STRATEGIC PLAN
2013-2018
JUNE 2013

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STRATEGIC PLAN
2013-2018

JUNE 2013
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADS</td>
<td>Australian Development Scholarship</td>
</tr>
<tr>
<td>AFUR</td>
<td>African Forum for Utility Regulators</td>
</tr>
<tr>
<td>ALTECH</td>
<td>Allied Technologies Ltd</td>
</tr>
<tr>
<td>ATRACO</td>
<td>Association of Transport Companies</td>
</tr>
<tr>
<td>ATU</td>
<td>African Telecommunication Union</td>
</tr>
<tr>
<td>CCK</td>
<td>Communications Commission of Kenya</td>
</tr>
<tr>
<td>CLIA</td>
<td>Corporate, Legal and Industry Affairs</td>
</tr>
<tr>
<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
</tr>
<tr>
<td>CREPA</td>
<td>Centre Régional pour l’Eau Potable et l’Assainissement</td>
</tr>
<tr>
<td>CSS</td>
<td>Commonwealth Scholarship Commission</td>
</tr>
<tr>
<td>DG</td>
<td>Director General</td>
</tr>
<tr>
<td>DTT</td>
<td>Digital Video Broadcasting</td>
</tr>
<tr>
<td>EAC</td>
<td>East African Community</td>
</tr>
<tr>
<td>EAPP</td>
<td>Eastern Africa Power Pool</td>
</tr>
<tr>
<td>EACO</td>
<td>East African Communication Organization</td>
</tr>
<tr>
<td>EARP</td>
<td>Electricity Access Roll-out Program</td>
</tr>
<tr>
<td>EDPRs</td>
<td>Economic Development and Poverty Reduction Strategy</td>
</tr>
<tr>
<td>EIA</td>
<td>Environmental Impact Assessment</td>
</tr>
<tr>
<td>ERA</td>
<td>Electricity Regulatory Authority</td>
</tr>
<tr>
<td>ERC</td>
<td>Energy Regulatory Commission</td>
</tr>
<tr>
<td>EREA</td>
<td>Energy Regulators Association Of East Africa</td>
</tr>
<tr>
<td>ERC</td>
<td>Energy Regulatory Commission</td>
</tr>
<tr>
<td>ESAWAS</td>
<td>Eastern and Southern Africa Water and Sanitation Regulators Association</td>
</tr>
<tr>
<td>EWSA</td>
<td>Energy, Water and Sanitation Authority</td>
</tr>
<tr>
<td>EWURA</td>
<td>Energy and Water Utilities Regulatory Authority</td>
</tr>
<tr>
<td>FIT</td>
<td>Feed-In Tariff</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>GoR</td>
<td>Government of Rwanda</td>
</tr>
<tr>
<td>ICAN</td>
<td>Internet Corporation For Assigned Names And Numbers</td>
</tr>
<tr>
<td>ICF</td>
<td>Investment Climate Facility for Africa</td>
</tr>
<tr>
<td>ICT</td>
<td>Information Communication Technologies</td>
</tr>
<tr>
<td>IPP</td>
<td>Independent Power Producer</td>
</tr>
<tr>
<td>IT</td>
<td>Information Technology</td>
</tr>
<tr>
<td>ITU</td>
<td>International Telecommunications Union</td>
</tr>
<tr>
<td>JICA</td>
<td>Japan International Cooperation Agency</td>
</tr>
<tr>
<td>KCC</td>
<td>Korea Communication Commission</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>KISA</td>
<td>Korea Information Society Agency</td>
</tr>
<tr>
<td>kV</td>
<td>Kilo Volt</td>
</tr>
<tr>
<td>kWh</td>
<td>Kilowatt-hour</td>
</tr>
<tr>
<td>LDC</td>
<td>Least Developing Countries</td>
</tr>
<tr>
<td>LoS</td>
<td>Level of Service</td>
</tr>
<tr>
<td>MDGs</td>
<td>Millennium Development Goals</td>
</tr>
<tr>
<td>M&amp;E</td>
<td>Monitoring &amp; Evaluation</td>
</tr>
<tr>
<td>MININFRA</td>
<td>Ministry of Infrastructure</td>
</tr>
<tr>
<td>MTN RWANDACELL</td>
<td>Mobile Telecommunications Network RWANDACELL</td>
</tr>
<tr>
<td>MW</td>
<td>Megawatt</td>
</tr>
<tr>
<td>NICI</td>
<td>National Information Communication &amp; Infrastructure</td>
</tr>
<tr>
<td>NISR</td>
<td>National Institute of Statistics of Rwanda</td>
</tr>
<tr>
<td>PPP</td>
<td>Public- Private Partnership</td>
</tr>
<tr>
<td>PRO</td>
<td>Public Relations Office</td>
</tr>
<tr>
<td>QoS</td>
<td>Quality of Service</td>
</tr>
<tr>
<td>RAERESA</td>
<td>Regional Association of Energy Regulators for Eastern and Southern Africa</td>
</tr>
<tr>
<td>RBS</td>
<td>Rwanda Bureau of Standards</td>
</tr>
<tr>
<td>RDB</td>
<td>Rwanda Development Board</td>
</tr>
<tr>
<td>RCIP</td>
<td>Regional Communication Information Project</td>
</tr>
<tr>
<td>REFIT</td>
<td>Renewable Energy Feed-In Tariff</td>
</tr>
<tr>
<td>RTFC</td>
<td>Rwanda Federation of Transport Cooperatives</td>
</tr>
<tr>
<td>RURA</td>
<td>Rwanda Utilities Regulatory Authority</td>
</tr>
<tr>
<td>RWANDATEL</td>
<td>Rwanda Telecommunications Company</td>
</tr>
<tr>
<td>SWOT</td>
<td>Strength, Weakness, Opportunity and Threats</td>
</tr>
<tr>
<td>TCRA</td>
<td>Tanzania Communications Regulatory Authority</td>
</tr>
<tr>
<td>TLMS</td>
<td>Transport Licensing Management Spectrum</td>
</tr>
<tr>
<td>TRASA</td>
<td>Telecommunications Regulators Association of Southern Africa</td>
</tr>
<tr>
<td>UA</td>
<td>Universal Access</td>
</tr>
<tr>
<td>UAF</td>
<td>Universal Access Fund</td>
</tr>
<tr>
<td>UCC</td>
<td>Uganda Communication Commission</td>
</tr>
<tr>
<td>UNDP</td>
<td>United Nations Development Program</td>
</tr>
<tr>
<td>USAID</td>
<td>United States Agency for International Development</td>
</tr>
<tr>
<td>USTTI</td>
<td>United States Telecommunication Training Institute</td>
</tr>
<tr>
<td>WDA</td>
<td>Work Development Authority</td>
</tr>
<tr>
<td>WIPO</td>
<td>World Intellectual Property Organization</td>
</tr>
<tr>
<td>WSP</td>
<td>Williams Sale Partnership</td>
</tr>
<tr>
<td>%</td>
<td>Percentage</td>
</tr>
</tbody>
</table>
On behalf of the Regulatory Board, Management and Staff of Rwanda Utilities Regulatory Authority [RURA], (hereinafter called the “Authority”) I have the pleasure to submit the Authority’s 5 years period Strategic Plan for fiscal years 2013 – 2018. It outlines how the Authority intends to accomplish its mission of regulating the four very important sectors of Rwanda’s economy namely ICTs, energy, transport and water & sanitation.

This strategic plan is in line with the general framework of the national programs and policies, including the Vision 2020 and the Economic Development and Poverty Reduction Strategy [EDPRS II] of Rwanda.

This Strategic Plan will allow RURA to contribute to the realization of Rwanda’s national policies. In addition, it takes cognisance of the fact that it was developed in line with the harmonisation process of Rwanda’s assent to the East African Community (EAC).

The Strategic Plan reviews anticipatively the mission of RURA to locate it in a clearly defined vision set for 2018 horizon. Our vision is:

“To be point of reference in public utilities regulation that inspires development and confidence.”

This is supported by the mission statement which is;

“To regulate public utilities by building an environment that promotes fair competition and quality of public utility service in a transparent, independent and reliable manner.”

This mission derives from the regulatory mandate as indicated in the Law creating RURA and shows the commitment of the Authority to contribute to the national socio-economic development. The Strategic Plan also presents strategic goals that will enable RURA to handle its challenges and hence meets its objectives.

This Strategic Plan further highlights the values to which RURA adheres; these include: **Independency, Accountability, Transparency and Firmness.** These values will constitute our identification flag in the fulfilment of the Authority’s mission.

In addition, this strategic plan serves as reference for programs and plans of action as well as projects platform for agreements between RURA and various partners.

We hope that this strategy paper will make it possible to timely respond to the utility needs within all sectors to be regulated, and to successfully handle most of the Authority’s current and future challenges.

We are fully committed to the implementation of this Strategic Plan and request all stakeholders to get involved in its implementation process.

Thank you,

KAZIGE Eugene

The Chairman of the Regulatory Board
MESSAGE FROM THE DIRECTOR GENERAL

Maj. François Regis GATARAYIHA
Director-General

This Strategic Plan has been prepared within a participatory framework and it reflects the mandate assigned to RURA by Law 09/2003 of 1/3/2013 establishing an Authority for the Regulation of telecommunications, information technology, broadcasting and converging electronic technologies including the internet and any other audiovisual information and communication technology; postal services; Renewable and non-renewable energy, industrial gases, pipelines and storage facilities; Water; Sanitation; Transport of persons and goods; and other public utilities, if deemed necessary.

This approach was privileged in order to maximize the involvement and participation of RURA staff and stakeholders in the strategic planning process to ease the way and increasing chances for its implementation.

This Strategic Plan is also based on previous strategic planning initiatives undertaken since 2009.

Consultations and benchmarking from our local and regional stakeholders resulted in clarifying the Authority’s role and responsibility as a multi-sector utilities regulator and in crafting the goals and objectives to attain in a way that will help to meet the government of Rwanda’s development agenda as stipulated in EDPRS II paper.

The vision, mission and values of the Authority have been streamlined through this strategic plan elaboration process to accurately position the Authority in its pivotal role of inspiring the development of the country.

The multispectral aspect of the Authority led us to elaborating this strategic plan in a form of mother-route from which each sector will be based and branched to give its full contribution to the development of the regulated sectors.

In addition to that, for the Authority to fulfil its ultimate aim of being a catalyst for socio-economic transformation and betterment of Rwandans, (7) seven goals have been put forward; these are:

- Develop an Efficient, Effective and Productive Corporate Entity;
- Create, Strengthen and enforce the legal and regulatory framework;
- Ensure that consumers enjoy acceptable quality of service at reasonable prices and are assured of secured supplies;
- Promote easy market entry, fair competition and support a market driven industry in the regulated utilities;
- Ensure efficient and effective allocation of resources, safety and reliability of utilities services;
- Contribute to the national long term development by promoting the availability, accessibility and affordability of regulated services to all consumers including low income, rural and disadvantaged consumers;
- Ensure a sustainable development of the Media sector that reflects a sense of Rwanda's identity, character, cultural diversity;
Based on the above goals, the Authority, will work hand in hand with all stakeholders to ensure that the requisite changes in regulation are effected on a timely basis for the benefit of regulated sectors.

All strategic goals have been translated into a “Strategic Plan Matrix” from which annual action plans will be delivered.

Another aspect of this strategic plan is that the set strategic objectives can be easily translated into stand-alone programs/projects of which the fulfilment will lead to the fulfilment of set strategic goals.

Furthermore, the current strategic Plan lays down a basis for annual action planning. It will serve as a tool which will assist in constantly evaluating the extent to which our resources are allocated in regard to the fulfilment of the Authority’s mission.

In addition, the seven strategic goals and related objectives will serve as accountability measures against which each department and unit performance will be assessed from.

Even though the elaboration of this strategic plan took longer than expected, I am proud to announce that there have been a clear common understanding, ownership and commitment from each level of the Authority’s administration to its full implementation.

On behalf of the Authority, I finally wish to thank everyone who contributed in the development of this plan and look forward to your continued support and participation in its implementation.

Maj. François Regis GATARAYIHA
Director-General

1. BACKGROUND

1.1 RWANDA IN CONTEXT

Rwanda is a landlocked country within the East Africa Community (EAC) political sphere (commonly known as the land of thousand hills) and has a surface area of 26,338 Square kilometres with a population of about 10.5 million- one of the highest in the world in terms of density (NISR, 2012). In Rwanda, Agriculture employs about 78.8% of the active population, contributing about 36% to the GDP and has a GDP per capita of about U$ 600 (as of 2012). It has a constitutional democracy, a President, Prime Minister and two houses of parliament.

The 1994 genocide against Tutsi destroyed almost all economic, legal and social infrastructures and led the country into quasi-total ruin. After this period, the country had to be reconstructed in all sectors. This rehabilitation, among other things, required the setting up of an adequate legal framework to manage the situation of post-genocide and war.


In line with its policy of economic development and good governance, the Government of Rwanda (GoR) has established the Rwanda Utilities Regulatory Authority (RURA) so that it contributes to the achievement of its socio-economic goals.

RURA is a multi-sector regulatory entity which has the mandate of regulating four sectors of the economy to wit; ICTs & Postal, Energy, Water & Sanitation and Transport.

With a very high tele-density, lower GDP per capita and highly agrarian economy, the role of this Regulatory Authority in the much-needed transformational development is both crucial
and strategic. The effective execution and fulfilment of its mandate will to a great extent depend on a clear and effective strategic plan that is workable in a conducive environment.

1.2 INSTITUTIONAL ANALYSIS

1.2.1 Legal framework

Rwanda Utilities Regulatory Authority (the Authority) was initially created by the Law n° 39/2001 of 13 September 2001 as an agency with the mission to regulate certain public Utilities, namely: telecommunications network and/or Telecommunications services, electricity, water, removal of waste products from residential or business premises, extraction and distribution of gas and transport of goods and persons.

This Law was further reviewed and replaced by Law N° 09/2013 of 01/03/2013 establishing Rwanda Utilities Regulatory Authority (RURA) and determining its mission, powers, organisation and functioning. This Law gives RURA the mandate to regulate:

1. telecommunications, information technology, broadcasting and converging electronic technologies including the internet and any other audiovisual information and communication technology;
2. postal services;
3. Renewable and non-renewable energy, industrial gases, pipelines and storage facilities;
4. Water;
5. Sanitation;
6. Transport of persons and goods; and
7. Other public utilities, if deemed necessary.

The same Law gives the Authority a legal personality, financial and administrative autonomy in the fulfilment of its mandate.

The Authority plays a pivotal role between the policy maker, licensed service providers and consumers. The Authority reports to the Office of the Prime Minister and it coordinates with line ministries responsible for each regulated sector in executing its functions.

In addition to the law creating RURA, there is a number of other legal and regulatory instruments which help RURA to discharge its responsibilities in each specific sector to be regulated.

In the same vein, the Authority has the mission to ensure fair competition, promoting and protecting consumers’ interests and rights in regulated sectors.

The figure No.1 represents the symbiotic relations of the Authority with its key stakeholders;

Figure 1: RURA Triple Bond

1.2.2 Functions & structure

To be able to regulate public utilities, the Law N° 09/2013 of 01/03/2013 gives the Authority the following missions:

- to set up necessary guidelines in order to implement laws and regulations in force;
- to ensure compliance by public utilities with the provisions of laws and regulations governing the regulated sectors in an objective, transparent and
non-discriminatory manner;
- to ensure the continuity of service delivery by the licensed or authorized service providers and the preservation of public interest;
- to protect users’ and operators’ interests by taking measures likely to guarantee effective, sound and fair competition in the regulated sectors within the framework of applicable laws and regulations;
- to protect and promote consumers’ interests;
- to promote the availability, accessibility and affordability of regulated services to all consumers including low income, rural and disadvantaged consumers;
- to promote efficient development of regulated sectors in accordance with Government economic and financial policy;
- to promote and enhance general knowledge, sensitization and awareness of the regulated sectors including but not limited to:
  - Promote and protect the rights and obligations of consumers and service providers;
  - Issuing permits, authorizations and licenses required for regulated sectors, in accordance with the relevant laws and regulations;
  - To monitor and ensure compliance by regulated network or service providers in line with their licenses, permits and concession obligations;
  - To ensure fair competition in all regulated sectors.

To fulfil this mission, the Authority is vested with the powers including among others: carrying out investigations including inspections at service delivery sites; imposing administrative sanctions in case of violation of laws and regulations; facilitating settlement of disputes relating to regulated services; issuing directives to the regulated service providers as well as regulating tariffs.

On administrative side, the Authority’s management has a flexible organizational structure which is currently based on a two organs: the Regulatory Board and the General Directorate.

At the apex is the Regulatory Board, which by virtue of the law is the supreme management and decision making organ. The Regulatory Board consists of seven (7) members including the Director General who equally serves as a rapporteur. The functioning and duties of the Regulatory Board are determined by Law.

The second organ is the General Directorate headed by the Director General. The Director General is entrusted with executive powers. He/she coordinates and directs the Authority’s daily activities and is answerable to the Regulatory Board on how its decisions are implemented.

The Director General is assisted by four Heads of Departments heading respectively 1) Communications & Media Regulation, 2) Transport Regulation, 3) Energy, Water & Sanitation Regulation and 4) Corporate, Legal & Industry Affairs Departments.

RURA finances are audited by the Auditor General of the State finances at the end of the budget year and whenever deemed necessary.
Figure 2: Organizational Chart


1.2.3 Financial resources

Resources of RURA derive from:

- fees levied on applications for and grants of licenses, permits, contracts, concessions and allocations to each public utility operator;
- grants, donations and legacies;
- annual regulatory fees based on a percentage of the turnover from each regulated service;
- all fines imposed by the Regulatory Board;
- loans;
- fees for services rendered by RURA;
- Any other payment or property due to RURA in respect of any activity related to the regulated services.

All revenues of RURA may be paid in total sums at once or in instalments. The Regulatory Board ensures that RURA has different activities that render it self-financing but not profit-making.

Over the last four years, RURA has registered a good performance in this regard as shown by the graph below:

Figure 3: Changes to net operating capital over 4 years

1.2.4 Human Resources

RURA’s workforce (staff members) had quantitatively increased from 24 in 2003 to 37 January 2008 and then to 104 by March 2013 with 36% of women.

By January 2013, the average age of RURA staff was 37. 66% of its staff represents the age group between 30 and 39 years while 8% is below 30 years. The staff-grouping that is between 40 and 50 years is 24% while only 2% is above 50 years. The figure No 4 depicts the situation:

Figure 4: Distribution of staff per group of age [March 2013]

About 43% of the Authority’s staff hold post graduate degrees, 41% hold bachelor’s degrees, 2% hold Secondary School certificates and 14% are pursuing post graduate studies.

Table 1: Qualification of RURA employees

<table>
<thead>
<tr>
<th>QUALIFICATION</th>
<th>YEAR 2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second School Certificate + Advanced Diploma</td>
<td>2%</td>
</tr>
<tr>
<td>First Degree (Bachelor’s degree)</td>
<td>41%</td>
</tr>
<tr>
<td>Second Degree (PGD, Masters)</td>
<td>43%</td>
</tr>
<tr>
<td>Ongoing Second Degree</td>
<td>14%</td>
</tr>
</tbody>
</table>

The specializations range from applied sciences to engineering, management and law.
Table 2: Summary of RURA staff per education areas

<table>
<thead>
<tr>
<th>EDUCATION BACKGROUND</th>
<th>N0. OF STAFF</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>24</td>
<td>23%</td>
</tr>
<tr>
<td>ICT</td>
<td>27</td>
<td>26%</td>
</tr>
<tr>
<td>Economics</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>Law</td>
<td>15</td>
<td>14%</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Engineering and Applied Sciences (ICT excluded)</td>
<td>22</td>
<td>21%</td>
</tr>
<tr>
<td>Natural Science</td>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>Total</td>
<td>104</td>
<td>100%</td>
</tr>
</tbody>
</table>

This table above reveals that RURA staff members have a very diverse academic background. This is justified by the fact that RURA is a multi-sector institution. Currently the majority of RURA staff members are engineers.

1.2.5 Regional & international partnerships

In this Globalisation arena, RURA realized that it cannot achieve its objectives without building effective partnerships with regional and international organisations. Much of them have so far contributed to its performance by supporting a good number of capacity building initiatives. By 2013 RURA has witnessed viable relationship and partnership with the following Regional and international organs; International Telecommunications Union (ITU), Commonwealth Scholarship Commission (CSC), Powering Progress Project, United Nations Development Programme (UNDP), Korea Communication Commission (KCC), Common Market for Eastern and Southern Africa (COMESA), African Forum for Utility Regulators (AFUR), Australian Development Scholarship (ADS), Japan International Cooperation Agency (JICA), United States Agency for International Development (USAID), African Telecommunications Union (ATU), East Africa Community (EAC), World Intellectual Property Organization (WIPO), Centre Régional pour l’Eau Potable et l’Assainissement (CREPA), Workforce Development Authority (WDA), Investment Climate Facility for Africa (ICF), Regional Communications Infrastructure Program (RCIP), World Bank through WSP/Africa, United States Telecommunication Training Institute (USTTI), Korean Information Society Agency (KISA) and Eastern Africa Power Pool (EAPP).

In addition, the Authority belongs to a number of regional and international organisations and these include ITU, CTO, ICANN, EREA, RAERESA, EACO and EAC Air Transport Facilitation Committee, EAWAS and it has since established working relationship with sister regulators like UCC (Uganda), EWURA (Tanzania), TCRA (Tanzania), CCK (Kenya), ERC (Kenya), ERA (Uganda), etc.


2. UTILITY SERVICES ANALYSIS

2.1 INFORMATION & COMMUNICATION TECHNOLOGY (ICT), MEDIA AND POSTAL

2.1.1 The mandate

RURA’s mandate, among other things, within the ICT sector is to license, monitor and enforce license obligations, manage scarce resources, advise policy makers on ICT related issues and represent Rwanda in international organizations on issues pertaining to ICT.

The ICT sector regulation in Rwanda includes: Media and Postal regulation, ICT Standards and Quality of Service regulation and ICT Scarce Resources Management and Monitoring.

The Media and Postal regulation aims at developing the media and postal industry, and at ensuring effective internet resources management and governance.

In ICT Standards and Quality of Service regulation, RURA oversees the regulatory and standardization aspects to be observed by both consumers and network/service providers. RURA also strives to bridge the digital divide by advancing the use of ICT-based networks, services and applications, enhance security and build confidence in the use of ICT resources.

2.1.2 The market performance and statistics

The ICT sector in Rwanda recorded a general growth in terms of subscriptions, revenues and investments since its liberalization in Rwanda. Despite the revocation of RWANDATEL mobile license in April 2011, the licensing of an additional telecom operator (Bharti AIRTTEL) in September 8th 2011 has brought about more competition in the sector as well as more and more affordable telecom services in Rwanda. Airtel pledged to invest US$ 100 Million in its operations over the next three years. More than USD 11 Million were already invested by June 2012.

With three major operators in mobile telephony which are MTN Rwandacell Ltd, TIGO Rwanda Ltd and AIRTTEL Rwanda Ltd, the penetration rate continued to grow while the fixed telephony provided by RWANDATEL growth remained almost stagnant.

The number of mobile and fixed telephone service subscribers per operators as per June 2012 stood as shown below:

Table 3: Mobile and Fixed Telephony Services in Rwanda

<table>
<thead>
<tr>
<th>Operators</th>
<th>Active subscribers</th>
<th>Mobile Teledensity</th>
<th>Fixed Teledensity</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTN Rwandacell</td>
<td>3,033,421</td>
<td>-</td>
<td>12,255</td>
</tr>
<tr>
<td>TIGO Rwanda Ltd</td>
<td>1,615,585</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>AIRTTEL Rwanda Ltd</td>
<td>10,304</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>RWANDATEL Ltd</td>
<td>-</td>
<td>-</td>
<td>31,371</td>
</tr>
<tr>
<td>Total</td>
<td>4,759,310</td>
<td>-</td>
<td>43,626</td>
</tr>
</tbody>
</table>

Source: RURA, Annual report 2012

The figure below shows the subscription growth rate for both the fixed and mobile telephony in Rwanda from 2002 to 2012.

Figure 5: Mobile Vs Fixed Telephony in Rwanda
The figure No 5 shows that the mobile telephone services has constantly risen exponentially while fixed telephone services remained almost constant. The Figure below depicts the number of internet subscribers.

The electronic Media industry in Rwanda is currently dominated by terrestrial Television and FM Broadcasting radio.

With the advent of Digital Terrestrial Television (DTT), the Government invested in the deployment a DTT network with 14 transmitters and a geographic coverage of over 85%.

With the business opportunities introduced by the DTT value chain, the Authority has developed new licensing framework for Signal Distribution in line with the national Broadcasting Policy.

With the required infrastructure and regulations in place, the country has embarked on the process of switching off the Analogue Terrestrial television by the end of 2013, two years ahead of the Switch Off date set by the International Telecommunication Union (ITU).

Even though Rwanda has a relative advancement Telecommunication access compared to some neighbouring countries, the above statistics show that, it still has some more steps to go for the whole population to get access to telecommunication services.

2.1.4 Trends in investments

The growth in investment in the ICT sector rose from over Rwf 4 Billion in 2001 to over Rwf 86 Billion by 2012. The trend in revenue of the major operators in the ICT also increased from over Rwf 18 Billion in 2001 to over Rwf 100 Billion at the end of 2011.

2.1.3 Bench-marking with selected countries

The table below compares the telecommunication access of Rwanda to the region and the other countries by 2012.

<table>
<thead>
<tr>
<th>Country</th>
<th>Mobile cellular subscribers</th>
<th>Main fixed telephone lines</th>
<th>Internet users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rwanda</td>
<td>44.4</td>
<td>0.36</td>
<td>7.00</td>
</tr>
<tr>
<td>Burundi</td>
<td>22.33</td>
<td>0.35</td>
<td>1.11</td>
</tr>
<tr>
<td>DRC</td>
<td>40.63</td>
<td>0.08</td>
<td>1.20</td>
</tr>
<tr>
<td>Tanzania</td>
<td>55.53</td>
<td>0.35</td>
<td>12.00</td>
</tr>
<tr>
<td>Uganda</td>
<td>48.38</td>
<td>1.35</td>
<td>13.01</td>
</tr>
<tr>
<td>Kenya</td>
<td>67.49</td>
<td>0.68</td>
<td>28.00</td>
</tr>
<tr>
<td>Iceland</td>
<td>106.08</td>
<td>45.22</td>
<td>95.02</td>
</tr>
<tr>
<td>Australia</td>
<td>108.34</td>
<td>46.77</td>
<td>79.00</td>
</tr>
<tr>
<td>JAPAN</td>
<td>104.95</td>
<td>51.12</td>
<td>79.53</td>
</tr>
<tr>
<td>USA</td>
<td>92.72</td>
<td>46.59</td>
<td>77.86</td>
</tr>
</tbody>
</table>

Even though Rwanda has a relative advancement Telecommunication access compared to some neighbouring countries, the above statistics show that, it still has some more steps to go for the whole population to get access to telecommunication services.

Source: RURA, Annual Report 2012
2.1.5 Trends in telecommunication revenues per operator [2001 – 2012]

As the investments in the ICT sector keep increasing there is that corresponding expansion of the communications infrastructure. The Figure No 7 depicts the trend in investments from 2001 to 2012.

Figure 8: Trend in Revenues (Telecom Industry)

2.2 ENERGY

2.2.1 The mandate

The Authority’s mandate in the energy sector is to control and regulate an efficient, sustainable and reliable energy sector in a transparent and fair manner for the benefit of all stakeholders. Regulated sub-sectors are: electricity, Lake Kivu natural gas, petroleum, renewable energies, medical and industrial gases, pipelines and storage facilities.

2.2.2 Electricity

Energy remains one of the top national priorities as a critical and basic requirement for the country’s sustainable development.

Within the framework of EDPRS 2, the Government has decided to tap all the opportunities available to increase electricity production and has committed to producing 563 MW by 2017 from both short and long term projects in Methane Gas, solar, Geothermal, Hydro and Peat resources as well as scale up the electricity access from the current 16% to at least 70% in 2017.

The electricity supply industry remained vertically integrated with EWSA being a major player with its own electricity generation, transmission and distribution facilities operating in the whole country. However, the recent enactment of the new Law No 21/2011 of 23/06/2011 governing electricity in Rwanda has liberalized the power market. Operationalization of this law is on track to pave the way for an efficient and sustainable liberalized power market in Rwanda.

Since the severe power shortages registered in 2004, electricity generation capacity has increased considerably but remains low compared to the needs of the country’s growing economy. Nevertheless, serious and dedicated efforts have been deployed to increase electricity generation, improve transmission and distribution networks, diversify the energy sources and elaborate conducive legal and regulatory framework.

Currently, the installed capacity has increased from 56MW in 2008 to 110.9 MW in 2012 against a target of 130MW while the available capacity fluctuates around 90MW against a demand that peaked at around 83MW in 2012.

The chart below shows the electricity generation mix (including imported power from Rusizi I and II hydropower plants):
The national electricity grid has been extended by 898 km of MV since 2009. The current power network is made of about 385 km of high-voltage (70 kV & 110 kV) transmission lines and 4,900 km of medium-Voltage (30 kV, 15 kV and 6.6 kV) distribution lines as of 2012.

Rwanda has adopted the use of single phase distribution lines for rural electrification. The distribution system consists of overhead lines in single-phase, line-to-neutral of 17.32-kV taken directly from a three phase line of 30 kV. The implementation of this new system started in 2008 with a pilot line from Nyagatare to Rukomo in the Eastern Province and after being successful, it was later extended to the rural areas of many other districts.

2.2.3 Coverage
Rwanda still has a low access to electricity despite outstanding efforts that have been made to increase it to 16% in 2012 from 9.5% in mid 2010.

The Government has launched an aggressive program to increase the access to the electricity services by all sectors of the economy and all consumer categories. In that line, the Electricity Access Roll-out Program (EARP) was set up to finance and implement most of rural electrification projects since it came into operation in 2010.

It has started from an extremely low base but the growth in electricity access has been an impressive 439% between 2006 and 2012 as indicated in the chart below.

2.2.4 Methane gas
The Government’s priority remains the production of electricity out of Lake Kivu methane Gas. Power production potential from the huge natural gas reserves has been estimated at 350 MW (Rwanda share).

One pilot project has been running since 2007 and produces around 2 MW, half of its design capacity. Another methane-to-power project, still in pipeline, is the Kivuwatt planning to generate 100 MW in two phases of 25 MW and 75 MW each.

2.2.5 Geothermal
The Government of Rwanda is targeting 310 MW in the next seven years and the estimated cost is $935 million. The geothermal resources have been identified between Gisenyi and Karisimbi Volcano and Bugarama.

Geothermal power is produced by tapping the steam created by water trapped near hot rocks in the earth. Rwanda is in a prime
area of the East African Rift Valley, one of the world’s hottest spots for geothermal activity. The area with the most geothermal activity has been identified as the Virunga volcanic zones in the northern part of the country and the area around hot springs in the western part. Experts estimate the geothermal potential along the East African Rift Valley in excess of 15,000 MW, but the huge potential has remained largely untapped except in Kenya and Ethiopia.

The Karisimbi Geothermal prospect is the first out of 4 prospects (Karisimbi, Kinigi, Gisenyi and Bugarama) that will be drilled in 2013. Three exploratory wells will be drilled to a depth of 3 km to prove the existence of the resource. If wells are successful, the plan is to install a wellhead generating unit for 10 MW.

### 2.2.6 Peat

A Peat Master Plan prepared by EKONO in 1993 indicated that Rwanda has estimated reserves of 155 million tons of dry peat spread over an area of about 50,000 hectares. In 1992, a Feasibility study of the Peat Master was conducted by Enoko-BRGM Company. The study concluded that peat could be successfully used to replace or supplement wood fuel in some applications. An updated Peat Master Plan is under finalization by Pöyry Company following the contract signature in February 2012.

Peat has been identified as one of the sources for least cost generation mix and the GoR plans to develop its peat resources to generate about 200 MW of power by 2017 from many projects.

a) Gishoma 15 MW Peat to Power Project/ by PEC/RIG – This is a quick winner project to be completed in about 15 months. Negotiations for loan facility of about USD 30.9 Million have been undertaken between EWSA and Bank of Kigali (BK); the financing terms and conditions of the loan facility have been concluded. MININFRA, RDB and EWSA started negotiations with Peat Energy Company (PEC) for peat supply cost.

b) Rwabusoro 100 MW Peat to Power project-complementary feasibility study is under preparation with two companies (IF-Consult from Finland and Tractebel from Belgium) and the procurement is in process for Peat mining and EIA.

c) HAKAN (IPP)-100 MW Peat to Power plant is to be constructed at Akanyaru South in Gisagara District. The feasibility study has been conducted and submitted by HAKAN. Negotiations and final deal were concluded with the signature of the Concession Agreement, the Power Purchase Agreement and the Guarantee on 10th September 2012 between the Ministry of Infrastructure, RDB, EWSA and HAKAN.

### 2.2.7 Solar

20 MW of electric power are expected to be developed from Solar PV, through partnership with Independent Power Producers (IPPs).

- 10 MW IPP Solar Plant in Bugesera District- to be constructed by Alpha Energy and Construction Solution Rwanda Ltd. The feasibility study has been analysed by EWAS technical team and PPA negotiations are in progress. The price agreement between land owners and Alpha has been confirmed.

- 10 MW IPP Solar Plant in Kayonza District- the plant is to be constructed by Contour Global. The feasibility study is ongoing and PPA negotiations are in progress between RDB, MININFRA/ EWSA and the Developer.

### 2.2.8 Downstream petroleum products and infrastructure

The demand for petroleum products is forecasted to grow at an average of 10% each year between now and 2020 and the importation cost has an important macro-economic impact and currently, oil products account for 25% of import costs. The proportion of export revenues spent on oil products is even higher at around 55%.

The petroleum industry in Rwanda mainly
relies on importation of petroleum products. Two corridors serve the purpose, the Northern Corridor through which petroleum products are transported from Kenya through Uganda, and the Central Corridor through which petroleum products are transported to Rwanda from Dar Es Salaam, Tanzania.

Concerning the petroleum infrastructure, the Government has clear plans to increase its strategic storage capacity of an equivalent of four months from the current one month. The total targeted strategic reserves are 150,000 m³ by 2017.

2.2.9 Tariff

**Time-Of-Use tariffs**

As part of the efficiency measures to improve the system load factor and thus reduced system capacity costs, RURA approved the EWSA proposed time-of-use tariffs for industries which has been effective from 1st May 2012. This has come as a remedy to high demand during peak hours (17h00-23h00) resulting into insufficient reserve margin and subsequently system instability. This tariff is an incentive for industrial customers to minimize the production costs by shifting their production to off-peak hours (23h00-7h00) while discouraging the use of electricity at peak hours.

**End-user tariffs**

The financial performance of EWSA in the past years has been negatively impacted as the electricity tariffs have not been revised since 2006. Tariffs have been eroded through the effects of inflation and depreciation of the Rwandan Franc against foreign currencies. Reliance on emergency thermal power, high fuel prices and increasing network maintenance costs (due to sharp increases in metal prices) over recent years have also placed heavy financial burdens on EWSA.

The electricity tariffs were considered below cost of service and therefore reviewed. RURA approved new end-user tariff with a 20% increase effective 1st July 2012. The average tariff was increased from 132 Rwf/kWh to 158 Rwf/ kWh (VAT inclusive) as shown in the table below:

In June 2012, RURA reviewed the End User Tariff of Electricity in Rwanda whereby applicable average tariff was increased by 20% as follows:

**Table 5: Electricity End-User Tariff Structure**

<table>
<thead>
<tr>
<th>Category</th>
<th>Rwf per kWh</th>
<th>VAT exclusive</th>
<th>VAT inclusive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>134</td>
<td>158</td>
<td></td>
</tr>
<tr>
<td>Time of use/Industrial and Commercial</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low: From 23h00 to 7h00</td>
<td>96</td>
<td>113</td>
<td></td>
</tr>
<tr>
<td>Medium: From 7h00 to 17h00</td>
<td>126</td>
<td>149</td>
<td></td>
</tr>
<tr>
<td>High: From 17h00 to 23h00</td>
<td>168</td>
<td>198</td>
<td></td>
</tr>
</tbody>
</table>

The time-of-use tariffs referred to in the above table are aimed at encouraging the industrial and commercial consumer to shift their electricity use to off-peak period.

**Renewable Energy Feed-In-Tariffs (REFIT)**

In order to attract and accelerate private investments in the electrical power generation, a study was conducted on REFIT/FIT for the purchase of electrical energy by EWSA from small sized hydro, geothermal, solar, and wind based power generation projects and proposed the related Feed-in-Tariffs (FITs) for mini and micro hydropower projects ranging from 50 kW up to 10 MW and located within 10 Km of the EWSA transmission network.

On 9th February 2012, the REFITs scheme for hydropower up to 10 MW was approved by RURA and the validity period of the REFIT Regulations was set at three years.
Table 6: energy feed-in-tariff (in usd cents)

<table>
<thead>
<tr>
<th>No</th>
<th>Tariffs (USD cents /kWh)</th>
<th>Plant installed capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>16.6</td>
<td>50kw</td>
</tr>
<tr>
<td>2</td>
<td>16.1</td>
<td>100kw</td>
</tr>
<tr>
<td>3</td>
<td>15.2</td>
<td>150kw</td>
</tr>
<tr>
<td>4</td>
<td>14.3</td>
<td>200kw</td>
</tr>
<tr>
<td>5</td>
<td>13.5</td>
<td>250kw</td>
</tr>
<tr>
<td>6</td>
<td>12.9</td>
<td>500kw</td>
</tr>
<tr>
<td>7</td>
<td>12.3</td>
<td>750kw</td>
</tr>
<tr>
<td>8</td>
<td>11.8</td>
<td>1mw</td>
</tr>
<tr>
<td>9</td>
<td>9.5</td>
<td>2mw</td>
</tr>
<tr>
<td>10</td>
<td>8.7</td>
<td>3mw</td>
</tr>
<tr>
<td>11</td>
<td>7.9</td>
<td>4mw</td>
</tr>
<tr>
<td>12</td>
<td>7.2</td>
<td>5mw</td>
</tr>
<tr>
<td>13</td>
<td>7.1</td>
<td>6mw</td>
</tr>
<tr>
<td>14</td>
<td>7</td>
<td>7mw</td>
</tr>
<tr>
<td>15</td>
<td>6.9</td>
<td>8mw</td>
</tr>
<tr>
<td>16</td>
<td>6.8</td>
<td>9mw</td>
</tr>
<tr>
<td>17</td>
<td>6.7</td>
<td>10mw</td>
</tr>
</tbody>
</table>

2.3 WATER AND SANITATION

2.3.1 Mandate

RURA mandate in water and sanitation sector is to regulate in a way that promotes fair competition, sustainable and efficient use of water resources, ensure effective protection of environment and better quality of service to customers at fair prices.

2.3.2 Sector profile

Access to safe drinking water and improved sanitation is a fundamental human right approved by the United Nations and well reflected in the 2010 National water and sanitation policy and strategy for Rwanda. This is mainly because the quality of drinking water and sanitation services have a direct impact on public health and both are key components of social and economic development.

The primary objective of the water and sanitation sector is to ensure sustainable and affordable access to safe drinking water and sanitation services to all and this is well stated in various national policies such as the EDPRS and the vision 2020. According to ONE’s 2013 continental Data report, Rwanda was recently ranked among countries that are on a good track towards the achievement of Millennium Development Goals targets (MDG) in the water and sanitation sector.

Statistics (NISR, 2012) show that urban households have improved access to drinking water and sanitation services than rural households, 86% and 72% for water and 83% and 73% for sanitation respectively. The same report show that within two years, improved sanitation has significantly increased by a larger extent for rural households (55 to 73%) relative to urban (75 to 83%) compared to 2010.

The same report stipulates that the Government targets set within the EDPRS I between 2008 and 2012 to increase the proportion of population with access to drinking water from 64% to 86% were achieved.

However, despite commendable achievements, the sector is still facing challenges relating to operations and management of rural water and sanitation infrastructures. This sector still requires more investments to keep infrastructures in good working conditions to ensure an improved access to these basic amenities.

Table 7: Water Access

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production in m$^3$/day (EWSA)</td>
<td>102,736.73</td>
</tr>
<tr>
<td>Total Water supply per day/ m$^3$</td>
<td>99,516.23</td>
</tr>
<tr>
<td>Number of clients</td>
<td>111,701</td>
</tr>
<tr>
<td>Urban population</td>
<td>14%</td>
</tr>
<tr>
<td>Urban Population connected to water</td>
<td>86.4 %</td>
</tr>
<tr>
<td>Urban population not connected to water</td>
<td>13.6 %</td>
</tr>
</tbody>
</table>

Source: EWSA report & NISR, 2012
2.3.3 Water status

Water supply is characterized by a rapid increase in access and management over the past years aided by a clear government policy and significant donor support. From 2002, local government contracted out service provision to the local private sector in a form of public-private partnership.

The water sub-sector is mainly classified into urban and rural water supply systems.

The Urban water supply is still monopolized by the state-owned public utility (Energy, Water and Sanitation Authority - EWSA). EWSA operates and manages 14 water treatment plants and 15 distribution networks in urban centres and Nyamata distribution network with the Ngenda water treatment plant in Bugesera district.

The following figure shows the number of subscribers to EWSA water network. As of June 2012, the total number of water subscribers was 104,419 of which 60% are based in Kigali City and 40% based in other cities of the country.

Figure 11: Number of subscribers to Water Services, June 2012

Source: RURA, EWSA returns

The above figure shows that almost 100% of water subscribers belong to the household category.

The water tariff as illustrated in EWSA tariff structure is as follows.
Rwanda Utilities Regulatory Authority (RURA)

STRATEGIC PLAN
2013-2018

Table 9: Distribution of Water Tariff per Category of Consumption

<table>
<thead>
<tr>
<th>Monthly Consumption</th>
<th>Water tariff per m³ VAT exclusive</th>
</tr>
</thead>
<tbody>
<tr>
<td>At Public Water Kiosk</td>
<td>Rwf 240</td>
</tr>
<tr>
<td>Between 0 and 5 m³</td>
<td>Rwf 240</td>
</tr>
<tr>
<td>Between 6 and 20 m³</td>
<td>Rwf 300</td>
</tr>
<tr>
<td>Between 21 and 50 m³</td>
<td>Rwf 400</td>
</tr>
<tr>
<td>Between 51 and 100 m³</td>
<td>Rwf 650</td>
</tr>
<tr>
<td>Above 101 m³</td>
<td>Rwf 740</td>
</tr>
<tr>
<td>Industries</td>
<td>Rwf 593</td>
</tr>
</tbody>
</table>

2.3.4 Sanitation status

The sanitation in Rwanda entails solid and liquid wastes as well as cleaning services.

A large part of the waste generated in urban areas is efficiently collected but the disposal still needs to be improved in environmentally unacceptable manner. From 1927, the disposal of waste in the City of Kigali has mainly been concentrated within the Nyanza dumping site, located approximately 12 km in the south-East of the Kigali city centre. Nyanza dumping site size is estimated to cover an area of approximately 7-10 ha. The disposal has been uncontrolled and this practice resulted in complaints from the local residents. A temporarily landfill site was last year opened in Nduba sector in the North-East part of Kigali in Gasabo district.

Over the last few years, associations, cooperatives and small companies are involved in solid waste collection and recycling. These organisations collect and transport solid wastes from residential and commercial premises to the dumping site. Some operators have tried to recycle wastes into briquettes and composts.

Concerning liquid waste management, there is no centralized sewer system for collection, transportation, treatment and disposal of domestic and institutional wastewater. However, there are new estates in the City of Kigali with small networks of sewer pipes connected to decentralized wastewater treatment plants.

Traditional pit latrines are the most popular and a few number of people with access to household water supply use flash toilets connected to septic tanks. Some important measures have been taken under the Organic Law n° 04/2005 of 08/04/2005, determining the modalities of protection, conservation and promotion of environment in Rwanda. These concern the establishment of a cleaner production center and for any project, an environmental impact assessment and a cleaner Production Programme.

Cleaning services concern mostly cleaning of roads, buildings and gardening and are also conducted by Cooperatives and small private companies.

Considering the need to set an end-user tariff for the solid waste collection and transportation from residential premises in the City of Kigali, a tariff study came up with tariff structure containing a level of cross-subsidy among the three categories of households borrowing the concept used in the “Mutuelle de santé” households' classification. The following tables show various tariffs according to districts.

Figure 13: Average Tariff/hh/Month in Kicukiro district

Source: RURA, Annual Hotel 2012
2.4 TRANSPORT SECTOR

2.4.1 Mandate

In the regulation of this sector, due attention is given to the transportation of goods and persons in the three modes namely road, waterways and air transport. In the absence of a sector law, the Authority developed a good number of tertiary legislations in terms of guidelines such as those for public transport, driving school as well as transport of goods operations, travel agencies and freight forwarding operations.

2.4.2 Status

Rwanda being a land-locked country, it depends mainly on land transport for most of her imported goods. This increases the unit costs of imported commodities due to limited multimodal transport options leading to high transport costs.

Although the percentage of national paved roads in good conditions was estimated at 98% in 2011, most parts of the country have rugged terrains and thus hampering the road network continuity especially to the rural areas. In these areas, the road network is operating at undesirable levels with 11.1% and 88.9% of the total length of road network being analyzed to operate at a Level of Service (LOS) E and F respectively. Such unsatisfactory LOS of the road network limit extension of transport services to the rural areas.

The absence of an adequate legal and regulatory framework in the transport sector continues to hinder the development of the entire sector but RURA has put in place regulatory tools in form of guidelines. It also established a framework for consultation on matters concerning the regulation of transport in general, especially on finding solution to various problems affecting the transport of persons and this has helped to increase the confidence that operators have in the regulator, leading to an increase in the number of new operators entering the market.

In addition to the regulatory guidelines that have been developed, a software application “Transport Licensing Management System” (TLMS) was developed in-house in order to track and better monitor the licensing of road transport operators and vehicles. This tool mechanism has helped in the management of data pertaining to the transport sector. Furthermore, RURA sets fares for public transport, handles and resolves complaints from both transport operators and passengers.

Some of the major challenges within the transport sector that RURA needs to address include illegal operators, low levels of professionalism among the transport operators which in turn lead to low levels of service delivery.

The strategic focus for this sector is therefore to address, among other things, the low financial and organizational capacities of operators, the low level of professionalism on the part of the operators and limited infrastructure facilities used in the provision of transport.
services. The need for a comprehensive legal and regulatory framework is equally a key.

2.4.3 Road transport of persons
Compared to previous years, the year 2012-2013 was characterized by an increase in the number of licensed Companies and Cooperatives which came from 20 to 33 Companies and/or Cooperatives, representing approximately a 40% increase from 2010.

The increase was mainly due to the sensitization programs in various meetings/workshops with the operators encouraging them to work as companies or cooperatives. This resulted in the establishment of the Rwanda Federation of Transport Cooperatives (RFTC), a profit-oriented body which replaced the former ATRACO.

In addition, 612 individual authorizations were issued to taxi cabs operators, 18,502 motorcycles and 1,973 motorbikes operators in 2011-2012 fiscal year.

Table 10: Licensed Operators per Category In The Transport Sector

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driving Schools</td>
<td>50</td>
</tr>
<tr>
<td>Public Transport Of Persons Companies</td>
<td>33</td>
</tr>
<tr>
<td>TAXI CABS COMPANIES/COOPERATIVES</td>
<td>17</td>
</tr>
<tr>
<td>Individual Tax Cabs</td>
<td>612</td>
</tr>
<tr>
<td>Individual Motorcycles</td>
<td>18,502</td>
</tr>
<tr>
<td>INDIVIDUAL MOTORBIKES (VÉLO-MOTEUR)</td>
<td>1,973</td>
</tr>
</tbody>
</table>

Source: Annual Report 2012

2.4.4 Road transport of goods
The Regulatory Board issued the decision No 006/TRANS-RURA/2011 of 16/09/2011 governing transport of goods in Rwanda to deal with quality of service and fair competition in the market. As a result, RURA started issuing transport of goods authorizations.

2.4.5 Waterways transport
In the waterways sub-sector, RURA established a licensing framework to start the regulation of the sub-sector. However, since the adoption of these regulations, no Individual or company has been licensed because of lack of specific policy and legal framework. The Ministry in charge of transport, in close collaboration with RURA and other key stakeholders in this sub-sector, has initiated a policy and a draft law is being worked out in order to overcome this challenge.

2.4.6 Freight forwarders and travel agencies
With regard to the regulation of freight forwarders and travel agencies, RURA issued five licenses in 2010 which are still valid. Considering that this number of licensed operators is very small compared to the non-licensed operators in the market, RURA plans to further sensitize and encourage non-licensed freight forwarders operators to comply with regulations governing their business.

2.4.7 Market Performance and Statistics
In fiscal year 2012-2013 Rwanda witnessed 40% increase of transport companies compared to the last year. The table No 10 above illustrates the number of licensed transport operators per category by June 2012.

As shown by the figure No 16, the Minibus, Coaster and buses are the mainly used means for public transport. The graph below depicts the market of each component.

Figure 16: Market Share Per Type Of Cars Used

Source: RURA, operators returns
This figure shows that most of minibuses are still operating on individual basis (94.6%) while most of licensed buses (91.3%) and coasters (63.6%) are operating as companies.

Figure 17: trend in individual licenses as of June 2012

As per the graph above, despite the increase of licensed companies, individual operators also increased from 44 to 612 for taxi cabs and from 189 to 223 for coasters among others.

2.4.8 Public transport tariffs

The activity of regulating transport prices is done all year around as the need arises and is done using a system of ‘price-cap’ regulation. Once there is an increase or decrease in fuel prices, the transport tariff structure is re-examined. Calculations may result in raising the transport tariff, keeping it as it is or decreasing it.

2.5 UNIVERSAL ACCESS

2.5.1 Background

Universal access refers to the ability of all people to have equal opportunity and access to a service or product from which they can benefit. It is tied strongly to the concept of human rights. This objective cuts across all sectors i.e. Water, Transport, Energy and ICT.

The first phase of the program has been to design a Universal access policy supporting telecommunications infrastructure towards remote and underserved areas. Universal service is now normally phrased as a requirement of the telecommunications service provider to meet criteria in the following three areas: Availability, Accessibility and Affordability (ITU 1998).

The Government through the Law No 44/2001 of 30th November 2001 governing Telecommunications established the UA fund to accelerate the use of ICT in the Country. The functioning and the source of funding of Universal Access Fund are determined by the Presidential Order No 05/01 of 15/03/2004.

In addition, the Law N°21/2011 of 23/06/2011 governing electricity in Rwanda provides that there shall be a Universal Access fund of which the main purpose is to optimize access to electricity in all areas of the country through cost effective means and minimized support. The same Law stipulates that a Presidential order shall determine the functioning of the Universal Access Fund for electricity.
2.5.2 Mandate of ICT universal access

The GoR decided to promote and implement the concept of Universal Access (UA) in ICT sector as per the Presidential Order No 05/01 of 13/03/2004, which determines the functioning of the Universal Access Fund (UAF) and public operators contribution. The fund is financed by contributions from licensed operators who contribute 2% of their annual turnover. The Regulatory Board has the mandate to manage this fund in a way that favours the spread and take-up of ICTs in designated remote and under-served areas of the country. Projects under Universal Access complement and integrate the overall NICI policy framework for Rwanda.

As some projects require very important investments, the Government of Rwanda (GoR) has also contributed towards making accessible the broadband connectivity in rural areas by subsidizing the layout of fibre optic backbone networks up to districts level.

2500 Km of fibre have been installed by RDB as NICI II implementation programme and the network is operational since end of 2010, providing broadband connectivity to institutions in remote and underserved areas.

2.5.3 Major projects under universal access fund

The Millennium Development Goals (MDG) on data penetration has set the 2015 deadline to have all villages (Imidugudu) connected to broadband services. To achieve the MDGs goals, more broadband infrastructure have to be deployed. The quickest way to implement broadband to meet MDGs is to use wireless technology as last mile solution to connect villages and homes.

The Universal Access Fund focused on connecting institutions in rural and remote areas to fibre network where VSAT technology is used. By June 2012, all districts in rural area, immigration services at the border posts, National Police, some High schools, all telecenters switched to fibre whereby out of 179 Sites subsidized by Universal Access, 112 sites already switched to Optic fibre.

2.5.4 Universal access fund and broadband penetration

RURA in collaboration with other concerned institutions is implementing a considerable number of projects using the Universal Access Fund. Those include among others:

- Support ICT Literacy in rural areas by providing financial assistance to E-ICT in establishing e-learning and e-service centres in rural areas as a way of providing access to affordable ICT services to rural communities.
- Subsidising bandwidth acquisition to the rural communities where fibre is not yet operational to ensure affordable access to Internet services and wider penetration of ICT services in rural area for private and public institutions.
- Support people with disability to have equal opportunity and access to ICTs.
3. RATIONALE

This strategic plan has been elaborated in a way that enables the Authority to play a significant role in the Government of Rwanda’s endeavour to reshape its development strategies targeting a growth rate of 11.5% by 2017 on a consistent basis and hence contribute to the meeting the vision 2020. Appendix No 1 depicts how set strategic goals and objectives are shaped to meet development thematic areas of EDPRS II. It is believed that their attainment will contribute significantly to attaining objectives of the six pillars of the Rwandan Vision 2020.

This plan is further a guide to thinking and acting strategically as the art of regulation and the regulated sectors pass through storms of technological changes and advancements.

The multi-sectoral nature of the Authority coupled with the SWOT analysis of both the Authority and regulated sectors led to the elaboration of the strategic plan in a form of mother-route from which each department/unit in RURA will draw operational strategies useful to cater for identified weakness and threats and maintain the momentum of current strengths as well as grasp opportunities available in the political, social and economical environments in which the Authority operates.

Major goals that are consistent with both the Authority’s vision and mission, have been identified for both the Authority and regulated sectors for a period of five years. The identified objectives for each goal, once accomplished, are expected to ensure growth, effective management of resources at both institutional and sectoral levels) and greater satisfaction on the part of all Authority’s stakeholders.

In this context, strategic goals have been devised and broken down into strategic objectives which can be easily translated into comprehensible, stand-alone and implementable programs to meet the regulatory needs and challenges of each regulated sector. Each strategic objective conveys a clear idea of what has to be done as far as utilities regulation is concerned. That way of shaping the strategic plan paves the way for its implementation since during annual planning periods, each department/unit will have to draw implementable programs from those strategic objectives to fulfil its mission.

In addition, the increasing demands of the industry which are becoming more dynamic, the expectations from the stakeholders which are becoming numerous and at times conflicting, the rapid technological changes, infrastructure networks, service access and quality requirements, the licensed operators’ organizational set-up and business roll-out commitments and the emerging sophistication of the consumers’ needs, all call for a modern utilities regulation which follows the trend and timely responds to those growing changes. This strategic plan attempts to well position the Authority in this sphere of influence.

Bearing in mind implications of programs that will be detailed in annual plans of activities and in relation to the current trends and potential opportunities of revenue collection, it is anticipated that the implementation of this strategic plan will require a total sum of Rwf 37,271,800,000 over the five (5) years period which represents an average of Rwf 7,454,360,000 annually.
4. SWOT ANALYSIS

The critical assessment of the environment in which the Authority operates led to identification of four elements that have influence on operations of the Authority. These forces have been summarized in a framework commonly called SWOT ANALYSIS detailed here below. This analysis presents external influences and trends; strengths and weaknesses in the thematic areas which should be addressed to enable the Authority to make and achieve the desired regulatory progress.

4.1. STRENGTHS

Some of the strengths identified include:

- The existence of a clear legal mandate to regulate

- The Authority is a multi-sectored regulatory institution regulating communications (ICTs), energy, transport, water and sanitation and as such it has the following strengths:
  - Benefits of economies of scale;
  - Constant factor of the transfer of regulatory “know-how” among sectors and key players;
  - Effective and efficient means of dealing with convergence of technologies;
  - Planning & co-ordination of the requirements between utilities;
  - Possibility of the avoidance of market distortions due to the application of different rules to competing utilities;
  - The Authority is a self-financing institution with autonomy over its finances and other resources and its sources of finance are properly defined by the Law;
- The Authority has qualified, competent and motivated young workforce.
- The Authority has created a conducive working environment.
- The Authority has acquired important required monitoring tools for the regulation of ICT Services.
- The Authority has built a strong formally established relation with other regional regulators to share knowledge and experience.

4.2 WEAKNESSES

The notwithstanding strengths, the Authority has some weaknesses which includes the following:

- Incomplete legal and regulatory framework in some sectors
- Skills gap in some key areas
- Lack of necessary regulatory monitoring tools and testing equipment for some regulated sectors;
- Limited awareness on the role of RURA by the general public;
- Lack of norms and standards for Quality of Service for some regulated sectors.
- Weak enforcement mechanisms in some areas.
- Gap between the pace of growth and change in the regulated sectors and the pace of the Authority’s human resources capacity
- Lack of strategic developed Research and Development.

4.3 OPPORTUNITIES
The main opportunities attributed to the socio-cultural, political and economical environment that will support the Authority in achieving its service delivery promise include:

- RURA is the custody of regulation of crucial sectors of Rwanda’s economy, the opportunities for both the Authority and the regulated sectors are enormous;
- The kaleidoscopic changes in technology as an impetus for the modernization of both the regulated sectors and the regulatory processes;
- Regional and International integration;
- Recognition of Utility services by the Government and development partners as drivers for economic development;
- International best practices in the regulation of the concerned sectors that create room for good harmonization process;

4.4 THREATS

The environment in which the Authority operates presents perceivable threats which must be mitigated to ensure that service delivery is not hindered. The identified threats include:

- Existence of other institutions whose functions and roles tend to overlap with the ones of the Authority;
- Lack of active consumers’ Associations
- Limited professionalism and adequate skills of some operators in the regulated sectors.
- The insufficient Foreign Direct Investment in some sectors;
- Limited purchasing power of the population to afford the price so as to have access to utility services
- Regulation of public utilities being socially and politically sensitive tends to call for political intervention hence affecting the Authority’s independence.
- Risk of losing the trained, competent and qualified staff of the Authority
- Reluctance of certain Government owned public utilities to comply with regulations in force

The contextual and environmental analyses of the Authority led us to suitably position and determine what will be the vision, Mission, values and Moto of the Authority over the next five years of this strategic plan. These are presented in the figure No 18.
5. MISSION, VISION AND VALUES

Based on the above institutional and sectoral analysis, the following vision, mission statements as well as values and motto of the Authority have been set.

5.1 THE AUTHORITY’S VISION

We aspire to be a point of reference in public utilities regulation that inspires development and confidence.

5.2 MISSION STATEMENT

This mission of the Authority is to regulate public utilities by building an environment that promotes fair competition and quality of public utility service in a transparent, independent and reliable manner.

5.3 THE AUTHORITY’S WORKING VALUES

The following values will constitute our identification flag in the fulfilment of the Authority’s mission:

Independency

We will demonstrate independent by being free from control or influence of any entity in line with the Law creating the Authority. Without this, the virtue of impartiality expected from us by our stakeholders may be compromised.

Transparency

We will strive to be transparent by being open in our regulatory initiatives and create free and easy public access to the Authority’s operations. This will ensure the public’s right to information of whatever the Authority is doing provided that it is all done within the confines of the law. Equally, the Authority’s decision making process will not alienate the public’s information rights.

Accountability

We will be accountable in our regulatory roles by acknowledging and assuming our responsibilities for actions, decisions and the general implementation of our mandate. We will provide reports and ensure that we are answerable to our actions. On the other hand, we will ensure that our authority is not arbitrarily exercised.

Firmness

We will be firm to our decisions and proceedings by exhibiting and upholding professionalism in the regulatory service we offer and sticking on the Regulator’s work ethics and ensuring that our judgments and decisions are equitable and fair. Our firmness will be rooted in impartiality exhibited in all we do as we will always act freely from bias or favoritism in our dealings with the stakeholders particularly the licensed operators.

5.4 THE AUTHORITY’S MOTTO

Our guiding principle is inspiring development

Figure 18: Rwanda Utilities Regulatory Authority’s Mission, Vision, Value and Motto

<table>
<thead>
<tr>
<th>VISION</th>
<th>We aspire to be a point of reference in public utilities regulation that inspires development and confidence.</th>
</tr>
</thead>
<tbody>
<tr>
<td>MISSION</td>
<td>Our perpetual guiding star is to regulate public utilities by building an environment that promotes fair competition and quality of public utility service in a transparent, independent and reliable manner.</td>
</tr>
<tr>
<td>VALUES</td>
<td>We believe in Independence, Accountability, Transparency, Firmness</td>
</tr>
<tr>
<td>MOTTO</td>
<td>Our guiding principle is Inspiring development</td>
</tr>
</tbody>
</table>

Strategic Plan
Rwanda Utilities Regulatory Authority (RURA)
2013-2018
6. STRATEGIC ORIENTATIONS

The following framework covers the 5 year strategic orientations for the Rwanda Utilities Regulatory Authority (RURA) in its mandate of regulating certain public utilities namely; Information and Communication Technologies (ICT), Postal Services, Renewable and non-renewable Energy, Industrial Gases, Pipelines and storage facilities, Water, Sanitation, Transport of persons and goods And other Public utilities if deemed necessary.

The Authority’s activities in the above sectors fall under seven intervention areas as summarized in the table below:

During the coming years, much emphasis will be put on the above seven areas to boost its visibility and contribution to the satisfaction of its key stakeholders, i.e. consumer of utility services, operators and policy makers. And it is on these areas that strategic goals are based.

Therefore, bearing in mind that there is no development without research and innovation, in each intervention area, research and development initiatives will be continuously developed to enable the Authority timely respond to changing regulatory needs and stakeholders’ expectations.

Table 11: Intervention areas of the Authority

<table>
<thead>
<tr>
<th>INTERVENTION AREAS</th>
<th>CORPORATE SERVICES</th>
<th>LEGAL AND REGULATORY FRAMEWORK</th>
<th>CONSUMERS ISSUES</th>
<th>ECONOMIC REGULATION</th>
<th>TECHNICAL REGULATION</th>
<th>UNIVERSAL ACCESS</th>
<th>MEDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cap. Building</td>
<td>Policies and Laws</td>
<td>Complaints and Disputes</td>
<td>Competition</td>
<td>Standards and Quality Service</td>
<td>Project and fund monitoring</td>
<td>Media regulatory framework</td>
<td></td>
</tr>
<tr>
<td>EMS</td>
<td>Regulations</td>
<td>Consumers’ Associations</td>
<td>Investment and business</td>
<td>Scarce resources</td>
<td>Infrastructure</td>
<td>Broadcasting media monitoring</td>
<td></td>
</tr>
<tr>
<td>Office availability</td>
<td>Litigation</td>
<td>Consumers Education</td>
<td>Cost and pricing</td>
<td>Monitoring and compliance</td>
<td>Penetration</td>
<td>Local content</td>
<td></td>
</tr>
<tr>
<td>Internal rules and procedures</td>
<td>Enforcement</td>
<td>Quality of experience</td>
<td>Market performance monitoring</td>
<td>Level of services</td>
<td>Affordability / pricing</td>
<td>Cooperation with self regulatory body</td>
<td></td>
</tr>
<tr>
<td>Public relations</td>
<td>Licensing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily management</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Research and Development
6.1 STRATEGIC GOALS

The extensive situational analysis resulted in formulating seven (7) Strategic Goals with well defined and measurable objectives to serve as guidance to the annual action plan elaboration for the next five (5) years. The goals were formulated based on the Authority’s six intervention areas as illustrated in figure No 11 above.

GOAL 1: Develop an Efficient, Effective and Productive Corporate Entity

In order to achieve its vision and mission, the Authority needs to have well-resourced human resources working in a conducive environment in which the organization structure, the work-culture and capabilities positively complement each other.

It is also paramount for RURA to re-configure its working framework with its new mandate, educate and inform the public about its regulatory activities, and timely respond to stakeholders’ expectations through intensive Research and Development initiatives.

Furthermore, it is equally important for RURA to have the best information technology tools and to operate with the most reliable and cutting-edge information technology platform.

In order to achieve the above, the following key strategic objectives will be pursued:

- Develop and proactively implement communication strategies for the Branding of the Authority image;
- Foster Regional / International cooperation and enhance Rwanda visibility to International regulatory bodies;
- Re-align RURA’s working framework with the new mandates;
- Build an outstanding working environment and high quality service standards oriented corporate entity which conducts its operations and utilize available resources in an efficient and effective manner.

GOAL 2: Create, Strengthen and enforce the legal and regulatory framework

The legitimacy of regulatory actions depends on the right and clear legal and regulatory framework that balances the interests of operators, the consumers and the policy makers.

In this regard, RURA is entrusted with the responsibility to ensure compliance with the provisions of any law and regulations governing public utility sectors. It is also provided by the law that RURA may play an advisory role in the process of policy formulation and can make proposals for new legislations pertaining to any regulated public utility sector and establish or review where it deems necessary the licensing framework.

RURA plays a critical role in the implementation of legal obligations relating to public utilities. So, RURA should ensure a timely and comprehensive development of regulatory framework.

Thus, the strategy adopted by the Authority is to establish and maintain transparent, consistent and objective legal and regulatory environment, to engage the institution in constant legal research in order to ensure effective regulation.

This will be achieved by following key strategic
GOAL 3: Ensure that consumers enjoy acceptable quality of service at reasonable prices and are assured of secured supplies.

The consumers are enabled to make informed choices on the available public utility services while at the same time are empowered to stand demand for their rights when infringed. Consumers will also be sensitized on their obligations with respect to usage of public utility services.

The strategy is to create an environment to better promote and protect the interests of consumers, in respect of the price, standards, quality of variety of services. To succeed in this, the following objectives are formulated:

- Put in place comprehensible mechanism for consumer complaint handling and dispute resolutions
- Devise means for consumer empowerment in the regulated sectors
- Provide consumers with the knowledge, information and confidence to be aware of their rights and obligations
- Assess the level of satisfaction in public utility services

GOAL 4: Promote easy market entry, fair competition and support a market driven industry in the regulated utilities.

One of the paramount functions of the regulator is to create a level playing field for all operators whereby discrimination is eliminated, hence boosting the investors’ confidence.

The Rwanda economic policy, laws and regulations concur with the fact that RURA should:

- Ensure that regulated utility providers are working within sustainable economic and financial stability,
- Promote efficient development of regulated sectors,
- Maintain and promote effective competition,
- Facilitate and encourage private sector investments in the public utilities.

In line with the above, the following are the objectives on which RURA will put more emphasis in the next five years:

- Conduct regular market analysis to identify and reduce barriers to entry in a view to balance supply and demand in the regulated sectors.
- To monitor the interconnection and access pricing policies to eliminate anticompetitive behaviour in all regulated sectors.
- To monitor and evaluate market performance of the licensees in a view to ensure the service delivery sustainability

GOAL 5: Ensure efficient and effective allocation of resources, safety and reliability of utilities services

The technical regulation being mainly concerned with the efficient allocation of resources, the safety, the security and reliability of utility services, RURA is committed to creating a conducive environment that fosters expansion of the reliable supply of utilities services to underserved areas in compliance with sectoral legislations, regulations, standards and best industry practices.

Also, there is a need of ensuring the quality
of service delivery by operators to consumers and putting in place a mechanisms to continually assess and follow up the trend of the technology by setting up a framework to use effectively and efficiently the national scarce resources.

In line with the above, the following are the objectives on which RURA will put more emphasis in the next three years:

- Develop and enforce operational service delivery standards and quality of service parameters in line with internationally recognized norms for all regulated services
- Put in place a mechanism to continually assess and follow the trend of the technology and accordingly set up structure to adjust national scarce resources plan for their use, management, planning and monitoring.

**GOAL 6: Contribute to the national long term development by promoting the availability, accessibility and affordability of regulated services to all consumers including low income, rural and disadvantaged consumers**

The universal access Strategic Goal is to promote the long term Rwanda development by universal access to utility services.

The Government entrusted RURA with the mandate of ensuring that utility services are provided throughout the whole country to meet all reasonable demands and needs of natural persons and organizations

RURA is therefore committed to setting up a framework to promote the availability and use of utility services throughout Rwanda by encouraging the installation of utility infrastructure and the provision of services in non-served areas and for underserved areas while tackling interests of people living with disability and low income earners within the society. To succeed in this, the following objectives are formulated

- To encourage the development and deployment of utility services to rural and underserved areas in line with National development policy.
- To promote and support the development and deployment of appropriate technologies, services & content with a special attention to people with disability, youth and women.
- Develop an appropriate and enduring Universal Access framework that ensures best quality, affordable and reliable services.
- To set up mechanisms to foster the deployment of Broadband connectivity and services both on supply and demand side.

**GOAL 7: Ensure a sustainable development of the Media sector that reflect a sense of Rwanda’s identity, character, cultural diversity and expression of content**

The Law No 09/2003 of 1/3/2013 gives to RURA the mandate to regulate Media. The same Law stipulates that RURA will be responsible for the regulation of broadcasting and converging electronic technologies including the internet and any other audiovisual information and communication technology.

In order to fulfil this mission in the next five years, The Authority will focus on:

- Development and enforcement of the regulatory framework for media sector in line with the Media Reform in the country.
- Establishment of mechanisms for Broadcasting Media monitoring and ensuring storage of broadcast contents for any further use and analysis.
- Supporting and encouraging the local content creation with the aim of having sufficient local content production and encouraging investment in local content production.
- Putting in place and supporting a framework of cooperation between Self Regulatory Body and RURA.
The strategic plan matrix below gives more details on the above.

### 6.2 STRATEGIC PLAN MATRIX

<table>
<thead>
<tr>
<th>GOAL 1: DEVELOP AN EFFICIENT, EFFECTIVE AND PRODUCTIVE CORPORATE ENTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Objectives</strong></td>
</tr>
<tr>
<td>---------------------------</td>
</tr>
<tr>
<td>Provide the required job- specific trainings to all RURA staff</td>
</tr>
<tr>
<td>Equip RURA with the best information technology tools with most reliable and cutting-edge information technology platform</td>
</tr>
<tr>
<td>Acquire a new and equipped RURA office building</td>
</tr>
<tr>
<td>Develop RURA rules and procedures for the conduct of RURA business</td>
</tr>
<tr>
<td>Provide RURA with modern documentation center for library and record keeping</td>
</tr>
<tr>
<td>Develop and proactively implement communication strategies for the branding of the Authority's image</td>
</tr>
<tr>
<td>Foster Regional / International cooperation and enhance Rwanda visibility to International regulatory bodies.</td>
</tr>
</tbody>
</table>
**Re-alignment of RURA working framework with the new mandates**

- **Realigned framework in place**
- **The effective regulatory response to the new mandate**

| Year 2 | All Dept | 50,000,000 |

**To build an outstanding working environment and high quality service standards oriented corporate entity which conducts its operations and utilize available resources in an efficient and effective manner.**

- **Classification of RURA among the 3 best public institutions of Rwanda**
- **Improved productivity of employees**
- **Improved efficiency and effectiveness in the management of Authority’s resources (financial material, human)**
- **High level satisfaction of RURA’s stakeholders needs.**

| Year 5 | All Department | 200,000,000 |

**Put in place a research and development framework to timely respond to changing regulatory needs and stakeholders’ expectations as well as coordinating all research based activities regarding the Authority**

- **Clear R&D framework in place**
- **Improved innovation oriented culture within the Authority**
- **Timely response to changing regulatory environment challenges**

| Annually | DG’s office/Planning | 800,000,000 |

### GOAL 2: CREATE, STRENGTHEN AND ENFORCE THE LEGAL AND REGULATORY FRAMEWORK

<table>
<thead>
<tr>
<th>Strategic Objectives</th>
<th>Performance Indicator</th>
<th>Expected Impact</th>
<th>Time frame</th>
<th>Responsibility</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate actively in the formulation of the sector policies and Laws</td>
<td>Sector policies and laws posted or reports on the progress available</td>
<td>Regulatory certainty in the regulated sectors is guaranteed</td>
<td>Annually</td>
<td>All Depts.</td>
<td>50,000,000</td>
</tr>
<tr>
<td>Put in place or review regulations and guidelines in the utility sectors where required</td>
<td>All utility regulations are gazetted or progressively reported for.</td>
<td>Improvement of service delivery in the regulated sectors</td>
<td>Annually</td>
<td>All Depts.</td>
<td>50,000,000</td>
</tr>
<tr>
<td>Put in place comprehensive mechanism for arbitration and litigation settlement</td>
<td>The mechanism in force.</td>
<td>Amicable resolutions among stakeholders. Increased public confidence in the Authority</td>
<td>Year 3</td>
<td>CLIA Dept</td>
<td>20,000,000</td>
</tr>
<tr>
<td>Set up and implement an appropriate and proactive enforcement mechanism for compliance with Laws, regulations and license obligations</td>
<td>Quarterly reports on particular cases and decisions taken</td>
<td>The compliance with laws and regulation is ensured</td>
<td>Annually</td>
<td>CLIA Dept</td>
<td>80,000,000</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------</td>
<td>---------</td>
<td>-----------</td>
<td>------------</td>
</tr>
<tr>
<td>Develop and review where necessary the licensing framework</td>
<td>Appropriate licensing framework for all regulated sectors available.</td>
<td>Improvement of the regulatory certainty and transparency.</td>
<td>annually</td>
<td>CLIA Dept</td>
<td>40,000,000</td>
</tr>
</tbody>
</table>

**GOAL 3: ENSURE THAT CONSUMERS ENJOY ACCEPTABLE QUALITY OF SERVICE AT REASONABLE PRICES AND ARE ASSURED OF SECURED SUPPLIES.**

<table>
<thead>
<tr>
<th>Strategic Objectives</th>
<th>Performance Indicator</th>
<th>Expected Impact</th>
<th>Time frame</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Put in place comprehensible mechanism for consumer complaint handling and dispute resolution</td>
<td>Complaint handling mechanisms in force.</td>
<td>Complaints are effectively addressed and appropriate responses given Increased consumer confidence in the Authority</td>
<td>Year 3</td>
<td>CLIA</td>
<td>40,000,000</td>
</tr>
<tr>
<td>Devise means for consumer empowerment, education, protection in the regulated sectors</td>
<td>Number of educational, advocacy programs conducted and materials developed</td>
<td>Consumers rights are better protected</td>
<td>annually</td>
<td>CLIA Dept</td>
<td>750,000,000</td>
</tr>
<tr>
<td>Assess the level of satisfaction in public utility services</td>
<td>Assessment report availed and published.</td>
<td>Increased level of quality of service</td>
<td>annually</td>
<td>CLIA Dept</td>
<td>600,000,000</td>
</tr>
</tbody>
</table>

**GOAL 4: PROMOTE EASY MARKET ENTRY, FAIR COMPETITION AND SUPPORT A MARKET DRIVEN INDUSTRY IN THE REGULATED UTILITIES.**

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Performance indicators</th>
<th>Expected impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct regular market analysis to identify and reduce barriers to entry in a view to balance supply and demand in the regulated sectors.</td>
<td>Market analysis reports available</td>
<td>Sustainable and efficient competition in regulated sectors</td>
<td>Annually</td>
<td>CLIA Dept</td>
<td>1,800,000,000</td>
</tr>
<tr>
<td>To monitor the interconnection and access pricing policies to eliminate anticompetitive behaviour in all regulated sectors.</td>
<td>Intervention reports</td>
<td></td>
<td>Annually</td>
<td>CLIA Dept</td>
<td>450,000,000</td>
</tr>
</tbody>
</table>
To monitor and evaluate market performance of the licensees in a view to ensure the service delivery sustainability

<table>
<thead>
<tr>
<th>Framework</th>
<th>Performance Indicators</th>
<th>Expected Impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Service delivery is improved and sustained</td>
<td>annually</td>
<td>All Dept</td>
<td>800,000,000</td>
<td></td>
</tr>
</tbody>
</table>

**GOAL 5: ENSURE EFFICIENT AND EFFECTIVE ALLOCATION OF RESOURCES, SAFETY AND RELIABILITY OF UTILITY SERVICES**

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Performance Indicators</th>
<th>Expected Impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and enforce operational service delivery standards and quality of service parameters in line with Internationally recognized norms for all regulated services</td>
<td>Standards and quality of services disseminated and effectively enforced</td>
<td>Improved quality of service delivery</td>
<td>Annually</td>
<td>All Dept</td>
<td>1,000,000,000</td>
</tr>
</tbody>
</table>

Put in place a mechanism to continually assess and follow the trend of the technology and accordingly set up a structure to adjust national scarce Resources plan for their use, management, planning and monitoring.

<table>
<thead>
<tr>
<th>Performance Indicators</th>
<th>Expected Impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scarce resources plan in place and communicated to all stakeholders and allocation plan implemented.</td>
<td>Efficient and effective management</td>
<td>Year 1</td>
<td>Comm &amp; Media Dept.</td>
<td>600,000,000</td>
</tr>
</tbody>
</table>

**GOAL 6: CONTRIBUTE TO THE NATIONAL LONG TERM DEVELOPMENT BY PROMOTING THE AVAILABILITY, ACCESSIBILITY ANDAFFORDABILITY OF REGULATED SERVICES TO ALL CONSUMERS INCLUDING LOW INCOME, RURAL AND DISADVANTAGED CONSUMERS**

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Performance Indicators</th>
<th>Expected Impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>To encourage the development and deployment of utility services to rural and underserved areas in line with National development policy</td>
<td>Incentive mechanisms in place and implemented for all the regulated sectors.</td>
<td>Increased availabilities and accessibility of utility services in the country.</td>
<td>Annually</td>
<td>UA</td>
<td>4,500,000,000</td>
</tr>
</tbody>
</table>

To promote and support the development and deployment of appropriate technologies, services & content with a special attention to people with disability, youth and women.

<table>
<thead>
<tr>
<th>Performance Indicators</th>
<th>Expected Impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regulations to protect the right of all citizens with no discrimination in place and implemented. Number of individuals or association of people with disability supported</td>
<td>Equal opportunity access to utilities and services</td>
<td>Annually</td>
<td>UA</td>
<td>3,000,000,000</td>
</tr>
</tbody>
</table>
## GOAL 7: ENSURE A SUSTAINABLE DEVELOPMENT OF THE MEDIA SECTOR THAT REFLECT A SENSE OF RWANDA’S IDENTITY, CHARACTER AND CULTURAL DIVERSITY

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Performance indicators</th>
<th>Expected impact</th>
<th>Deadline</th>
<th>Responsibility</th>
<th>Estimated budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and enforce the regulatory framework for media sector in line with the Media Reform in the country</td>
<td>Regulations are in place and enforced</td>
<td>Vibrant and developed sector with more professional players.</td>
<td>Year 5</td>
<td>Communication and media Department</td>
<td>15,000,000</td>
</tr>
<tr>
<td>Establish mechanisms for Broadcasting Media monitoring and ensure storage of broadcast contents for any further use and analysis.</td>
<td>Required monitoring tools in place and operational</td>
<td>Improved compliance of broadcasting content with the laws and regulations</td>
<td>Year 3</td>
<td>Communication and media Department</td>
<td>200,000,000</td>
</tr>
<tr>
<td>Supporting and encourage the local content creation with the aim of having sufficient local production and encourage investment of local content production.</td>
<td>Increase in number of local content creators</td>
<td>More innovation, entrepreneurship and competitiveness in local content creation</td>
<td>Annually</td>
<td>Communication and media Department</td>
<td>150,000,000</td>
</tr>
<tr>
<td>Put in place and support a framework of cooperation between Self Regulatory Body and RURA</td>
<td>Agreement between RURA and Self Regulatory Body in place, number of issues handled</td>
<td>Enhanced professionalism, accountability and professional conflict handling in Rwandan media sector</td>
<td>Annually</td>
<td>Communication and media Department</td>
<td>50,000,000</td>
</tr>
</tbody>
</table>
7. IMPLEMENTATION, MONITORING AND EVALUATION MECHANISMS

For this strategic plan to be effectively implemented and set strategic goals achieved, a number of strategies will be taken into consideration and implemented; like the Authority's organisational re-structuring, ensuring constant availability of financial resources, ensuring an effective planning and implementation coordination as well as a proper monitoring and evaluation of the strategic implementation.

7.1 AUTHORITY’S ORGANISATIONAL RE-STRUCTURING

The implementation of this strategic plan will require the optimum level of human resource placement in terms of quality and quantity. In this regard, the first priority will be to restructure the Authority for its organisational set up to be well balanced to support the fulfilment of the Authority’s mission and mandate as drawn by the law no 09/2013 of 1/03 establishing the Authority and determining its mission, power, organisation and functioning.

Bearing in mind that the strategic planning process has to be complemented by an organisational structure that is tailored in alignment with the envisaged goals and objectives, the restructuring will take into consideration the Authority’s needs in terms of human resource allocation and placement. In this regard, an assessment for optimal staff requirements and capacity need will be conducted and if any gaps are identified, requisite measures will be implemented to supplement the competencies.

In addition, continuously, staff requirements will be assessed and capacity building initiatives implemented.

The nature of the changing regulatory environment in the regulated sector will necessitate that Authority envisages review of staff terms and conditions of employment and capacity, acquiring special skills and the implementation of competitive remuneration and capacity development initiatives as well.

7.2 FINANCIAL RESOURCES

The implementation of this strategic plan requires both financial and physical resources. The total cost of achieving the set objectives and goals as detailed in the strategic plan matrix has arrived to a total sum of **Rwf 37,271,800,000** over the five (5) years period which represents an average of **Rwf 7,454,360,000** annually.

The Law creating the Authority provides that RURA will get various revenue sources for the fulfilment of its mission. These include:

- Fees levied on application of and grant of licenses, permits, contracts, concessions and allocations to each public utility operator;
- Grants,
- Donations and legacies,
- Annual regulatory fee based on a percentage of the turnover from each regulated service,
- All administrative fines imposed by the regulatory board;
- Loans; fees for services rendered by RURA and
- Any other payment or property due to RURA in respect of any activity related to the regulated services.

The Responsibility of both the Regulatory Board and the Management will be to ensure that there is no loophole in revenue collection
and efficient as well as accountable use of available resources.

7.3 ACTION PLAN

An office responsible for planning and Research will be created and strengthened to coordinate all the Authority’s planning and Research activities. This office will be responsible for annual preparation of action plan that meets set strategic goals and objectives and realise the vision and mission of the Authority.

This office will as well be responsible for timely and systematic reporting on implementation as well as monitoring and evaluation of this strategic plan by coordinating and guiding in preparation of detailed annual action plan and the annual activity based budget in collaboration with the office in charge of finance management and other departments.

A special emphasis will be accorded to Monitoring and Evaluation activities. A departmental implication and involvement will also be required to timely and effectively ensure that the Authority is in a good track in fulfilling its mission and vision as stipulated in this strategic plan.

An annual plan of action will be drawn from the strategic plan. The Action Plan shall be based on the objectives as provided in the logical framework for each strategic orientation in this strategic plan. The Steering Committee will organize semester meetings to monitor the implementation of the action plan according to the expected performance indicators.

7.4 STEERING COMMITTEE

A Steering Committee for the monitoring of the implementation of this strategic plan will be constituted and will be composed by the four Heads of Departments and two persons representing the Board, the Director General and the Director in charge of Finance and the officer responsible of Monitoring and Evaluation who will be the secretary of this Steering Committee. The Committee Chairperson will be chosen by the members of the Steering Committee. The Steering Committee will determine its functioning rules. It will mainly be in charge of monitoring and evaluating the implementation of this Strategic Plan.

More specifically, the following framework is put in place to facilitate a smooth and effective implementation, monitoring and Evaluation of the current strategic plan:

- Each responsible office will extract from this plan specific targets and provide implementation reports on a regular basis. The strategy will be translated into performance responsibilities by senior staff who will ensure that detailed work plans of junior officers are set in conformity with the Authority’s mission and strategic goals and objectives.
- Annual performance contracts will be signed between each officer and his supervisor based on the set strategic targets. It is against these contracts that performance of employees will be assessed on regular basis.
- A senior management meeting chaired by the Director General will be held on a regular basis to Evaluate the progress report progress of the strategic plan;
- The Regulatory Board will commission an annual review of implementation of the Strategic plan and incorporate any changes in the sector in case of need;

7.5 ANNUAL EVALUATION

The annual evaluation of achievements within the framework of the Strategic Plan will be made during annual meetings on the basis of reports prepared by the DG Office. The annual evaluation will be conducted
internally. The Self Evaluation Committee will be comprised of the Board members, the Director General, Heads of Departments, and all RURA unit directors. A workshop will be held to share on the challenges, ways and means of improvement in order to fully realize the expected results.

7.6 MID TERM EVALUATION

The mid-term evaluation will be carried out after 2.5 years, if required, by an independent Consultant so as to get a neutral opinion on the implementation of the Strategic Plan and then debate on adjustments to be made in order to reach expected outputs. Her/his report will be submitted to the Director General of RURA. Goals will be assessed against the progress made. Appropriate recommendations in response to problems encountered during the implementation will be formulated. These recommendations may lead to the adaptation of the proposed strategies and the expected outputs. A workshop will be held to share challenges, ways and means of improvement in order to achieve the expected results as indicated in the strategic plan.

7.7 FINAL EVALUATION

A final evaluation which may require the assistance of an independent Consultant will take place during the first semester of the year 2018. The final evaluation report will include recommendations on the new strategic orientations which will be included in the 2013-2018 Strategic Plan. This evaluation report will be submitted to the RURA Director General. The 2018-2023 Strategic Plan will be prepared in the second semester of 2018. A workshop will be held to share the challenges, ways and means of improvement and hence, to learn from the implementation of this strategic plan for future planning initiatives.

8. CRITICAL SUCCESS FACTORS

The Authority has identified the following critical factors for the successful implementation of the current strategic plan:

- Understanding and ownership of the Strategic goals and objectives by all those who are involved in its implementation;
- Provision of leadership and commitment from the Authority’s top management as their leadership is required to lead by example;
- Effective communication between all implementers on activities and outcomes;
- The timely approval and implementation of activities;
- Availability of resources as identified under each strategy;
- Proper consultation, cooperation and support of stakeholders;
- Effective translation of strategic plan targets into implementable annual plans and budgets; and
- Regular review, performance oversight, measurement and reporting.
### APPENDIX

Appendix No. 1:

**Figure 19: RURA Response and contribution to Rwandan development priorities**

<table>
<thead>
<tr>
<th>Thematic areas of EDPRS II</th>
<th>RURA Strategic intervention, contribution and response to the Thematic Areas of EDPRS II</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Economic Transformation for Rapid Growth</strong></td>
<td></td>
</tr>
<tr>
<td>- Priority 1: Increase the domestic interconnectivity of the Rwandan economy through investments in hard and soft infrastructure</td>
<td>The Authority will accompany and support initiatives aiming at increasing the domestic interconnectivity of the Rwandan economy through investments in hard and soft infrastructure by facilitating increasing access to public utilities services and infrastructure and resources in priority sectors of the economy namely ICT, water, sanitation and transport services.</td>
</tr>
<tr>
<td>- Priority 2: Increase the external connectivity of Rwanda’s economy and boosting exports</td>
<td>In addition, programs will be initiated to contribute to promoting the availability, accessibility and affordability of regulated services to all consumers including low income, rural and disadvantaged consumers; <strong>Goal 6.</strong></td>
</tr>
<tr>
<td>- Priority 3: Transform the private sector by increasing investments in priority sectors</td>
<td>The Authority will put in place regulations that promote investments in the regulated sectors and by virtue of the Law, it will create a level playing field for the private sector’s players involved in utilities services provision; <strong>Goal 2.</strong></td>
</tr>
<tr>
<td>- Priority 4: Transform the economic geography of Rwanda by facilitating and managing urbanisation, and promoting an urban network enhancing economic growth country-wide</td>
<td>RURA will give priority to fostering Regional/International cooperation with the aim of enhancing Rwanda visibility and market its image and investment opportunities on international scene to attract large investors; <strong>Goal 1.</strong></td>
</tr>
<tr>
<td>- Priority 5: Pursue a ‘green economy’ approach to economic transformation</td>
<td>As far as regulated sectors are concerned, a goal has been set clearly stating the commitment of the Authority to devise efforts to promote easy market entry, fair competition and support a market driven industry in the regulated utilities with the aim of attracting and maintaining large foreign investors by identifying and reducing barriers to entry on Rwandan market and creating a level playing field; <strong>Goal 2 and Goal 4.</strong></td>
</tr>
<tr>
<td></td>
<td>Furthermore, the Authority will contribute to the human well-being and social equity, while significantly reducing environmental risks and ecological scarcities by ensuring efficient and effective allocation utilities resources, safety and reliability of utility services; <strong>Goal 5.</strong></td>
</tr>
<tr>
<td><strong>2. Rural Development</strong></td>
<td></td>
</tr>
<tr>
<td>- Priority 1: Integrated Approach to Land Use and Human Settlements</td>
<td>The Authority will encourage and support initiatives put forward to develop and deploy utility services to non/underserved areas in line with National development policy; <strong>Goal 6.</strong></td>
</tr>
<tr>
<td>- Priority 2: Increase the Productivity of Agriculture</td>
<td>The Authority will contribute to transforming rural communities by supporting programs aiming at connecting them to economic opportunity through Improved Infrastructure where Electricity and ICT will be geared as drives of development to urban areas to build a capacity and knowledge of communities; <strong>Goal 6.</strong></td>
</tr>
<tr>
<td>- Priority 3: Enabling Graduation from Extreme Poverty</td>
<td>RURA will be actively involved in promoting clean water supply and provision of sanitation facilities and services as well as quality transport services with the aim of promoting healthcare and socio-economic development of citizens in rural areas; <strong>Goal 3, Goal 5 and Goal 6.</strong></td>
</tr>
<tr>
<td>- Priority 4: Connecting Rural Communities to Economic Opportunity through Improved Infrastructure</td>
<td></td>
</tr>
</tbody>
</table>
### 3. Productivity and Youth Employment

**Priority 1:** Skills and Attitudes  
**Priority 2:** Technology  
**Priority 3:** Entrepreneurship, Access to Finance and Business Development  
**Priority 4:** Labour Market Interventions

In the spirit of contributing to building a knowledge based economy, RURA will set up mechanisms to foster the deployment of broadband last mile solution, promoting and supporting the deployment of appropriate technologies, service and content which are meant to be enablers of strong entrepreneurship and business development and innovation initiatives, with much emphasis to rural communities and youth in rural and remote areas; **Goal 6.**

### 4. Accountable Governance

**Priority 1:** Citizens’ participation in delivery of development and strengthened public Accountability.  
**Priority 2:** Quality Service Delivery

Provisions are taken care of in this strategic plan whereby means will be availed to ensure that the citizens enjoy acceptable quality of services at reasonable prices and are assured of secured supplies. They will be empowered to protect and claim their rights, educated and equipped to not only accept quality services, but also respect their obligations; **Goal 3.**

In addition to that, RURA will be transformed into an effective, efficient and productive corporate entity which proactively responds to changing environment and stakeholders needs with accountability as a driving force in all its operations. **Goal 1.**

The elaboration of this strategic plan gave credit to an assumption that increased level professionalism of the media sector will promote Rwandan identity, character and cultural diversity and freedom of expression which will contribute much to Citizens’ participation in delivery of development and strengthened public accountability. It is in this regard that a goal has been set to support the development of sustainable and professional media in Rwanda; **Goal 7.**

### 5. Cross-Cutting Issues:

- Capacity Building  
- Environment and Climate Change  
- Family and Gender  
- Regional Integration  
- HIV/AIDS and NCDs  
- Disaster Management  
- Disability and Social Inclusion

This strategic plan acknowledges that there cannot be developed, efficient, effective and productive corporate entity without consistent capacity building initiatives, family and gender sensitivity as well as regional and international cooperation; **Goal 1.**

The Authority will prioritize the disaster prevention approach by ensuring safety and reliability of utility services. **Goal 5.**

Furthermore, the Authority will promote and support the development and deployment of appropriate technologies, services & content ensuring non-discrimination especially for people with disabilities; **Goal 6.**