



ANNUAL REPORT 2019-2020



OUR VISION

To be a leading global regulator of public utilities.



OUR MISSION

In regulating public utilities, RURA:

- promotes free and fair competition;
- protects the rights of consumers and balances the interest of all stakeholders;
- promotes availability of affordable, quality services to all; and
- leads in the development of the public utilities sectors.



OUR VALUES

The Authority upholds the following core values:

- Independence
- Transparency and Accountability
- Fairness
- Integrity
- Professionalism
- Innovation
- Sustainability

OUR MOTO

Inspiring Development



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ABBREVIATIONS

BSC	Broadband Systems Corporation
CAPEX	Capital Expenditure
CENFRI	Centre for Financial Regulation and Inclusion
CNRI	Corporation for National Research Initiatives
CSI	Cybersecurity Strategic Integration
DOA	Digital Object Architecture
DSSD	Digital Solutions for Sustainable Development
FM	Frequency Modulation
FTTH	Fiber-To-The-Home
FY	Financial Year
G2	Generation two
HD	High Definition
HFO	Heavy Fuel Oil
IA	Artificial Intelligence
IAEA	International Atomic Energy Agency
IBS	Indoor Building Solution
IBS-DAS	Indoor Building Solution - Distributed Antenna System
ISP	Internet Service Provider
JAXA	Japanese Aerospace and Exploration Agency
KPIs	Key Performance Indicators
KTRN	Korea Telecom Rwanda Networks
KWL	Kigali Water Ltd
LPG	Liquefied Petroleum Gas
MINALOC	Ministry of Local Government
MNOs	Mobile Network Operator
MoU	Memorandum of Understanding
MW	Megawatt
NRW	Non-Revenue Water
NST1	National Strategy for Transformation
PPA	Public Private Partnership Agreement
PPP	Public Private Partnership
QoS	Quality of Services
RfP	Request for proposal
RICTA	Rwanda Internet Community and Technology Alliance
RISA	Rwanda Information Society Authority
RSA	Rwanda Space Agency
RWASAT-1	Rwanda Satellite -1
SPC	Signaling Point Code
UAF	Universal Access Fund
VAS	Value Added Services
VoIP	Voice -over-IP
WASAC	Water and Sanitation Corporation

THE REGULATORY BOARD



Dr. GATARE IGNACE
Chairperson

Dr. Ignace GATARE currently serves as the Principal of the College of Science and Technology of the University of Rwanda. Prior to his appointment, he served as the Director General of Rwanda National Commission of Science and Technology (NCST). From November 2009 until April 2012, he served as Minister in Charge of Information and Communications Technology. He is a member of governing bodies for various national and international institutions and projects.



PEACE ABABO
Vice-Chairperson

Ms. Peace ABABO is trained in Urban Planning and Environmental Science. She has over 15 years of working experience in Quality Assurance and Quality Management Systems, Compliance and has corporate governance experience of over 5 years. She is currently a consultant in Quality Management Systems implementation schemes.



FORTUNE MUKANDOLI
Member

Ms. Fortune MUKANDOLI is a permanent Lecturer at University of Lay Adventists of Kigali (UNILAK), Faculty of Law with 13 years of experience. She is a researcher in the Field of Law and has previously served in the Ministry of Public Works and Energy for 9 years.



Dr. DANIEL UFITIKIREZI
Member

Dr. Daniel Ufitikirezi is a Strategic consultant with speciality in Investment. Previously, he has served in different capacities as Director General of Rwanda Social Security Board, Deputy Director General in charge of Funds Management of the same institution, Head of Assets and Investment Management at Rwanda Development Board; Deputy CEO, Head of Business Incubation Services and General Manager Horizon Group.



MIREILLE UMWALI
Member

Ms. Mireille UMWALI, is a regional Project Management Consultant. Previously, Mireille served in different positions such as Chief Operations Officer, Chief Finance Officer and Managing Director of Ultimate Concepts Ltd; Resident Director of Prime Holdings Ltd; National Coordinator in Urban Infrastructure City Management Project – UICMP. Mireille is a registered arbitrator and a member of the Kigali International Arbitration Center (KIAC).



Dr. KAYIHURA MUGANGA DIDAS
Member

Dr. Didas KAYIHURA is the Rector of the Institute of Legal Practice and Development (ILPD).

He has an experience of over 15 years in Academia, including over 10 years in Academic management positions. Has over 11 years of Practice in Law, and an equivalent number of years of experience in the practice of Arbitration. Dr. Didas has over 12 years of Board membership practice, and over 11 years of Law Firm Senior management practice.



PATRICK NYIRISHEMA
Lt Col
D G / Member

Since July 2014, Patrick Nyirishema has been serving as the Director General of Rwanda Utilities Regulatory Authority (RURA) and Counselor to the International Telecommunication Union (ITU). From June 2006 to July 2013, he served as Deputy Director General of Rwanda Information Technology Authority, and later as Deputy CEO in charge of ICT at Rwanda Development Board.

FOREWORD



I am pleased to present the 2019-2020 Annual Report of Rwanda Utilities Regulatory Authority (RURA) on behalf of the Regulatory Board, the Management and the entire RURA Staff.

This report depicts the work done during the evaluated financial year and achievements registered despite the fact that the normal business of the institution has been disrupted by a worldwide COVID-19 pandemic.

During the financial year 2019-2020, RURA, managed to implement its action plan at a commendable level although the COVID-19 Pandemic has affected its achievements during the second semester of the year. It is worth mentioning that the lockdown and the

partial lifting of lockdown as well as the necessity of adopting protective measures to limit the spread of the disease, have triggered innovations and new ways of conducting businesses.

In a bid of slowing down the spread of the COVID-19, RURA has greatly contributed, in collaboration with other institutions including the Rwanda National Police (RNP), National Bank of Rwanda (BNR), Rwanda Development Board (RDB) and operators, to the effort of implementing the protective measures including social distancing and adoption of cashless payments among others.

The report highlights the key achievements of the ended financial year and the readers will notice that apart from the regular businesses of increasing the quality, the availability and security of ICT services, the ICT sector was rather boosted by the necessity of using e-transactions including digital payment, online meetings, e-education among others.

In the energy sector, the Government target is to reach electricity universal access by 2024. During this financial year, there was a significant increase of lines and grid connections, which means that some steps are being made towards the objective. It is also worth mentioning that the energy generated from renewable resources occupy the largest share of the overall electricity production on the grid with 54.3%. Among other achievements in the energy sector is the increase of the storage capacity of the Liquefied Petroleum Gas (LPG), which has almost doubled during this financial year. The Regulator has endeavored to put in place a conducive regulatory environment in line with the Government aim to reduce substantially the use of biomass for cooking.

As multisector regulator, the reader will get to know where we are in the Water and Sanitation sector towards the achievement of the government commitment to achieve universal access to potable water and sanitation services by 2024 and the challenges that the sector is facing.

During this financial year, the public transport sector was the most affected by the COVID-19 Pandemic with the lockdown and requirements of social distancing during the partial lifting of lockdown. The Regulator has put in place some measures to mitigate the impact of the reduction of the activities for public transport but has also improved the service delivery to the licensees with the digitization of the licensing processes. The reader will notice that some sub-sectors of the transport sector have rather developed pursuant to enforcement mechanism implemented but also the changes in the way of conducting business pursuant to the pandemic.

As a corporate entity with social responsibilities, among other activities implemented during this financial year, RURA also participated in the connect Rwanda initiative by pledging 2,000 Smartphones to boost the penetration of smartphones in the country while leveraging the digital economy. RURA was also proud to mentor 58 young internees (professional and academic) thanks to its internship policy.

We are looking forward to another year full of innovative solutions to increase the availability, accessibility and reliability of public utilities. The current challenges will make us only more resilient and stronger.

Dr. Ignace GATARE

Chairperson of the Regulatory Board



EXECUTIVE SUMMARY

The financial year 2019-2020 report describes the activities accomplished, achievements and challenges that continue to be tackled considering the mandate in fulfilling essential role between the policy makers, licensed service providers and consumers.

The RURA Strategic Plan implemented through annual plans and this report is a reflection of the achievements of action plan in different regulated sectors

During the year, RURA focused on various initiatives designed to educate the public such as; a campaign to raise awareness on preventive measures against coronavirus, Gerayo Amahoro campaign in different bus parks, Nation-wide Campaign for sustainable management of electrical and electronic waste, workshop on captive power systems and distributed energy integration.

With regard to Cooperation, the Authority collaborated with Trademark East Africa and signed a USD 600,000 deal to facilitate digitization of key processes that will improve RURA's ability to provide services, The Authority entered also into a partnership with OTOWA Electric Co., Ltd, a Japanese manufacturer specializing in lightning protection related products.

In the ICT Sector, more efforts were in monitoring and assessment of quality of service to ensure compliance with established Key Performance Indicators.

Other important achievements in the ICT Sector are the mobile-cellular subscriptions were 77.9 registered for every 100 people while for fixed telephone subscriptions were 0.1%.

In comparison with the situation of the June 2019, the mobile-cellular telephone subscriptions per 100 inhabitants recorded an increase of 3.1%, from 74.8 to 77.9.

In addition, the number of fixed telephone subscriptions has also increased from 10,175 as of June 2019 to 11,626 subscriptions as of June 2020.

RURA through the Universal Access Fund supported Mobile Network Operators in the deployment of 68 sites countrywide to improve coverage and quality of services in underserved and uncovered locations.

In Energy Sector, the number of national grid connections increased by 14.8%. In addition, the installed capacity (MW) increased by 1.15% to reach 228.102MW while the electrical energy generated (kWh) increased by 2.16% and the annual peak demand has increased by 7.4%.

In the Gas and Downstream Petroleum sub-sector, the Liquefied Petroleum Gas (LPG) experienced an increase of 27.7% in importation while the total LPG storage capacity expanded by 43.7%. Imports of diesel and gasoline also increase by 60.5% and 60.6 % respectively. Moreover, decrease in Jet A-1 importation by 13.4 % due to the Covid-19 pandemic that led to the temporary closure of flights.

Under Water and Sanitation Subsector, water production and customer connections in urban and peri-urban areas increased by 1.6% and 6.7% respectively. The Water production increased by 1.6% from 52,388,588 m³/year in 2018-2019 to 53,245,484 m³/year in 2019-2020. The increase is mainly due to the increase in water treatment plants' performance that cumulated in increase of water production.

In the licensing, five (5) new licenses granted to new operators for the management of rural water supply systems and 33 new operators were licensed for the provision of sanitation services. In addition, the licensing processes has been digitized and all applications are processed online for both water and sanitation services.

The Transport Sector is a significant part of country's economy due to its strategic role in boosting socio-economic development. The sector registered an increase of car rental fleet by 17.8% from 731 to 861 and Taxicab operators' fleet by 10.07 %. This year under review was also characterized by IT based initiatives to modernize the transport sector, which noted 1,079 taxicab vehicles fitted with smart Taximeters and more than 15,073 motorcycles with intelligent connected fare meters.

However, the sector was greatly affected by the Covid-19 pandemic especially passenger transport, driving schools and motorcycle transport services which were not operational for forty days of total lockdown. The post lockdown era came with the social distancing requirement hence reducing the bus carrying capacity by a half while driving schools remained non-operational until the reporting period.

However, the government directives allowing movement of goods during covid-19 lockdown enabled an entry of 376 new individual goods transport operators.

Finally, Management would like to take this opportunity to convey sincere gratitude to the Ministries in charge of regulated sectors and all stakeholders for their cooperation accorded to the Authority throughout the year.

Thank You!

RURA Management





INTRODUCTION

1

INTRODUCTION

The year 2019-2020 marks the final year of the Regulatory Authority's Strategic Plan 2017-2020. The Authority has progressively implemented its strategic goals through its annual action plans in collaboration with both internal and external stakeholders in the regulated sectors.

This report is a reflection of the overall implementation status by June 2020. It is also worth noting that the achievement was measured against the average output under every goal.

Therefore, this report represents the registered achievements and progress towards the implementation of the Authority's strategic goal as per the approved strategic plan 2017-2020 as elaborated below:

- **Goal 1:** Interests of regulated services users protected
- **Goal 2:** Interests of service providers, investors and other stakeholders protected
- **Goal 3:** RURA contributes to the national, regional and international long-term development goals.
- **Goal 4:** Regulated services sectors' legal framework strengthened.
- **Goal 5:** RURA research and development function is established and functional
- **Goal 6:** RURA's institutional capacity strengthened.

The chart below shows the level of achievement for each of above-mentioned six goals



Figure 1: Achievement level by goal from 2017-2020 (Source: RURA)

1.1 RURA'S OPERATIONAL FRAMEWORK

RURA was initially created by the Law N° 39/2001 of 13th September 2001 as a multi-sector Regulatory Agency with the mission to regulate certain public Utilities. This Law was repealed and replaced by Law N° 09/2013 of 01/03/2013 establishing Rwanda Utilities Regulatory Authority (RURA) and determining its mission, powers, organization and functioning.

RURA has the mandate to regulate:

1. Telecommunications, information technology, broadcasting and converging electronic technologies including the internet and any other audio-visual 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;
7. Radiation Protection and;
8. Other public utilities, if deemed necessary.

RURA has a legal personality, financial and administrative autonomy in the fulfillment of its mandate. The Authority plays a pivotal role between the policy makers, licensed service providers and consumers. It reports to the Office of the Prime Minister, the supervising organ of RURA. In executing its duties, RURA also coordinates with line ministries responsible for each regulated sector in accordance with the Prime Minister's Order No 89/03 of 11/09/2014 determining modalities of which Ministries in charge of regulated sectors shall coordinate their activities with RURA in implementing their Respective Mandate.

1.2. CORPORATE GOVERNANCE

1.2.1 REGULATORY BOARD

The Regulatory Board is the supreme management and decision-making organ of RURA. It has full powers and responsibilities of managing the property of RURA in order for it to fulfill its mission.

The Regulatory Board is composed of seven Members including the Board Chairperson, Vice Chairperson and the Director General who also acts as rapporteur. Daily activities of the Regulatory Authority are coordinated and directed by the Director General who entrusted with executive powers.

Regulatory Board Meetings

For ordinary meetings, the Regulatory Board convenes on a monthly basis. However, if need arises, extra ordinary meetings maybe held upon initiation by the Chairperson or the Vice-Chairperson of the Regulatory Board, office of the Prime Minister which is the supervising Organ of RURA, two thirds (2/3) of members of the Regulatory Board or the Director General of RURA.

During its meetings, the Regulatory Board reviews and may approve any regulatory instruments, license applications, tariff changes and the Regulatory Authority's budget and action plan. It may also make administrative decisions like hiring or dismissal of employees and resolution of disputes referred to it among others.

During this year, the Regulatory Board conducted five (5) ordinary and one (1) extra-ordinary meeting where a number of decisions were taken and regulatory instruments adopted. Decision taken include among others, the approval of:

- a) 8 Regulations;
- b) 2 Guidelines;
- c) 5 Licenses;
- d) Annual Report for the FY 2018/2019;
- e) Receivables, payables and undebated cheques write offs;
- f) Electricity Tariff;
- g) RURA and UAF Budget Review for the FY 2019/2020;
- h) Transport tariff for the post-lockdown period;
- i) Regulatory Board Charter.

1.2.1.1 Board Committees

For efficiency, the Regulatory Board is made up of three specialized committees that meet regularly to deliberate on different agenda items submitted to them on behalf of the Regulatory Authority. These committees include:

1.2.1.1.1 Corporate Governance and HR Committee

This Committee oversees issues pertaining to Corporate Governance and Human Resource of the Regulatory Authority. The Committee reviews all human resource policies and makes appropriate recommendations to the Board.

During the financial year, the Corporate Governance and Human Resource Committee held three (3) meetings towards discharging its mission. Among other key achievements, the Committee assessed the Regulatory Board Charter, implementation of the one Laptop per Employee policy and recruitment of new staff members.

1.2.1.1.2 Economic Regulation, Finance and Audit Committee

This Committee reviews all matters relating to economic regulation including reviewing of tariffs in all regulated sectors, financial statements and internal control systems of the Authority and makes appropriate recommendations to the Board.

In the financial year under review, the Economic Regulation, Finance and Audit Committee held eight (8) meetings. During these meetings, the key activities were the assessment of the action plan and the budget execution, the follow up of the implementation of the Auditor General's recommendations on the Audit of the financial year 2015-2016, the assessment of receivables and payables to be written off, the internal auditors reports, the electricity tariff review and the transport tariff applicable pursuant to the social distancing imposed by the COVID-19 pandemic.

1.2.1.1.3 Technical, Legal and Regulatory Committee

The Technical Legal and Regulatory Committee is allocated the task of reviewing all technical issues from all sectors regulated by the Authority including new regulations to be approved and makes appropriate recommendations to the Board.

During this financial year, The Technical Legal and Regulatory Committee held four (4) meetings where it submitted for the Regulatory Board consideration a number of regulations and licenses.



CORPORATE PERFORMANCE REVIEW

2

CORPORATE PERFORMANCE REVIEW

The Authority plays a vital role in the country's socio-economic development efforts. As a corporate entity and as an Independent Regulatory Authority, RURA needs financial and human resources as well as adequate processes and procedures to execute its mandate.

In discharging its duties during the financial year 2019-2020, a particular attention was given to the institutional growth, innovation, improvement in business processes, consumer/customer protection and financial performance.

During the reporting year, the institution focused on the following:

1. Consumer protection through awareness and complaints resolving
2. Enhancement of legal and regulatory framework by adopting and renewing laws, guidelines and regulations
3. Ensuring improvement of quality of service in all regulated sectors
4. Sector growth based on research and development guidance
5. Digitization of RURA Services
6. Continue with the construction of RURA headquarters

In addition to this, the Authority played an important role in supporting the national efforts to deal with the Covid-19 pandemic and more particularly to ensure the continuity of essential services during the lockdown period.

However, it is important to note that some activities of RURA were affected by the lockdown.

Nevertheless, with the help of the technology, most of the activities have been accomplished and the overall achievement vis a vis planned activities reached 80%.

2.1. WORKFORCE

The number of RURA staff by June 2020 reached One Hundred and Sixty Six staff members (166).

The below graph shows the percentage of RURA staff by gender where male represent 69% and female 31%.

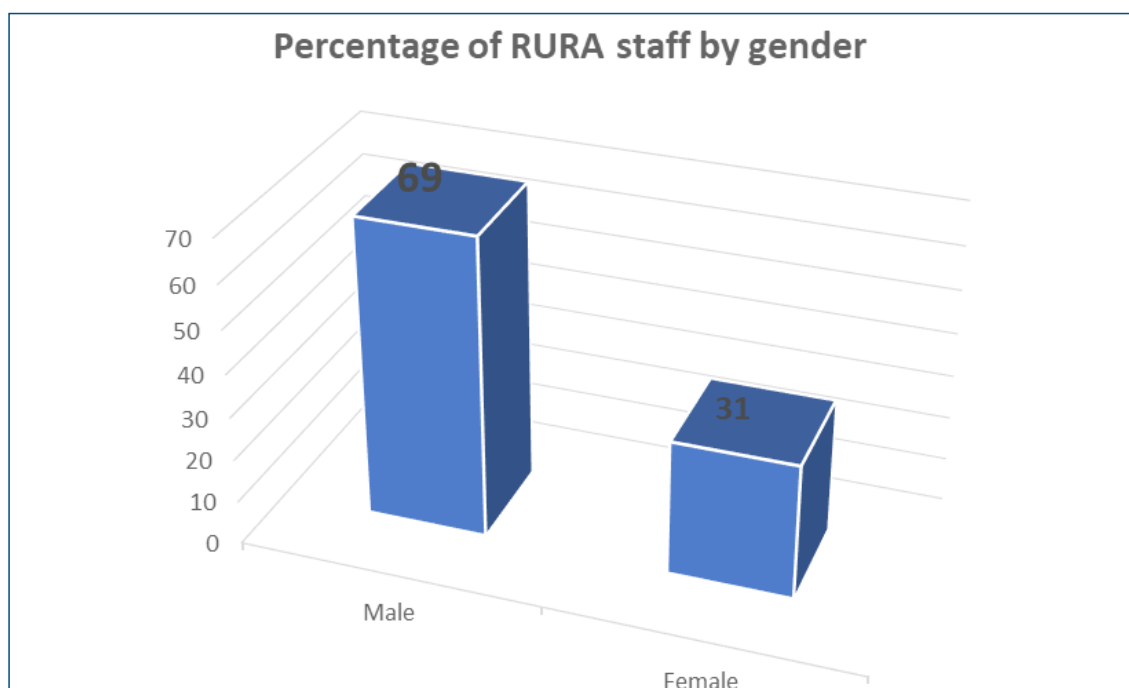


Figure 3: RURA staff by gender (Source: RURA)

Classification of Rura Staff by Education Levels in 2019-2020

RURA through its training policy has continued to equip its staff with the required skills towards the achievement of the RURA's vision, mission and the strategic goals so that inspire development.

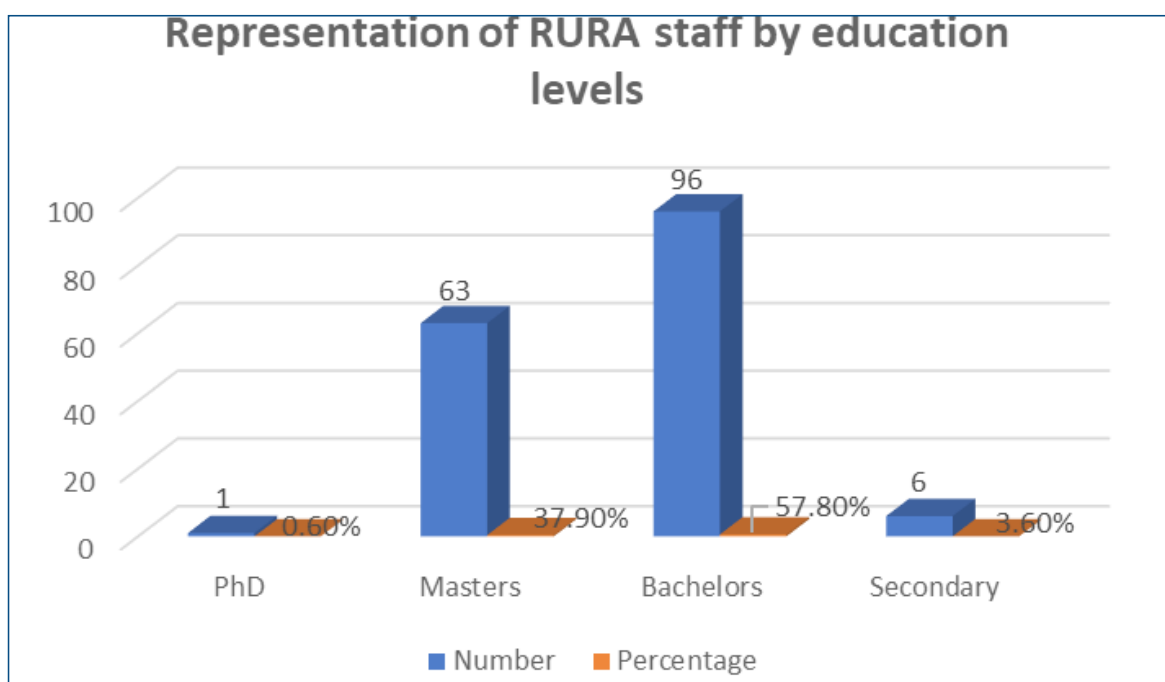


Figure 4: RURA staff by education levels (Source: RURA)

Classification of RURA staff by age 2019-2020

The statistics on age shows that the majority of RURA staff age is between 36 and 45 as illustrated in the figure below

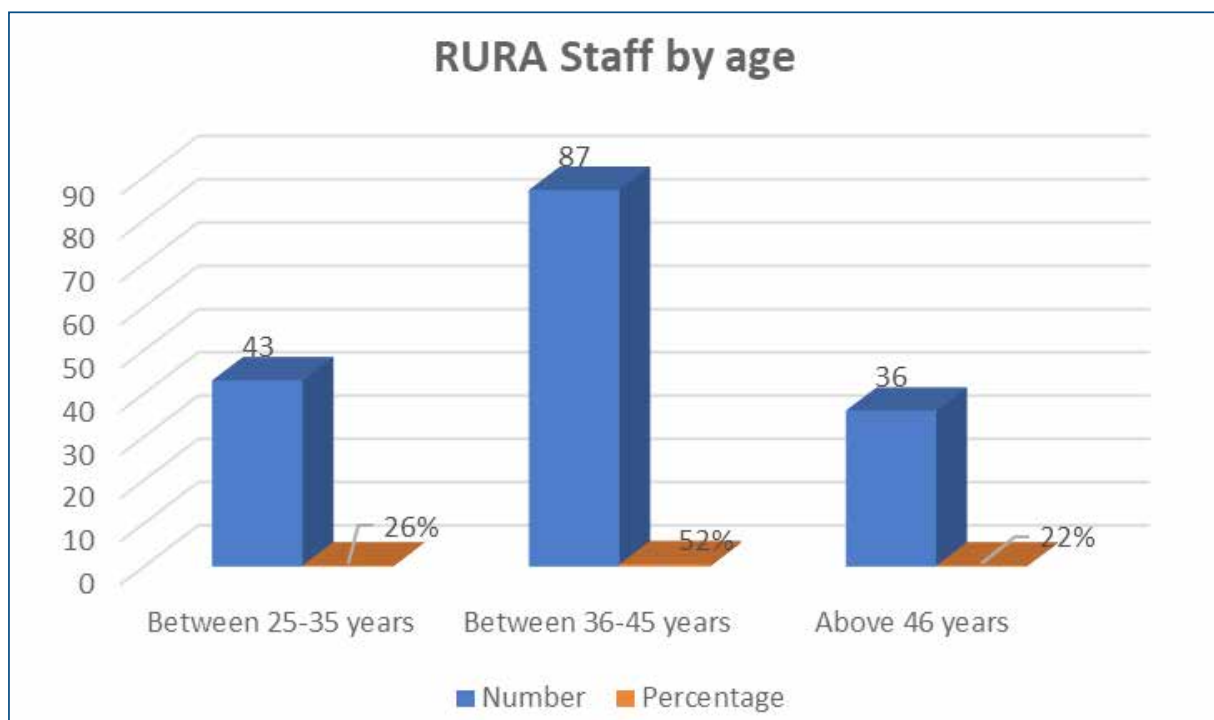


Figure 5: RURA staff by age (Source: RURA)

TRAINING AND DEVELOPMENT

In order to tie the dynamic work demands, every year RURA plans for long- and short-term trainings for its staff. During the year 2019-2020, RURA concentrated on professional courses like PMP certification, Professional Business Analyst Training (PBA), Training on Quality of Services (QoS) Equipment, Training in Legal Practice Program (ILPD), Masters in Economic Regulation and Competition Policy and ACCA. Change in our capacity building plan mainly was to focus more on professional courses as mentioned above which will lead to value addition to the institution in terms deliverables and our staff members being certified and join professional bodies in Rwanda.

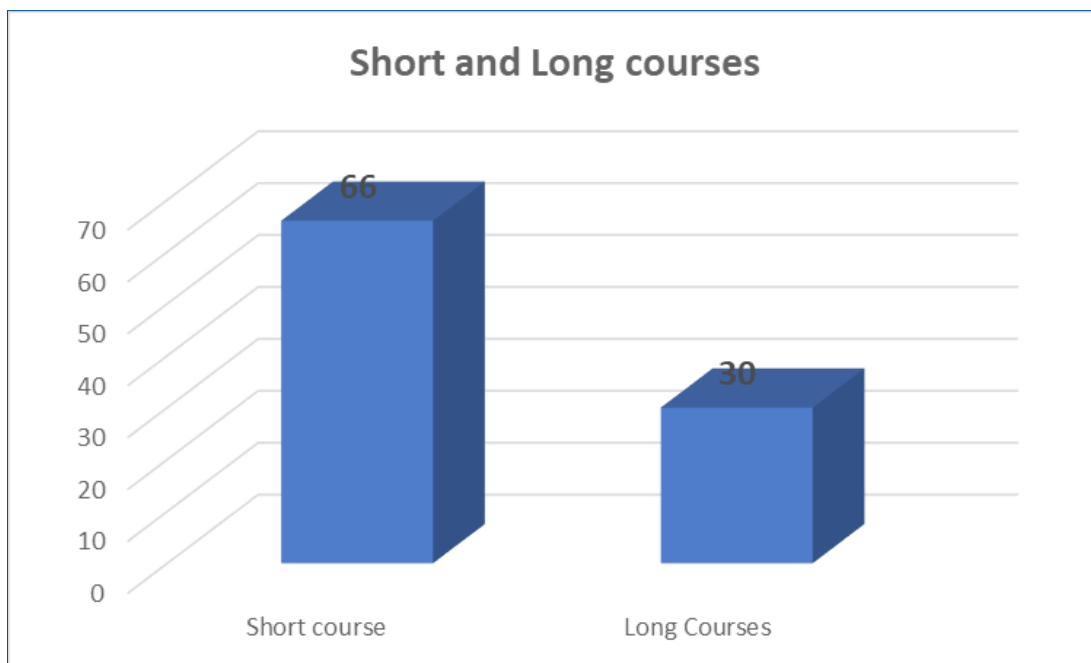


Figure 6: Staff who attended Long and short courses (Source: RURA)

STAFF RECRUITMENT

In 2019-2020, RURA recruited four (4) staff in different Units/Departments to ensure consistency in honoring its functions.

2.2. KNOWLEDGE TRANSFER

Every year, RURA receives both professionals and academic interns for knowledge sharing and transfer to help them put in practice the acquired academic knowledge. The year 2019-2020, RURA mentored 58 (professional and academic) interns.

2.3. CORPORATE SOCIAL RESPONSIBILITY

RURA contributed through UAF and even participated in the distribution of smart phone within the context of Connect Rwanda Initiative. On 13th and 14th March 2020, smart phones were distributed in the Southern and Northern Provinces where we used our Professional Interns during that process.

2.4. PUBLIC RELATIONS

The Authority is committed to building strong relationships with stakeholders, operators, and consumers in all regulated sectors aimed at making its visibility to the public to promote, establish and maintain credibility and good reputation.

During 2019-2020 fiscal year, RURA organized a number of events and campaigns with the aim of ensuring the proper compliance of the regulations and guidelines in the regulated sectors

Events and Campaigns

In collaboration with Rwanda National Police, and transport companies, RURA conducted a campaign to raise awareness on preventive measures against coronavirus.



Figure 7: Preventive measures against COVID – 19 in Public Transport (Source: RURA)

5th March 2020: Together with GIZ and Enviroserve, RURA launched a National-wide Campaign for sustainable management of electrical and electronic waste.



Figure 8: National-wide Campaign for sustainable management of electrical and e- waste
(Source: RURA)

25th - 27th Feb 2020: RURA together with National Association of Regulatory Utility Commissioners (NARUC), USAID and Power Africa conducted a 3-day workshop on captive power systems and distributed energy integration.



Figure 9: RURA together with NARUC and USAID Power Africa conducted a 3-day workshop on power systems and distributed energy integration (Source: RURA)

4th -7th February 2020: RURA hosted Expert Mission on Threat Assessment and a Risk Informed Approach for Developing a National Detection Strategy for Nuclear and Other Radioactive Material out of Regulatory Control.



Figure 10: RURA hosted Expert Mission on Threat Assessment and a Risk Informed Approach
(Source: RURA)

11th December 2019: A consumer education campaign took place at the University of Lay Adventists of Kigali where students were briefed on consumer rights and responsibilities, with an aim of promoting and protecting consumer interests and rights in all regulated sectors.



Figure 11: The consumer education campaign took place at the University Of Lay Adventists Of Kigali (Source: RURA)

4th December 2019: RURA in collaboration with Rwanda National Police conducted the Gerayo Amahoro campaign in different bus parks.



Figure 12: Gerayo Amahoro campaign in different bus parks (Source: RURA)



Figure 13: Gerayo Amahoro campaign in different bus parks (Source: RURA)

13th November 2019: RURA and Trademark East Africa signed a USD 600,000 deal to facilitate digitization of key processes that will improve RURA's ability to provide services to traders as well as to monitor and enforce compliance to standards on selected imports.

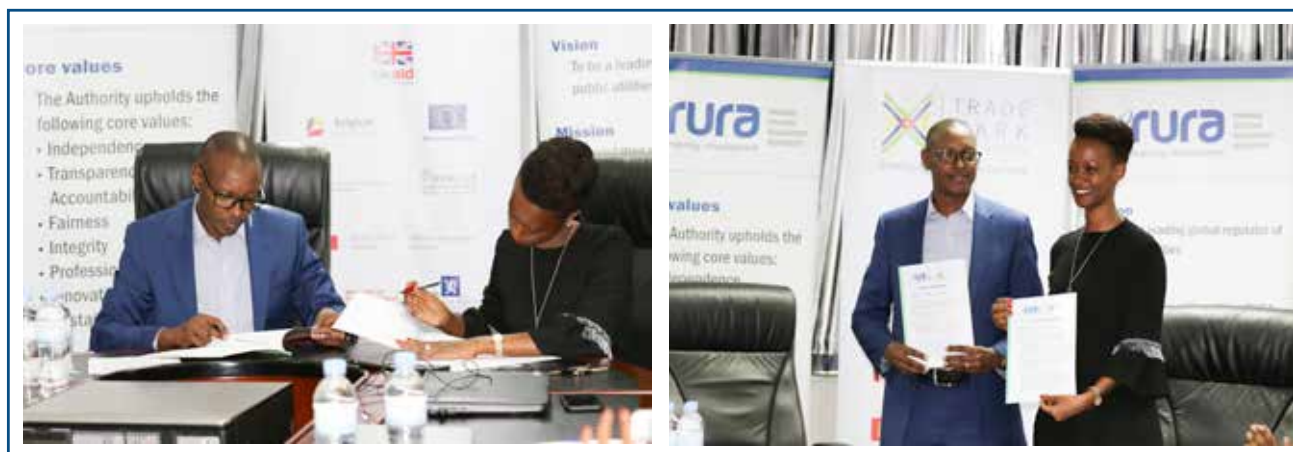


Figure 14: RURA and Trademark East Africa signed MoU (Source: RURA)

7th November 2019: The Director General of RURA, Patrick Nyirishema led a delegation comprising senior officials from RURA in a visit to Rwanda Standards Board, to discuss areas in need of enhanced collaboration to ensure more synergy between standardization services and the regulatory work.



Figure 15: Senior officials from RURA in a visit to Rwanda Standards Board (Source: RURA)

9th October 2019: RURA launched partnership with OTOWA Electric Co., Ltd, the Japanese manufacturer specializing in lightning protection related products. OTOWA's technology will protect key ICT infrastructures from damages caused by lightning strikes.



Figure 16: RURA launched partnership with OTOWA Electric Co., Ltd (Source: RURA)

8th October 2019: RURA, Ministry of ICT and Embassy of Japan held a press conference on the launch of RWASAT-1.



Figure 17: Press conference on the launch of RWASAT-1 (Source: RURA)

22nd July 2019: RURA in collaboration with the International Atomic Energy Agency (IAEA) hosted a regional training course on the transportation of radioactive materials.



Figure 18: RURA and International Atomic Energy Agency (IAEA) hosted a regional training (Source: RURA)

16th July 2019: The Director General of RURA participated in panel discussions during the Mobile 360 – Africa event, where Tech and telecom leaders from across Africa met in Kigali to share disruptive, provocative, and inspirational ideas contributing to Africa's digital rise.



Figure 19: The Director General of RURA in panel discussions during the Mobile 360 – Africa event (Source: RURA)

2.5. FINANCIAL PERFORMANCE REVIEW

RURA's financial performance for the year 2019-2020 was marked by 10.37% increase in revenue collection, from 11,775,596,828 Frw to 12,997,218,213 Frw. This increase was attributed mainly to strong enforcement measures where majority of the operators timely made their payments and the introduction of new service fees in ICT sector mainly on:

- Short code fees on telecommunication services
- Signaling Point Code (SPC)

The chart below shows the revenues collected from the regulated sectors.

REVENUE COLLECTION PER SECTOR

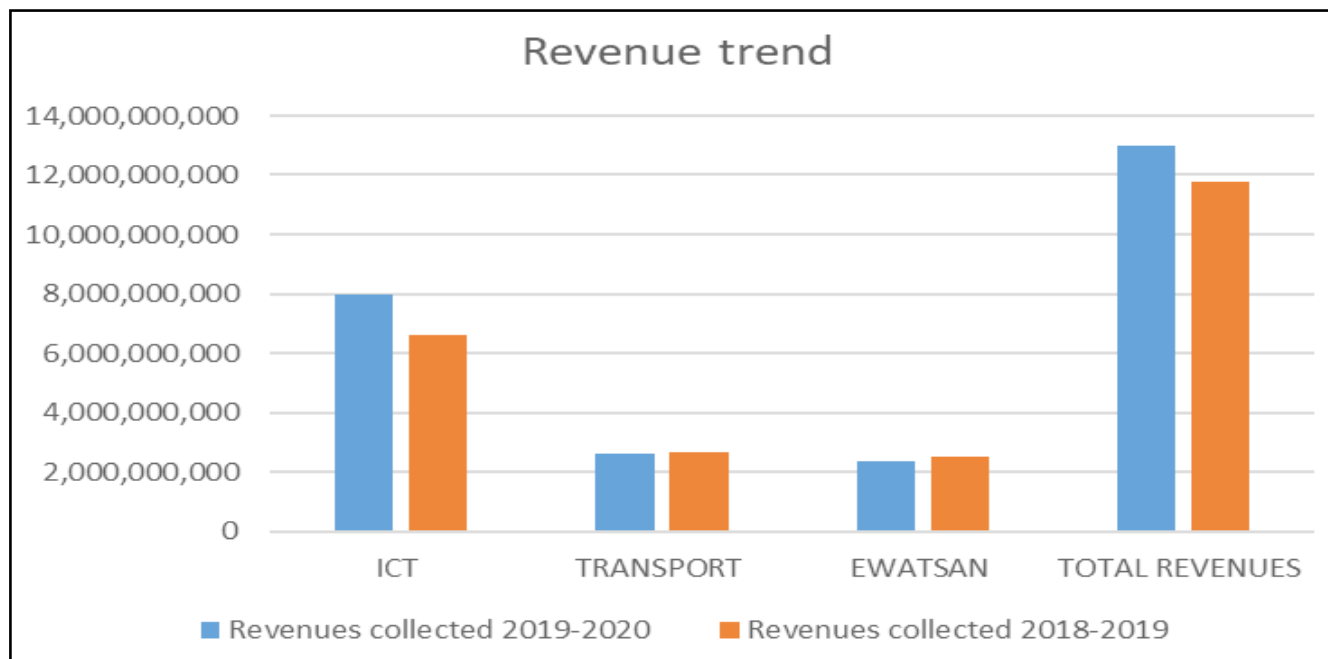


Figure 20: Revenue collection per sector (Source: RURA)

During the reporting period, the overall 2019-2020 expenditures was 13,513,126,442 with CAPEX activities representing 38% of the total actual expenditures, the 2018-2019 expenditures was 11,757,513,710 with Capex activities representing 31%, the increase in expenditures is attributed to construction of RURA headquarters

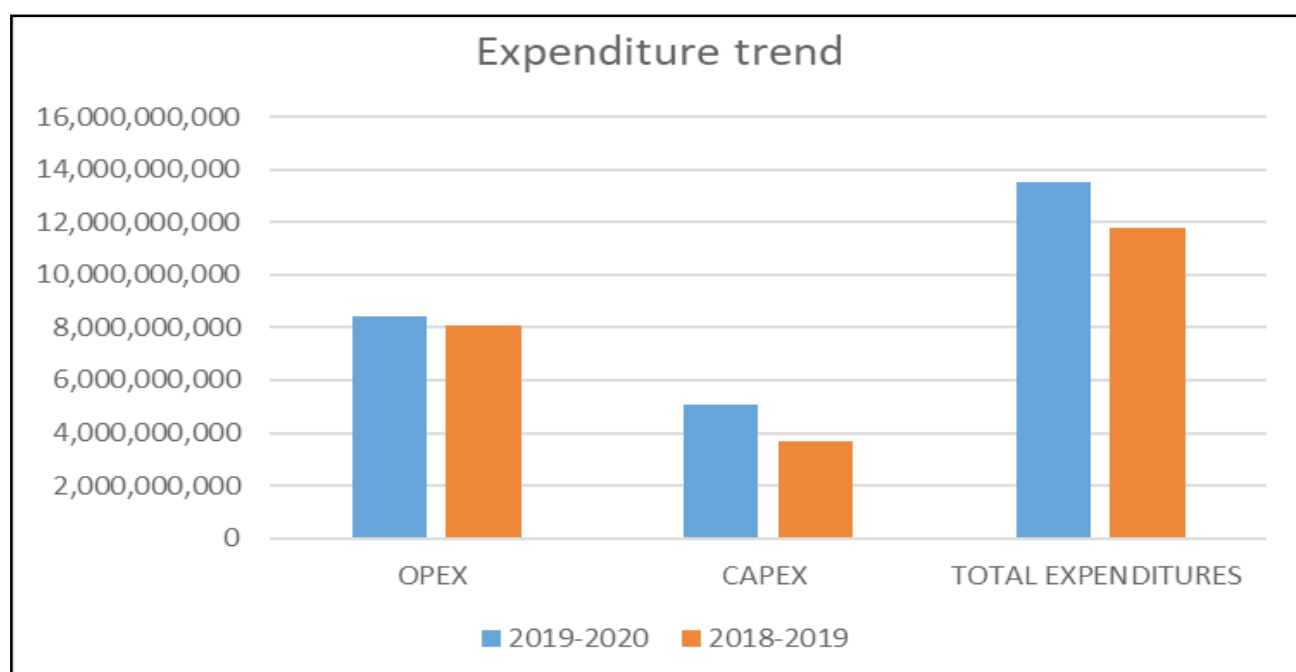


Figure 21: Expenditure (Source: RURA)

2.6 UAF FINANCIAL PERFORMANCE OVERVIEW

During this year, UAF contributions increased from the previous year forecast of Frw 4,229,199,343 to 4,634,957,231 whereas expenditures were 4,124,696,265 compared to 5,826,255,226 in the previous year as illustrated in the figure below. A big percentage of these expenditures, Frw 3,865,801,364 was used to sponsor Telecom sites in order to increase network coverage in underserved areas.

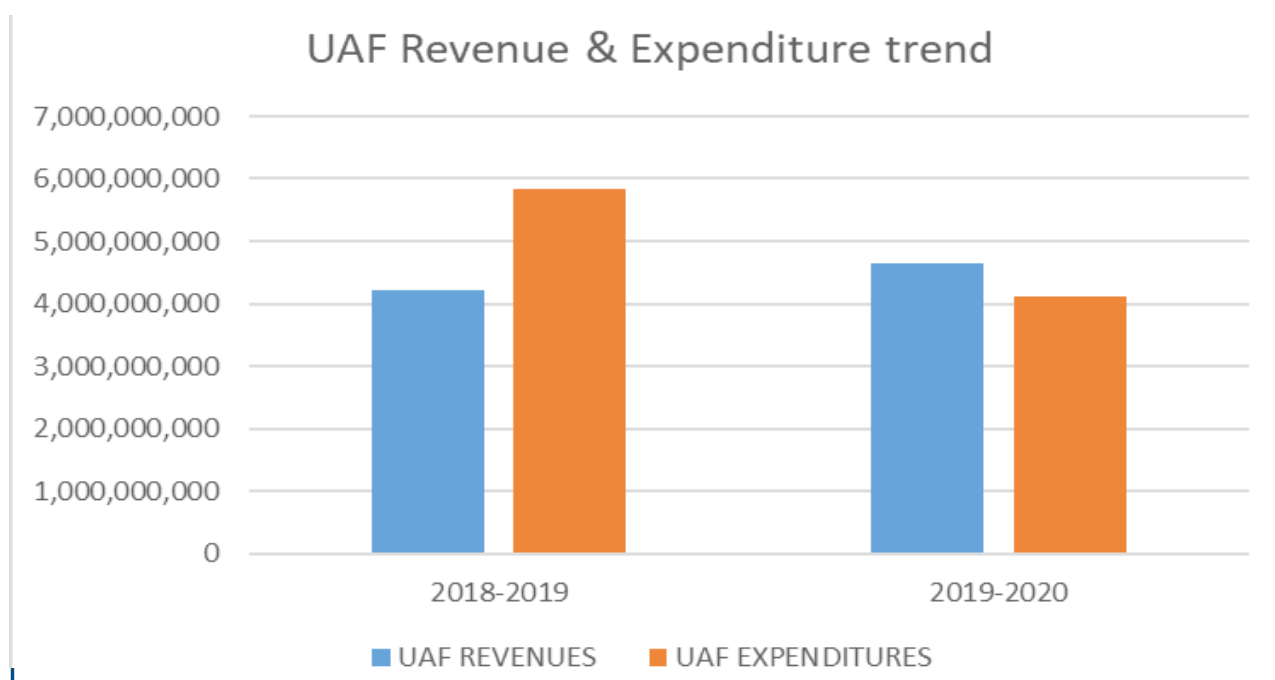


Figure 22: UAF Financial Performance overview (Source: RURA)

2.7 PROCUREMENT

During the reporting year, the Authority had forty (40) tenders on its procurement plan of which twenty-nine (29) published and processed accordingly, representing an execution rate of 72.5%. In addition, for the institution to be able to match its priorities with its capacity in terms of the revenues, a procurement plan review was initiated where by some tenders based on their nature were deferred to the next financial year.

RURA just like other Government institutions is using e-procurement platform in the management of all its tendering processes. Thus, the platform has improved the efficiency and effectiveness of the procurement function besides the fair market competition element.

2.8 RURA HEADQUARTERS' CONSTRUCTION

In terms of infrastructure development, the Authority focused on the close follow-up of the construction works of its headquarters located in Nyarugenge - Kigali with 83.48% of Physical progress as of 30th June 2020 despite the constraints of Covid-19 that in general, hindered the full execution of planned activities.



Figure 23: The current photo as of 30/06/2020 of RURA Building (Source: RURA)



**CONSUMER
PROTECTION
IN REGULATED
SECTORS**

3

CONSUMER PROTECTION IN REGULATED SECTORS

Consumer Protection is a crosscutting function that deals with consumer issues across regulated sectors with the main responsibilities of Consumer Education, Inspections to monitor the QoS, Investigations on raised consumer Issues, Complaints Handling, combating anti-competitive behaviors, drafting consumer protection tools and Analysis of Promotions from Telecom Operators to avoid consumer exploitation.

3.1. CONSUMER EDUCATION AND AWARENESS CAMPAIGNS

The Authority produced consumer awareness messages and published articles in online and print media as well as talk shows on RTV and radio Rwanda. To reach as many people as possible, Consumer Education Programs were achieved by using different strategies. In total 24 programs were conducted in different regulated sectors (nine covering all sectors, three in ICT, two in electricity, Eight in transport of persons and two in Gas).

In all cases, service providers were advised to comply with regulations governing their respective sectors and to always communicate with RURA whenever they face challenges.

3.2. COMPLAINTS HANDLING

Despite efforts invested in consumer education and protection, we still observe many issues linked to service delivery in all regulated sectors and the Authority will continue to monitor the quality of service offered to service end users through regular inspections.

The Authority received 1,358 complaints in total and 1,279 were successfully resolved. Only 79 are still pending and unclosed due to lack of sufficient evidence.

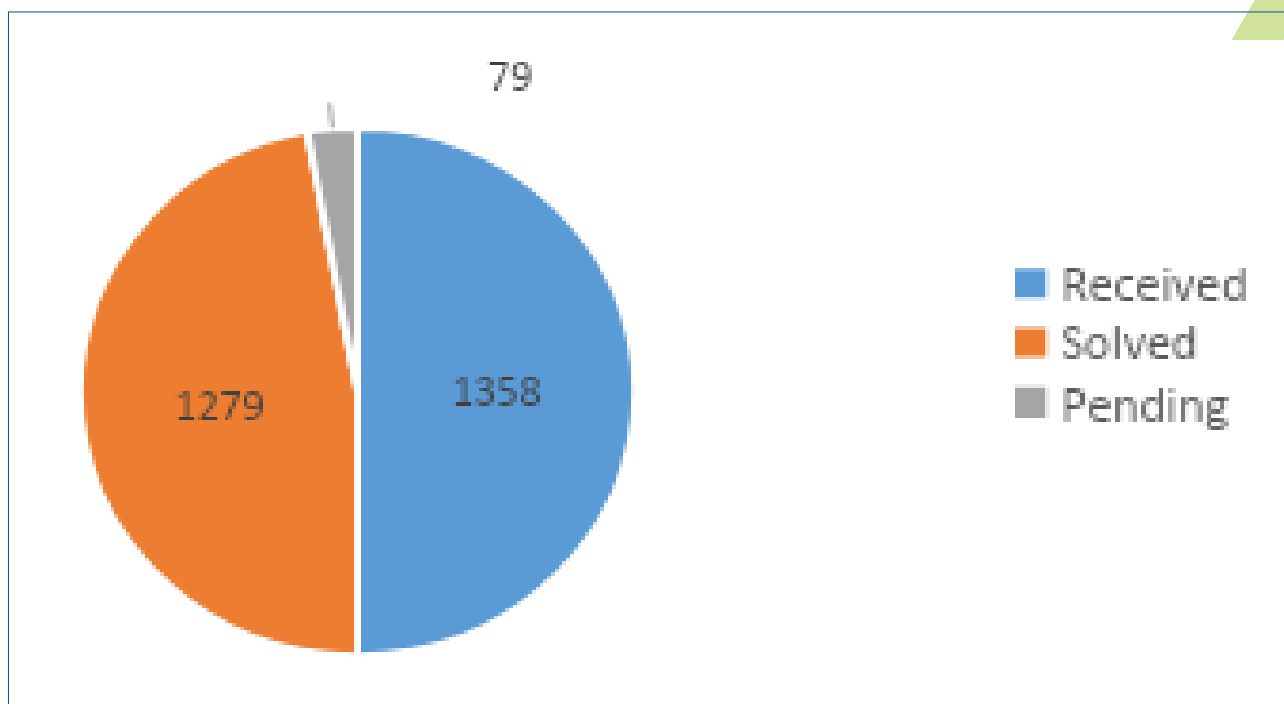


Figure 24: Received and resolved complaints ((Source: RURA)

As portrayed by the pie chart above, 94% of received complaints were resolved. In comparison to the previous year, more effort was put into solving consumer complaints whereby Percentage of solved complaints increased from 91% to 94%.

The figure below shows complaints received per sector in blue vs closed complaints in orange.

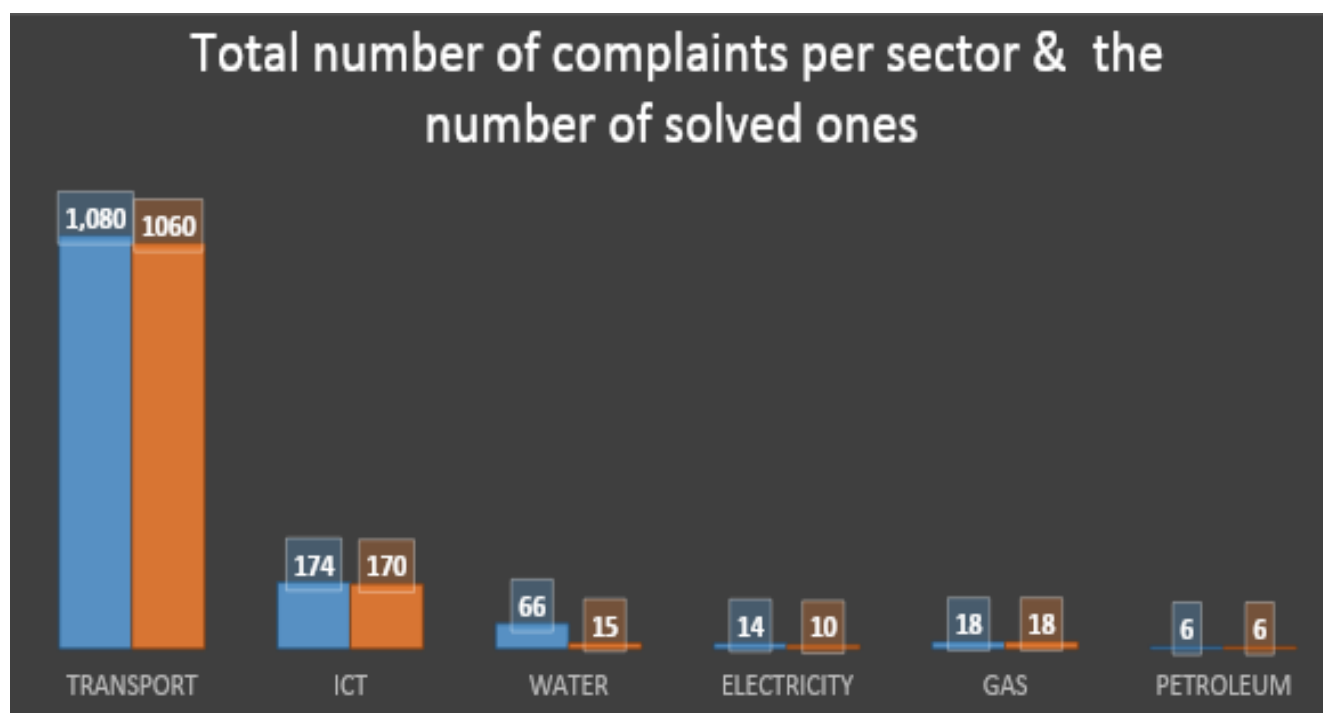


Figure 25: Complaints received per sector in blue vs closed complaints in orange (Source: RURA)

The transport sector received the most complaints with 80% of complaints, ICT is the second with 13% and water is the third with 5%.

The reason why transport sector has more complaints (80%) is due to the use of Irembo online application, which was new to motorcyclists and has brought many issues with some delays in issuing licenses and authorizations due to the level of understanding of motorcyclists, the level of literacy in ICT and sometime failures in the platform.

In addition to this, complaints in transportation are easier to understand and consequently easier to lodge. To address this issue, the transport department introduced an interim solution by issuing temporally physical authorizations.

3.3. INSPECTIONS

The Authority carried out several inspections to monitor the quality of service and evaluate compliance with standards set by RURA. In addition, inspections are used as an opportunity to educate both service providers and consumers.

3.4. COMPLAINTS IN DIFFERENT SECTORS

In the ICT sector, most of the complaints are related to billing issues, poor customer care, mobile money fraud and poor quality of service and others related to purchased data bundles and its usage. Many complaints lodged by telecom operators' agents for several reasons including but not limited to locked SIM cards due to non-compliance with COVID-19 preventive measures, receiving less commission than what they should have received, and the issue of limiting mobile money transactions to 10 in a day.

In this regard, the ICT Sector registered 174 complaints among which 170 were resolved and the remaining four (4) are still pending.

Other consumer protection achievements in ICT include:

- In course of 2020, RURA was able to get Rwanda activated on apple-iTunes and apple accounts after a long-standing issue that Rwandan apple clients were facing of not having the right to register their accounts in Rwanda and access the iTunes content. This has enabled apple clients that are registered in Rwanda to create and sell their content via iTunes and buy from the apple store.
- In spectrum management and monitoring RURA handled 8 complaints related to harmful interference.

In Transport Sector, except the challenges related to Irembo online platform, main causes of complaints in transport are loss of passengers' luggages, poor customer care, non-respect of departure time indicated on tickets, issues with Tap-Go, increase of tariffs set by RURA by some companies and cooperatives especially during peak hours, opening and close of schools.

In the water sub-sector, the two main causes of complaints are billing issues resulted from not respecting of periods in which WASAC should collect meter indexes, shortage of water in some locations and non-compliance with rationing programs. In the electricity sub-sector, complaints are mainly related to voltage fluctuations in the network and offgrid companies that sometimes breach contract terms with their clients.

In the Gas sub-sector, suppliers increased prices during the lockdown period but the issue was addressed by setting the price cap per Kilogram.

In the petroleum sub-sector, there were complaints against some petrol stations for giving their customers fuel diluted with water.

Inspections revealed that the issue was due to leakage in fuel storage tanks and the concerned petrol stations were requested to immediately upgrade their tanks' installations.

The number of complaints fluctuated due to some factors like new regulations in place; awareness campaigns stimulated consumers to report and claim for their rights unlike in the previous years

Table 1: Analysis of promotions

The analysis of promotions from Telecom operators is meant to remove exploitative clauses in all launched promotions				
Twelve promotions were analyzed and approved	Telecom Company & Number of Promotions			
	Airtel/Tigo	MTN	KT Telecom	Total
	3	8	1	12



ICT SECTOR

3 ICT SECTOR

4.1 SECTOR PROFILE

The core mandate of RURA is to create an enabling regulatory environment for telecommunications, information technology, broadcasting, postal services and converging electronic technologies. RURA also plays an advisory role to policy makers to ensure that ICT contributes to the growth of other sectors in the country.

Currently Rwanda ICT sector, comprises of two (2) Mobile Network Operators namely MTN Rwanda Ltd and Airtel Rwanda Ltd, twenty-Six (26) Internet Service Providers (ISPs), two (2) network capacity resellers, one (1) 4G Wholesaler Network Service Provider, two (2) Network Facility Providers, twenty-seven (27) postal and courier service providers, thirty (30) FM broadcasters, Nineteen (19) Content broadcasters, Twelve (12) Print Media, three (3) Pay Tv providers, one (1) signal distributors.

In the course of the year 2020, RURA put more effort in monitoring and assessment of quality of service to ensure compliance of established Key Performance Indicators. This led to modernization and optimization of operators' networks towards improvement of the quality of service by and increased capacity, while Guidelines on requirements for Indoor Building Solution (IBS) - Distributed Antenna System Installation were developed to improve coverage inside buildings.

In order to stimulate competition on the market and make broadband connectivity to homes more affordable with a remarkable improvement of quality of service, RURA has granted two (2) licenses to new entrants in the market for providing Internet Service via fiber transmission (FTTH).

With regard to E-waste management, RURA has granted a license for e-waste management (collection, transportation, dismantling, refurbishment and recycling) to ENVIROSERVE Rwanda Green Park Limited to ensure that all e-wastes are handled and disposed in accordance with international standards.

In Space technologies, RURA collaborated with the University of Tokyo to develop a microsatellite equipped with cameras and antennas that will be used for prediction of crops yield and collection of useful data for disaster management.

RURA in collaboration with Rwanda Investigation Bureau, Rwanda National Police and other stakeholders also took measures in preventing crimes and frauds committed while using SIM Cards.

RURA through the Universal Access Fund supported Mobile Network Operators in the deployment of 68 sites countrywide worthy 3.5 Billion to improve coverage and quality of services in underserved and uncovered locations.

Furthermore, RURA contributed #ConnetRwanda initiative with 2000 Smart Phones with total amount of 200 Million.

4.2 REGULATORY ENVIRONMENT

4.2.1 LEGAL AND REGULATORY FRAMEWORK

During the course of year 2019- 2020, RURA developed different regulations in order to enable a conducive and playing level environment for service providers, ensure interest of customers are protected and setting- up minimum operating requirements for the best of the sector.

The Authority has put in place different regulations and guidelines with the aim improving the quality of imported electronic communication equipment, ensuring efficient management of radio spectrum resources, establishment of requirements and guidance for potential online and internet content providers, improving coverage and best quality of mobile communication inside buildings. Those regulations and guidelines are:

- Regulation on Importation and type approval of electronic Communication Equipment;
- Regulation governing Radio Frequency Management;
- Regulation governing the licensing of Multimedia services provision in Rwanda
- Guidelines on short-range devices;
- Guidelines on requirements for Indoor Building Solution (IBS)- Distributed Antenna System Installation.

4.2.2 IMPLEMENTATION OF GOVERNMENT POLICIES

During the year under review, RURA facilitated the establishment and implementation of the following policies and initiatives:

- The establishment of a National Technical Committee of “Emerging Technology Strategy” and the development of the national strategy on Emerging technologies;
- The establishment of a National Technical committee on “Child Online Protection Policy” and the development of the “Child Online Protection Guidelines “;
- The establishment of a National Technical committee on “Data Protection Law”, and the drafting of implementation regulatory instruments under the proposed “Data Protection Regulation”;
- The drafting and validation of the following national strategies:
 - The Strategy on ICT4Gov Cluster;
 - The National E-commerce strategy;
 - ICT4com strategy.

In its role as the government agency tasked to lead and coordinate all efforts around the adoption, growth and encouraging investment in the sector of **Artificial Intelligence (AI)**, the Authority achieved the following milestones:

- In September 2019, an MOU was signed between RURA and GIZ. Under this MoU, GIZ in collaboration with RURA started implementing the project “FAIR Forward – Intelligence for all”. This project aims to support digital learning and training for the development and use of AI, facilitate the provision of open, non-discriminatory and inclusive training data and open-source AI applications for local innovation and advocacy for ethical AI that is rooted in human rights, international norms such as accountability, transparency of decision-making and privacy. In Feb 2020, RURA, GIZ, Mozilla, and Digital Umuganda; launched Kinyarwanda Tech. This initiative aims at showcasing the usefulness of automatic speech recognition for Kinyarwanda.
- In June 2020, in partnership with RURA, MINICT and GIZ Rwanda through its Digital Solutions for Sustainable Development (DSSD) project, Rwanda started to work on a national AI policy. The policy will represent a pillar stone in the establishment of a coordinated national approach, identify priority areas and set measurable KPIs.

4.2.2.1 Quality of ICT made in Rwanda improvement and connect Rwanda initiatives

RURA in conjunction with the Ministry of ICT and Innovation and RISA has participated in improving the quality of ICT equipment made in Rwanda by working with CETECOM GmbH, an accredited and reputable laboratory in development of test plans and tests of made in Rwanda devices.

4.2.2.2 RURA Contribution in World Radio Communication Conference (WRC19)

- In line with the Government policy to start a Space program in Rwanda, RURA secured and registered at the International Telecommunication Union (ITU), a national satellite orbital slot for broadcasting satellites. The new Rwandan satellite slot is located at 9.2° west along the Equator.
- During the WRC19 Rwanda position to allocate 17.25GHz bandwidth for 5G, was adopted. This contributes in readiness of introduction of 5G technology in Rwanda.

4.2.2.3 Data-driven decision making

In an effort to promote and encourage data-driven and justified regulatory interventions, the authority created a new department. The department of Cybersecurity and Strategic Integration (CSI). Strategic integration involves more fully exploiting growth potential by combining resources and competencies from all units and directing those units toward opportunities that extend the existing working framework in order to streamline processes and increase value.

In this spirit, the department undertook an exercise to map all the national policies and identify all KPIs and identified all possible variables that could be used to measure progress. The unit then proceeded to meet with all the stakeholders and identify how the Authority can gather all this data for internal analysis.

The transportation sector was targeted as the first, and the Authority now has fully visibility on all tickets sales, bus location in real-time and can monitor vehicle speed and revenues in RURA premises. The next step is analyzing the data to optimize routes, tariff and offering real-time bus information at all the bus stops.

The department is also targeting the digitization of all the other sectors, by using the automated management of regulatory processes through technology.

4.2.2.4 Support during COVID-19 crisis

RURA, like many other government organs, contributed to the support of national efforts to eradicate/slow the progress of COVID-19. As part of the national steering committee, RURA provided further support by availing experts and computing resources. RURA also facilitated several essential services to continue operations online using hotlines and USSD short codes. The following are some of the services that were facilitated:

- A platform used by MINEDUC for e-learning where students accessed education materials at their convenient time via their cell phones;
- A platform established by the Ministry of Local Government (MINALOC) for collecting donations for helping people who have been severely affected by the COVID 19 crisis;
- A hotline used by the NGOs for supporting people who live with HIV during the COVID-19 lockdown.
- A hotline used by NGOs to provide remote counseling and support to genocide survivors during the commemoration period of Genocide against the Tutsi;
- RURA ensured that the MNOs give their consumers a more advanced digital cashless experience through Mobile Payment and in collaboration with other government institutions, enforcement for compliance with instructions for protection against COVID -19 was done.
- As an effort to understand the impact that COVID-19 had on the adoption of cashless payment methods, also known as Digital Financial Services. RURA in partnership with the Centre for Financial Regulation and Inclusion (CENFRI) and BNR, undertook an exercise to analyze all Mobile money transactions in order to measure compliance against government's initiated policy and ensure that there are no barriers in place for consumers/vendors to fully embrace the payment alternative.

4.2.2.5 Mapping E-Commerce Eco-system in Rwanda

A research document called "E-commerce Ecosystem Mapping in Rwanda" was done by RURA in collaboration with other E-commerce stakeholders (MINICOM, MINICT, RISA, RDB and ICT chamber) members of National E-commerce technical working group.

The objective was to understand "who does what" in other words the role of each enabler and player in E-commerce E-ecosystem in Rwanda as well as their respective initiatives or projects being implemented.

This document identified all E-commerce initiatives being implemented in Rwanda and their implementation status as of June 2020. The impact of E-Commerce services on covid-19 and related challenges was also analyzed in this document.

The ultimate objective of this research is to have a deep understanding of E-commerce related issues and dynamics in order to be able to put in place appropriate enabling regulatory framework.

4.3 LICENSING STATUS

In line with its regulatory mandate to license service providers in regulated sectors including ICT (Telecommunication, Broadcasting, and postal services), RURA has licensed a number of service providers in the sector with the main objective of increasing competition, expanding the customer choice for customers, and setting also a minimum operating standards for service providers to ensure safety and services of quality to customers.

Licenses issued in 2019-2020 listed in the table below:

Table 2: Licenses issued in 2019-2020

No	Licensee	Provided Service	License validity
1	GVA Rwanda	Internet Service Provider	15 years
2	Century Net	Internet Service Provider	5 years
3	Enviroserve	E-Waste Management	5 years
4	PANAFRICA LTD	TV Signal Distribution	15 years
5	Isibo TV	TV Content Provision	5 years
6	Genesis TV	TV Content Provision	5 years
7	Pacis TV	TV Content Provision	5 years
8	Vision FM	FM Radio Broadcasting	5 years
9	Umwezi FM	FM Radio Broadcasting	5 years
10	IAEXP COURIER SERVICE LTD	Inbound courier services	5 years
11	G&H Thousand Hills Supply limiteds	Intra-city Courier services	5 year

The list of all licensees in ICT Sector attached as ANNEX 1 and **ANNEX 2**.

4.4 COMPLIANCE AND ENFORCEMENT

The Authority's Compliance activities focused on ensuring that no service provider operates without a valid license, all licensees pay required fees on time and all arrears are fully recovered. Regular inspections were also carried out to check compliance with operating standards as

well as technical requirements as specified in regulations and licenses obligations.

During the fiscal year 2019-2020, enforcement measures in the table below undertaken in order to deal with issues of non-compliance

Table 3: Enforcement measures to deal with the issues of non-compliance

SN	ENFORCEMENT MEASURE	NUMBERS OF CONCERNED OPERATORS	REASONS
Postal and courier services			
1	Notices of suspension proceeding commencement	3	No declaration of financial statements and no payment of Regulatory Fee
2	Notice of administrative fine sent and Payment of Fines	4	Operating without a valid License for providing courier services
3	Call for Hearing	6	No declaration of financial statements and no payment of Regulatory Fee
4	Revocation or cancellation of License	3	Abandonment of license activities
			Requested to cancel their licenses
Broadcasting services			
1	Notices of suspension	4	Non-payment of radio communication license fees
2	Call for Hearing	3	Abandonment of license activities
3	Enforcement notice and withdraw of broadcasting rights	1	Operating without a valid License for and non-payment of radio communication license fees
Spectrum and numbering management			
1	Warning letters to clear radio communication fees arrears (FM radios)	10	Non-payment of radio-communication fees
2	Warning notice to comply with regulatory obligations (4G internet retailers)	10	Not payment of license fees and not renewing license on time
3	Suspension orders (FM radios)	4	Non-payment of frequency fees and working without valid licenses

Applying the above-mentioned enforcement measures to some operators pushed other non-compliant operators and all operators in general to pay their arrears of regulatory fee, radiocommunication fees, declare financial revenues, and provide statistical data on time. As a result, rate of compliance of service providers in ICT sector passed from 65 to 81.5%

4.5 QUALITY OF SERVICE MONITORING

During the fiscal year 2019/2020, RURA monitored the Network Quality of Service of all licensed mobile Network Operators (MNOs) and the following were the findings:

4.5.1 MTN Rwanda

MTN Rwanda improved the network QoS by increasing the coverage with the deployment of 124 sites national wide and improved the capacity and the quality by adding the 4th sector to each existing site which were congested mainly in City of Kigali; upgrading Software (EPG, SGSN, IP Works), Deploying Value added services (VAS) Cloud, establishing 3G Direct Tunneling, implementing High Definition (HD) Voice and Reviewing the Frequency Plan. In addition, MTN conducted a Radio Frequency antenna clean-up to further fortune the Quality of Service.

4.5.2 AIRTEL

AIRTEL Rwanda improved the network QoS by conducting the RAN Modernization with the latest Radio and Baseband Technology with a Consolidated Network consisting of 681 sites which increased population coverage for both 2G and 3G; Improving 3G broadband access in cities and rural areas through Carriers upgrade for 3G in the 2100MHz band and introduction of 3G data services on 900MHz band on all sites. Furthermore, AIRTEL introduced new 2G Frequency Plan which improved Quality of 2G Network.

In the same line, AIRTEL Rwanda upgraded their Transmission Network to full IP modernized network consisting of microwave rings as well as fiber rings to provide high services availability and resilience.

4.5.3 KTRN

In order to improve the network QoS, KTRN conducted network upgrade of its network performance by upgrading 120 Sites whose resources were over utilized (110 in Kigali and 10 outside Kigali), the International link (from 2.8Gbps to 5 gbps), the Software (Core and Radio) and expanding Coverage from 480 to 600 sites. Furthermore, KTRN introduced in the upgraded sites a carrier aggregation, which provided up to 250 Mbps throughput on a phone with 4G+ capability.

4.5.4 In building Coverage

Besides developing the Guidelines on requirements for Indoor Building Solution - Distributed Antenna System (IBS-DAS) Installation, RURA sponsored and supervised installation of the In-Building Solution-Distributed Antennas System (IBS-DAS) in prime minister's Administrative Offices Complex in order to enhance its indoor coverage.

4.6 DIGITIZATION OF SERVICES

In order to promote paperless and implementing zero trip as government policy, some services were fully digitized, and are provided via online platform to RURA customers. The listed services were added on digitized services during the course of year 2020:

- Type approval online platform that enables importers to obtain type approval with zero trip.
- Licenses for Private Mobile Radios Services

4.7 MARKET PERFORMANCE AND STATISTICS

4.7.1 MOBILE AND FIXED TELEPHONE SERVICES

As of 30 June 2020, the number of active mobile-cellular telephone subscriptions was around 9.9 million SIM cards. Therefore, the mobile-cellular subscriptions were 77.9 registered for every 100 people while for fixed telephone subscriptions were 0.1%.

In comparison with the situation of the June 2019, the mobile-cellular telephone subscriptions per 100 inhabitants recorded an increase of 3.1%, from 74.8 to 77.9.

The table below provides for details regarding Number of mobile and fixed Telephone service subscribers per telecom operators as of June 2020

Table 4: Subscriptions for mobile and fixed Telephone service per telecom operators as of June 2020

Name of Operator	Active subscriptions		Fixed-telephone subscriptions per 100 inhabitants	Mobile-cellular subscriptions per 100 inhabitants
	Mobile-cellular telephone	Fixed-telephone		
MTN Rwanda Ltd	5,894,343	171	0.1	77.9
Airtel Rwanda Ltd	3,965,826	9,523		
Liquid Telecom Ltd	-	802		
BSC Ltd	-	1,130		
Total	9,860,169	11,626		

Source: Operators' reports, June 2020

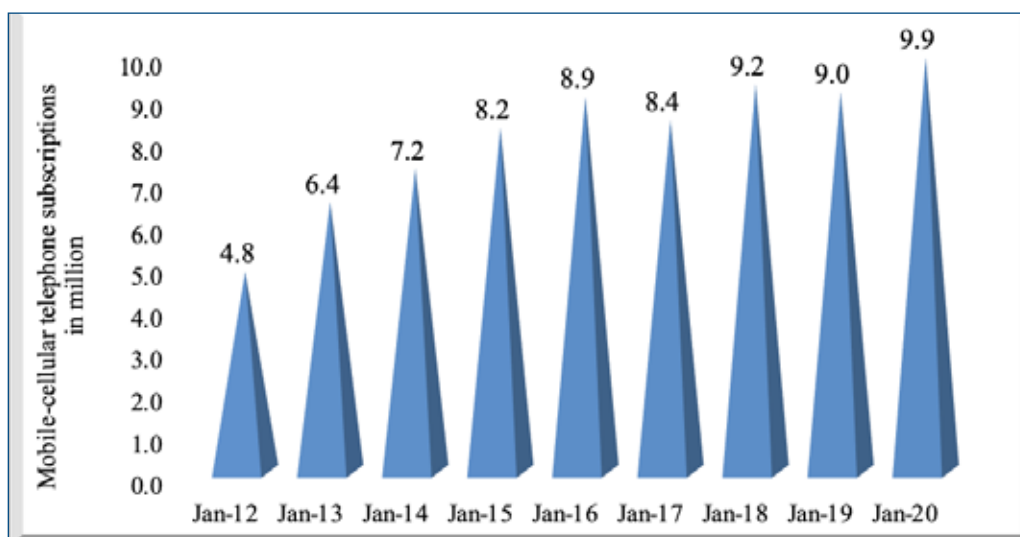


Figure 26: Trends of the mobile-cellular telephone subscriptions from June 2012 to June 2020
(Source: Operators' reports, June 2020)

On the other hand, the number of fixed telephone subscriptions has also increased from 10,175 as of June 2019 to 11,626 subscriptions as of June 2020. The fixed telephone subscriptions captures the sum of active number of analogue fixed- telephone lines, voice-over-IP (VoIP) subscriptions and fixed public payphones as per the definition of International Telecommunication Union.

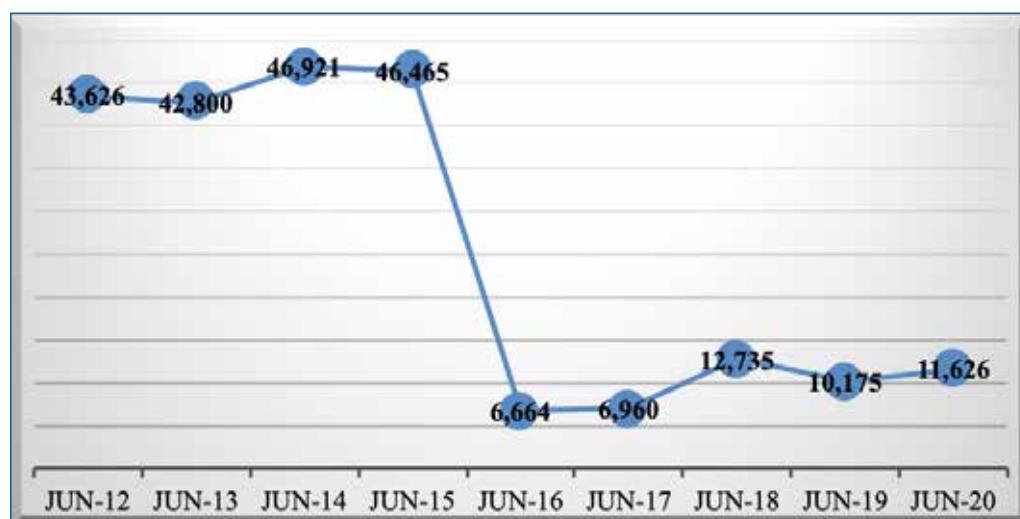


Figure 27: Trends of fixed telephone subscriptions for the period June 2012-June 2020
(Source: Operators' reports, June 2020)

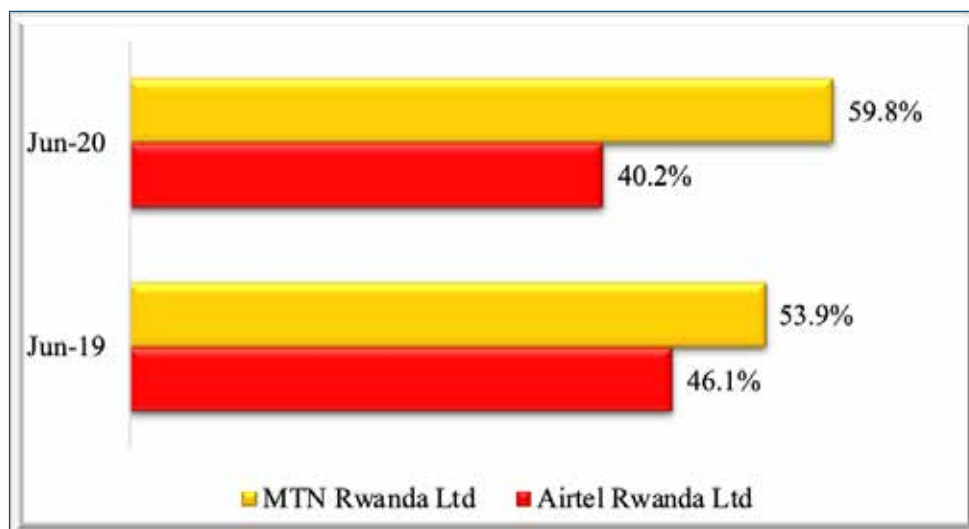
¹ Active subscriptions mean the number of SIM cards or fixed telephone lines that generated revenues to the operator within 90 days.

² Fixed-telephone subscriptions per 100 inhabitants are computed with reference to the sum of active number of analogue fixed-telephone lines over the Rwandan population as projected by National Institute of Statistics of Rwanda.

³ Mobile-cellular telephone subscriptions per 100 inhabitants also known as the mobile phone penetration rate, are computed with reference to the sum of active SIM cards over the Rwandan population as projected by National Institute of Statistics of Rwanda.

Market share for active mobile-cellular subscriptions

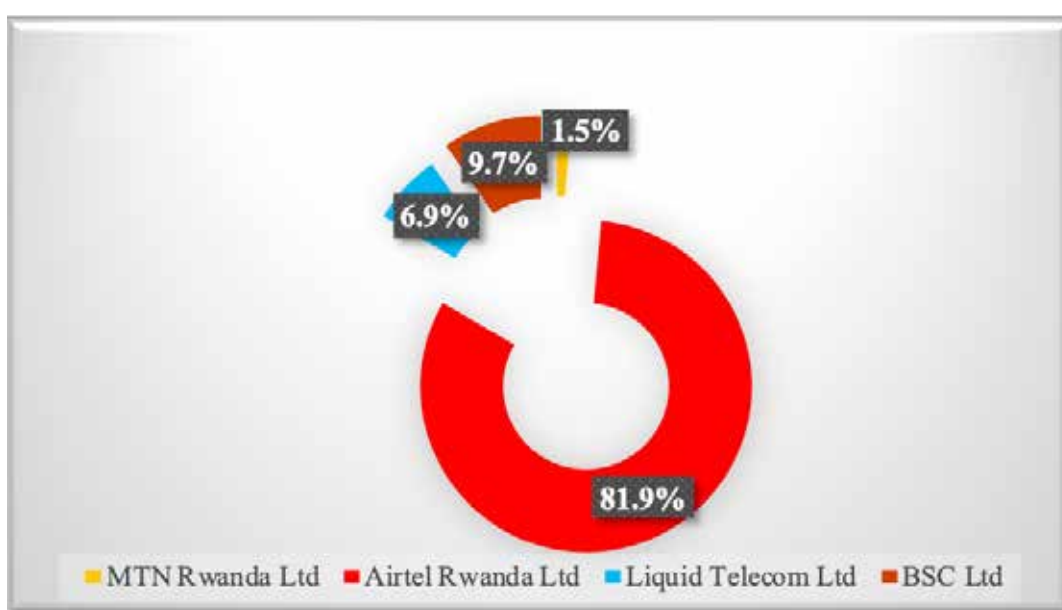
In this fiscal year, the mobile-cellular telephone subscriptions market shares for MTN Rwanda Ltd increased by 5.9 percentage points up to 59.8 per cent, whereas that for Airtel Rwanda Ltd declined by the same margin to stand at 40.2 per cent.



*Figure 28 : Market share for active mobile-cellular telephone subscriptions
(Source: Operators' reports, June 2020)*

4.7.2 MARKET SHARE FOR FIXED TELEPHONE SUBSCRIPTIONS

During the year under review, the operators offering fixed telephone services were Liquid Telecom Ltd, MTN Rwanda Ltd, Airtel Rwanda Ltd and BSC Ltd that offers voice-over-IP (VoIP) subscriptions only. Airtel Rwanda Ltd recorded the largest market share of 81.9 percent in fixed telephone subscriptions, whereas MTN Rwanda Ltd marked the lowest shares of 1.5 percent.



*Figure 29: Market share for fixed telephone subscriptions
(Source: Operators' reports, June 2020)*

4.7.3 RETAIL TARIFFS FOR MOBILE AND FIXED TELEPHONE SERVICE

The licensees are freely determining and publish tariffs for the use of their networks and services. The Regulatory Authority monitored the implementation of voice, SMS, and internet retail prices. There were different voice and internet packs, which are convenient and available for consumers.

Table 5: Fixed Voice Telephone Tariff Trend in FRW

	MTN Rwanda Ltd			Liquid Telecom Ltd			Airtel Rwanda Ltd		
	Jun-18	Jun-19	Jun-20	Jun-18	Jun-19	Jun-20	Jun-18	Jun-19	Jun-20
On net	45	-	45	20	20	10	22	22	35
Off net	45	-	45	60	60	30	45	22	35
One Network	70	-	70	135	135	408	45	70	70

Source: Operators' reports, June 2020

Table 6: Mobile voice tariff in FRW

Destination	MTN Rwanda Ltd	Airtel Rwanda Ltd				
	Jun-18	Jun-19	Jun-20	Jun-18	Jun-19	Jun-20
On net	45	45	45	35	35	35
Off net	45	45	45	35	35	35
One Area Network	70	70	70	70	70	70
US/Canada/China/India/Belgium	51	51	51	50	50	50

Source: Operators' reports, June 2020

During the last three years, the standard tariff for calling by MTN Rwanda Ltd and Airtel Rwanda Ltd within and between telecom operators remains unchanged at 45 Frw and 35 Frw per minute respectively. The One Area Network tariff was also 70 Frw per minute of both MTN Rwanda Ltd and Airtel Rwanda Ltd.

Table 7: Mobile internet Standard Tariff per MB in FRW

Operator	Jun-18	Jun-19	Jun-20
MTN Rwanda Ltd	10	10	10
Airtel Rwanda Ltd	51	51	51

Source: Operators' reports, June 2020

During the last three years, the standard tariff for mobile internet per MB was stable at 10 Frw on MTN Rwanda Ltd and 51 Frw on Airtel Rwanda Ltd networks.

Table 8: Mobile internet tariff on bundles per MB in FRW as of June 2020

Charac- teristics	MTN	AIRTEL			
Bundle Prices	Validity Period	Bundle Name	MBs	Bundle Name	MBs
RWF 100	24 Hours	3G_ 15MB_Daily Bundle	15	ISANZURE-INTERNET 100	250
RWF 200	24 Hours	3G_ 50MB_Daily Bundle	50	ISANZURE-INTERNET 200	550
RWF 500	24 Hours	3G_200 MB_Daily Bundle	200	ISANZURE-INTERNET 500-1D	1,536
RWF 1,000	7 Days	3G_500 MB_Weekly Bundle	500	ISANZURE-INTERNET 1000-7D	2,560
RWF 2,000	7 Days	3G_1.5 GB_Weekly Bundle	1,536	Surf_Weekly_2000	3,072
RWF 5,000	30 Days	3G_3 GB_Monthly Bundle	3,072	Surf monthly 5000	7,168
RWF 10,000	30 Days	3G_10 GB_Monthly Bundle	10,240	monthly_10000	30,720
RWF 21,000	30 Days	3G_30 GB_Monthly Bundle	30,720	monthly_21000	66,560
RWF 30,000	30 Days	3G_90 GB_Monthly Bundle	92,160	monthly_30000	97,280

This table indicates comparable bundles packaged by MTN and AIRTEL according to the bundle prices and their respective validity periods.

4.7.4 INTERNET SERVICE PROVISION

The total internet subscriptions both mobile and fixed increased from 6,234,520 subscriptions by June 2019 to 7,886,771 as of June 2020 marking an increase of 26.5%. The internet subscriptions per 100 inhabitants increased from 51.6 as of June 2019 to 62.3 in June 2020.

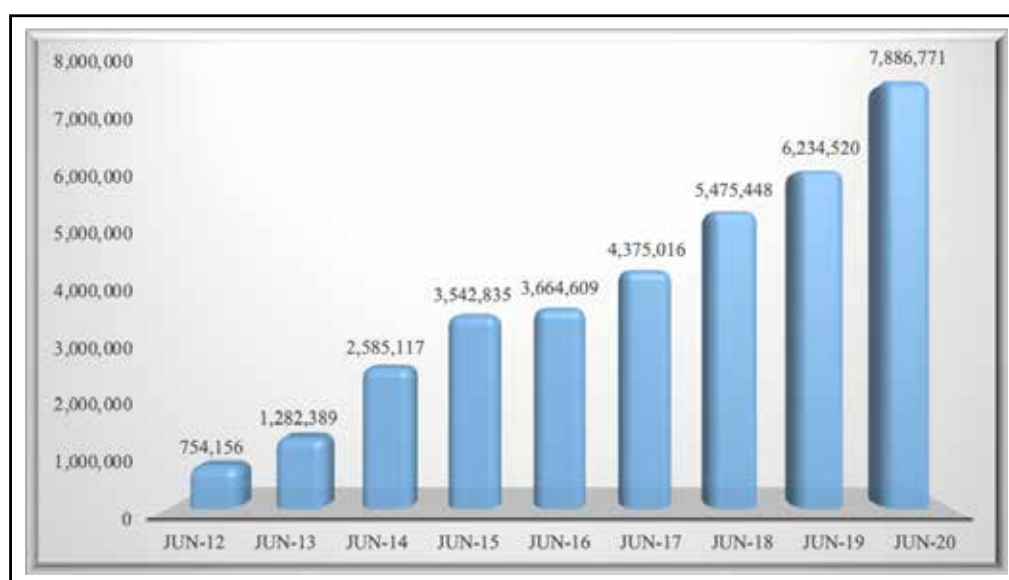
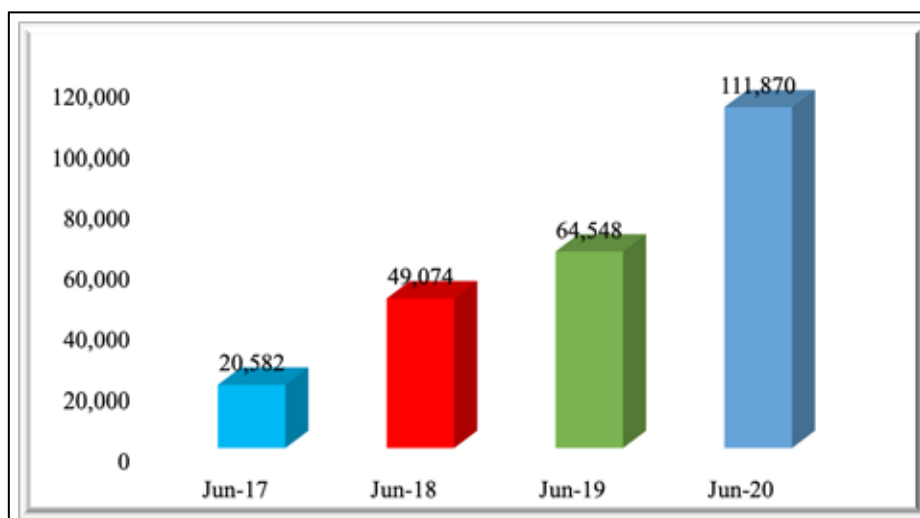


Figure 30: Trend of Internet subscription for the period June 2012-June 2020
(Source: Operators' reports, June 2020)

⁴ Internet subscriptions combine the number of SIM cards (mobile internet) connected to the internet at least once within 90 days and active fixed internet connections.

⁵ Internet subscriptions per 100 inhabitants are computed with reference to the total internet subscriptions over the Rwandan population as projected by National Institute of Statistics of Rwanda.

The total equipped international bandwidth capacity increased by 73.3% from 64,548 Mbps to 111,870 Mbps. This positive trend was driven by the increase of internet subscriptions, customers' traffic security protection, and for minimizing customers' links outages.



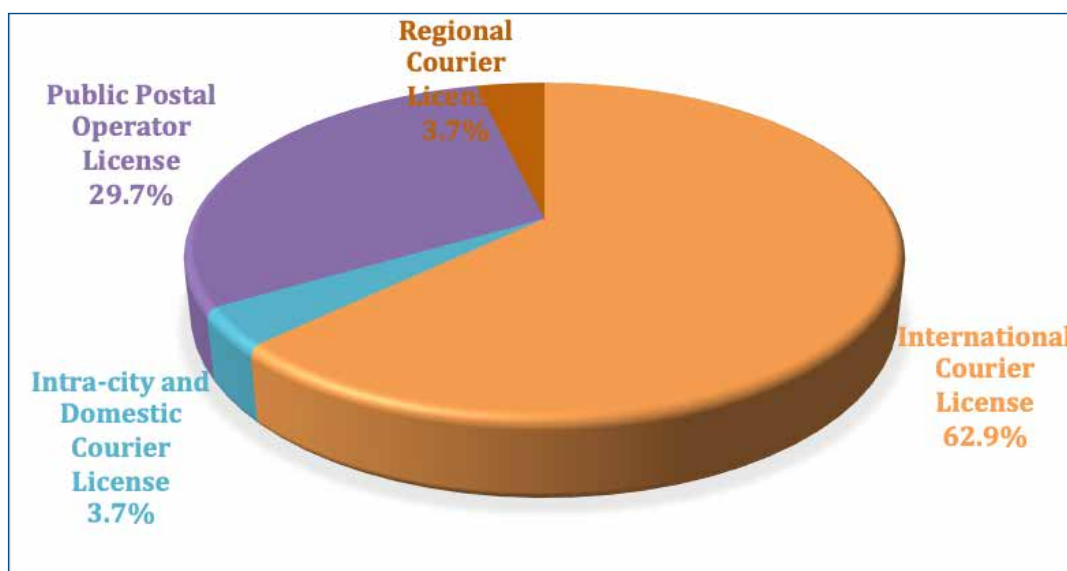
*Figure 31: Equipped International Internet bandwidth in Mbps
(Source: Operators' reports, June 2020)*

4.7.5 COURIER AND POSTAL SERVICES

As of June 30th 2020, the distribution according to the license types of operators within the subsector of postal and courier services is as follows:

Types of license	Number of operators
Intra – City & Domestic courier License	15
Inbound courier License	1
International Courier License	6
Public Postal operator license	1
Regional Courier License	4
Total	27

The following chart indicates the market share structure for postal and courier services. Operators holding international Courier License dominate the market at 62.9% while the National Postal Office accounts for 29.7% and holders of other licenses remain with 7.4%.



*Figure 32: Market share for postal and courier services
(Source: Operators' reports, June 2020)*

4.8 UNIVERSAL ACCESS

The Universal Access and Service Fund (UAF) seeks to ensure that all Rwandans have access to a set of basic yet essential telecommunications/ICT services at affordable prices. While guarding against market distortions, the Fund focuses its assistance on areas, which are beyond the reach of telecommunications/ICT services; enabling underserved and unserved communities to connect with other populations and take advantage of the opportunities and benefits that come with access to broadband Internet and other ICT services.

Rwanda Utilities Regulatory Authority (RURA) collaborates with different telecommunications operators to support “through UAF financing scheme” various initiatives aiming at facilitating access and use of telecommunications/ICT services, on affordable terms, to general public located in unserved or underserved regions. Initiatives financed by UAF in this fiscal year 2019-2020 are the following:

4.8.1 SUBSIDIZING THE COST OF INTERNET IN RURAL AND REMOTE AREAS

In a bid to ensure the connectivity of non-covered remote and/or rural area and to ensure access of the affordable Internet services and wider penetration of ICTs services to the public and private institutions, RURA through UAF has adopted a scheme of subsidizing the Internet bandwidth acquisition to the rural communities in underserved remote areas of Rwanda. So far, 193 sites from public and private institutions have benefited from this initiative and the Broadband Systems Corporation (BSC) awarded the contract to provide the Internet Service to all UAF subsidized sites through different access technologies. The sponsorship is valued at one hundred million Rwandan francs (100,000,000 FRW).

4.8.2 SUPPORTING “CONNECT RWANDA CHALLENGE” PROGRAMME

For increasing the smartphone penetration in Rwanda, Ministry of ICT and Innovation in partnership with MTN Rwanda championed the “connect Rwanda challenge” and other telecom operators were invited to join the campaign. MTN and the Ministry of ICT and Innovation work with local leaders to identify the vulnerable households to give the gadgets.

The campaign targets vulnerable households and aims to ensure that each household in the country owns at least a smartphone. There are 2.88 million households in the country, according to official figures and the program targets to distribute one million (1,000,000) smartphones. Pledging Made-in-Rwanda phones are a double win namely:

- i. Increases digital penetration and
- ii. Promotes Made-in-Rwanda products.

The extra services that come with these phones is training to the beneficiaries. The Ministry of ICT has already trained digital ambassadors and community members who help in boosting digital literacy. Current figures also demonstrate the need for increasing smartphone penetration, which is currently below 20%. The Regulatory Authority supported the programme through Universal Access Fund two hundred Million Rwandan Francs (200,000,000 FRW).

4.8.3 CONSTRUCTION OF PASSIVE INFRASTRUCTURE FOR MOBILE NETWORK OPERATORS IN REMOTE AREAS

In the spirit of providing equal opportunity and access to telecommunication/ICT services to all Rwandans, through UAF, the Regulatory Authority supported MNOs to increase their network coverage countrywide.

In order to bridge the mobile network connectivity gaps and provide coverage in different uncovered and underserved areas of the country, RURA together with mobile telecom operators conducted a joint survey to look for suitable positions to install telecom sites required to cover identified areas.

In the survey conducted, the team identified Sixty- eight (68) potential sites as the nominal points to cover the major and accessible parts.

After the survey, the Telecom Operators requested intervention from RURA for the operations expenditures (OPEX) of passive infrastructure in order to cover some of the areas with less justifiable business case especially for this particular coverage requirement. The project value is three and half billion (3,500,000,000 FRW) Rwandan francs.

As per the Presidential Order No 05/01 of 15/03/2004 determining the functioning of the Universal Access Fund and Public Operators' contributions, RURA through its Universal Access Fund agreed to cover the initial cost for operations expenditure (OPEX) in building the passive infrastructure in all identified 68 sites.



Figure 33: One of the towers constructed (Source: RURA)



Figure 34: Some towers are powered by Green energy - solar panel (Source: RURA)



Figure 35: Tower with installed active infrastructure (Source: RURA)

4.8.4 SUPPORTING THE TRAINING IN SPACE MANAGEMENT AND ESTABLISHMENT OF THE RWANDA SPACE AGENCY

The Regulatory Authority through Universal Access Fund supported the training of three (3) Rwandan Engineers to attend the training in space management in Japan. Further to that, RURA in partnership with the Ministry of ICT and Innovation and other stakeholders played a role in the establishment of Rwanda Space Agency (RSA). The fund provided is equivalent to four thousand seven hundred and one (USD 4,701) United State Dollars for training.

RSA will support prediction and planning in agriculture, environmental monitoring, disaster preparedness, as well as urban planning through the utilization of satellite data and imagery services. The new space agency will be responsible for preparing policies and regulations that position Rwanda competitively in the space industry.

It will coordinate and support scientific research and capacity building programme in space sciences and technology, as well as design, build and launch satellites. Rwanda Space Agency will similarly manage international space cooperation on behalf of the Government.

The country launched its first satellite into space through the partnership between the Government and the Japanese Aerospace and Exploration Agency (JAXA). The country is hoping to leverage such satellites to promote precision agriculture, among other things. From the orbit, RWASAT-1 would be sending information to ground stations, which agriculture institutions could utilize to make informed decisions in the prediction of crop yields as well as soil moisture monitoring.

4.8.5 SUPPORTING THE MANAGEMENT OF THE DIGITAL OBJECT ARCHITECTURE (DOA)

In a bid to position Rwanda as ICT hub in Africa, RURA signed an agreement to acquire Digital Object (DOA) Architecture, a system of information management that promotes interoperability across diverse information systems. The agreement was signed between RURA and DONA Foundation, a Swiss organization that provides management and software development; Smart Africa; and the Corporation for National Research Initiatives (CNRI).

DOA allows Rwanda to participate in the Global Handle Registry, a technology for assigning, managing, and resolving persistent identifiers for digital objects and other resources on the Internet. The programme was supported with seventy-five thousand Swiss francs (75,000 CHF) during the year under review.

4.8.6 SUPPORT THE ACQUISITION OF QUALITY OF SERVICES EQUIPMENT

During the year under review, RURA acquired the quality of service equipment that will be used to measure the quality of services provided by different telecom operators and Internet services providers (ISPs). The system is able to measure the existing technologies and emerging technologies including 4G LTE qualities of services. The project cost is five hundred million (500,000,000 FRW) Rwandan francs. With the use of this new acquired system, there is a hope that it will help to identify the challenges faced by services providers and increase the quality of services of voice and data in different areas countrywide.

4.8.7 SUPPORTING THE CAPACITY BUILDING AND ORGANIZATION OF RWANDA INTERNET GOVERNANCE FORUM

In line with the partnership between Rwanda Internet Community and Technology Alliance (RICTA) and the Regulatory Authority towards the and implementation of Rwanda Digital Talent policy, Universal Access Fund supported the organization of Rwanda Network Operations Group (Rwanda NOG 2019) and more than 50 engineers were trained and certified in Network management and System administration.

The Regulatory Authority also in partnership with stakeholders sponsored the organization of Rwanda Internet Governance Forum, 2019. The Rwanda Internet Governance forum (RWIGF, 2019) edition was held on 27 November 2019 at Marriott Hotel Kigali. The theme was, "Digital inclusion for a Better Rwandan Society". The forum gathered the local Internet community and beyond, to discuss about impact of digital inclusion for a better society.

The forum highlighted electricity coverage, cost of Internet and quality in some cases and lack of awareness, incentives and motivation as main challenges for digital inclusion. The forum further recommended conducting an assessment on the status of digital inclusion in Rwanda and to set and measure indicators towards Rwanda becoming a knowledge-based economy. The two activities were sponsored with six million (6,000,000 FRW) Rwandan francs.

4.8.8 MONITORING OF RWANDA INTERNET EXCHANGE POINT

As shown in table below, the maximum traffic at the Rwanda Internet Exchange Point decreased slightly during the year under review. According to statistics, without the Internet Exchange Point, it would have cost Rwanda \$49,920 per month to access content from overseas; this means that Rwanda saved about USD 599,040 in the just concluded financial year 2019-2020. The calculation was based on Internet Society (ISOC) model that considers peak traffic and the cost of 1 Mbps per month. Within the EAC, Kenya has benefited from the Exchange Point where it saved USD 6,000,000 in the last financial year with the peak traffic of 19 Gbps as per ISOC report. The trend is that the content at RINEX will continue to increase with more content delivery network coming into the country.

Table 9: Traffic at Rwanda Exchange Point (RINEX)

Direction	ISP/CS ISP/CSP/Route Server					
	30 June 2018		30 June 2019		30 June 2020	
	Average	Maximum	Average	Maximum	Average	Maximum
Inbound	2.5 Gbps	3.1 Gbps	1.89 Gbps	2.43 Gbps	1.41Gbps	2.08Gbps
Outbound	2.2 Gbps	3.1 Gbps	1.89 Gbps	2.38Gbps	1.37Gbps	2.30Gbps

Content Delivery Network (CDN)

There are four (4) Content Delivery Networks in Rwanda as of June 2020. The traffic at Netflix almost quadrupled compared to the last year. Akamai content also increased exponentially whereas the Google Cache content almost doubled. Facebook content remained almost constant. The increase of the use of the content was the result of the lockdown and most users used the CDN contents.

Table 10: Content Delivery Networks Traffic (Source: RURA)

CDN (2018-2019)	ISP	Average	Max Inbound	CDN (2019-2020)	Average	Max Inbound
Facebook	BSC	-	1.3 Gbps	Facebook	271 Mbps	1.1 Gbps
GGC	BSC					
	-	905 Mbps	GGC	171 Mbps	1.55 Gbps	
Netflix	MTN	-	150 Mbps	Netflix	539.44 Mbps	1.14 Gbps
Akamai	BSC	118.91 Mbps	295 Mbps	Akamai	1.08 Mbps	1.12 Gbps

4.8.9 MONITORING OF BROADBAND PERFORMANCE OF DIFFERENT INSTITUTIONS

Rwanda Utilities Regulatory Authority (RURA) in partnership with Rwanda Information Society Authority (RISA) and Rwanda Development Board (RDB) inspected sixty-six (66) hotels in the City of Kigali. The hotels improved their broadband capacity. Most of them are using Fiber optic, point to point and 4G LTE. Some of them meet the requirement that are set in the guideline like broadband capacity and wireless coverage whereas other have the plan to upgrade the capacity and achieve the requirements. Each non-compliant entity has been requested to have to a roadmap to meet the requirements of the guidelines.



ENERGY SECTOR

5 ENERGY SECTOR

5.1 SECTOR PROFILE

The Regulatory Authority is mandated to regulate four energy sub-sector namely Electricity, Renewable Energy, Gas & Downstream Petroleum. The core regulatory activities in energy sector comprise establishment and enforcement of regulatory tools, advising the Government on energy related policies, disputes and complaints handling, licensing, tariff setting, and monitoring of licensees' operations to promote the availability, accessibility, affordability and reliability of services to all consumers.

In the electricity industry, despite the challenges and negative socio-economic impacts of COVID-19 pandemic, the electricity sector still registered progress during the year under review, although this progress is relatively low compared to previous years.

Efforts are being deployed by all players in the electricity industry towards achieving the government target to reach electricity universal access by 2024. To that end, during the year under review, the number of national grid connections increased by 14.8%. Also, the installed capacity (MW) increased by 1.15% to reach 228.102MW while the electrical energy generated (kWh) increased by 2.16% and the annual peak demand has increased by 7.4%.

In the Petroleum Industry, Rwanda experienced an increase of 27.7% in importation of Liquefied Petroleum Gas (LPG) from 18,907,402 Kg last year to 24,153,151 Kg while the total LPG storage capacity was expanded by 43.7%. Imports of diesel and gasoline also increased by 60.5% and 60.6 % respectively. However, there was a noticeable decrease in Jet A-1 importation by 13.4 % due to the Covid-19 pandemic that led to the temporary closure of flights.

5.2 LEGAL AND REGULATORY FRAMEWORK

In the Downstream Petroleum sub-sector, besides the existing regulations No001/LPG/R/GP-EWS/RURA/2018 of 10/01/2018 governing Liquefied Petroleum Gas business in Rwanda and regulations No003/R/GP-EWATSAN/RURA/2017 of 30th August, 2017 governing the installation, upgrade and operations of petrol service stations in Rwanda, the following two new regulations were developed and adopted in this fiscal year:

- Regulations No 04/R/GP-EWS/RURA/2019 of 15/11/2019 governing aboveground petroleum storage facilities and importation of petroleum products;
- Regulations No 05/R/GP-EWS/RURA/2019 of 15/11/2019 governing road transportation of petroleum products

The above regulations are intended to offer greater degrees of safety in the use of road tank-

ers for the transportation of petroleum by road in order to mitigate issues such as spillage, injury, accident or fire. Moreover, the regulation governing storage facilities and importation of fuel is expected to promote safe and reliable storage and importation of fuel in the country.

Under Electricity & Renewable Energy sub-sectors, there was no new regulation that was adopted during the year under review. The focus was put more on enforcement and monitoring compliance of the existing regulatory tools.

5.3 LICENSING

5.3.1 ELECTRICITY AND RENEWABLE ENERGY

The Regulatory Authority issued generation licenses to three (3) power plants with a combined installed capacity of 2.5 MW. Also, two (2) provisional licenses covering four (4) hydropower sites have been renewed. The list of electricity licenses issued in 2019-2020 fiscal year is indicated in table 10 below.

Table 11: List of new Licensed Projects during 2019-2020

List of fully licensed Generation projects				
SN	Licensee	Project	Capacity (MW)	Duration (Years)
1	LED Solutions & Green Energy Rwanda Limited	Kigasa HPP	0.272	25
2	CARERA-EDERER & TIGER LTD	Agatobwe HPP	0.41	25
3	Nyirantaruko Hydropower LTD	Nyirantaruko HPP	1.84	25
List of Renewed Provisional Licenses				
1	Ngali Energy LTD	Rwondo HPP	2.83	1
2	Ngali Energy LTD	Base I HPP	2.9	1
		Base II HPP	2.9	
		Ngororero HPP	2.4	

Source: RURA

The total number of generation licenses has increased from 31 to 34 by the end of June 2020. Also, the number of licensed electrical installation practitioners with valid electrical installation permits increased from 75 to 90 as a result of enforcement of the Regulation governing Electrical Installations.

The Authority has also reviewed and approved two (2) Power Purchase Agreements for Kore and Rucanzogera hydropower projects with expected capacity of 1.352 MW and 1.9 MW respectively.

5.3.2 GAS AND DOWNSTREAM PETROLEUM

To ensure compliance with the regulations in place, the Regulatory Authority has assessed during this fiscal year 176 applications requesting authorizations and licenses of proposed projects from investors in the petroleum supply chain. The table below illustrates new licenses and authorizations granted to eligible applicants in various activities related to importation, transportation, storage, wholesale and retail of petroleum products during this fiscal year:

Table 12: Types of licenses and authorizations

S. N	Type of License / Authorization in the Gas and Downstream Petroleum Subsector	Number
1.	Licenses for Liquefied Petroleum Gas (LPG) plants/skids installation	5
2.	Authorizations for Liquefied Petroleum Gas (LPG) plants/skids upgrade	2
3.	Licenses for Liquefied Petroleum Gas (LPG) plant operations	5
4.	Licenses for importation of Liquefied Petroleum Gas (LPG)	2
5.	License for wholesale of Liquefied Petroleum Gas (LPG)	7
6.	License for transportation of Liquefied Petroleum Gas (LPG)	33
7.	License for installation of new petrol service stations	5
8.	Retail license for Petrol Service Station	2
9.	Temporary authorization for transportation of fuel using road tankers	3
10.	Authorization for transportation of fuel using road tankers	5

Source: RURA

5.4 MARKET PERFORMANCE

5.4.1 ELECTRICITY AND RENEWABLE ENERGY

5.4.1.1 Electricity supply

During the year under review, the grid installed capacity comprising domestic, regional shared and imports increased from 225.5 MW to 228.102 MW due to commissioning of Nyirantaruko and Kigasa Hydropower plants, as well as the rehabilitation of Agatobwe hydropower plant.

The peak demand increased from 140.61 MW to 151.02 MW in the month of February 2020, corresponding to an increment of 7.4% compared to last year. This increment is mainly due to new customers connected to electricity. The annual grid electricity generation slightly increased by 2.16% from 854,183.9 MWh to 872,646.14 MWh.

Domestic and regional shared power plants contributed 96.5% of the annual generation to the grid, of which Independent Power Producers had a share of 53.7%.

The shares of electricity produced from different resources is detailed in the figure below.

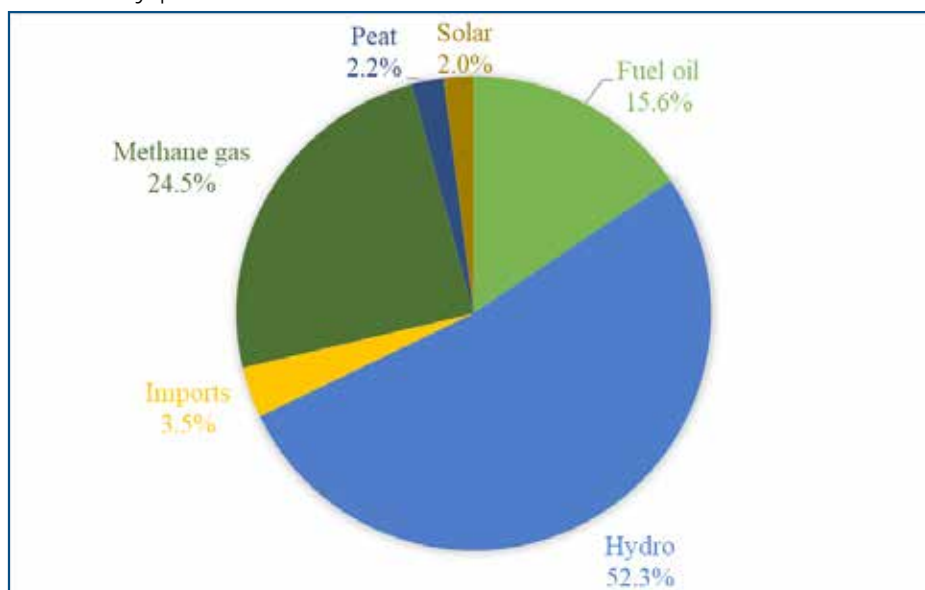


Figure 36: Energy mix for electricity generation (Source: EUCL)

Energy generated from renewables occupied the largest share of the overall electricity production on the grid with 54.3%, where hydro was predominant with 52.3% and Solar contributed 2%. The share of hydro combines both domestic and Rusizi II regional shared hydropower plant, and the share of imports includes electricity imported from Gatuna and Rusizi 1.

5.4.1.2 Access to electricity

The national grid's low and medium voltage lines was extended from 15,252 to 16,108.93 km and 8,794 to 9,205.8 km corresponding to 5.6% and 4.6% of increments respectively. Consequently, the number of grid connections increased by 14.8% to reach a total of 1,092,168.

The figure below illustrates the trend of national grid connections since end June 2013.

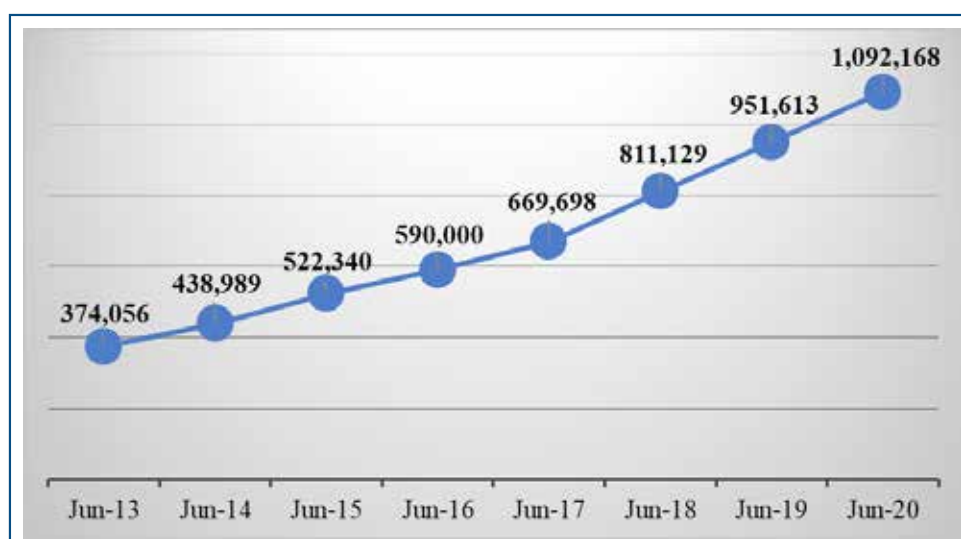


Figure 37: Trend of national grid connections since June 2013 (Source: EUCL)

5.4.1.3 Efficiency and reliability

The total network losses slightly reduced by 0.29% from 19.39% to 19.10%. The reliability of the grid has also improved where the number of outages reduced from 2,687 to 2,460, and their duration reduced as well from 1,632 to 1,488 hours, hence an improvement of 8.4% and 8.8% respectively. The figure below illustrates the improvement in terms of outages occurrence frequency and duration.

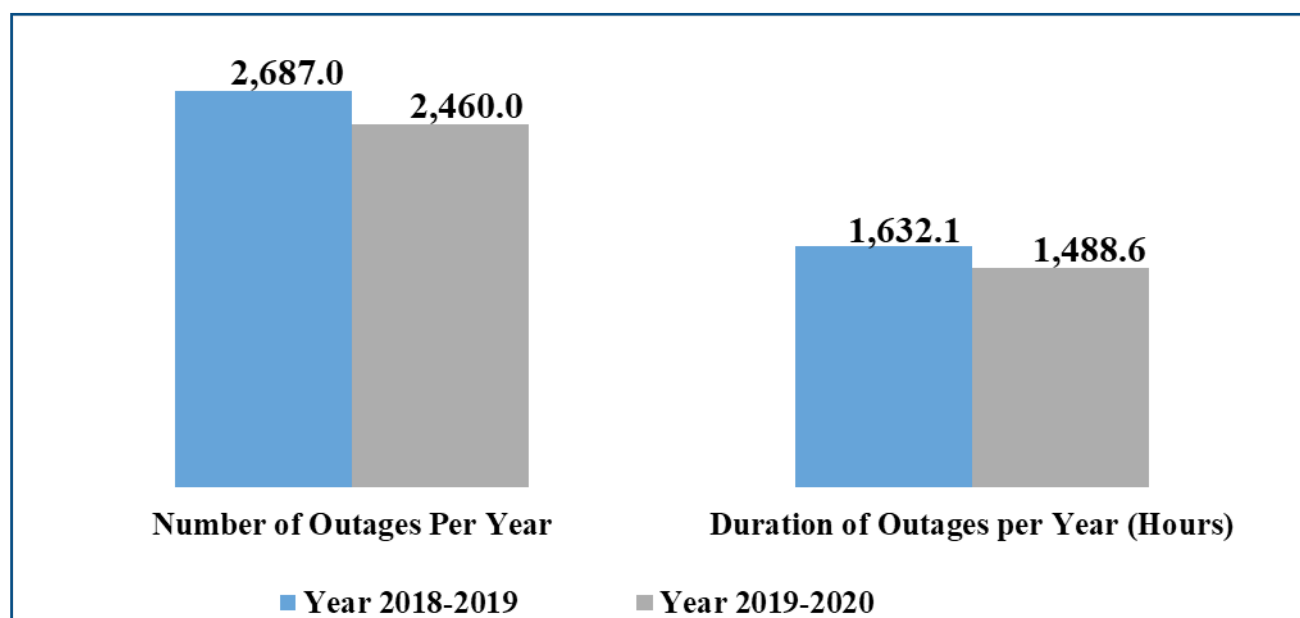


Figure 38: Grid outages occurrence rate and duration (Source: EUCL)

5.4.1.4 Electricity tariffs

The end-user tariff for grid-connected customers has been revised and the new approved tariff became effective since January 2020. The tariff review was mainly driven by the need to ensure financial sustainability of the Electric Utility. In addition, in line with the country's goal of ensuring access to modern and affordable infrastructure and services, and quality health for all, as stipulated in National Strategy for Transformation (NST1), the electricity end user tariff for health facilities and commercial data centers were reduced by 3.1% and 19.4% respectively.

The detailed electricity end-user tariff is available on RURA website and in the **annex 1**

5.4.2 GAS AND DOWNSTREAM PETROLEUM

5.4.2.1 Liquefied Petroleum Gas (LPG) subsector

The total storage capacity of commercial LPG facilities expanded by 43.7% from 482.7 to 693.7 Metric Tons (MT) arising from the following additional LPG Plants that were installed in different locations in the country:

- 150 MT at Kabuga in Gasabo District by MOUNT MERU GAS
- 10 MT at Giporoso, Kicukiro District by SOCIETE PETROLIERE LTD
- 10 MT in Musanze District by SOCIETE PETROLIERE LTD
- 10 MT in Rubavu District by SOCIETE PETROLIERE LTD
- The 42 MT plant at Gikondo was relocated to Rwamagana District and upgraded to 50MT
- 23 MT at Gahanga, Kicukiro district by MEREZ PETROLEUM Ltd

The table below shows all the LPG filling plants in the country and their respective capacity.

Table 13: LPG storage facilities, capacity and location

District	LPG filling	Location	Capacity (MT)
Gasabo	Kobil Petroleum Rwanda	Gatsata	103
	Abbarci Petroleum Marketing Co.	Jabana	95.2
	Rwanda Oxygene	Ndera,-Mulindi	100
	Mount Meru Gas Rwanda	Kabuga II	150
Kicukiro	Sulfo Rwanda Industries	Gatenga -Magerwa	28.5
	Societe Petroliere	Giporoso	10
	Standard Gas	Kicukiro	51
	Merez Petroleum	Gahanga,	23
Kamonyi	Lake Petroleum Rwanda	Rugarika	23
Muhanga	Societe Petroliere	Nyamabuye	10
Rusizi	Societe Petroliere	Kamembe	10
Musanze	Societe Petroliere	Muhoza	20
Rwamagana	Societe Petroliere	Rwamagana -Town City	60
Rubavu	Societe Petroliere	Rubavu – Town City	10
Total			693.7

Source: RURA

The total LPG imports also increased by 27.7% from 18,907,402 Kg to 24,153,151 Kg. The monthly imports are shown in the graph below:

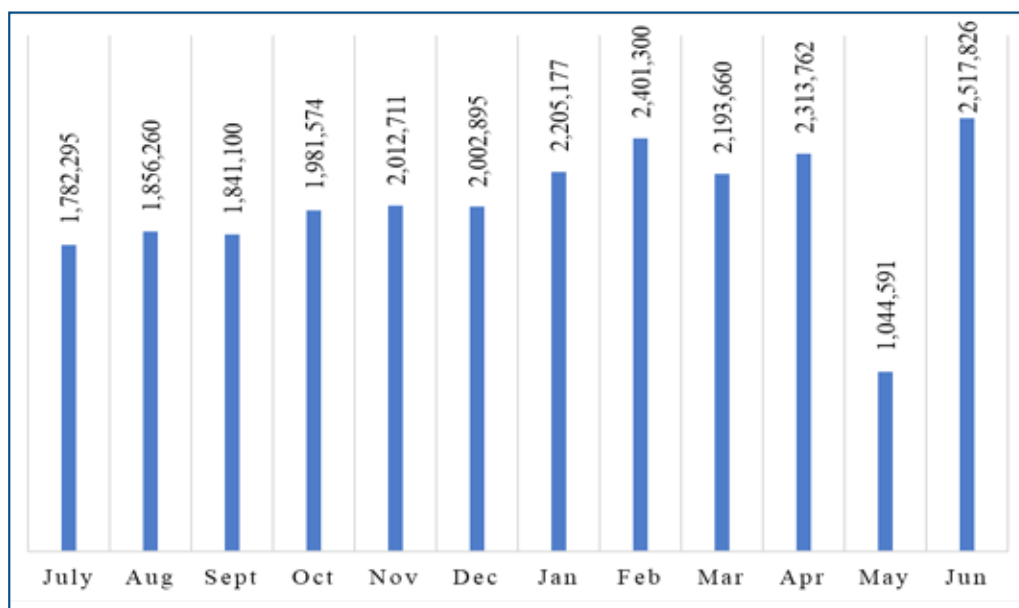


Figure 39: Trend of imported LPG during July 2019- June 2020 (in Kg) (Source: RRA)

This increase is also due to Government incentives as well as massive awareness and sensitization programs being conducted jointly by different stakeholders as well as a conducive regulatory framework that was put in place with the aim to substantially reduce the use of biomass for cooking.

LPG penetration is also rapidly increasing due to the demand from processing and manufacturing industries, whereby some of them are shifting from using diesel to LPG as source of heat for their boilers. In the same way, hotels, schools, refugees camp, prisons, hotels, restaurants etc... are gradually shifting from the use of charcoal and biomass for cooking to LPG with installations of LPG facilities (skids) at their kitchen facilities.

It is worth noting that in the month of May 2020, a decrease of importation noticed due to challenges related to trans-border transportation that followed the outbreak of Covid-19 pandemic.



Figure 40: New LPG Plant – MT MERU, Rusororo (Source: RURA)



Figure 41: LPG tanks at consumer site (Source RURA)

The annual LPG imports have impressively increased since 2014 up to December 2019 from 4,240,080 Kg to 21,517,960 Kg as shown in the home consumption import figure below:

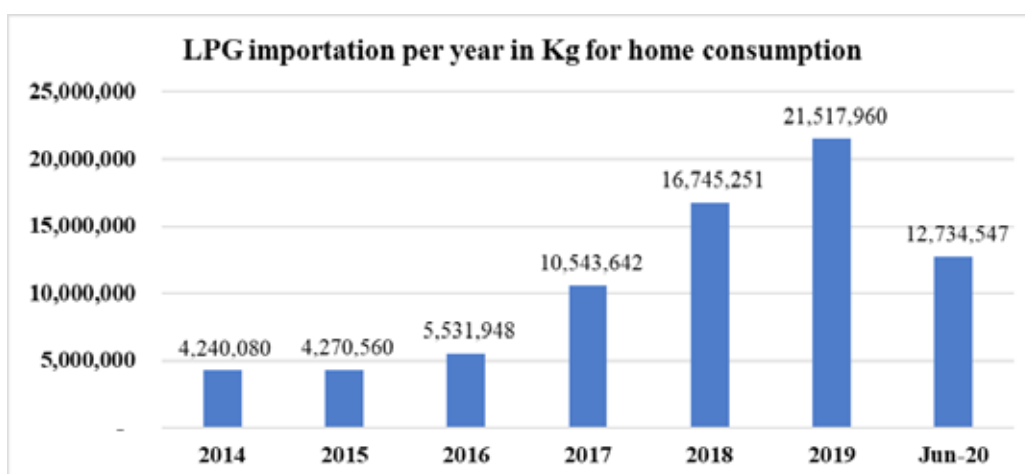


Figure 42: Trend of imported LPG 2014-2020 (Source RRA)

5.4.2.2 Fuel Depots

The total storage capacity of fuel depots remains the same (112,100m³) as in the previous fiscal year. However, with the newly adopted regulation governing the installation fuel depot combined with the government's efforts to attract investment in storage facilities, the fuel storage capacity is expected to increase in order to achieve a total capacity of 198,000 m³ by 2024 as set in Rwanda Energy Sector Strategic Plan 2018/19-2023/24.

5.4.2.3 Fuel Importation

An increase has been recorded for the importation of diesel (AGO), gasoline (PMS) and liquefied petroleum gas (LPG) unlike the remaining three products, kerosene (IK), heavy fuel oil (HFO) and Jet A-1 which decreased slightly during this fiscal year.

The increase in the strategic reserve capacity constructed at SP Rusororo Depots from 22 million in 2019 to 60 million liters in 2020 was the main driver of the increase in imports of diesel and gasoline to 60.5% and 60.6 % respectively compared to what have been noted in the previous year.

The closure of commercial flights in March 2020, as a prevention measure following the outbreak the covid-19 pandemic caused the import of Jet A-1 to decrease by 13% during the year under review. The table below shows the imported quantities of different petroleum products in the last 3 years.

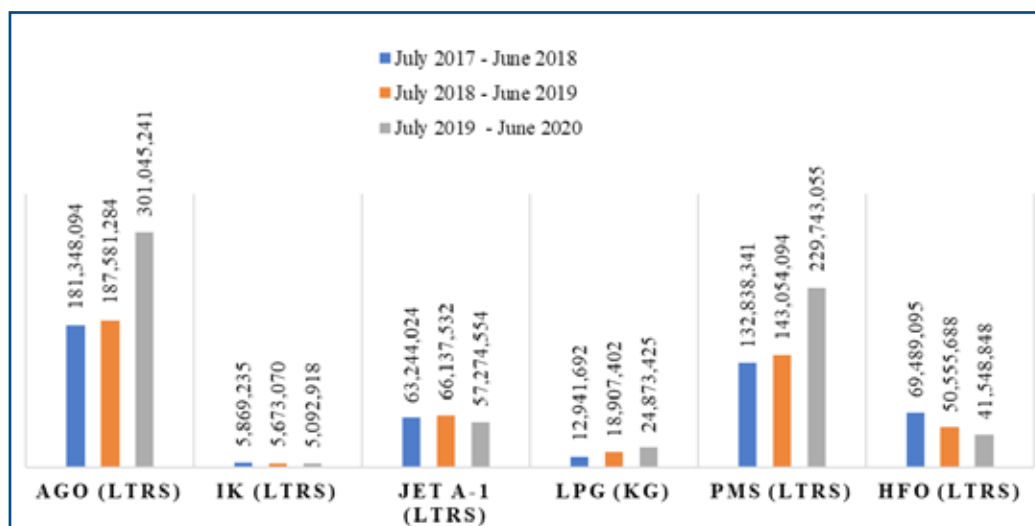


Figure 43: Petroleum products importation (home consumption) (Source RRA)

Fuel pricing

RURA has continued to periodically review fuel pump price to absorb global events and international oil price fluctuations. The pump price for Gasoline and Diesel is reviewed every two months while the price of Jet A-1 is reviewed on a monthly basis.

The period of May and June registered a sharp drop in fuel pump price as a result of the drastic decline in global fuel demand due the effects of COVID-19 pandemic. Below is the chart which shows monthly variations of public pump (Gasoline and Diesel) and Jet A1 retail prices.

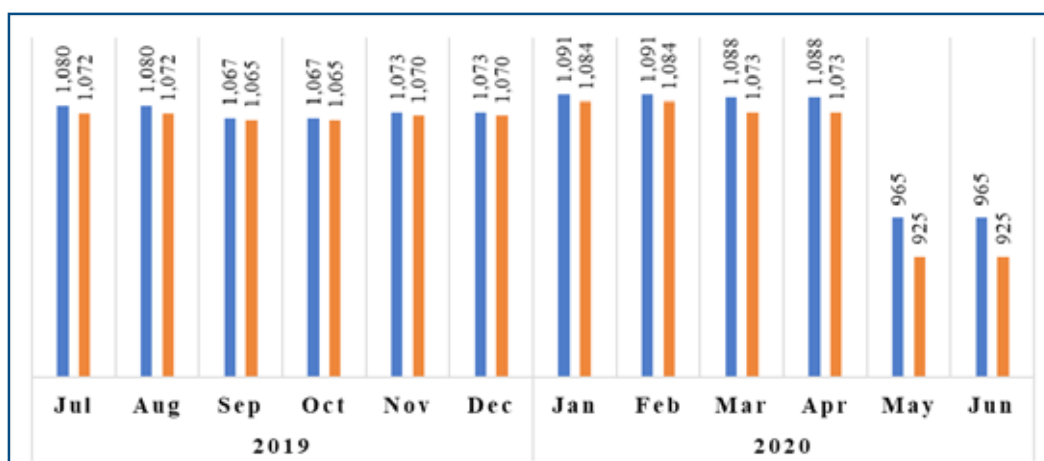


Figure 44: Kigali Public Pump Price (Frw/Liter) (source: RURA)

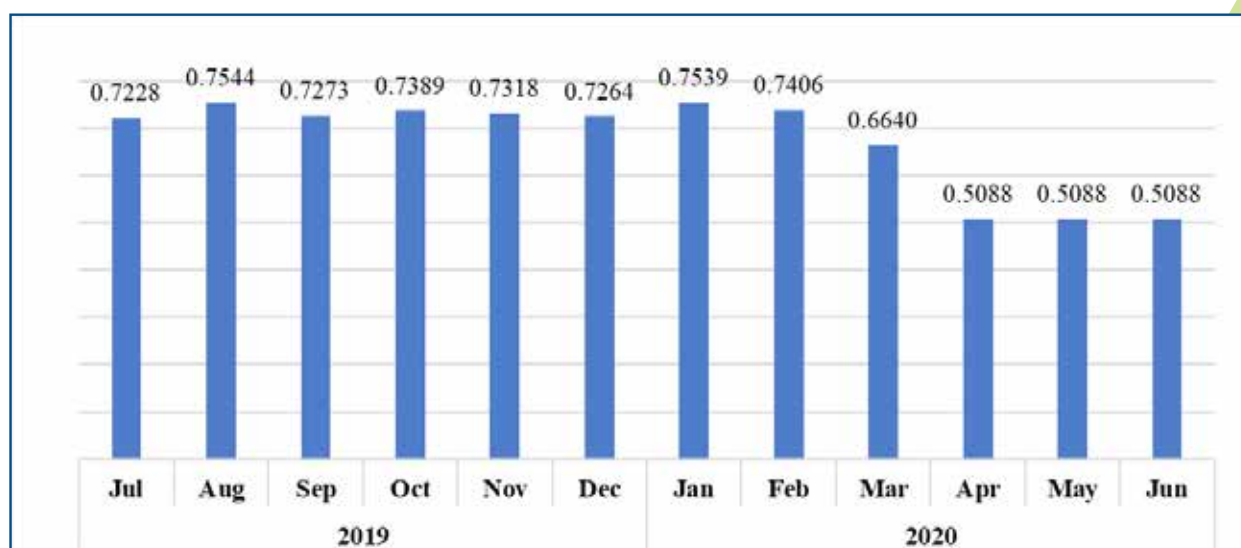


Figure 45: Jet A1 Retail Price (USD/ Liter) (Source: RURA)

5.5 INSPECTION AND MONITORING

5.5.1 ELECTRICITY AND RENEWABLE ENERGY

The Regulatory Authority continued to conduct on-site inspections to check compliance of various operators and monitor the progress of the projects under development. In that regard, the Regulatory Authority conducted regular site visits to nine (9) projects under-construction as well as to operational power plants, mini-grids and captive power systems. The findings and recommendations were shared with concerned operators and non-compliant operators were requested to address concerns that were observed. Also, registration of captive power systems was conducted as a first step that will facilitate the development of a specific regulatory framework that will govern such activities.

5.5.2 GAS AND DOWNSTREAM PETROLEUM

Regular site inspections were conducted to Liquefied Petroleum Gas (LPG) operators in the City of Kigali to evaluate the market performance and compliance with LPG regulations at retail, wholesale and plants premises.

During the lockdown period, following several complaints from consumers and inspections that revealed LPG price hike on the market due to speculations from the outbreak of COVID-19, RURA intervened by setting a price cap which was temporarily set at 1084 FRW/Kg at retail sites.

Plants that are manufacturing industrial gases and health facilities with medical gases systems were also inspected to facilitate the development of the regulations governing medical gases in Rwanda.

During the year under review, RURA also conducted regular inspections on fuel depot facilities and different petrol stations to monitor safe operations and ensure efficient utilization of the storage capacity particularly during and after the lockdown period.

5.5.3 OPPORTUNITIES

Considering that downstream petroleum sector has recorded progress in new constructed infrastructures but also in the quantity of imported petroleum products, it is paramount that preventive safety measures is considered as a priority and LPG equipment such as LPG tanks and Cylinders as well as their accessories be available on the market at affordable prices. In that regard:

- Revalidation centers to test and revalidate all LPG Cylinders in Rwanda and their accessories should be established for safety purposes;
- Local manufacturing industries for petroleum equipment and accessories should also be in place to curb imported expensive equipment;
- LPG strategic stocks should be increased to cover at least 3 months in order to overcome any shortage of the product, which may occur due to unexpected challenges in the petroleum supply chain.



WATER AND SANITATION SECTOR

6 WATER AND SANITATION SECTOR

6.1 SECTOR PROFILE

Availability of water and sanitation services contributes significantly to human welfare and is critical for socio-economic development of a country. In line with Sustainable Development Goals, the Government of Rwanda committed to achieve universal access to potable water and sanitation services by 2024. The role of RURA in attaining this ambitious target is to ensure adequate service delivery through establishment of enabling regulatory environment, licensing service providers and monitoring the quality of service.

The period under review recorded the following achievements:

- Water production and customer connections in urban and peri-urban areas increased by 1.6% and 6.7% respectively;
- The promotion of Public Private Partnership (PPP) resulted in 94.6% of rural water supply schemes well managed by professional licensed operators under PPP contracts with Districts;
- Concerning licensing, five (5) new licenses were granted to new operators for the management of rural water supply systems and 33 new operators were licensed for the provision of sanitation services. In addition, the licensing processes has been digitized and all applications are processed online for both water and sanitation services.

It is however worth to note that the sector still faces challenges related to high Non-Revenue Water (43.4%) and imbalance of water supply and demand specifically in urban and peri-urban areas.

6.2 LEGAL AND REGULATORY FRAMEWORK

The sector regulation requires a strong and dynamic legal and regulatory environment that facilitates easy entry, fair competition and ensure improved quality of service provision. To ensure that this is achieved, regular update of the legal framework is necessary. In the fiscal year 2019-2020, the regulation governing cleaning service provision was reviewed to accommodate new changes required to improve the quality of service in cleaning service provision.

6.3 LICENSING

Licensing is one of the core function of the Regulatory Authority and the law establishing the Regulator stipulates that service providers shall only operates under license conditions to ensure that providers of services are able to provide required services. The following are recorded achievements with regard to licensing:

In water supply, five (5) new licenses were granted to new water service providers in the management of simple rural water supply schemes while nine (9) licenses were surrendered as they were not being used. This brought the total number of active operators to 63 licensed operators managing simple water supply schemes. In addition, there are currently three (3) other active licensed service providers for the Urban Water Utility (WASAC), Bulk water production (KIGALI WATER) and the management of Complex rural water supply system (AQUAVIRUNGA).

In sanitation service provision, the status of licensing stands as follows:

- Cleaning service: Twenty (20) new licenses were approved and three (3) licenses renewed. In addition, twenty-nine (29) licenses were revoked following repetitive non-compliance and this decreased the total number of operators from 201 to 199.
- Solid waste management: Five (5) new licenses were granted and two (2) licenses renewed for solid waste collection and transportation services, one (1) license and two (2) licenses approved for hazardous waste management and waste recycling respectively.

The chart below illustrates changes recorded in the number of licensed operators in both water and sanitation.

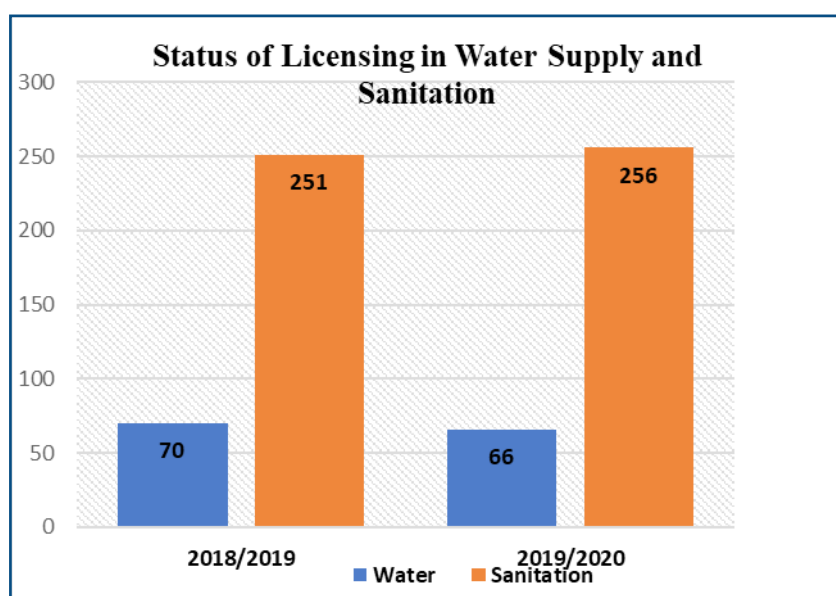


Figure 46: changes recorded in the number of licensed operators in both water and sanitation (WASAC)

The decrease in the total number of active licensed service providers in 2019-2020 is due to revoked licenses (29) in cleaning services and those surrendered (9) by rural water supply service providers.

6.4 MARKET PERFORMANCE

One of the key roles of the Regulator is to monitor progress in the attainment of national targets captured in the National Water Supply and Sanitation policies and Strategies (2016) and the progress monitoring aims at unlocking any bottlenecks to the realization expected

sector outcomes. In the course of 2019-2020, the sector recorded positive outcomes in water produced and supplied customer connections, and hours of water supply and revenue collections. However, there is still high Non-Revenue water compared to the sector targets.

The Water production slightly increased by 1.6% from 52,388,588 m³/year in 2018/2019 to 53,245,484 m³/year in 2019/2020. The increase in water production is mainly due to the increase in water treatment plants' performance that cumulated in increase of water production. In addition, the laying of transmission pipes within Kigali (through Mont Kigali from Nzove) has allowed Nzove water treatment plants to operate at increase performance. However, due to high water losses, water supply recorded a decrease of 0.8% from 51,397,843 m³/year to 50,985,445 m³/year.

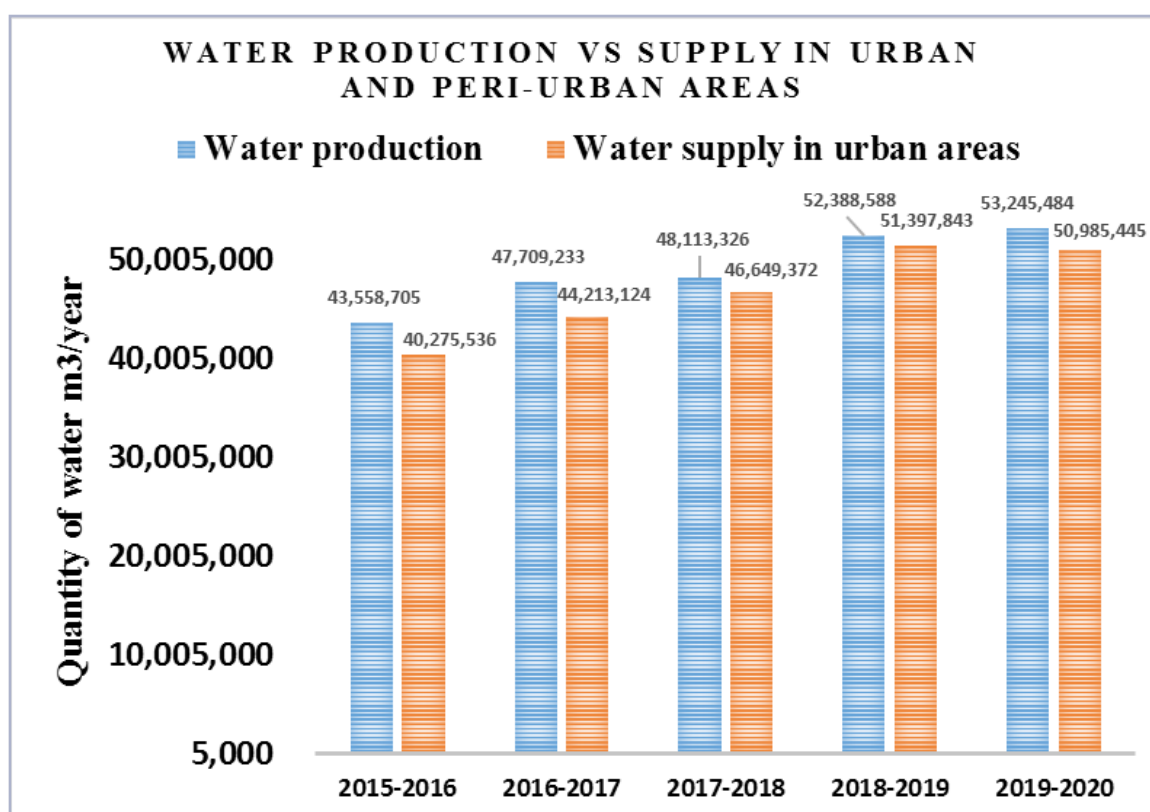


Figure 47: Water Production VS Supply in Urban & Peri - Urban Areas
(Source: WASAC)

Within the same context to increase water production, a Public Private Partnership Agreement (PPA Amendment) was agreed between the Government of Rwanda (GoR), WASAC Ltd and Kigali Water Ltd (KWL) for the construction of a bulk water treatment facility of 40,000 m³/day and the construction of that facility stands currently at 90.5% as shown below.



Figure 48: The progress of construction works: Cascade Aeration and Clariflocculators

The number of water subscribers in urban and peri-urban areas increased from 214,637 (2018-2019) to 230,190 (2019-2020), making an increase of 6.7% as shown by chart below.

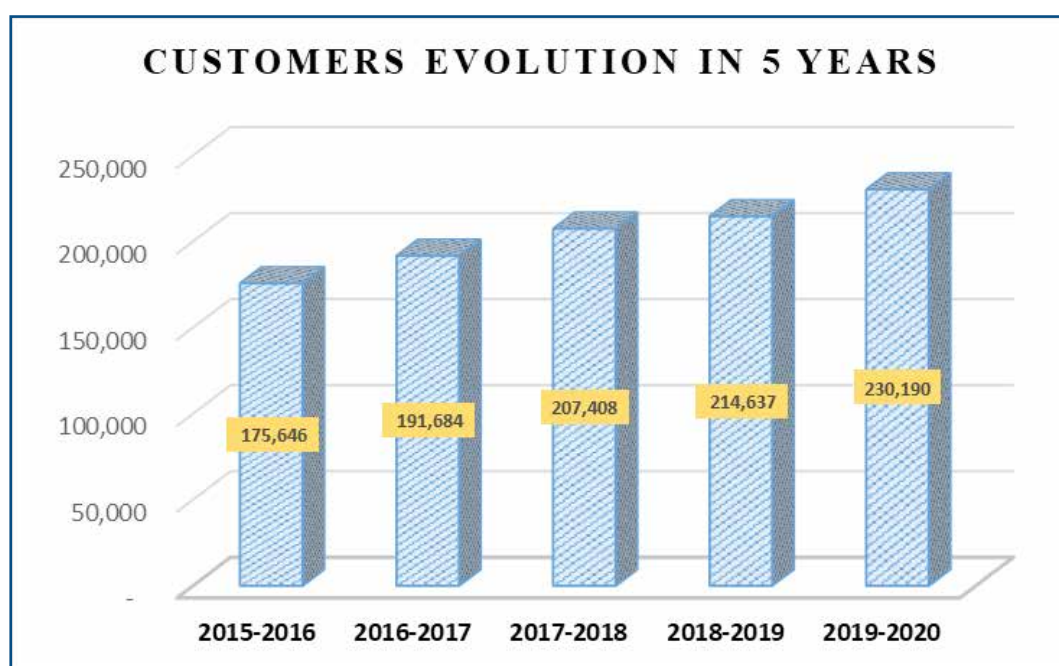


Figure 49: The number of water subscribers in urban and peri-urban areas (Source: WASAC)

Non-Revenue Water (NRW) consisting of both technical and commercial losses continues to be a very big challenge for the sector and has increased from 38.8% in 2018/2019 to 43.4% in 2019/2020. The recorded increase is mainly due to leakages recorded within distribution networks as a result of burst pipes, aging infrastructure, landslides during heavy rains, road construction works, etc. NRW is an operational indicator contributing to the sustainability of service providers and therefore a significant measure for efficiency assessment.

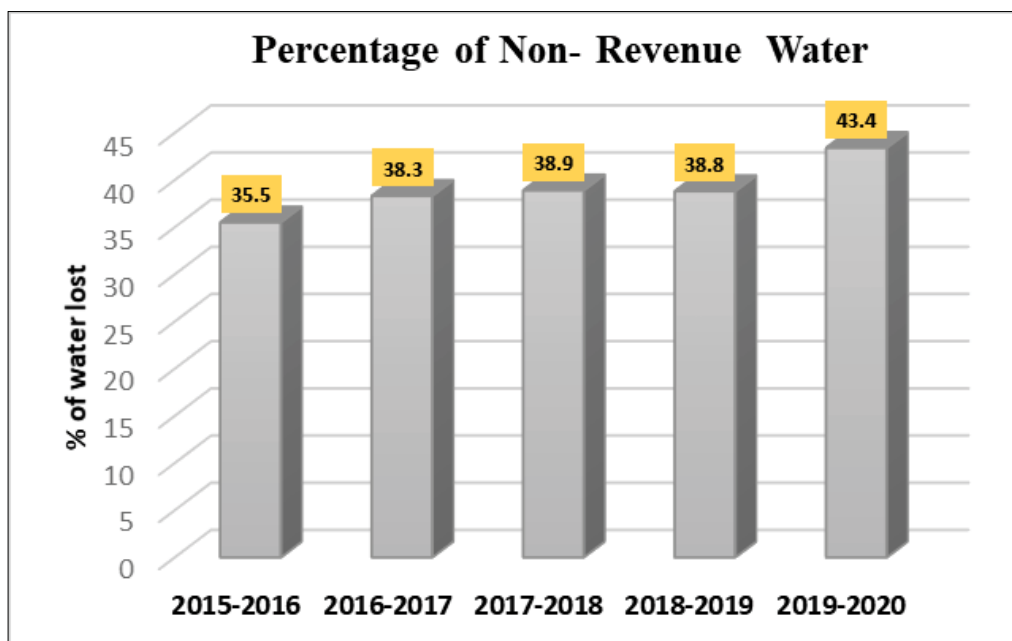


Figure 50: Percentage of Non - Revenue Water (Source: WASAC)

6.5 COMPLIANCE MONITORING

In order to ensure the quality of service and compliance with regulations in water supply and sanitation, inspections were conducted to licensed operators.

In water supply, inspections were conducted to service providers in Kigali and Rusizi, Nyamasheke, Nyamagabe, Nyaruguru and Gisagara Districts. Inspections recorded various improvements in terms of quality of service with regard to water quality, connection time, metering, billing, etc.

With regard to rural water supply and in collaboration with UNICEF Rwanda, RURA has initiated and implemented an online reporting and monitoring system within the framework to facilitate the assessment of operators' performance.

In sanitation, inspections were carried out to licensed companies providing solid waste collection and transportation services in the City of Kigali. The findings of these inspections revealed that:

- Households having contracts with service providers for waste collection services increased from 91.8 % to 92.3%;
- Compliance with the frequency of garbage collection increased at 80.1% with a noted increase of 0.3% from last year;
- The quality of service decreased during the rainy season due to poor murram road networks in various sectors and cells as well as the slopping unpaved road leading to Nduba waste disposal site.



TRANSPORT SECTOR

7 TRANSPORT SECTOR

7.1 SECTOR PROFILE

Transport regulation in Rwanda focuses mainly on transport of persons and goods on both road and waterway. In road transport, regulated services includes public transport service by buses within and across the country, motorcycle transport, taxicab transport, rental vehicles and trucks.

On the other hand, the authority also regulates waterways transport of persons and goods by boats. In addition, driving schools and Freight forwarders services are regulated under transport sector.

Following the enforcement measures mounted during the period under review, the sector registered an increase of car rental fleet by 17.8% from 731 to 861 and Taxicab operators' fleet by 10.07 %.

The year under review was also characterized by IT based initiatives to modernize the transport sector, which noted 1,079 taxicab vehicles fitted with smart Taxi meters and more than 15,073 motorcycles with intelligent connected fare meters.

However, the sector was greatly affected by the Covid-19 pandemic especially passenger transport, driving schools and motorcycle transport services which were not operational during the period of total lockdown. The post lockdown period came with the social distancing requirement hence reducing the bus carrying capacity by a half while driving schools remain non-operational economically affecting the sector.

Nonetheless, the government directives allowing movement of goods during covid-19 lockdown enabled an entry of 376 new individual goods transport operators.

The Regulatory Authority contributed to the study for the development of business model for Public Transport Services in the City of Kigali and issued Request for proposal (RfP) for the provision of Public Transport and also participated in evaluation of proposals for Generation two (G2) of Public Transport services with a purpose of enhancing public transport service.

7.2 LICENSING

The Regulatory Authority issues licenses to transport operators after fulfilling the requirements governing each sub sector. The license validity varies as follows:

- 2 years for public transport (buses, taxi cabs and rentals)
- 1 year for motorcycles, freight forwarders, driving schools, waterways and goods transport.
- 5 years issued through routes tendering competition

7.2.1 PASSENGERS TRANSPORT

In this financial year, no new operators were licensed, 13 licenses with a total fleet of six hundred thirty six (636) were renewed. However, five (5) transport operators were not able to renew their operational licenses, two (2) due to Covid -19 and three (3) due to failure to meet RfP requirements.

Table 14: Renewed licensed public transport operators

No	Companies/Cooperatives	Number of Vehicles
1	Capital Express	29
2	City Express	39
3	Excel Tours & Travel Agency	60
4	Fidelity Express	22
5	Horizon Express	100
6	Kayonza T/Cooperative	43
7	La Colombe Express	47
8	Volcano Express	94
9	Yahoo Car Express	60
10	Modern Coast Express.	18
11	Trinity Transporters & Distributors Co. Ltd	43
12	Mash Bus Services Limited	15
13	Hope School Bus Cooperative	66

Source: RURA

The list of all licensed passenger buses transport Operators is shown in **annex 5**.

7.2.2 TRANSPORTATION OF GOODS SERVICES

In transport of goods, two new licenses were issued to akagera business group ltd and ecopen ituze ltd. In addition, 5,964 individual goods transport authorizations were issued including 376 new individual goods transport operators. The increase is attributed to enforcement mechanisms put in place.

The table of all licensed transportation of goods operators is in **annex 6**.

7.2.3 MOTORCYCLE TAXI SERVICES

During the reporting year, RURA introduced an online system of licensing motorcycles through Irembo platform. This service has facilitated the issuance of 20,747 authorizations for individual operators working in cooperative saving time and resources for motorcycle drivers who previously had to get physical authorization document from RURA.

The number of motorcycles authorizations issued, decreased by 39.1% compared to the previous financial year. This was due to the impact of COVID-19 on their business and the challenges related to the use of the new system.

The chart below summarizes the authorization issuance status from 2016 to 2020:

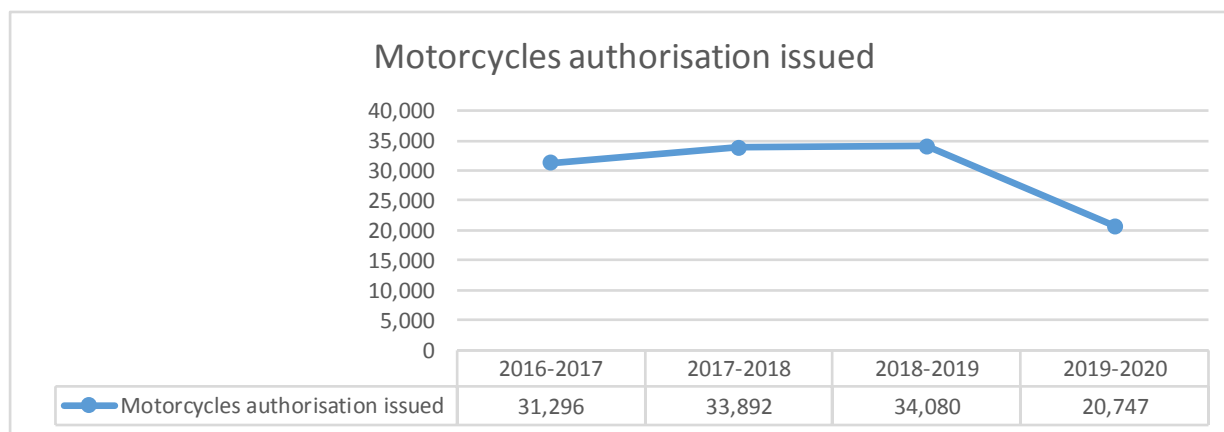


Figure 51: summarizes the authorization issuance status from 2016 to 2020 (Source: RURA)

7.2.4 TAXI CAB SERVICES

As a result of enforcement, a good working relationship with operators and the introduction of smart taxi meter usage in taxi cab vehicles, out of 48 taxi cab operators, 42 renewed their licenses and two new taxi cabs operators were licensed. As a result, the total fleet increased by 10.07 % from 1052 to 1158 taxicab vehicles including new fleet of 54 vehicles.

See Licensed Taxi Cabs operators and their corresponding fleet size in **annex 7**

7.2.5 CAR RENTAL SERVICES

Car rental service is among the transport-regulated services licensed by the Regulatory Authority. During this fiscal year, five new operators were licensed in addition to 731 vehicles previously recorded increasing the total licensed rental fleet to 861 representing 17.8% increase. The increase registered was brought by the strengthened enforcement measures.

The table below shows new licensed car rental companies and their fleet capacity:

Table 15: Newly licensed car rental operators

	Companies	Fleet Capacity
1	Safe Tour And Travel	31
2	Empire Transport Company Ltd	15
3	East Africa Tourism And Transport Services	15
4	Keen Transport Company Limited	14
5	Daddy Rwanda Tours	16

It should be noted that four (4) rental car operators had their licenses expired during lockdown and were not able to renew their license due to Covid-19, but currently in the renewal process.

The list of licensed Car Rental Companies/Cooperatives is in **annex 8**.

7.2.6 DRIVING SCHOOLS

During the year under review, three new driving school operators were licensed and thirty driving school operators were not able to renew their licenses resulting into a decrease of 35.4% of operators and 40% of fleets respectively. This is due to the fact that, driving schools were not allowed to operate during and after the lockdown.

The list of licensed Driving Schools Companies/Cooperatives is in **annex 9**.

7.2.7 WATERWAY TRANSPORT SERVICES

In waterways transport Service, the licensed operators increased by 5.35% (from 336 to 354). This increment is due to enforcement mechanisms together with sensitization campaigns carried out by RURA in collaboration with Rwanda National Police Marine to encourage waterway transport service providers to operate legally.

The list of licensed Waterways Companies/Cooperatives is here below:

Table 16: The list of licensed Waterways Companies/Cooperatives

	Boat Companies/ Cooperatives	Number Of Boats
1.	Karongi Boat Tours Company Ltd	5
2.	Cooperative Cotralaki	8
3.	Cooperative Coptilak	6
4.	Cooperative C.T.L.M. Isonga	5

7.2.8 FREIGHT FORWARDERS SERVICES

Freight Forwarders sub sector is another component regulated by the Regulatory Authority. During this fiscal year, only one new operator was licensed and all other Freight Forwarders renewed their licenses.

The list of all licensed Freight Forwarder operators is in **annex 10**.

7.3 MARKET PERFORMANCE

In this year the transport sector registered new licensed operators in transport of goods, Car Rental Services, driving schools, taxi cabs and waterways transport as per below table:

Table 17: Newly licensed operators

Category: New Licenses	Newly licensed operators
Goods transport companies	2
Bus transport companies	0
Car rental operators	5
Driving schools	3
Taxi cab cooperatives	2
Waterways Individual operators	65
Freight Forwarder operator	1

As illustrated in the table below, the licensed operators in goods transport, car rentals, taxi cabs and waterways increased due to enforcement measures and awareness campaigns and market opportunities

Table 18: Comparison of the last two previous years: Fleet per Category

FLEET PER CATEGORY	2018-2019	2019-2020
Transportation of goods	279	299
Transportation of persons	3,085	2,534
Motorcycles cooperatives	34,081	20,747
Car rental operators	731	861
Driving schools	1,058	683
Taxi cab	1,052	1,158
Waterways	336	354

7.4 TARIFF STRUCTURE

In line with RURA mandate, during this fiscal year, public transport fares were reviewed pursuant to the decrease of fuel price and COVID-19 factor. Current Public bus tariff is the previous tariff of March 2018 plus COVID-19 factor increment of 45% whereas tariff for Taxi cab remained the same. These tariffs can be found on RURA website.

7.5 MONITORING AND ENFORCEMENT

7.5.1 ENFORCEMENT IN PUBLIC TRANSPORT

RURA ensures that public transport operators comply with the regulations, license obligations and other applicable laws. In this context, field inspections are organized to encourage compliance and non-compliant operators were sanctioned. During the financial year under review, the following offences were recorded in public transport:

Offenses countrywide

Table 19: Offense committed in public transport sector in 2019 – 2020

Offenses	Provinces	City of Kigali	Countrywide
Operating without Uniform	18	41	59
Route violation	49	71	120
Driving Without Required Documents	95	488	583
Failure to Use E-ticketing	55	73	128
Operating without Emergency Call	6	4	10
Loading at Unauthorized Place	13	60	73
Fare Overcharging	1	10	11
Overloading	6	19	25
Failure to use taxi Meter	0	287	287
Operating without Authorization	93	700	793
Speed Governor / GPS Offline	3	13	16
False Tonnage	4	39	43
Using Non Licensed Vehicle	41	110	151
Vehicle Without company's identification	3	6	9
Not Issuing Tickets to Passengers	336	288	624
Use of brokers	0	4	4
Not Observing Departure Time	0	4	4
Using Inappropriate License.	5	11	16
Unmarked Seats	1	38	39
Operating on non-given route	5	12	17
Leaving Passenger at Non Final Destination	0	2	2
Using Unsuitable Vehicle	0	2	2
Being Rude to Passengers	0	1	1
Failure to Observe Headways	0	65	65
Regulatory Fee Payment Delay payment	6	15	21
TOTAL	740	2363	3103

Source: RURA

As shown in the table above, the most repetitive offences Countrywide are operating without authorization or use of expired authorization followed by, not issuing tickets to passengers, and Failure to Use Taxi Meter among others

In the City of Kigali, the most repetitive offences are operating without authorization or use of expired authorization followed by Failure to Use Taxi Meter, while in the provinces the most repetitive offences are, not issuing tickets to passengers and operating without authorization among others.

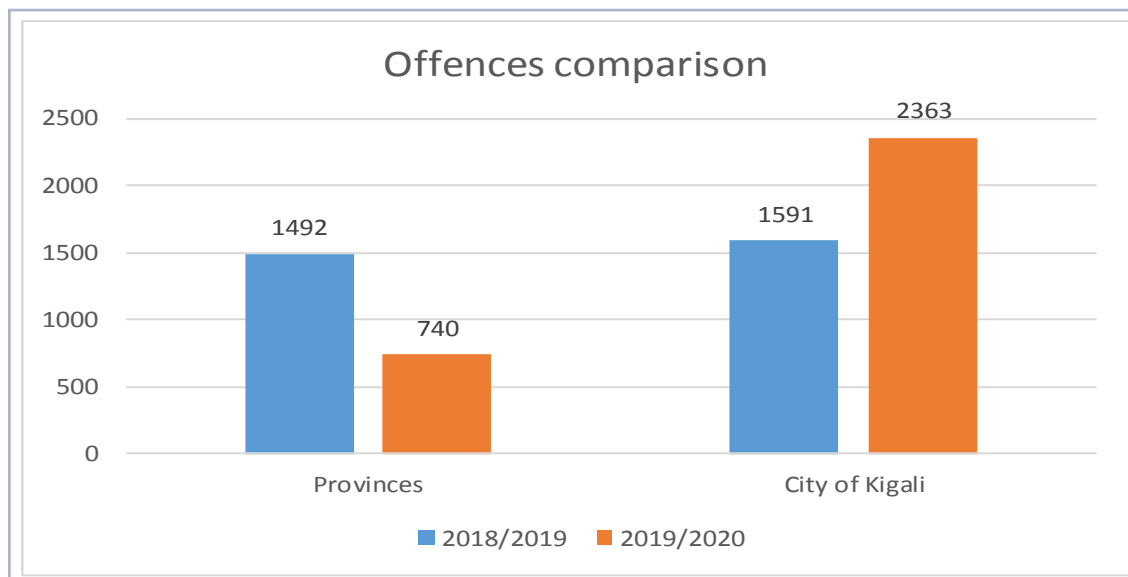


Figure 52: Offence comparison (Source: RURA)

As seen from the above chart, the overall decrease of offences in the provinces is attributed to Covid 19 conditions which affected transport activities and the necessity for inspections.

In contrast, the overall offences in the City of Kigali increased during the year under review compared to previous fiscal year. This increment is due to increased enforcement mechanisms particularly during the period of covid-19 where all inspection exercises are carried out in the city of Kigali only.

Offenses by sector

In transport sub sectors other than public transport, different kinds of offences were mostly observed in Taxi Cabs, Transportation of Goods and motorcycles.

The table below highlights recorded offences per operator categories.

Table 20: Offences committed in the FY 2019 – 2020

OPERATORS CATEGORIES	RECORDED OFFENCES	OFFENCES
Taxi Cabs Operators	440	<ol style="list-style-type: none"> 1. Drive without all required documents; 2. Use of Unlicensed Vehicle 3. Use of Expired Authorization 4. Failure to Use Taxi Meter
Motorcyclists Operators	50	<ol style="list-style-type: none"> 1. Using expired Authorization 2. Use of Unlicensed Vehicle

Transportation of Goods Operators	838	<ol style="list-style-type: none"> 1. Driving Without Required Documents 2. Use of expired authorization 3. Use of Unlicensed vehicle 4. False tonnage
Driving School Operators	79	<ol style="list-style-type: none"> 1. Violating Route 2. Use of expired authorization 3. Use of Unlicensed Vehicle 4. Lack of operator indicator
School Bus Operators	63	<ol style="list-style-type: none"> 1. Driving Without Required Documents 2. Without Authorization 3. Use of unlicensed vehicle
Rental Cars Operators	141	<ol style="list-style-type: none"> 1. Driving Without Required Documents 2. Use of expired authorization 3. Use of Unlicensed vehicle

7.6 TRANSPORT INSPECTION DURING COVID-19 PANDEMIC

In line with the Ministry of Health guidelines on COVID-19 pandemic, RURA initiated safe seating arrangement in buses and social distancing in bus parks and bus stops.

The safe seating arrangements involve seat marking and reduced number of passengers in public transport buses and other vehicles. Also marked were seats at bus parks and places where passengers line up in preparation for boarding buses. Together with partners, RURA was involved in public awareness campaign on safe driving, service delivery and observing COVID 19 guidelines



Figure 53: Respecting social distancing inside in the Bus (Source: RURA)



Allowed seat



Not allowed seat



Figure 54: Respecting social distancing in bus station (Source: RURA)



ANNEXES



8

ANNEXES

ANNEX 1: THE LIST OF LICENCEES IN ICT SECTOR

MOBILE NETWORK OPERATORS

NO	COMPANY	LICENSE ISSUANCE YEAR
1	MTN	2006
2	AIRTEL	2011 (LICENSE REVIEWED IN 2019 AFTER MERGING WITH TIGO)

INTERNET SERVICE PROVIDERS

NO	COMPANY	LICENSE ISSUANCE YEAR
1	BSC	2012
2	GVA	2019
3	AXIOM NETWORKS	2013
4	CENTURY NET	2020
5	REVOLUTION AIR	2019
6	LIQUID TELECOM	2013
7	ISPA	2005
9	4NET AFRICA	2014
10	GMAX	2014
11	PIRAMIE	2014
12	TNSP	2014
13	SIMBA SUPERMARKET	2015
14	TRUCONNECT LTD	2015
15	POPCONN LTD	2015
16	BK TELECOM LTD	2015
17	ISCO LTD	2015
18	FASTNET LTD	2016
19	CBNET LTD	2016
20	SMART BROADBAND LTD	2016
21	NET LINK LTD	2017

22	RWANDA TELECENTRE NETWORK (RTN)	2017
23	AFRONET	2018
24	NETPRO LIMITED	2018
25	AC GROUP LIMITED	2018
26	MANGO TELECOM	2018

NETWORK CAPACITY RESELLER

NO	COMPANY	LICENSE ISSUANCE YEAR
1	BANDWIDTH AND CLOUD SERVICES (BCS)	2015

4G WHOLE SELLER AND NETWORK PROVIDER

NO	COMPANY	LICENSE ISSUANCE YEAR
1	KTRN	2013

NETWORK FACILITY PROVIDERS

NO	COMPANY	LICENSE ISSUANCE YEAR
1	IHS RWANDA LTD	2013
2	TRUST ENGINEERING SOLUTIONS (TRES)	2020

APPLICATION SERVICE PROVIDERS

NO	COMPANY	LICENSE ISSUANCE YEAR
1	YEGO INNOVATION	2018
2	VW MOBILITY	2018
3	PASCAL TECHNOLOGY	2019
4	CENTRIKA	2019
5	AG GROUP LIMITED	2020

ANNEX 2: THE LIST LICENSED MEDIA HOUSES

OPERATING RADIO STATIONS	
1	Radio 10
2	Flash FM
3	City Radio
4	Voice of Africa
5	Radio Maria RWANDA
6	Voice of hope Radio
7	Umucyo Radio
8	Isango Stars Radio
9	KFM
10	Isangano Radio
11	Huguka Radio
12	Salus Radio
13	Radio Ishingiro
14	RFI
15	Authentic Radio
16	BBC
17	Sana radio
18	Izuba radio
19	Voice of America
20	Radio 1
21	Radio Inkoramutima
22	Royal FM
23	KT Radio
24	Kiss FM
25	Hot FM Radio
26	Fine FM
27	Energy FM
28	Life Radio
29	VisionFM Radio

30	Umwezi FM radio
31	Magic FM

OPERATING TV STATIONS

1	TV1
2	TV10
3	Victory TV
4	Flash TV
5	Isango Starts TV
6	Authentic TV
7	Btn TV
8	Goodrich TV
9	TV7
10	Family TV
11	Izuba TV
12	France 24 French
13	France 24 English
14	TV5
15	Prime TV
16	Buryohe
17	Isibo TV
18	Pacis TV
19	Genesis TV

PRINT MEDIA

1	Umuhuza Newspaper
2	Mont Jali
3	Pax Press
4	Journal Imena
5	Ishya N'ihirwe Newspaper
6	Panorama Newspaper
7	Urungano Magazine
8	The Light Magazine

9	Insight Magazine
10	Rwanda For You Magazine
11	Ijwi Ryacu Magazine
12	The Newtimes
13	Imvaho Nshya

ANNEX 3: LIST OF LICENSED POSTAL AND COURIER OPERATORS AS OF JUNE 2020

The matrix below shows the status of licensed and operational postal and courier services operators as of June 2020:

SN	Operator / Company name	Type of license	Year of license	Year of expiration
1	Shaft Ltd	Regional courier License;	2016	2021
2	DHL Express	International Courier License	2016	2021
3	Pan Africa Express Transport Ltd	International Courier License	2016	2021
4	Stella Express Ltd	Domestic courier License	2016	2021
5	Skynet Worldwide Express Ltd	International Courier License	2016	2021
6	I&T Investment & Supply Company Ltd	Intra-city courier License	2016	2021
7	National Post Office license	Public Postal operator license	2016	2021
8	Sofast Ltd	Domestic courier License	2016	2021
9	Horizontal Ltd	Domestic courier License	2016	2021
10	Kigali Coach Tours & Travel Ltd	Domestic courier License	2016	2021
11	Ukine Ltd	Regional Courier License	2016	2021
12	Eagle Net Ltd	International Courier License	2016	2021
13	Alpha Express Company Ltd	Domestic courier License	2016	2021
14	Excel Travel & Tours Agency Ltd	Domestic courier License	2016	2021
15	Isco Intersec Security	International Courier License	2016	2021
16	Kigali Safari Express	Domestic courier License	2016	2021
17	Modern Coast Express Uganda Ltd	Regional Courier License	2016	2021

18	Omega Ltd	Domestic courier License	2016	2021
19	Virunga Courier Express Ltd	Domestic courier License	2016	2021
20	Matunda Express Ltd	Domestic courier License	2016	2021
21	Common Rock Ltd	Domestic courier License	2016	2021
22	International Express Ltd	Domestic courier License	2016	2021
23	Fast Rwanda Courier Ltd	Domestic courier License	2017	2022
24	Trinity Transporters And Distributors Company Ltd	Regional Courier License	2017	2022
25	Target Today Delivery Ltd	International Courier License	2017	2022
26	IAEXP Courier Service Ltd	Inbound courier License	2020	2025
27	G&H Supply Limited	Intra-city courier License	2020	2025

ANNEX 4: ELECTRICITY END-USER TARIFFS

Customer	Block	New tariff (FRW/kWh)
Residential	[0-15]	89
]15-50]	212
	>50	249
Non-Residential	[0-100]	227
	>100	255
WTP & WPS	All	126
Telecom towers	All	201
Hotels	All	157
Health Facilities	All	186
Broadcasters	All	192
Small industries	All	134
Medium Industries	All	103
Large industries	All	94
Commercial data Centers	All	179

Tariffs for industries

Industry Category	Charges (VAT exclusive)				
	Energy Charge (FRW/kWh)	Maximum Demand Charge (FRW/kVA/month)			Customer Service Charge (FRW/ Month)
		Off-peak hours (11:00PM-07:59AM)	Shoulder hours (8:00AM-5:59PM)	Peak hours (6:00PM-10:59PM)	
Small	134	1,691	4,008	11,017	10,000
Medium	103	1,292	3,588	10,514	10,000
Large	94	886	2,004	7,184	10,000

Flat rates for industrial customers without smart meters

Industry Category	Flat rate (VAT Exclusive)-FRW/kWh
Small	151
Medium	123
Large	106

ANNEX 5: LIST OF LICENSED PUBLIC TRANSPORT COMPANIES/ COOPERATIVES

No	COMPANIES/COOPERATIVES	NUMBER OF VEHICLES
1	Alpha Express	37
2	Capital Express	29
3	City Center T/Cooperative	196
4	City Express	39
5	Different Express	30
6	Excel Tours & Travel Agency	60
7	Fidelity Express	22
8	Gicumbi T/Cooperative	39
9	Horizon Express	100
10	International Express	70
11	Kayonza T/Cooperative	43
12	Kigali Coach Agency	43
13	Nile Safaris Express	34

14	Kivu Belt Express	46
15	La Colombe Express	47
16	Matunda Express	31
17	Muhanga T/Cooperative	74
18	Musanze T/Cooperative	187
19	Ngoma T/Cooperative	67
20	Nyabugogo T/Cooperative	282
21	Nyagatare T/Cooperative	42
22	Omega Express	43
23	Remera T/Cooperative	142
24	Star Express	40
25	Ruhire Express	29
26	Rusizi T/Cooperative	68
27	Rwanda School And Students Transport Cooperative	61
28	Select Express	31
29	Stella Express	64
30	Tripartite Tours	24
31	Ugusenga Express	39
32	Virunga Express	57
33	Volcano Express	94
34	Yahoo Car Express	60
35	Shalom Transportation Ltd	19
36	Volcano Ltd/School Bus	27
37	Students Safety Bus Ltd	34
38	Modern Coast Exp.Uganda	18
39	Trinity Transporters & Distributors Co. Ltd	43
40	Jakobu Entreprises Ltd	42
41	Mash Bus Services Limited	15
42	Hope School Bus Cooperative	66
	Total Vehicles	2534

ANNEX 6: LIST OF LICENSED TRANSPORTATION OF GOODS COMPANIES AND COOPERATIVES

	NAME OF LICENSEES	NUMBER OF VEHICLES
1	Kaurwa Ltd	16
2	Nyampinga Drivers Ltd	10
3	Techno Stars Ltd	10
4	Umoja Wa Madereva	16
5	Ntambch Transport Service	5
6	Co.Ta.Li.Ca.Nya	17
7	Coctramavk	24
8	Cooperative Des Transporteurs Des Marchandises De Gisenyi	21
9	Delta Gakinjiro Drivers Cooperative	9
10	Intersec Security Company Ltd	34
11	Isano Pick Up And Truck Drivers Cooperative Kicukiro	11
12	J.A.K Safaris Ltd	5
13	Kamo & Sons Ltd	17
14	Mema Ltd	5
15	Societe Rwandaise De Distribution Et Services	5
16	Soft Services Company Ltd	7
17	Supatec International Ltd	28
18	Techno Stars Ltd	10
19	Umoja Wa Madereva	16
20	Ntambch Transport Service	5
21	Jaka Transporters Ltd	4
22	Uwaleo Company Ltd	8
23	Akagera Business Group Ltd	14
24	Ecopen Ituze Ltd	2
25	Cooperative De Transport Aeroport Ville	19
	Total	298

ANNEX 7: LIST OF LICENSED TAXI CABS COMPANIES AND COOPERATIVES

	LICENSED COMPANIES/COOPERATIVES	NUMBER OF VEHICLES
1	New G Rock	39
2	Bliss Tour Company	15
3	Coop Des Taximan Voiture Rusizi-Bugarama(Ctvrbr)	26
4	Access Transport Company	40
5	Condor Special Taxi Company Ltd	19
6	Coop Des Taximen De L Hotel Amahoro	20
7	Cooperative Des Taximen Voiture Gakinjiro-Gisozi	18
8	Unity Cooperative Taxi Services Kacyiru	21
9	Twigire Taxi Service	28
10	Abanyamurava Transport Coop	21
11	Taxi Town Service Center Coop	25
12	Coop De Taxi Voiture Hopital Militaire	18
13	Coop De Taximen Voiture Kabuga	18
14	Holly Auto Travel Agence (Hatta)	15
15	Cooperative De Development Des Ancien Chauffeurs De L' Etat (Codace)	16
16	Coop Des Chauffeurs De Taxi Voiture De L' Ouest	41
17	Cooperative De Transport Par Taxis Voitures De Gisenyi	31
18	Cooperative Des Taximen Voiture De Nyabugogo (Cotavonya)	22
19	Cooperative Des Taximens De L'hotel Chez Lando(Cothala)	15
20	Cooperative De Taxi Voiture De Kicukiro (Coctaki)	16
21	Cooperative De Taxis Voiture De Kabuga	18
22	Kigali Taxi Voiture Cooperative	21
23	Cooperative De Taxis Voitures De La Capitale (Cotavoc)	17
24	Airport Taxi Drivers Of Kigali (A.T.A.K)	31
25	Coop Pour Taxi Voiture De Taxi Voiture De Kigali	17
26	Company De Taxmen De Gikondo(Cotagika)	15
27	Huye Taxi Transport Cooperative	47

28	Nyarutarama Taxi Cooperative (N.T.C)	19
29	Kimironko United Taxi Cooperative (K.U.T.C)	28
30	Abahuriyehamwe Company Ltd	15
31	Cooperative Des Taximen Roi Faysal	17
32	Nyabugogo Small Taxi Driver Cooperative (Nyastadrico)	26
33	Innovation Transport Agency Ltd	23
34	Unity Coop Taxi Services Kacyiru (U.C.T.S.K)	21
35	Dufatanye Transport Company Ltd	42
36	Intego Transport Company	14
37	Nyamirambo Taxi Services	10
38	Cooperative Des Taximen Voitures De Kibagabaga(Cotavoki)	19
39	Cooperative Des Taximens De L Hotel Amahoro(Cotahama)	20
40	Coopertive Kisimenti Taximen-Voitures (Kokita)	21
41	Amarembo City Taxi Services	14
42	United Taximen Cooperative (Unitax)	81
43	Cooperative De Taximen Voiture De Gacuriro (Cotavoga)	39
44	Cooperative Tunyaruke Musanze De Taxi Voitures	39
45	Cooperative De Taximen Voitures Muhima (Cotavomu)	11
46	Cooperative Taxi Voitures Gare Remera (Cotavogar)	25
47	Jyambere Company Ltd	19
48	Ubumwe Solution Transport Company Ltd	25
	Total	1158

ANNEX 8: LIST OF LICENSED RENTAL CARS COMPANIES AND COOPERATIVES

	COMPANIES / COOPERATIVES	NUMBER OF VEHICLE
1	Safe Tour And Travel	31
2	Empire Transport Company Ltd	15
3	East Africa Tourism And Transport Services	15
4	Keen Transport Company Limited	14
5	Daddy Rwanda Tourc	16
6	Cooperative De Development Des Anciens Chauffeurs De L'etat(Codace)	58
7	Gad House Ltd	16
8	Oxygen Travel & Tours Ltd	16
9	Cooperative De Taximen-Voitures-Kacyiru (Cotavoka)	18
10	Muhi Transport Ltd	17
11	Tours Des Pays Des Grand Lac	70
12	Gisenyi Transport Services Ltd	26
13	Quick Taxis Services (Q.T.S)	22
14	Taxi Service Company Ltd	19
15	Techno Stars Ltd	27
16	Women Transport Company Ltd	29
17	Rwanda Tourism And Travel Agency	23
18	Premier Transport Services Ltd	18
19	Kigali Multiservice Cooperative (K.M.C)	17
20	United Transparency Company Ltd	16
21	Mountain Transport Motor Service Ltd	15
22	Special Drivers United Ltd	121
23	Car Rental Transport Cooperative	61
24	Iraganwa Transport	15
25	Cooperative Des Taximen Voiture De Nyabugogo(Cotavonya)	16
26	Limoz Rwanda Ltd	37
27	Buganza Transport Ltd	28
28	Access Transport Company (A.T.Co) Ltd	46
29	Comfortable Kicukiro Services Ltd (C.K.S Ltd)	23
30	Nyungwe Investment Group Ltd	16
	Total Number Of Vehicles	861

ANNEX 9: LIST OF LICENSED DRIVING SCHOOLS COMPANIES AND COOPERATIVES

	LICENSED DRIVING SCHOOLS COMPANIES /COOPERATIVES	NUMBER OF VEHICLE
1	Isange Driving School	2
2	Mayange Driving School	5
3	We Can Driving School	4
4	Kurujyejuru Regional Driving School	43
5	Zion Driving School Ltd	39
6	Alphonse Driving School Ltd	7
7	Asifiwe Driving School Ltd	4
8	Auto Ecole La Preference Ltd	4
9	Auto Ecole La Reference Ltd	5
10	Auto Ecole Maranatha Ltd	7
11	Better Driving School Ltd	21
12	Blessings Driving School Ltd	14
13	Cotrascus Ltd/Alpha Driving School	39
14	Diaspora Driving School Ltd	8
15	Don Bosco Driving School	4
16	Driving School Ikaze Ltd	13
17	Gisenyi Driving School Ltd	3
18	Hirwa Driving School Ltd	8
19	Intiganda Nyagatare(Co.T.M.In)	7
20	Narada Driving School Ltd	5
21	Omega Star Driving School Ltd	5
22	Reoboth Driving School Ltd	6
23	Rusizi Driving School Ltd	6
24	Superior Driving School	13
25	United Driving School Cooperative (U.D.S.C)	147
26	Urumuri Driving School Ltd	7
27	Welcome Driving School Ltd	8

28	Youth Driving School Ltd	18
29	Akagera Driving School Ltd	12
30	Auto Ecole Kabarondo Ltd	13
31	Auto Ecole La Charite Ltd	9
32	Auto Ecole Sainte Famille Ltd	4
33	Don't Worry Driving School	48
34	Karongi Nice Driving School Ltd	16
35	Kicukiro Driving School Ltd	14
36	Nice Driving School Ltd	5
37	Nyamata Driving School Ltd	10
38	Sainte Ritha V.T.C Ltd Driving School	6
39	Sinayi Driving School Ltd	10
40	Sion Driving School Ltd	24
41	Umuganda Driving School Ltd	47
42	Shilo Driving School Ltd	13
Total		683

ANNEX 10: LIST OF LICENSED FREIGHT FORWARDERS OPERATORS

LICENSED FREIGHT FORWARDERS OPERATORS

No	Company	Address
1	Bollore Transport & Logistics Rwanda Ltd	Gatenga / Kicukiro
2	Cma Cgm Rwanda Ltd.	Nyarugenge
3	Diamond Worldwide Logistics	Kimihurura Gasabo
4	East Africa Cargo	Hotel Des Mille Collines
5	Ecs Logistics Kenya Ltd	Muhima Nyarugenge
6	Frameg Cargo Services	Kicukiro District
7	Global Shipping Ltd	Nyarugenge Market
8	Kenfreight Rwanda Ltd	Gikondo Kicukiro
9	Pan African Logistics Limited	Gasabo
10	Plantinum Logistics Rwanda Ltd	Gitega Nyarugenge
11	Rapid Freight International	3742 Kigali
12	Spedag Interfreight	Magerwa Road
13	Real Transit Transport and Clearing Services Ltd	Gatenga - Kicukiro



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