary research on global markets to:

- Identify high-impact use cases (3-4) within each of the chosen sectors.
- Identify and assess priority domain-specific and cross-sector data/datasets relevant to select use cases.
- Map key actors in the data ecosystem for relevant sectors.
- Review examples from other markets (e.g. India, Rwanda) with more mature AI data ecosystems, to derive applicable lessons.

2. Key informant interviews

Semi-structured interviews, to:

- Understand data needs, challenges, gaps and opportunities from key stakeholder groups.
- Identify targeted, stakeholder-specific solutions to strengthening the data ecosystem.
- Gather relevant learnings on data for AI from international experts in comparable markets.

Stakeholder type	No. of KIIs
Public sector stakeholders , e.g. national and county level government officials and agencies	5-7
Private sector stakeholders , e.g. innovators, startups, organisations/companies with domain-relevant data	5-7
Domain experts , e.g. development actors, researchers, startups, NGOs, community groups relevant to chosen sectors	5-7
Global experts working on data and AI in comparable markets with more mature data ecosystems for AI	5-7
	Total: ~30

Scope

This research will focus on Kenya’s data ecosystem for AI in the context of 3-4 select high-potential use cases in 2 priority sectors. It will not be a comprehensive study of the full range of potential AI use cases and sectors. While data is just one pillar of Kenya’s AI strategy, other AI building blocks (infrastructure, R&D, etc.) are out of scope for this study.

Target audience

The primary objective of the research will be to support the FCDO in Kenya to further deepen its engagement, advisory and programming in the AI ecosystem in Kenya, and the region more broadly, under such initiatives such as the recently launched UK-Kenya AI challenge fund,¹⁹ the Kenya-UK partnership on emerging technologies between academic institutions and researchers from Kenya and the UK, to establish a framework for AI research and innovation that will guide the creation of the Kenya Emerging Tech Institute and Action Lab,²⁰ and the regional AI4D initiative being delivered alongside multiple other donor and development partners.²¹

The research will directly support the Data pillar of the Kenya AI Strategy as well as secondarily support other national development plans, such as the National Digital Masterplan 2022–2032, the goals of the Bottom-up Economic Transformation Agenda (BETA) and Vision 2030.

The research will help support Kenya’s innovators and researchers to access better quality and more useable local and national datasets, enabling the development of AI solutions that are locally relevant as well as globally competitive.

Deliverables and timelines

Activities	Timeline
Proposal submission from supplier	13 th October 2025
Interviews with short-listed suppliers	15 th – 21 st October 2025
Contract research supplier and project kick-off	1 st November 2025
Inception report for GSMA review	21 st November 2025
GSMA feedback on inception report	28 th November 2025
Revised inception report	7 th December 2025
Desk research and key informant interviews	December 2025 – February 2026
Interim report for GSMA review	12 th February 2026
GSMA review of interim report	19 th February 2026
Revised draft of interim report	26 th February 2026

Activities	Timeline
Analysis, recommendations, case studies and report writing	March 2026
Final report for GSMA review	30 th March 2026
GSMA review of final report	6 th April 2026
Final report submission to GSMA	13 th April 2026

Deliverables

The primary deliverable for this research will be a public-facing report or slide deck (approximately fifty pages) with a consolidated set of findings and recommendations on Kenya’s data ecosystem focused on select use cases, along with multi-stakeholder recommendations for strengthening the data ecosystem for AI advancement.

In addition, the supplier will develop a 5–10-page dedicated briefing for the FCDO with recommendations and opportunities for supporting data advancement for these use cases.

The supplier will additionally support up to 2 virtual dissemination events, post-research. If participation in any in-person events is expected, GSMA will ensure this is only where local to the supplier, with no expectation of international travel.

Firm and proposal requirements

Looking for: *Individual consultant or Consultancy team*

Required experience

Essential:

- *Demonstrable track record of completing similar assignments.*
- *Expertise in data and emerging technologies such as AI.*
- *Thematic expertise in development, public sector services, MSMEs.*
- *Clear and demonstrable experience in working with mobile network operators.*
- *Full working proficiency in English, writing to publication quality.*
- *A strong network, including potential interviewees.*

Proposals should include a separate technical and financial proposal:

Technical proposal

1. A short (1 page) statement of suitability, highlighting recent relevant experience.
2. A short (2-4 page) discussion of the proposed approach including: the analytical frameworks to be used, identified data sources, and initial proposals on case studies.
3. Any proposed changes to the ToR.
4. Details of relevant firm project experience.
5. Gantt chart outlining major project stages and timelines
6. CVs, and location of team members.

Financial proposal

1. Level of effort (person-day) by activity.
2. Fee rates (per day in GBP).
3. Total project cost (GBP), without VAT¹.
4. The Respondent's Total Price is inclusive of all costs, insurances, fees, costs, expenses, liabilities, obligations, risks, and all financial requirements for the performance of Services and provision of Deliverables.
5. Any charge not stated in this Proposal, which extends above to the Total Price, is not permitted.

Due to GSMA compliance requirements, exact project budgets cannot be provided at this stage. You are, however, able to provide a few implementation/budget options that can help us assess value for money and we can align our project scope to the relevant budget after a consultant has been selected.

Proposal assessment and selection process

The proposal will be scored on the following set of criteria:

Criteria	Importance	Weighting
Cost	Proposal's value for money	20%
Quality	Quality of the research approach outlined in the proposal, including degree to which it addresses the outlined research questions and proposal elements	35%
Bidder's capacity to manage the	Demonstrated experience of conducting research projects, selection of experienced high-quality research partner(s) and ability to manage the project on time and on budget	30%

Criteria	Importance	Weighting
project on time and on budget		
Relevant experience	Bidder's experience in successfully conducting similar projects	15%

- Proposals are to be submitted no later than 4pm BST on 13th October 2025 to Nigham Shahid (nshahid@gsma.com), Daisy Macaskie (dmacaskie@gsma.com) and Zarah Udwadia (zudwadia@gsma.com)
- Clarification questions can be sent to Nigham Shahid (nshahid@gsma.com), Daisy Macaskie (dmacaskie@gsma.com) and Zarah Udwadia (zudwadia@gsma.com).
- Shortlisted consultants may be contacted for interviews, which will be take place 15th – 21st October 2025.