

STRATEGIC PLAN 2022–2027

July 2022



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MESSAGE FROM THE CHAIRPERSON



Dr. GATARE IGNACE

Chairperson

On behalf of the Regulatory Board, Management and Staff of Rwanda Utilities Regulatory Authority (RURA), I have the pleasure to submit RURA's 5 Year Strategic Plan for fiscal years 2022 – 2027. It outlines how RURA intends to accomplish its mandate of regulating the public utilities that falls under its purview.

This strategic plan is in line with national programs and policies such as the National Strategy for Transformation (NST1) and Rwanda's Vision 2050. As part of this process, RURA also ensured alignment with certain regional and international strategy documents that are relevant to the sectors regulated.

RURA has also redefined the vision as; "To be globally recognized as an effective regulator of public utilities", reinforced with a more relevant and simple mission and set of values that are highly pertinent to the fulfillment of RURA's regulatory role.

We believe this Strategic Plan will enable the Authority to effectively respond to the needs, opportunities, and challenges within all sectors and I would like to emphasize that RURA is fully committed to successfully implementing this comprehensive plan.

Finally, I would like to sincerely thank everyone that were involved in the strategy formulation process and compilation of this strategic plan.

Dr. Gatare Ignace

Chairperson



MESSAGE FROM THE DIRECTOR GENERAL



Dr. ERNEST NSABIMANA

Director General

RURA's Strategic Plan for the period of 2022-2027 is the outcome of a long and comprehensive process, encompassing a comprehensive diagnosis engaging both internal and external stakeholders supplemented with international sector specialists and sector research.

Based on the above, RURA has identified nine (9) goals that will be crucial to execute its mandate.

Goal 1: Develop a fully-fledged R&D Function – with the capabilities to continuously scan the sector environments and its dynamics, experiment, and roll-out innovative regulatory responses (including data-driven and high-tech interventions), share knowledge and learnings via thought leadership initiatives.

Goal 2: Ensure that Rwanda's regulatory framework for the sectors regulated by RURA are comprehensive, conducive and updated. Thereby enabling high quality service provisions and contributing towards national development (including enabling investments into the sectors).

Goal 3: Ensure 100% of the service providers (i.e., all those who should be licensed) are identified, tracked and licensed – enabled by service quality and digital efficiencies.

Goal 4: Ensure 100% compliance (thereby minimizing the need for enforcement) – enabled by service quality and digital efficiencies.

Goal 5: Ensure availability, affordability and accessibility to ICT, Energy, Water & Sanitation and Transport services via the functions that RURA manages (ensuring Consumer Education, Protection and Safety). This also includes RURA's role to supplement national efforts to develop and advance these critical sectors

Goal 6: Develop and execute a comprehensive framework to measure the impact of RURA's contribution to the National Goals – based on which take corrective action.

Goal 7: Develop a future-ready organization to meet the opportunities and challenges in the sectors – via Organizational Structure, Capacity, Competencies, Processes & Systems.

Goal 8: Improve service and operational efficiency via digitizing RURA's key internal and external processes / interfaces.

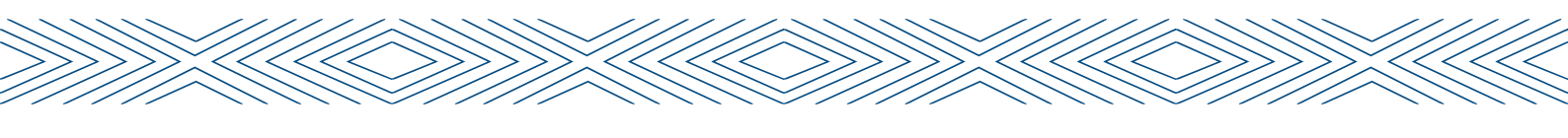
Goal 9: Ensure RURA continues to be financially self-sufficient – considering additional funding required to meet RURA's Strategic Pursuits, possible impact on revenues (due to sector dynamics) and therefore optimizing international development funding

In order to achieve the organizational goals formulated, a total of seventeen (17) Strategic Initiatives were developed supported by a comprehensive Implementation Plan / M&E Framework which has been further broken down into milestones and detailed actions for ease of implementation. Moreover, in order to assist the evaluation of the Strategic Initiatives progress, KPIs have also been assigned to each Initiative.

As a result, RURA Management is fully committed to implementing this Strategic Plan with the aim of achieving a quantum leap of performance of RURA as a regulatory entity and more importantly as an enabler of development in Rwanda.

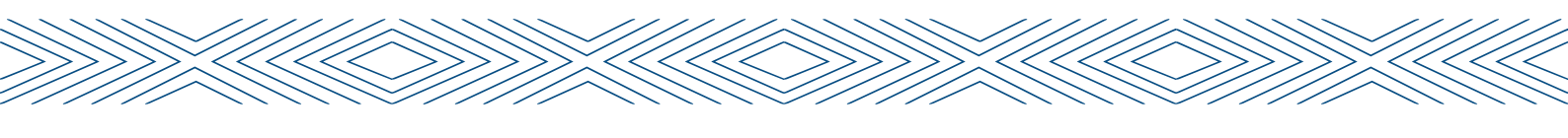
Dr. Ernest Nsabimana

Director General



ABBREVIATIONS

- ATU-UAT** – African Telecommunications Union
- CLMS** - Converged Licensing Management System
- CSOs** – Civil Society Organizations
- DG** – Director General
- EACO** - East African Communications Organisation
- EDCL** - Energy Development Corporation Limited
- EICV5** - Integrated Household Living Conditions Survey 5
- EICV6** - Integrated Household Living Conditions Survey 6
- EREA** - Energy Regulatory Association of East Africa
- EUCL** - Energy Utility Corporation Limited
- GM** – General Manager
- GSMA** - GSM Association
- ICT** – Information Communication Technology
- ICT SSP** – ICT Sector Strategic Plan
- IDD** - International Direct Dialing
- IPOSITA** - Rwanda Post Office
- IPPs** - Independent Power Producers
- ITC** – International Trade Centre
- ITU** - International Telecommunication Union
- KPIs** – Key Performance Indicators
- LPG** - Liquefied Petroleum Gas
- MC** – Management Committee
- M&E** – Monitoring & Evaluation
- MINICT** – Ministry of ICT, Rwanda
- MOU** – Memorandum of Understanding
- NCSA** - National Cyber Security Authority
- NST1** - National Strategy for Transformation



PAPU - Pan African Postal Union

PEST – Political, Economic, Social and Technological

PPP - Public Private Partnership

QMS – Quality Management System

R&D – Research & Development

RAEB - Rwanda Atomic Energy Board

RBA – Rwanda Broadcasting Agency

REG – Rwanda Energy Group

REMA - Rwanda Environment Management Authority

RGB – Rwanda Governance Board

RICA - Rwanda Inspectorate, Competition, and Consumer Protection Authority

RISA - Rwanda Information Society Authority

RMB - Rwanda Mines, Petroleum and Gas Board

RMC - Rwanda Media Commission

RSA – Rwanda Space Agency

RSB – Rwanda Standards Board

RURA – Rwanda Utilities Regulatory Authority

RWB - Rwanda Water Resources Board

SDGs – Sustainable Development Goals

SME – Small & Medium Enterprises

SWOT – Strengths, Weaknesses, Opportunities and Threats

UAF – Universal Access Fund

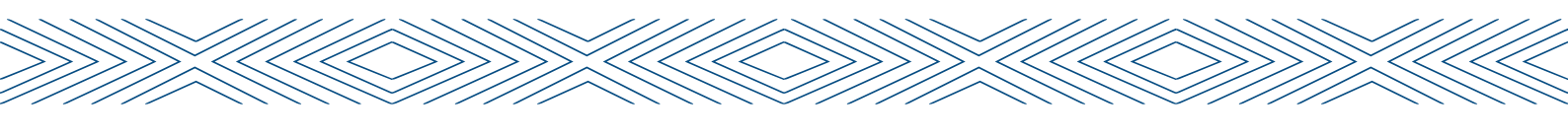
UN – United Nations

UNDP – United Nation Development Program

UPU - Universal Postal Union

WASAC - Water and Sanitation Corporation Ltd.

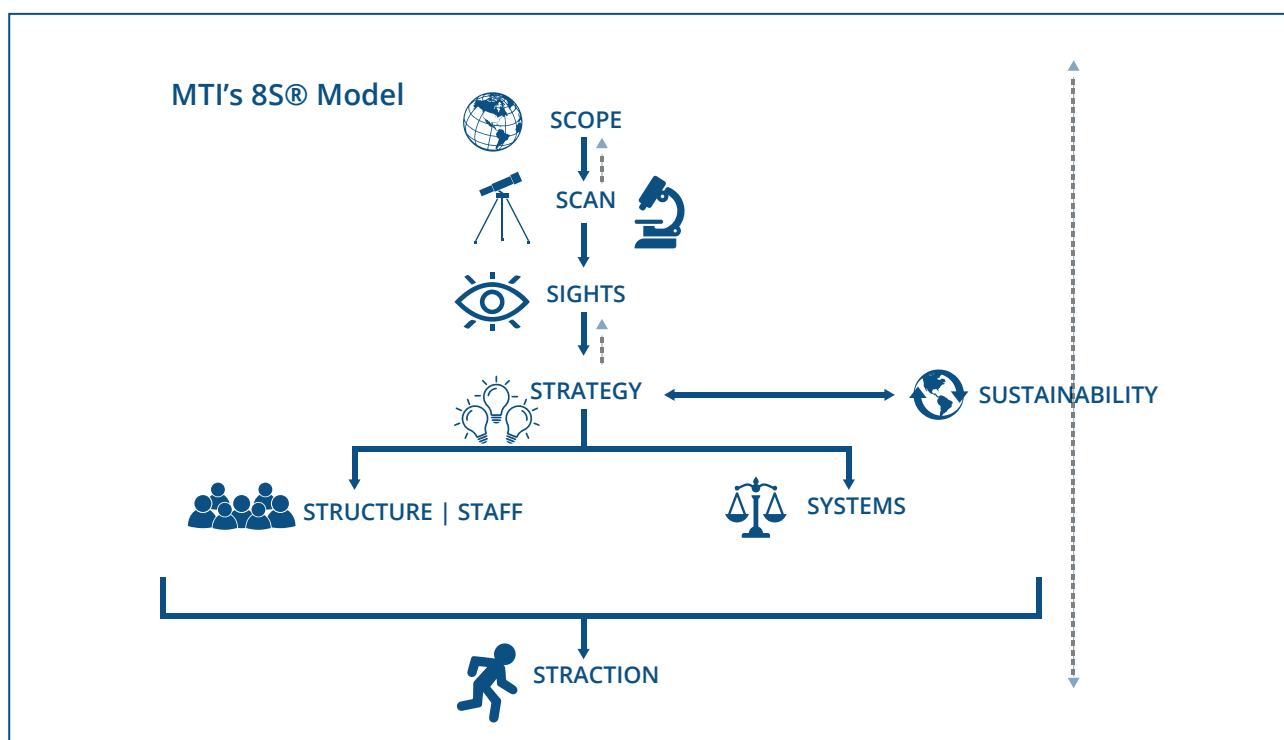
WTO – World Trade Organization



EXECUTIVE SUMMARY

- Rwanda Utilities Regulatory Authority (RURA) is a multi-sectoral regulator that is responsible to regulate the following public utilities in Rwanda;
 - Telecommunications, information technology, broadcasting and converging electronic technologies including the internet and any other audiovisual information and communication technology
 - Postal services
 - Renewable and non-renewable energy, industrial gases, pipelines and storage facilities
 - Water
 - Sanitation
 - Transport of persons and goods
 - Nuclear & Radiation Protection
- As the regulator of some of the most highly dynamic sectors, RURA is playing a key role in enabling Rwanda's Development and realizing Rwanda's Vision 2050 as a timely and strong regulatory framework geared towards growth is paramount for any nation's development.
- In this backdrop and with the existing Strategic Plan of RURA coming to an end, RURA undertook the development of the 5 Year Strategic Plan for the period of 2022 to 2027. This Strategic Plan utilized four key methodologies;
 1. RURA Staff Inputs and Interviews - covering all the internal departments, units and functions of RURA. This includes, the leadership, all the sectors, core functions and supporting functions. These interviews were supplemented by relevant staff inputs and information.
 2. Stakeholder Interviews - covering some of the key external stakeholders of RURA. This includes, line and linked ministries, government institutions, service providers / operators, international / regional organizations and consumer groups. Refer **Appendix 5** for the full list.
 3. Desk Research & Analytics – covering, Rwanda's national plans, domain / sector research, RURA's financial statements and RURA's previous strategic plan and achievements.

4. Sector Expertise - 12 international domain specialists were brought into this project via the consultant. All of them were involved in direct client interface and provided expertise and insights to the consultant.
- This Strategic Plan was developed based on MTI's 8S® Model which is a proprietary model of the consultant (MTI Consulting).

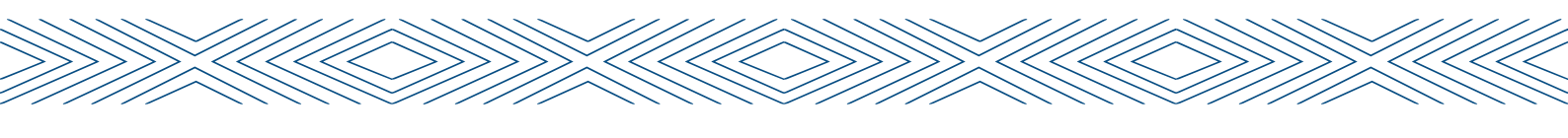


Presented below is a high-level summary of the conceptual framework upon which this Strategic Plan was developed.

| | |
|--|---|
| National Vision | As per Vision 2050, Rwanda's National Vision is to become an Upper Middle-Income Country by 2035 & High-Income Country by 2050. |
| National Sector Goals | In order to realize the National Vision, there are certain goals that have already been set in the key National Agenda documents such as NST1 and Vision 2050, which are applicable to the sectors that RURA regulates (refer Page 32). |
| Organizational Goals (RURA) | Considering the above, 9 goals have been formulated (refer Page 34) covering the Value- chain functions of RURA. Additionally, a clear link is also demonstrated between the National Sector Goals of Rwanda and Organizational Goals of RURA (refer Page 35-37). |
| Strategic Initiatives | In order to achieve the Organizational Goals formulated, a total of 17 Strategic Initiatives have been developed to undertake. Refer Page 55 to appreciate how each of these strategic initiatives link to the 9 Organizational Goals |
| Implementation Plan (Milestones & Actions) | The above 17 Strategic Initiatives are then broken down into Milestones and detailed Actions for ease of implementation. KPIs have also been assigned at a Strategic Initiative level to evaluate the progress of the Initiative. Refer M&E Framework |

1

SCOPE



- The intent of this module is:
 - To define the organizational scope of RURA – considering the sectors it needs to regulate and the key functions it needs to perform.
 - To review the current Mission Statement of RURA.

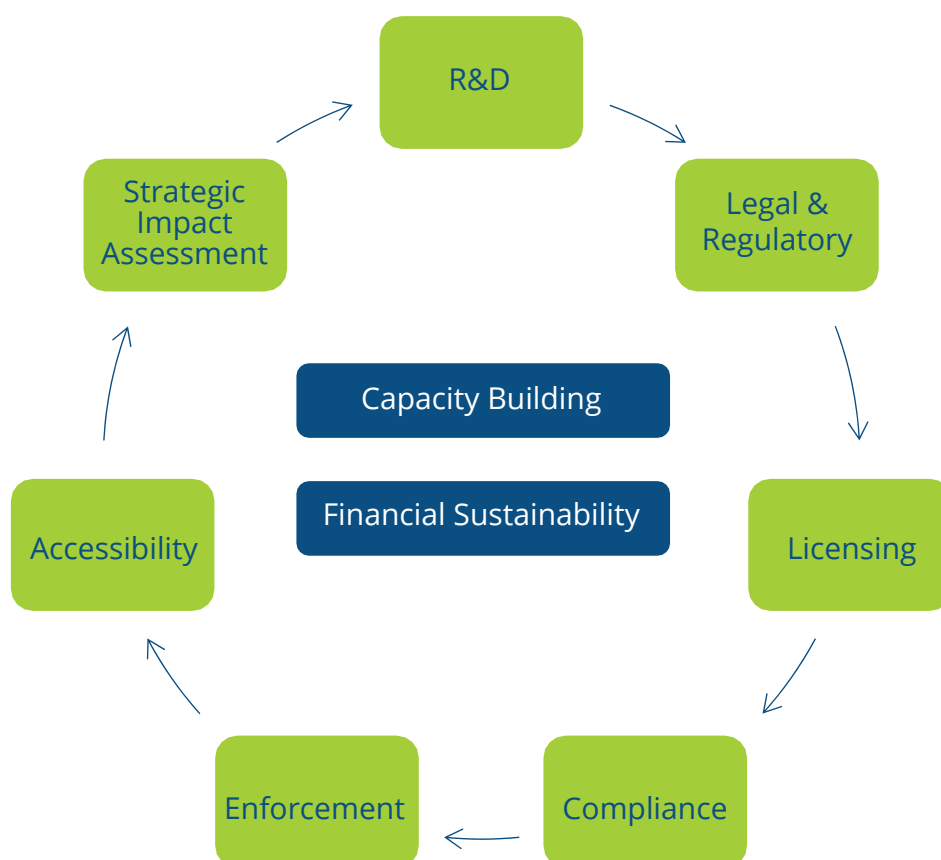
1.1 Organizational Scope

- The organizational scope for this 5-year strategic plan has been defined on two dimensions i.e., Functions and Sectors.

The functions are diagrammatically illustrated below, based on the concept of a value chain based circular flow. Refer next page for an overview of each function.

Functions (Value Chain Based)

*Note that here the focus is on the R&D as a function not as a department



Sectors (Regulated by RURA)

| ICT | Energy | Water & Sanitation | Transport | Nuclear & Radiation protection |
|---|--|--|---|---|
| <ul style="list-style-type: none"> • Telecom • IT Services & infrastrure • Electronic Communication Equipment • Cybersecurity & Tech Innovation • Media & Broadcasting • Postal, Courier & E-Commerce • E-waste & Circular Economy | <ul style="list-style-type: none"> • Electricity • Renewable Energy • Downstream petroleum • Gas | <ul style="list-style-type: none"> • Water Supply • Sanitation • Waste Management | <ul style="list-style-type: none"> • Road Transport • Waterways Transport | <ul style="list-style-type: none"> • Nuclear and Radiation Safety • Nuclear and Radiactive Sources Security |

RURA's Value Chain based Functions

RURA's Value Chain based concept for functions brings in the clarity and alignment required to achieve its mandate and mission.

As demonstrated in *Functions (Value Chain based) Model* in the previous page, the concept takes a circular flow covering RURA's key functions from R&D to Strategic Impact Assessment while Capacity Building and Financial Sustainability, at the core, are considered key enablers.

Below is an overview of each Value Chain Function:

| Value Chain Function | | Overview |
|----------------------|------------------------------|--|
| Key Functions | Research & Development (R&D) | R&D function will ensure RURA (in its role as a regulator) is up to date in the areas of public utilities regulation, emerging technologies, developments in the sectors it regulates, and is able to disseminate timely thought leadership communications. |
| | Legal & Regulatory | Via this function, RURA is able to initiate or influence the development of sound Policies and Laws enabling Rwanda's development - based on which RURA will draft regulations, guidelines and set tariffs that are in line with those Policies and Laws. |
| | Licensing | Licensing function will enable the timely licensing of service providers for the sectors it regulates (including any modifications to the existing licensing framework or development of new frameworks when the need arises). |
| | Compliance | Compliance function will ensure that all service providers comply with the regulations / guidelines / obligations with regards to licensing and service provisions via regular monitoring and inspections. Furthermore, this function will also be responsible for resolving any disputes that may arise with service providers. |
| | Enforcement | This function will ensure that appropriate actions are enforced against service providers that do not comply with the regulations / guidelines / obligations regarding to licensing and service provisions. |
| | Accessibility | RURA as a regulator plays a pivotal role in ensuring the services offered by the service providers (in the sectors it regulates) are accessible to the public. This will be accomplished for an example, via consumer awareness and signature initiatives such as the Universal Access Fund (UAF). |
| Key Enablers | Strategic Impact Assessment | Strategic Impact Assessment will allow RURA to continuously assess the effectiveness of the initiatives / operations carried out in the 6 functions above making sure RURA is contributing to the National Vision & Goals and capture learnings, challenges, opportunities to improve its operations. |
| | Capacity Building | Having the right people, processes, systems, and funding will be crucial to enable the performance of the functions above. |
| | Financial Sustainability | |



1.2 Organizational Scope



OUR VISION

- ✓ To be globally recognized as an effective regulator of public utilities



OUR MISSION

- ✓ We enable the regulatory, licensing, compliance, enforcement, and accessibility of public utilities in Rwanda.
- ✓ Thereby:
 - Enabling the availability and affordability of quality services to the public;
 - Protecting the rights of the consumers and balancing the interests of all the stakeholders;
 - Ensuring safety and security of all residents against possible threats caused by the regulated sectors that fall within the purview of RURA
 - Being a trustworthy and transparent enabler of service provisions Promoting free and fair competition; and
 - Contributing to the socio-economic development of Rwanda.

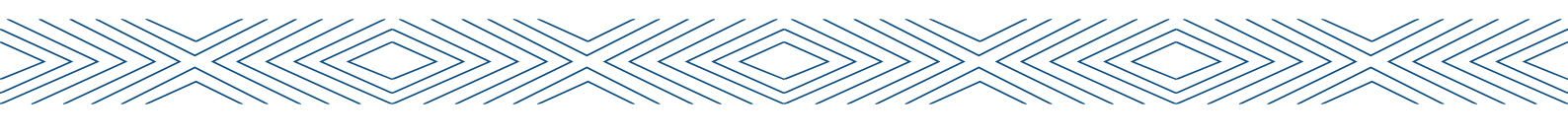


OUR VALUES

- ✓ The Authority upholds the following core values:
 - Independence
 - Transparency and Accountability
 - Fairness
 - Integrity
 - Collaboration
 - Data-Driven
 - Innovation
 - Sustainability

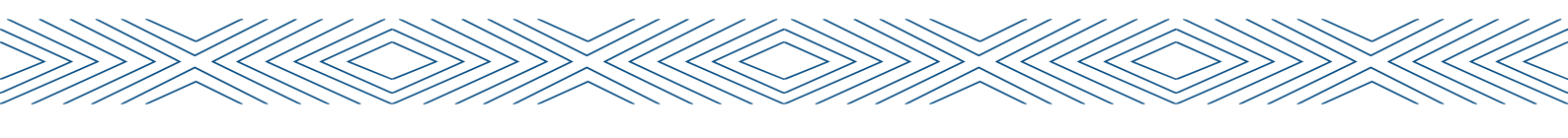
OUR MOTTO

Inspiring Development



2

SCAN



- The intent of this module is to scan the operating environment in which RURA operates. Based on this scan, RURA can assess its ability (i.e. strengths and weaknesses) to respond to the opportunities and challenges in the external environment.

2.1 National Expectations

What are the implications of and expectations from RURA arising from Rwanda Vision 2050, NST 1 and the SDGs?

2.2 Macro Environmental Scan

What are the PEST aspects that has an impact on RURA's performance?

2.3 Sector Environmental Scan

For each of the sectors that RURA regulates, what are the opportunities and challenges – that RURA needs to study and respond to?

2.4 Stakeholder Scan

Who are the key stakeholders in RURA's operating eco-system and what are their expectations from RURA?

2.5 Internal Organizational Scan

How are RURA's Sights, Strategy, Structure-Staff, Straction and Financials (as per MTI's 8S ® Model) geared to meet the opportunities and challenges in the external environment?

2.6 Last Strategic Plan

How effective was / is RURA's last strategic plan? – in terms of the documentation and the achievement of the stated objectives and initiatives

Implication of the Scans (above)

For each of the points in the 6 Scans above, RURA has asked the question 'So what?' – which means how does this impact RURA?

Each of these 'So What?' points have then been transferred to the relevant modules of MTI's 8S ® Model – so that each of these can be contextually considered and for responses to be developed in each module.

2.1 National Expectations

- What are the implications of and expectations from RURA arising from Rwanda's Vision 2050, NST1 and the UN's Sustainable Development Goals (SDG)?

| Considerations for RURA | Relevant Source (NST1 / Vision 2050 / SDG) | Area of Impact for RURA | |
|---|---|-------------------------|----------------------|
| | | Sector | Value Chain Function |
| Promote research and development to fast-track Rwanda's economic transformation | NST1 | All sectors | R&D |
| Achieve high standards/ quality services and customer care across public and private sectors | NST1 | All sectors | Compliance |
| Ensure 100% Government services are delivered online by 2024 | NST1 | All sectors | All functions |
| Rwanda is targeting to belong to the top ten countries in doing business in 2035 | Vision 2050 | All sectors | Legal & Regulatory |
| Support domestic technology development, research and innovation in developing countries, including by ensuring a conducive policy environment for inter alia, industrial diversification and value addition to commodities | SDG | All sectors | Legal & Regulatory |
| Promote and enforce non-discriminatory laws and policies for sustainable development | SDG | All sectors | Legal & Regulatory |
| Reduce the cost of doing business and facilitate trade | NST1 | All sectors | Accessibility |
| Promote industrialization and attain a structural shift in the export base to high-value goods and services with the aim of growing exports by 17% annually | NST1 | All sectors | All functions |
| Access to electricity will be scaled up to all from 34.4% (EICV5) to 100% by 2024 | NST1 / Vision 2050 | Energy | Accessibility |
| Promote use of alternative fuels such as cooking gas and biogas | NST1 | Energy | Accessibility |
| Tariffs will be kept affordable by developing long term least cost power generation plans | Vision 2050 | Energy | Legal & Regulatory |
| Continued emphasis on clean and renewable energy as a source of generation with at least 60% of installed capacity in this category | Vision 2050 | Energy | R&D |
| By 2030, ensure universal access to affordable, reliable and modern energy services | SDG | Energy | Accessibility |
| By 2030, increase substantially the share of renewable energy in the global energy mix | SDG | Energy | R&D |
| Generation capacity increased to ensure that all demand is met and a 15% reserve margin is maintained | NST1 / Energy SSP | Energy | Accessibility |
| Petroleum strategic reserves increased to cover three months' supply. | NST1 / Energy SSP | Energy | Accessibility |

| Considerations for RURA (Cont'd) | Relevant Source (NST1 / Vision 2050 / SDG) | Area of Impact for RURA | |
|---|---|-------------------------|-----------------------------------|
| | | Sector | Value Chain Function |
| Capacity building for experts within the framework of the national nuclear energy program of the Republic of Rwanda | IGA on CST, 2019 | Nuclear and Radiation | Capacity Building / Accessibility |
| Rwanda to acquire 2 more cancer centers with nuclear/radiation diagnostic & treatment technologies by 2024 | RNCC Plan 2020-2024 | Nuclear and Radiation | Accessibility |
| Accelerate niche emerging sectors, such as nanotech, biotech, block chain technology or AI | Vision 2050 | ICT | R&D |
| Rwanda to differentiate itself as the "proof-of-concept" country | Vision 2050 | ICT | Legal & Regulatory |
| Position Rwanda as Africa's leading ICT hub by 2024 | NST1 / ICT SSP | ICT | Legal & Regulatory |
| 80% internet penetration by 2024 | NST1 / ICT SSP | ICT | Accessibility |
| Digital literacy for all youth (16-30 years) by 2024 | NST1 | ICT | Accessibility |
| Rwanda will ensure digital literacy for all by 2035 | Vision 2050 | ICT | Accessibility |
| Enhance the use of enabling technology, in particular ICT, to promote the empowerment of women | SDG | ICT | Accessibility |
| Significantly increase access to ICT and strive to provide universal and affordable access to the internet in least developed countries by 2020 | SDG | ICT | Accessibility |
| Rwanda's cyber space and information assets secured | NST1 / ICT SSP | ICT | Legal & Regulatory |
| Vibrant, competitive, and innovative ICT private sector established | NST1 / ICT SSP | ICT | Legal & Regulatory |
| Vibrant smart cities sustained | NST1 / ICT SSP | ICT | Legal & Regulatory |
| 30% of business/companies will participate in e-commerce by 2024 | NST1 / ICT SSP | Postal & E-com | Licensing |
| Improve accessibility to broadcasting contents through government led development of promoting the broadcasting industry | NST1 / ICT SSP | Media & Broadcasting | Accessibility |
| By 2030, achieve universal and equitable access to safe and affordable drinking water for all | SDG | Water | Accessibility |
| Access to water will be scaled up to all from 87.4% (EICV5) to 100% by 2024 | NST1 / Vision 2050 | Water | Accessibility |
| Access to sanitation will be scaled up to all from 86% (Est. 2016) to 100% | NST1 / Vision 2050 | Sanitation | Accessibility |
| By 2030, substantially reduce waste generation through prevention, reduction, recycling and reuse | SDG | Sanitation | Legal & Regulatory |
| By 2030, achieve access to adequate and equitable sanitation and hygiene for all | SDG | Sanitation | Accessibility |

| Considerations for RURA (Cont'd) | Relevant Source (NST1 / Vision 2050 / SDG) | Area of Impact for RURA | |
|--|---|-------------------------|----------------------|
| | | Sector | Value Chain Function |
| Improve rural and urban transportation services – avg. waiting time in the City of Kigali for buses during peak hours will be reduced from 30 minutes (2016/17) to 15 minutes by 2023/24 | NST1 | Transport | All functions |
| Proportion of population conveying with public transportation to be 24% by 2035 and 40% by 2050 | Vision 2050 | Transport | Accessibility |
| Develop maritime transport on Lake Kivu, River Akagera and other water bodies | Vision 2050 | Transport | R&D |
| By 2030, provide access to safe, affordable, accessible, and sustainable transport systems for all | SDG | Transport | Accessibility |
| Advocate on the removal of trade barriers for free movement of goods, services, and capital. | NST1 / Vision 2050 | Transport | Legal & Regulatory |
| Convenient public transport will be accessible at least within 500m radius or less | Vision 2050 | Transport | Accessibility |

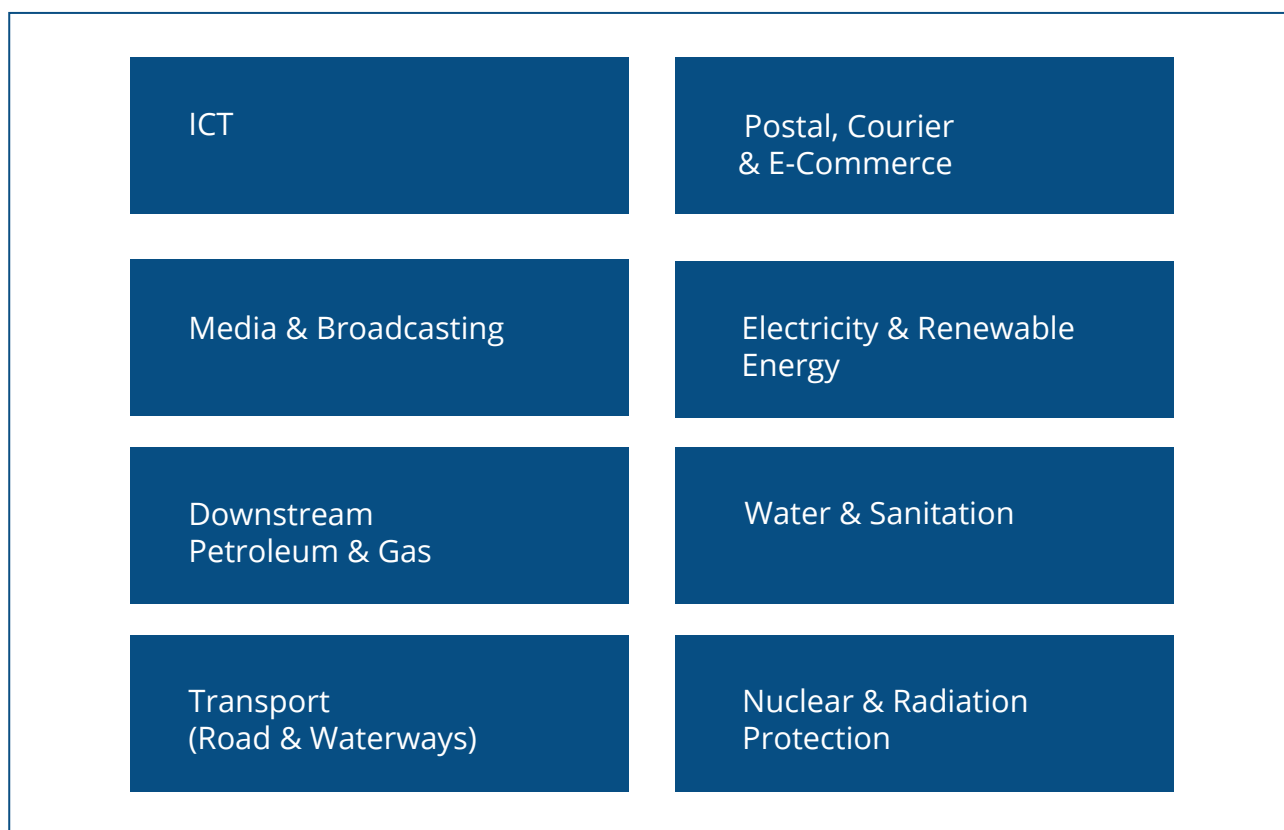
2.2 Macro Environmental Scan

- What are the Political, Economic, Social and Technological aspects that has an impact on RURA's performance?

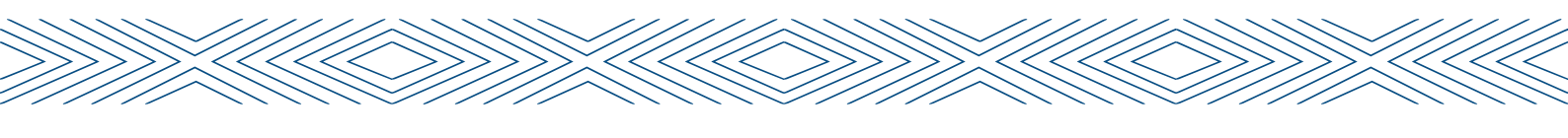
| | Political | Economic | Social | Technological |
|---|---|---|--|--|
| Relevant Points arising from 2.1 National Expectations | <ul style="list-style-type: none"> Advocate on the removal of trade barriers for free movement of goods, services, and capital. Rwanda is targeting to belong to the top ten countries in doing business in 2035. Rwanda to differentiate itself as the “proof-of-concept” country. Tariffs will be kept affordable by developing long term least cost power generation plans. | <ul style="list-style-type: none"> Promote research and development to fast-track Rwanda's economic transformation. | <ul style="list-style-type: none"> Access to electricity will be scaled up to all from 34.4% (EICV5) to 100% by 2024. Access to water will be scaled up to all from 87.4% (EICV5) to 100% by 2024. Access to sanitation and hygiene will be scaled up to all from 86.2% (EICV5) to 100%. Digital literacy for all youth (16- 30 years) by 2024. Convenient public transport will be accessible at least within 500m radius or less. | <ul style="list-style-type: none"> Rwanda to differentiate itself as the “proof-of-concept” country. Accelerate niche emerging sectors, such as nanotech, biotech, blockchain technology or AI. Ensure 100% Government services are delivered online by 2024. |
| Considerations outside the above | <ul style="list-style-type: none"> Political will and stability have been a key enabler of development in Rwanda. Global recognition for 'Brand Rwanda'. Ongoing integration and policy harmonization efforts within the region As evident from '2.4 Stakeholder Scan' – RURA needs to collaborate with several other Government Institutions whose roles may be overlapping with RURA. | <ul style="list-style-type: none"> Continued advancements in ICT capabilities making Rwanda attractive to potential investors. Government commitments for rapid economic transformation is demonstrated in national plans such as Vision 2050 / NST. Cost and reliable supply of electricity combined with Rwanda's landlocked nature poses a major challenge. COVID-19 has impacted the economic performance of Rwanda and that has manifested in most of the sectors that RURA regulates. | <ul style="list-style-type: none"> Commendable achievements in gender equality which has resulted in Rwanda being the Best Place to be a Woman in Africa and 9th Globally. Digital literacy in Rwanda currently stands below 10%, a few major bottlenecks include affordability of smart devices, internet, and electricity. Skilled and competent resource pool remains a challenge, especially for science & technology. COVID-19 has led to an increase in ICT usage – across multiple industries – due to the inability to carry out in person shopping, schooling, office attendance etc. | |
| Refer to 2.3 Sector Environmental Scan – in which the relevant PEST factors have been integrated. | | | | |

2.3 Sector Environmental Scan

- Under this module, RURA studied the full suite of sectors and sub- sectors that fall under its mandate to regulate.
- Based on above, an overview is presented for each sector covering;
 - Key sector indicators / highlights at a national level
 - Existing regulatory framework
 - Type of players in the sector
 - Key opportunities and challenges that RURA needs to study and respond
- Below is the sector classification followed for the scan in Page 18 - 31;



Refer Appendix 1 for Key Sector Achievements (2017 - 2020)



ICT (TELECOM, IT SERVICES, CYBERSECURITY AND INNOVATION)

Sector Highlights

- **84.1%** Mobile Phone Penetration
- **<20%** Smart Phone Penetration
- **10.8** million Mobile Connections
- **62.9%** Internet Penetration
- **38** Licensed Service Providers

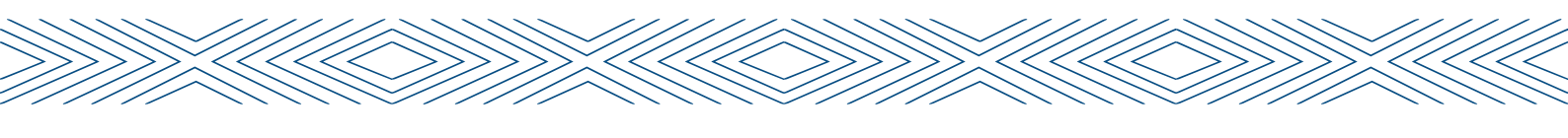
Sources: RURA and MINICT

Regulatory Target Market (no. of licensed service providers)

- Mobile Telecom Operators (2)
- Internet Service Providers (24)
- Network Capacity Resellers (1)
- Wholesale Network Service Providers (1)
- Network Facility Providers (2)
- Application Service Providers (4)
- E-waste management Licensee (3)
- Satellite network filing Operator (1)

Regulatory Framework

- Law N°24/2016 of 18/06/2016 governing Information and Communication Technologies (ICT)
- Regulation on Importation and type approval of Electronic Communication Equipment
- Regulation governing Radio Frequency Management
- Regulations governing the quality of service of Cellular mobile network services
- Regulations governing E-waste management in Rwanda
- Regulations governing Cybersecurity
- Guidelines on short-range devices
- Guidelines on requirements for Indoor Building Solution (IBS)- Distributed Antenna System Installation.



Opportunities

- The political will to develop the ICT sector with strong and consistent National ICT policies and institutions such as RISA, MINICT, RURA, etc.
- Rwanda's focus on e-government, accelerating the digitization of government services.

Challenges

- Lack of skilled human resources limiting the level of research to be conducted to develop regulatory instruments (including cybersecurity aspects) needed for emerging technologies.
- Limited industry-based research and analysis carried out by RURA.
- Rwanda is one of the very few countries globally that consider the telecom and ICT sector as being a common utility hence its regulation falls under a generic converged utility regulator.
- Although the model has its benefits, one of the key issues include its inability to effectively regulate the sector given that telecom/ICT's pace of development outperforms other utility sectors.
- Requirement of advanced ICT infrastructures within RURA to ensure the supply of reliable information which will be critical for compliance and enforcement quality.
- Low digital literacy rate (standing currently below 10%) combined with low smart phone penetration (<20%) and high cost of electricity limits the access / usage of digital services.
- Rwanda, with the help of its National Broadband Planning, has been able to bring down the cost of internet significantly. However, it is still considered expensive.

POSTAL, COURIER & E-COMMERCE

Sector Highlights

- **15** National Post Office Branches
- **7000** P.O. Boxes
- **62.9%** Market Share held by International Courier License holders
- **24** licensed Service Providers

Sources: RURA and IPOSITA

Regulatory Target Market (no. of licensed service providers)

- Intra – City & Domestic Courier Operators (9)
- Inbound Courier Operators (1)
- International Courier (6)
- International Inbound Courier Operators (2)
- Public Postal Operator (1)
- Regional Courier (3)

Regulatory Framework

- Pursuant to the Law n° 09/2013 of 01/03/2013 establishing RURA and determining its mission, powers, organization, and functioning, in its article 2 specifies that Postal Sector is among the sectors to be regulated by RURA.
- Regulation governing Postal and Courier Services in Rwanda.

Opportunities

- Globally, postal operators are diversifying into non-mail segments such as logistics, freight, parcels and financial services due to poor business prospects in traditional mail.
- Ecommerce driven demand for small packages delivery
- Benefits of digital addressing for last mile delivery services.
- Already established postal networks are making postal operators an attractive complementary for parcel deliveries / international operators

Challenges

- Continued decline of traditional mail such as letter posts, due to instant communication technologies (this is further accelerated by COVID-19 induced pressure).
- Profitability concerns among industry participants.
- COVID-19 induced travel restrictions have caused delivery delays due to labor shortages and disruptions to air transport routes.
- Given that the Postal sector is betting on Ecommerce – growth in digital literacy will be paramount. Presently, digital literacy rate is below 10%.

MEDIA & BROADCASTING

Sector Highlights

- **84.1%** Mobile Phone Penetration
- **<20%** Smart Phone Penetration
- **73.2%** Literacy Rate - <10% Digital Literacy
- **320,198** Registered PayTV Subscribers. Only 65,251 (~30%) are Active Subscribers
- **110** Licensed Operators

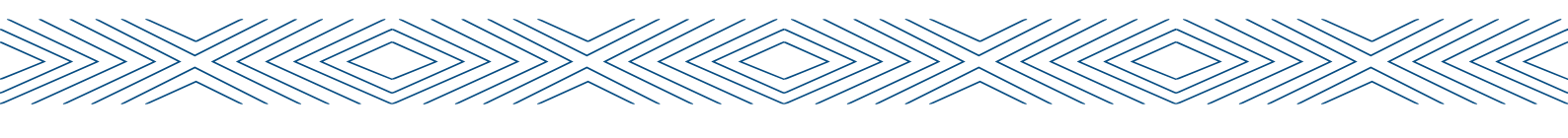
Sources: RURA, MINICT and RGB

Regulatory Target Market (no. of licensed service providers)

- Signal Distributors (1)
- Pay TV Operators (4)
- FM Radio Stations (30)
- Television Stations (18)
- Online Media Houses (23)
- Print Media Houses (31)
- International Media Houses (3)

Regulatory Framework

- Pursuant to the Law n° 09/2013 of 01/03/2013 establishing RURA and determining its mission, powers, organization, and functioning, in its article 2 specifies that Media is among the sectors to be regulated by RURA.
- Regulations governing licensing of Multimedia Services provision in Rwanda.
- Regulations governing Broadcasting services
- Regulations governing satellite subscriptions TV services



Challenges

- Regulation of digital media remains a challenge.
- There is still a gap on the 'right to information' according to RGB's Media Barometer (2018) indicated by journalists, CSOs and the business community.
- Profitability in the media sector remains a challenge.
- This situation is further worsened by the ongoing pandemic pressuring businesses to cutdown on expenses such as advertising which will continue to adversely impact media operators.
- Lack of advance systems for compliance monitoring.
- Poor enforcement of Copyright / Intellectual Property laws, as a result, discouraging artists and the creative community to showcase / monetize their work.
- Digital literacy remains low affecting consumption of content.

ELECTRICITY & RENEWABLE ENERGY

Sector Highlights

- **67.1%** Cumulative Connectivity Rate
- **872,646** MWh Total Electricity Generation (2020)
- **96.5%** Domestically Generated and via Regional Shared Plants
- **3.5%** Imported
- **52%** of the Energy Mix is Hydro, followed by Methane Gas (24.5%)
- **34** Electricity Generation License Holders
- **90** Practitioners with valid Electrical Installation Permits

Sources: RURA and REG

Regulatory Target Market (no. of licensed service providers)

- Generation - IPPs (34)
- Transmission (1)
- Distribution (1)
- Domestic Trade (1)
- International trade (1)
- Accredited Electrical Practitioners (90)

Regulatory Framework

- Law N°52/2018 of 13/08/2018 Modifying Law N°21/2011 of 23/06/2011 Governing Electricity in Rwanda as Modified to Date
- Regulations governing the Simplified Electricity Licensing Framework for Rural Electrification in Rwanda
- Electricity Safety Regulations
- Electricity Installation Regulations
- Electricity Licensing Regulations
- Electricity Quality of Service Regulations
- Right of Way Guidelines for Power Lines
- Minimum Technical Requirements Guidelines for Mini grids in Rwanda
- Guidelines promoting Energy Efficiency Measures

Opportunities

- Shifting energy mix - Countries are diversifying into more sustainable / environment friendly solutions including non-hydro renewables and natural gas.
- Ambitious national plans to have universal access to electricity by 2024.

Challenges

- Inadequate access to reliable data leading to poor planning – presently the data is scattered hence need integration.
- Ageing infrastructure also remains a challenge and leading to inefficiencies
- Outdated electricity law
- Insufficient investments to initiate electricity transmission and distribution projects
- Excess electricity supply compared to demand.
- Rwanda's electricity tariffs are among the highest in the region and are non- cost reflective.
- Low electrification, especially in rural areas. Low usage also remains a concern.
- Low rate of access to modern / cleaner energy sources (high usage of biomass).

DOWNSTREAM PETROLEUM & GAS

Sector Highlights

Downstream Petroleum

- **100%** of Petroleum Products requirements are imported
- **17%** of Total National Imports
- **72** Million liters of Storage Capacity
- **23** Million liters consumed per month

Gas

- **24.5%** of the Energy Mix is Methane Gas, only 2nd to Hydro (52%)
- **55** billion cubic meters (est.) of Methane Gas reserves in Lake Kivu
- **700MW** of estimated output – Lake Kivu is equally shared between Rwanda and DRC
- **10,000** tonnes of LPG is consumed annually
- **77.7%** of households use Firewood as cooking fuel and only 4.2% use Gas

Sources: RURA, REG, EICV6, MINFRA and WTO

Regulatory Target Market

- Importers
- Wholesalers

Retailers (e.g., Petrol Service Stations)

Regulatory Framework

- Law N°85/2013 Of 11/9/2013 Regulating Petroleum and Petroleum Products Trade in Rwanda
- Prime Minister's Order determining RURA as regulatory authority for trade of petroleum, petroleum products and its additional responsibilities
- Regulations governing Liquefied Petroleum Gas (LPG)
- Regulation governing for fuel depots and importation
- Regulation governing road transportation of petroleum products
- Regulations governing for Petrol Service Stations

- Law n° 09/2013 of 01/03/2013 establishing RURA and determining its mission, powers, organization and functioning

Opportunities

- Government commitment to reduce biomass consumption from 79% (2017) to 42% by 2024 via alternatives.
- Given that Methane Gas is a unique resource to Rwanda, the govt. will further prioritize its usage for electricity production
- Shift towards low carbon solutions globally hence emphasizing the need for alternative sources such as hydrogen fuel and bioenergy.
- Increasing demand from both industries and consumers - shift from biomass to LPG.

Challenges

- Price volatility and shocks are a cause of concern due to Rwanda's dependency on imports
- Inadequate access to reliable data leading to poor planning / monitoring.
- Limited staff for compliance monitoring
- Affordability of LPG remains a challenge.
- COVID-19 induced travel pressure could also slow down importation

WATER & SANITATION

Sector Highlights

- **89.2%** of households are using an improved drinking water source at national level
- **94.6%** of rural water supply is managed by operators under PPP contracts
- Urban Water Supply is managed by WASAC
- **66** Licensed Operators in the water sector
- **89.6%** of households are using improved sanitation at national level
- **256** Licensed Operators in the sanitation sector
- **Kigali** is the cleanest city in Africa

Sources: RURA and EICV6

Regulatory Target Market (no. of licensed service providers)

- Simple water supplier scheme operators (63)
- Urban water utility (1)
- Bulk water production (1)
- Complex rural water supply system (1)
- Solid waste collection and transportation service providers (2)
- Waster-water treatment service providers
- Cleaning services operators (199)

Regulatory Framework

- Law n° 09/2013 of 01/03/2013 establishing RURA and determining its mission, powers, organization and functioning
- Regulations governing Water Supply Services in Rwanda
- Regulations governing Decentralized Wastewater Treatment Systems
- Regulations governing Cleaning Service Provision
- Regulations governing the Provision of Services of Hazardous Waste Management
- Regulations governing Liquid Waste Collection and Transportation

Opportunities

- Rising demand for Water to fulfill economic activities.
- Possible extension of WASAC's mandate and role in sanitation could improve integration and coordination.
- Government commitment to achieving universal access to clean water services and sanitation.

Challenges

- Urbanization and changing climate creating new barriers to service provisions
- Inadequate access to reliable data leading to poor planning / monitoring
- Absence of Laws for Water & Sanitation
- Lack of water resources and depletion of existing water resources, resulting in high costs of service provision.
- Gaps in human resource capacity in areas of planning, project management and operation and maintenance of water and sanitation infrastructures
- Low private sector interest to invest, due to low return on investment in the sanitation sector
- High non-revenue water (43.4%) largely due to the poor distribution infrastructure.
- Non-compliance of service providers.
- Funding constraints to upgrade existing infrastructures.
- Unclear stakeholder roles in the sanitation sector.

TRANSPORTATION (ROAD & WATERWAYS)

Sector Highlights

- **90%** of goods transportation traffic and passenger travel are catered by Road Transport
- **221,000** registered vehicles consisting;
- **52%** Motorcycles and 38% Passenger Vehicles
- **187** Licensed Road Transport Operators
- **354** Licensed / Authorized Waterway Transport Operators

Sources: RURA, MINFRA and RTDA

Regulatory Target Market (no. of licensed service providers)

- Public transport companies / cooperatives (42)
- Transportation of goods companies / cooperatives (25)
- Taxi cabs companies / cooperatives (48)
- Rental cars companies / cooperatives (30)

- Driving school companies / cooperatives (42)
- Waterways operators (354)

Regulatory Framework

- Pursuant to the Law n° 09/2013 of 01/03/2013 establishing RURA and determining its mission, powers, organization and functioning, in its article 2 specifies that transportation of persons and goods is among the sectors to be regulated by RURA
- Regulations governing Public Transport Bus Services
- Regulations governing Motorcycle Public Transport Services in Rwanda
- Regulations governing Passengers Road Transport
- Code of Conduct of Public Road Transport Drivers in Rwanda
- Regulations governing waterways transport
- Regulations governing transport of goods
- Code of Conduct for Boat Drivers of Public Passenger and Cargo Boats in the Republic of Rwanda

Opportunities

- Global Trends
 - Industry wide automation via mobile ticketing and other smart applications powered by technologies such as big data to support the daily commute, optimizing vehicle dispatch, routes and schedules.
 - Introduction of multimodal solutions such as bike / scooter rentals, ride-share, shared parking spaces to complement public transit
- Digital licensing processes through the CLMS platform combined with other IT based initiatives such as smart taximeters geared towards modernizing the sector
- International developmental support to develop modern waterways infrastructure

Challenges

- Growing environmental concern as transportation is a major contributor to CO2 emissions worldwide, with road goods transport representing the largest
- It's important to note that the take up of digital licensing services are highly dependent on the digital literacy levels – which is evident via the share of complaints received (80%) in the FY 2019/20.
- Limited staff for compliance monitoring, especially for Waterways Transport.
- COVID-19 induced travel restrictions could adversely impact operators.
- Passenger usage of waterways modes of transportation is considerably low largely due to limited infrastructure.

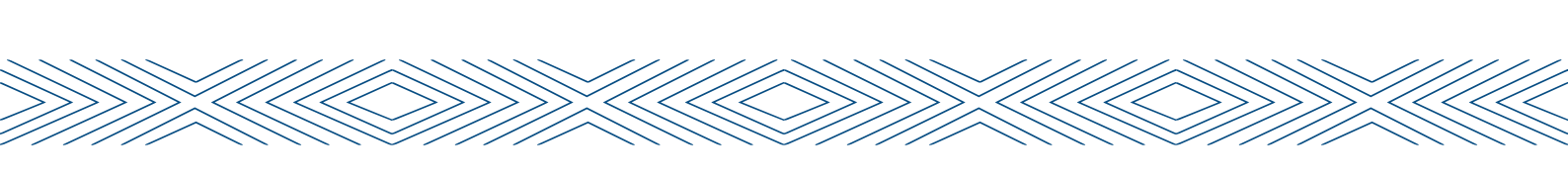
NUCLEAR & RADIATION PROTECTION

Regulatory Framework

- Law No. 59/2017 of 24/01/2018 Governing Radiation Protection in Rwanda
- Regulations governing Radiation Protection in Diagnostic and Interventional Radiology
- Regulations governing Radiation Protection in Radiotherapy in Rwanda
- Regulations governing Security of Radioactive Materials During Manufacturing, Use and Storage and of Associated Facilities in Rwanda
- General Regulation governing Radiation Safety in Rwanda

Regulatory Target Market

- Authorizations are currently issued to Nuclear material;
- Importers & exporters
- Manufacturing & storage
- Transporting
- Disposal
- Radiation Sources & generators



Opportunities

- Financial independence of RURA and International Cooperation's support to Rwanda remains an opportunity.

Challenges

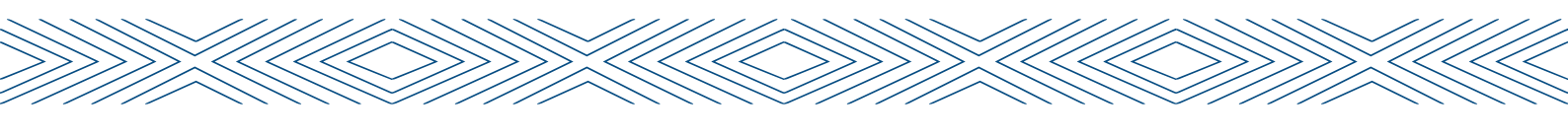
- Incomplete regulatory framework.
- High investment / CAPEX, operational and maintenance costs, including the limited availability of a skilled resource pool
- Licensees need to be educated on radiation protection, however, there are no established training programs in place.
- Limited availability of required equipment (measurement/dosimetry) and services (maintenance/calibration)
- Lack of awareness of the radiation safety needs.
- Increased public misconceptions in Rwanda's involvement in this space.

2.4 Stakeholder Scan

- RURA is required to interface with multiple stakeholders regularly to fulfill its mandate, operate efficiently and for the successful implementation of this Strategic Plan.
- Table below answers two questions i.e., who are the key stakeholders in RURA's operating eco-system and what are their expectations from RURA?

| External Stakeholders | Scope of the Stakeholder | Interface Considerations |
|---|--|--|
| Consumers / Consumer Organizations | <ul style="list-style-type: none"> ▪ Consumers are the end users of public utilities such as ICT, electricity, transport, and water. They pay tariff to receive the utilities. ▪ Consumer groups represent the interests of consumers as a collective. | <ul style="list-style-type: none"> ▪ Availability of affordable and quality public utilities. ▪ Consumer awareness on utilities, services, prices / tariff, rights and complaint procedures. ▪ Intermediary between consumers, service providers and other institutions to resolve consumer issues and complaints. ▪ Active engagements with consumer groups on consumer awareness and protection. |

| | | |
|--|--|--|
| Service Providers / Service Provider's Associations | <ul style="list-style-type: none"> Service providers offer the public utilities to the consumers. Primarily regulated and licensed by RURA. Both private service providers and government owned service providers Service Providers Associations represent the interests of service providers as a collective. | <ul style="list-style-type: none"> R&D engagements - to be up-to-date on sector developments. Accurate and on-time data collection and analysis. Conducive operating environment via; up-to-date regulations (including regulatory fees) and fair competition. Seamless and efficient licensing process. Effective and transparent compliance monitoring and enforcement. Active engagements with Service Provider's Associations. |
| Office of the Prime Minister | <ul style="list-style-type: none"> Coordinating the national policies and development programs. Monitoring and evaluating the implementation of national policies and programs. Overseeing the functioning of the Government's Institutions. | <ul style="list-style-type: none"> Ensure RURA's mandate is delivered. Contribute to national plans, policies, agendas and programs (NST1, Vision 2050, SDGs). Expertise / Advisory in developing regulated sectors. Timely and accurate reporting. Accountability and transparency in all dealings. |
| Parliament | <ul style="list-style-type: none"> Legislate and oversee the executive action for and on behalf of the people of Rwanda. | |
| Rwanda Development Board (RDB) | <ul style="list-style-type: none"> Accelerate Rwanda's economic development by enabling private sector growth – as the One Stop Shop for business and investments. | <ul style="list-style-type: none"> Conducive regulatory environment for business and investment. Seamless and efficient licensing process. Assistance in resolving investor queries. Timely reporting of key sector statistics. Stronger collaboration with regards to regulation formulation. |



| External Stakeholders | Scope of the Stakeholder | Interface Considerations |
|---|---|---|
| Line and Linked Ministries <ul style="list-style-type: none"> Ministry of ICT, Ministry of Infrastructure, Ministry of Trade and Industry, Ministry of Local Government | <ul style="list-style-type: none"> Ministries are in charge of developing and implementing the national agendas, plans, policies and programs of their respective sectors. | <ul style="list-style-type: none"> Contribute to ministry plans, policies, agendas and programs (linked to national plans). Initiate the development of legal and regulatory frameworks of the relevant sectors. Expertise / Advisory in developing regulated sectors. |
| Key Government / Non-Government Institutions (with a similar mandate for different sectors and functions) | <ul style="list-style-type: none"> Perform the specific mandate given – in terms of development of the respective sector and functions. There could be possible overlaps with RURA's mandate. | <ul style="list-style-type: none"> Collaborate to develop, promote and enforce regulations in the respective sectors / functions – in order to support the national plans, agenda, policies and programs. Expertise / Advisory in developing respective sectors / functions. |
| All Other Ministries and Government Institutions | <ul style="list-style-type: none"> Perform the ministry or institutional mandate. | |
| International / Regional Organizations | <ul style="list-style-type: none"> Perform the mandate of the organization – including international collaborations to develop respective sectors / functions. | <ul style="list-style-type: none"> Represent Rwanda in international / regional platforms – share Rwanda's learnings and best practices. Collaborate to develop the respective sectors / functions in Rwanda – by acquiring funding or technical expertise. |
| Suppliers | <ul style="list-style-type: none"> Suppliers that RURA is procuring supplies from to fulfill a specific good / services requirement. | <ul style="list-style-type: none"> Adherence to contract terms. Equal opportunity and fair procurement. Timely information sharing for improvements and support services delivery. |
| Media | <ul style="list-style-type: none"> Local / International media that deliver news to mass/ targeted audiences. | <ul style="list-style-type: none"> Timely and accurate information sharing. |

| Internal Stakeholders | Scope of the Stakeholder | Interface Considerations |
|-------------------------|---|---|
| Regulatory Board | <ul style="list-style-type: none"> Regulatory Board, comprised of 7 board members are responsible for overall oversight of RURA's mandate. | <ul style="list-style-type: none"> Efficient management of day-to-day operations. Transparent, accountable and sustainable organization. |
| Staff | <ul style="list-style-type: none"> This is the management and staff of RURA that carries out day-to-day operations. | <ul style="list-style-type: none"> Transparent, accountable and sustainable organization. Career development. Equal opportunity and performance recognition. |

2.5 Internal Organizational Scan

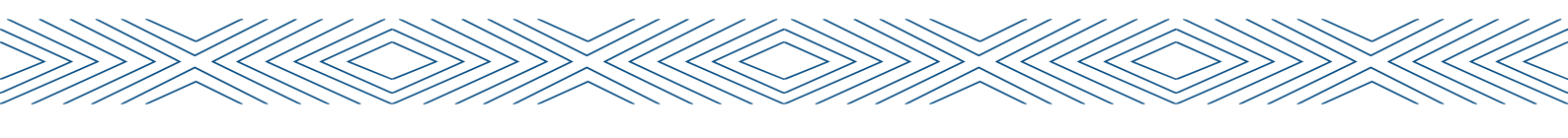
How are RURA's Sights, Strategy, Structure-Staff, and Straction (as per MTI's 8S ® Model) geared to meet the opportunities and challenges in the external environment?

| Modules (based on MTI's 8S ® Model) | Key Considerations (SWOT Integrated) |
|-------------------------------------|--|
| Scope | <ul style="list-style-type: none"> RURA is an independent institution with a well-defined mandate (as per RURA Law of 2001 and 2013). Possible overlapping of roles with other government institutions (See 2.4 Stakeholder Scan in the previous page). Lacks clarity on 'if' and 'how to' regulate certain sub-sectors – e.g., E-Commerce. |
| Sights | <ul style="list-style-type: none"> Measure 6 broad goals – which are not clearly linked to end outputs and activities. Diligent monitoring and reporting by Planning, M&E Unit (with departments) – quarterly and annually. |

| | | |
|----------|--------------------|--|
| Strategy | R&D | <ul style="list-style-type: none"> Minimal research conducted on all the sectors. Only limited to basic data collection and analysis, which faces further challenges in terms of accuracy and timeliness of data. Lacks a structured research framework or methodology and does not optimize technology to conduct research. Collaboration opportunities with local and international partners to conduct research (including the availability of research funding). |
| | Legal & Regulatory | <ul style="list-style-type: none"> The political will to develop a conducive regulatory environment for economic development and investment promotion in Rwanda. Gaps in regulatory framework – including Policies, Laws, Presidential Orders and Prime Ministerial orders (see list in Appendix 2). According to consumers, tariff rates are too high - in sectors such as Electricity, Water, ICT and Petroleum. However, some tariff rates are still not cost reflective. The current regulatory fee framework needs an update – due to feedback from both internal and external sector stakeholders. |
| | Licensing | <ul style="list-style-type: none"> Digitization of licensing process via Converging License Management System (CLMS). Lacks clarity on ‘if’ and ‘how to’ license certain service providers – e.g.: Waterways Transport, E-Commerce, Cleaning Companies etc. |
| | Compliance | <ul style="list-style-type: none"> Lack of advanced technology tools for compliance monitoring (such as Network Monitoring Systems). RURA’s systems are not integrated with the service provider’s systems. Above, leads to challenges in enforcing regulations (and standards) and revenue collection. |
| | Enforcement | <ul style="list-style-type: none"> Quality Management System (QMS) is being implemented as a part of the new Quality Assurance division. However, currently there are gaps such as lack of quality manuals, quality reports and updated service level standards. Collaborations with national police and other government institutions – officiated by MOUs. |

| Modules (based on MTI's 8S® Model) | | Key Considerations (SWOT Integrated) |
|------------------------------------|-----------------------------|---|
| Strategy | Accessibility | <ul style="list-style-type: none"> Availability of the Universal Access Fund (UAF) to increase the accessibility of Telecom and ICT services. Potential to increase the fund's scope to Postal and Media & Broadcasting via new Presidential Order. Consumer Protection – lacks a call center and an integrated platform to store, share, monitor and resolve consumer complaints. Awareness – There are awareness gaps about RURA's role, among consumers, service providers and government institutions. |
| | Strategic Impact Assessment | <ul style="list-style-type: none"> Currently, RURA does not conduct any strategic impact assessments. |

| | |
|--|---|
| Structure-Staff | <ul style="list-style-type: none"> ▪ The current organizational structure is not optimal and has to be reviewed. ▪ There are many capacity gaps (vacant positions) in the structure - 35 out of 203 positions are vacant, including some senior positions ▪ Competent and qualified staff is a key strength, and the leadership is committed to build organizational capacity. ▪ Competency development is a key priority at RURA, to be in-line with the dynamic nature of all the sectors that RURA regulates (see Competency Map in Page 47). ▪ Academic collaborations to develop competencies – such as launching Masters in Regulatory Economics and Competition Policy with University of Rwanda. |
| Sustainability (Environment) | <ul style="list-style-type: none"> ▪ High internal paper usage, due to mostly manual processes and procedures. ▪ Ability to develop regulations to promote environmental sustainability – e.g.: Renewable Energy, E-Mobility. |
| Systems | <ul style="list-style-type: none"> ▪ Digitization plans are in progress and seems to be in the early stages (see list of initiatives and gaps in Appendix 3). ▪ Gaps in updated process documents and procedure manuals in areas such as, customer service, finance, revenue collection etc. - creating the need for a comprehensive process mapping to facilitate digitization. ▪ RURA's performance management is not linked to regulatory impact assessments and market assessments. ▪ Limited organizational Risk Management in place and no dedicated responsibility in the structure. |
| Straction (Converting Strategy to Action) | <ul style="list-style-type: none"> ▪ Dedicated unit is there for strategic plan implementation, monitoring and evaluation. ▪ Gaps in previous strategic plan development and implementation |



2.6 Last Strategic Plan

How effective has / is RURA's last strategic plan – in terms of the documentation and the achievement of the stated objectives and initiatives?

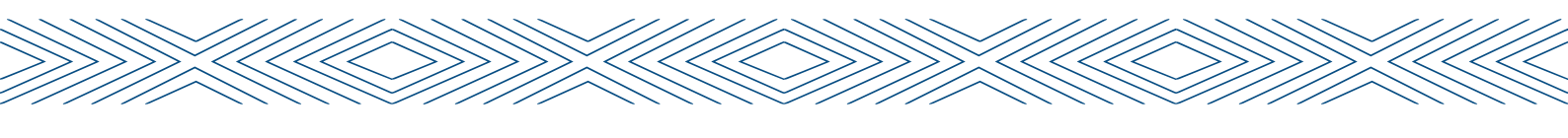
What are the key observations and learnings to be extracted?

| Section | Key Observations Key Learnings | How it is addressed in this Strategic Plan? |
|---|--|---|
| Chapter 3: Situational Analysis | <ul style="list-style-type: none"> Regulated Utility Services Analysis is disjointed from other sections of the Strategic Plan. Ideally should be linked with the Situational Analysis (PEST and SWOT). PEST and SWOT could have been better structured as per the Sectors and Value Chain. | <ul style="list-style-type: none"> An overall PEST Analysis is carried out Above is supplemented with PEST and SWOT analysis for each sector, demonstrated in the respective Sector Scans. Refer Page 17-31 |
| Chapter 4: Strategic Formulation | <ul style="list-style-type: none"> There are 6 Strategic Goals, and each Goal has a Strategic Objective. However, the Strategic Objectives are just more descriptive versions of the Goals. | <ul style="list-style-type: none"> 9 Strategic Goals were formulated and a clear linkage between Nation Vision / Goals and RURA Goals have also been demonstrated. Refer Page 32-38 |
| | <ul style="list-style-type: none"> Strategic Goals are not linked to Rwanda's National Goals. | |
| | <ul style="list-style-type: none"> Steep jump from Strategic Objectives to Strategic Outputs Full range of options not considered – needs deep thinking | <ul style="list-style-type: none"> Arising from the 9 RURA Goals, 17 Strategic Initiatives have been developed and clear linkage between these two have been demonstrated. Refer Page 55 Each Strategic Initiative will have Milestones and detailed actions to enable execution. Refer M&E Framework |
| Logical and M&E Frame- work | <ul style="list-style-type: none"> Strategic Objectives are broken down into Strategic Outputs. Each Output has a Strategic Outcome and an Outcome Verifiable Indicator. Most of the Outcome Verifiable Indicators are not completely within RURA's control to achieve – e.g.: 10% annual increase in population with access to affordable electricity, 10% annual increase in internet penetration. | <ul style="list-style-type: none"> A National Sector Goals contribution measurement mechanism has been introduced to track and monitor RURA's contribution to the National Goals. Refer M&E Framework |

| | | |
|---|---|---|
| Detailed Logical and M&E Framework | <ul style="list-style-type: none"> Strategic Outputs are further broken down into Activities. Each Activity has a Verifiable Indicator. However, it's not clear how these Activities will lead to the achievement of Strategic Outputs and finally, Strategic Objectives. This is mainly because, the Activity Verifiable Indicators are not clearly linked to Outcome Verifiable Indicators. Not all the Activities can be measured by KPIs. Some activities can be deliverables. Given the market dynamics, the given targets / KPIs needs the flexibility to change. | <ul style="list-style-type: none"> KPIs are assigned at a Strategic Initiative level to measure if the Strategic Initiative was able to achieve its desired impact. Baseline and Targets have also been assigned to each KPI. Refer M&E Framework |
| | <ul style="list-style-type: none"> Activity plans and measurements reflect a combination of day to day job descriptions, as opposed to being strategic. These are too detailed for a Strategic Plan and impractical to monitor. | <ul style="list-style-type: none"> A clear boundary between the day job and strategic actions has been established. A simple yet comprehensive M&E template has been introduced. |
| | <ul style="list-style-type: none"> Developing and monitoring budget for each Strategic Outcome and Activity is impractical and of limited value. | <ul style="list-style-type: none"> Budgets are now assigned at a Strategic Initiative level. This will provide a high-level estimation on how much it will cost to implement the Strategic Initiative. Refer M&E Framework. |
| Overall | <ul style="list-style-type: none"> Overall, there are two detailed formats / frameworks with many columns and key words. This could have possibly made M&E of Strategic Plan implementation cumbersome. | <ul style="list-style-type: none"> A simple yet comprehensive M&E template has been introduced. Majority of this M&E framework is automated to ensure ease-of-tracking |

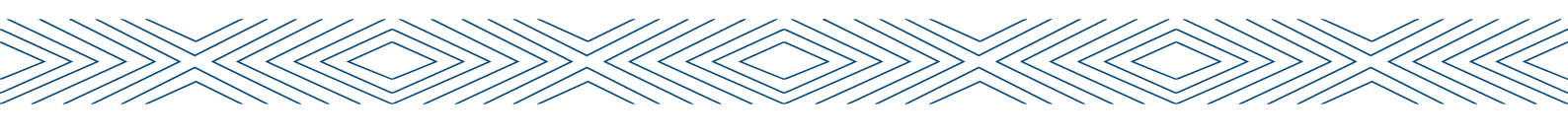


| | |
|----------------|--|
| Results | <ul style="list-style-type: none"> Due to above challenges and gaps, M&E of the Strategic Plan 17-20 has not been conducted exactly as per the format in the Strategic Plan. However, the six Goals, certain Outcomes and Verifiable Indicators have been measured (including the budget). To complete this analysis, these formats have been reviewed and summarized as below. |
| | <ul style="list-style-type: none"> Based on the data received, overall, <u>70%</u> was achieved in the Strategic Plan 17-20 - as per the 6 Strategic Goals set. Out of the total budget allocated (Rwf 84 billion) only 64% was spent. |
| | <ul style="list-style-type: none"> Out of the 6 Strategic Goals, only 1 was achieved over <u>80%</u> - i.e., RURA Contributes To The National, Regional And International Long Term Development Goals. |
| | <ul style="list-style-type: none"> Over <u>70%</u> achievement in 4 out of 6 Strategic Goals. |
| | <ul style="list-style-type: none"> Only <u>35%</u> achievement in Strategic Goal 5: RURA Research And Development Function is Established And Functional – significantly lower financial and human resources have been allocated for this goal (only <u>0.7%</u> of allocated budget was utilized and currently 5/10 positions are vacant as at 2021) |
| | <ul style="list-style-type: none"> (Refer Appendix 4 for breakdown of Strategic Goals Achievement and Key Sector Highlights and Achievements – During Strategic Plan 2017- 20) |



3

SIGHTS



3.1 National Vision and National Sector Goals

Listed in the table below are some of the selected key sector goals that have already been set for Rwanda in the National Agenda documents such as NST1 and Vision 2050. These goals were considered as a foundation in determining RURA's organizational goals.

National Vision:

Upper Middle-Income Country by 2035 & High-Income Country by 2050



| Sector | National Sector Goal |
|--------|--|
| ICT | 80% internet penetration by 2024 |
| | Rwanda to differentiate itself as the “proof-of-concept” country |
| | Position Rwanda as Africa’s leading ICT hub by 2024 |
| | Digital literacy for all youth (16-30 years) by 2024 |
| | Accelerate niche emerging sectors, such as nanotech, biotech, block chain technology or AI |
| | Vibrant smart cities sustained |
| | Improve accessibility to broadcasting contents through government led development of promoting the broadcasting industry |
| | 30% of business/companies will participate in ecommerce by 2024 |
| Energy | Access to electricity will be scaled up to 100% by 2024 |
| | 60% of Installed Capacity via Renewable Energy by 2035 |
| | Reduce Firewood Dependence to 42% by 2024 |
| | Generation capacity increased to ensure that all demand is met and a 15% reserve margin is maintained |
| Water | Access to water will be scaled up to 100% by 2024 |

| | |
|-------------|---|
| Sanitation | Access to sanitation will be scaled up to 100% by 2024 |
| Transport | Improve rural and urban transportation services |
| | Proportion of population conveying with public transportation to be 24% by 2035 and 40% by 2050 |
| | Advocate on the removal of trade barriers for free movement of goods, services, and capital. |
| | Convenient public transport will be accessible at least within 500m radius or less |
| All Sectors | Promote research and development to fast-track Rwanda's economic transformation |
| | Rwanda is targeting to belong to the top ten countries in doing business in 2035 |
| | Reduce the cost of doing business and facilitate trade |
| | Promote industrialization and attain a structural shift in the export base to high-value goods and services with the aim of growing exports by 17% annually |
| | Achieve high standards/ quality services and customer care across public and private sectors |
| | Ensure 100% Government services are delivered online by 2024 |

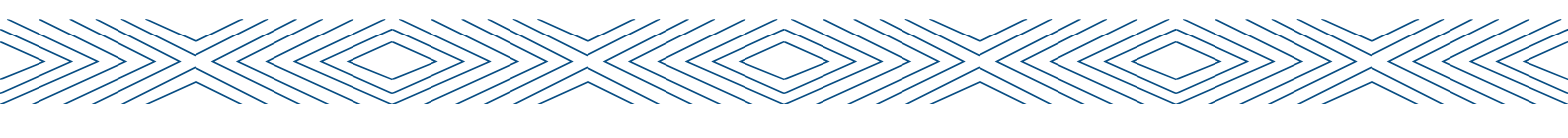




3.2 Organizational Goals

| Goal Area | Organizational Goals |
|---------------------------------|--|
| R&D | Goal 1: Develop a fully-fledged R&D Function – with the capabilities to continuously scan the sector environments and its dynamics, experiment and roll-out innovative regulatory responses (including data-driven and high-tech interventions), share knowledge and learnings via thought leadership initiatives. |
| Legal & Regulatory | Goal 2: Ensure that Rwanda's regulatory framework for the sectors regulated by RURA are comprehensive, conducive and updated. Thereby enabling high quality service provisions and contributing towards national development (including enabling investments into the sectors). |
| Licensing | Goal 3: Ensure 100% of the service providers (i.e., all those who should be licensed) are identified, tracked and licensed – enabled by service quality and digital efficiencies. |
| Compliance Enforcement & | Goal 4: Ensure 100% compliance (there by minimizing the need for enforcement) – enabled by service quality and digital efficiencies. |
| Accessibility | Goal 5: Ensure availability, affordability and accessibility to ICT, Energy, Water & Sanitation and Transport services via the functions that RURA manages (ensuring Consumer Education, Protection and Safety). This also includes RURA's role to supplement national efforts to develop and advance these critical sectors. |

| | | |
|---------------------------------|---------------|--|
| Strategic Assessment | Impact | Goal 6: Develop and execute a comprehensive framework to measure the impact of RURA's contribution to the National Goals – based on which take corrective action. |
| Capacity Building | | Goal 7: Develop a future-ready organization to meet the opportunities and challenges in the sectors – via Organizational Structure, Capacity, Competencies, Processes & Systems. |
| | | Goal 8: Improve service and operational efficiency via digitizing RURA's key internal and external processes / interfaces |
| Financial Sustainability | | Goal 9: Ensure RURA continues to be financially self-sufficient – considering additional funding required to meet RURA's Strategic Pursuits, possible impact on revenues (due to sector dynamics) and therefore optimizing international development funding. |



3.3 RURA's Organizational Goals linked to National Sector Goals

- The grid below demonstrates how RURA's 9 Organizational Goals link with the National Sector Goals defined in National Agenda documents such as NST1 and Vision 2050.

| Sector | National Sector Goals | Organizational Goals | | | | | | | |
|--------|--|----------------------|------------|-----------|--------------------------|---------------|-----------------------------|-------------------|--------------------------|
| | | R&D | Regulatory | Licensing | Compliance & Enforcement | Accessibility | Strategic Impact Assessment | Capacity Building | Financial Sustainability |
| | | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goals 5 | Goal 6 | Goal 7& 8 | Goal 9 |
| ICT | 80% internet penetration by 2024 | X | X | | X | X | X | | |
| | Rwanda to differentiate itself as the "proof-of-concept" country | X | X | X | | | | | |
| | Position Rwanda as Africa's leading ICT hub by 2024 | X | X | X | | X | | | |
| | Digital literacy for all youth (16-30 years) by 2024 | | X | | | X | | | |
| | Accelerate niche emerging sectors, such as nanotech, biotech, block chain technology or AI | X | X | X | X | | | | |
| | Vibrant smart cities sustained | X | X | | | | | | |
| | Improve accessibility to broadcasting contents through government led development of promoting the broadcasting industry | | X | X | X | X | | | |
| | 30% of business/companies will participate in ecommerce by 2024 | | X | X | | X | | | |

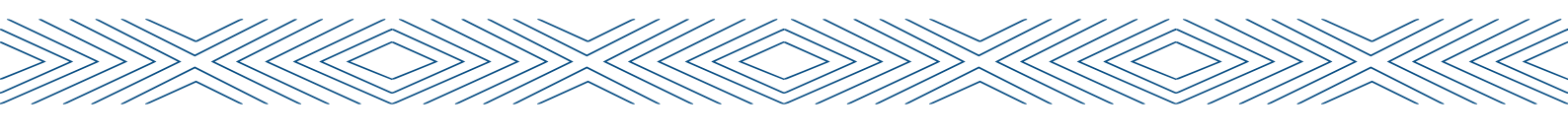
| Sector | National Sector Goals | Organizational Goals | | | | | | | |
|----------------|---|----------------------|------------|-----------|--------------------------|---------------|-----------------------------|-------------------|--------------------------|
| | | R&D | Regulatory | Licensing | Compliance & Enforcement | Accessibility | Strategic Impact Assessment | Capacity Building | Financial Sustainability |
| | | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goals 5 | Goal 6 | Goal 7 & 8 | Goal 9 |
| Energy | 100% Electricity Access by 2024 | | X | | X | X | X | | |
| | 60% of Installed Capacity via Renewable Energy by 2035 | X | X | X | | | | | |
| | Reduce Firewood Dependence to 42% by 2024 | | X | X | | X | | | |
| | Generation capacity increased to ensure that all demand is met and a 15% reserve margin is maintained | | X | | X | X | | | |
| Water | 100% Access by 2024 | | X | | X | X | X | | |
| Sanitation | 100% Access by 2024 | | X | | X | X | X | | |
| Road Transport | Improve rural and urban transportation services | | X | X | X | X | | | |
| | % Population conveying with public transportation to be 24% by 2035 and 40% by 2050 | X | X | | | X | X | | |
| | Advocate on the removal of trade barriers for free movement of goods, services, and capital. | | X | X | X | X | | | |
| | Convenient public transport will be accessible at least within 500m radius or less | | X | X | | X | | | |

| Sector | National Sector Goals | Organizational Goals | | | | | | | |
|-------------|---|----------------------|------------|-----------|--------------------------|---------------|-----------------------------|-------------------|--------------------------|
| | | R&D | Regulatory | Licensing | Compliance & Enforcement | Accessibility | Strategic Impact Assessment | Capacity Building | Financial Sustainability |
| | | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goals 5 | Goal 6 | Goal 7 & 8 | Goal 9 |
| All Sectors | Promote research and development to fast-track Rwanda's economic transformation | X | | | | | X | X | |
| | Rwanda is targeting to belong to the top ten countries in doing business in 2035 | X | X | X | X | X | | | |
| | Reduce the cost of doing business and facilitate trade | | X | X | X | X | | | |
| | Promote industrialization and attain a structural shift in the export base to high-value goods and services with the aim of growing exports by 17% annually | | X | X | | | | | |
| | Achieve high standards/ quality services and customer care across public and private sectors | | | | | | | X | |
| | Ensure 100% Government services are delivered online by 2024 | | | | | | | X | |

3.4 Organizational Focus

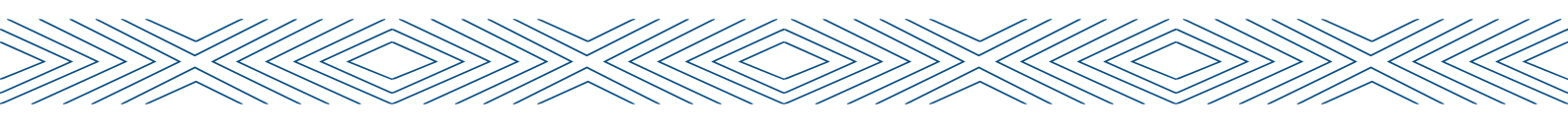
- RURA regulates a total of 18 sub-sectors with the possibility of performing 6 key functions per sub-sector. Thus, a total of 108 sector / function combinations. (refer Page 9).
- RURA has limited staff strength and needs to prioritize / focus its energies on the key sectors and functions.
- Below is a sample Sector Focus Grid template that RURA's Senior Management Team (cross-functional) will study and fill as part of this Strategic Plan

| Functions | Regulatory | Licensing | Compliance | Enforcement | Accessibility |
|--------------------|------------|------------|------------|-------------|---------------|
| Sub Sectors | | | | | |
| [Insert Subsector] | High / Low | High / Low | High / Low | High / Low | High / Low |
| [Insert Subsector] | High / Low | High / Low | High / Low | High / Low | High / Low |



4

STRATEGY



- In 'Module 3: Sights', the Focus and Goals for RURA have been determined.
- Given the above, the focus of this module is to develop the Strategies – that will help RURA to achieve the 9 Goals specified in 'Module 3. Sights' (refer Page 34).
- Accordingly, 10 Strategic Initiatives have been identified.

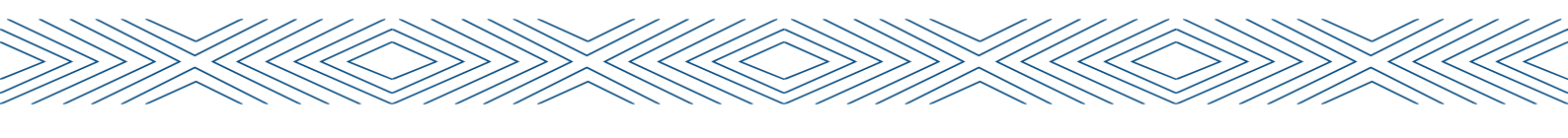
| Title | What? (Scope) | Why? (Rationale) | How? (Measurement) |
|---|---|---|---|
| Re-invent the R&D Function | <ul style="list-style-type: none"> Proactively monitor emerging trends, challenges, and opportunities in the sectors that RURA regulates. Capture, analyze and report on-time / real-time data related to the sectors, | <ul style="list-style-type: none"> Current R&D function at RURA, only addresses routine data collection and analysis for few sectors. Research is only limited to a few ad-hoc initiatives. | <ul style="list-style-type: none"> Successful completion of Milestones R&D Plan / Charter Execution Progress (%) > Performance Management |
| Bridge Regulatory Gaps | <ul style="list-style-type: none"> To undertake a comprehensive critique of the current policies, laws, orders and regulations for each of the sectors that RURA regulates – based on the emerging opportunities, challenges and national expectations. | <ul style="list-style-type: none"> RURA regulates, fast-paced and dynamic sectors making existing policies, laws and regulations obsolete, more frequently. This has led to the current regulatory gaps in Rwanda (see Appendix 2) and possible future gaps. | <ul style="list-style-type: none"> Successful completion of Milestones |
| Enabling Investments into Sectors | <ul style="list-style-type: none"> RURA could be a key enabler in attracting investments (including FDIs) into Rwanda for the sectors it regulates, by creating a business-friendly regulatory framework and offer incentives with regards to licensing. | <ul style="list-style-type: none"> Rwanda's economy needs a much higher level of investments to develop its key sectors. Having a conducive regulatory framework coupled with incentives will be key to enable investments into a country. | <ul style="list-style-type: none"> Successful completion of Milestones |
| Optimize Digital Interface – Consumers & Operators | <ul style="list-style-type: none"> Optimizing the use of digital channels to interface with both end-consumers and operators – thus ensuring higher service quality, efficiency and complementing RURA's existing marketing / brand-building efforts | <ul style="list-style-type: none"> Given the number of sectors RURA is mandated to regulate, manually interfacing with end-consumers and operators will require significant manpower, leading to higher costs and overall inefficiencies. | <ul style="list-style-type: none"> Successful completion of Milestone Action Plan Progress (%) > Performance Management |
| Advancing Consumer Access and Usage | <ul style="list-style-type: none"> To increase the levels of access and usage of the essential public utilities to the wider population of Rwanda. | <ul style="list-style-type: none"> Ultimately, the core of RURA's existence is to serve Rwandan citizens by ensuring the affordable accessibility of public utilities, thus leading to the Socio-economic development of Rwanda. | <ul style="list-style-type: none"> Successful completion of Milestones Public Utilities Accessibility Achievement % (National Goals in M&E Framework) |

| Title | What? (Scope) | Why? (Rationale) | How? (Measurement) |
|--|--|---|---|
| Protect Consumer Interests by Ensuring Quality of Service (QoS) | <ul style="list-style-type: none"> Protect the interests and rights of consumers, by playing the role of the intermediary between consumers and operators. Resolve consumer complaints and ensure consumers receive services as per stipulated quality standards and guidelines. Also, the interests of operators needs to be accounted while ensuring operator knowledge gaps are identified and addressed | <ul style="list-style-type: none"> Most of the complaints RURA receives from consumers are on quality-of-service related aspects. Need to ensure that these complaints are resolved on-time, in a satisfactory manner and possible future issues are prevented. | <ul style="list-style-type: none"> Successful completion of Milestones QoS compliance levels > Performance Management % of consumer complaints resolved > Performance Management |
| Enhancing Institutional Collaboration | <ul style="list-style-type: none"> RURA to proactively collaborate with a multitude of Rwandan Government Stakeholders – whose roles has an interface, inter-link and /or overlap with RURA's role. So that all parties concerned can work in synergy and create greater value to the Country, Consumers and Operators. | <ul style="list-style-type: none"> Most sector developmental initiatives will require some degree of collaboration between the key players in Rwandan Government Eco-System. RURA can benefit by tapping into the resources and know-how of these organizations, whilst sharing RURA's own expertise with them. | <ul style="list-style-type: none"> Successful completion of Milestones Measures of Success (As per MOU) > Performance Management |
| Strategic Linking with Development Agencies | <ul style="list-style-type: none"> To identify international development and donor agencies – with whom RURA can collaborate for R&D, Competency Development, Technical Support, Knowledge Sharing and Thought Leadership Initiatives (that will also help to strengthen the corporate brand position of RURA). | <ul style="list-style-type: none"> With rapid changes taking place in RURA's operating environment and possible impact this will have on RURA's operations and revenue, there is a need for international collaboration and the need for alternate funding sources. | <ul style="list-style-type: none"> Successful completion of Milestones Measures of Success (As per MOU – e.g.: Initiatives, Training Hours, Funding etc.) > Performance Management |

| | | | |
|--|--|--|---|
| Improve Operations Quality Management | <ul style="list-style-type: none"> Ensuring that RURA adheres to defined quality standards – in relation to the serving its Customers and Operators (the front-end) and its Operations (the back-end). | <ul style="list-style-type: none"> Given the breadth of sectors / functions that RURA needs to regulate and the number of interfaces / transactions it needs to manage, there needs to be a disciplined approach to managing quality. | <ul style="list-style-type: none"> Successful completion of Milestones Results from Service Quality and Satisfaction Survey (Satisfaction Levels) > Performance Management |
| Strategic Impact Assessment | <ul style="list-style-type: none"> To develop a framework and ensure it is periodically tested – to assess the strategic impact of the role and contribution of RURA to the 'bigger picture' i.e., National Socio-Economic Development. | <ul style="list-style-type: none"> Given the intermediary / contributory role of RURA to the national agenda, the importance of a strategic check – to ensure the organizational efforts are converted to impact. | <ul style="list-style-type: none"> Successful completion of Milestones Continuous Strategic Impact Assessments and Actions > Performance Management |

4.1 Strategic Partnership Map

- Forming mutually beneficial and strategic partnerships across RURA's value chain functions and sectors (refer Page 9) will be crucial to effectively fulfill its role as a regulator.
- These partnerships could be with:
- Local institutions having a highly complementary or possibly an overlapping / similar scope.
 - International / Regional institutions - with the reach, access to resources and intelligence on the sectors regulated by RURA.
- Table below presents a mapping of some key Local and International / Regional institutions that RURA could possibly benefit from by forming / strengthening strategic partnerships with:



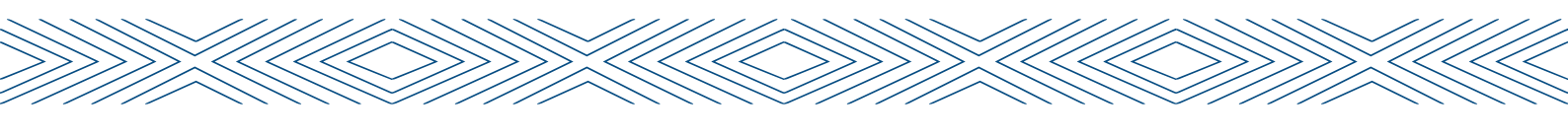
| | Organization | Sectors / Functions | Scope | RURA Inter-face |
|---|---|----------------------|---|--|
| Local (Institutions with supporting / possibly overlapping mandates) | Rwanda Information Society Authority (RISA) | ICT | RISA is mandated to plan and coordinate the implementation of National ICT for Development Agenda. | <p>Given the overlapping / complementary scope that these organizations have, RURA should strive to strengthen its relations by collaborating / working together in the areas of;</p> <ul style="list-style-type: none"> ▪ Research & Development ▪ Involvement in the regulatory formulation and licensing process ▪ Optimize resources to support compliance and enforcement processes ▪ Joint campaigns to ensure accessibility to quality services |
| | National Cyber Security Authority (NCSA) | ICT | NCSA was established to protect private and government information and infrastructure against cyber-attacks. | |
| | Rwanda Space Agency (RSA) | ICT | RSA is mandated develop and implement national space policies / strategies and further Rwanda's knowledge base in space technologies. | |
| | Rwanda Media Commission (RMC) | Media & Broadcasting | RMC is a Media Self-Regulatory Body with the mission of promoting free, responsible and accountable media. | |
| | Rwanda Energy Group (REG) | Energy | REG was established to expand, maintain and operate the energy infrastructure in Rwanda. It has 2 subsidiaries under its belt - EUCL is focused on service delivery while EDCL is focused on project management/implementation. | |
| | Rwanda Mines, Petroleum and Gas Board (RMB) | Energy | RMB's key responsibility is to implement and advise the government on issues related to national policies, laws and strategies related to mines, petroleum and gas. | |
| | Rwanda Atomic Energy Board (RAEB) | Energy | RAEB is mandated to set up nuclear facilities based on international standards, coordinate research & development and ensure safety aspects of nuclear energy applications. | |

| | Organization | Sectors / Functions | Scope | RURA Interface |
|----------------|--|---------------------|---|----------------|
| Local (cont'd) | Rwanda Water Resources Board (RWB) | Water | RWD's key responsibilities include implementation of national policies, laws and strategies related to water resources for sustainable development. | |
| | Rwanda Environment Management Authority (REMA) | Sanitation | REMA's mandate encompasses national environmental protection, conservation, promotion and overall management, including advisory to the government on all matters pertinent to the environment and climate change. | |
| | Rwanda Transport Development Agency (RTDA) | Transport | RTDA's key functions among other things as per its mission, include implementation of government policy on transportation infrastructure and develop public transport service within the country on road and waterways. | |
| | Rwanda Standards Board (RSB) | All sectors | RSB is mandated to undertake all activities pertaining to the development of Standards, Conformity Assessment and Metrology services in Rwanda. | |
| | Rwanda Inspectorate, Competition, and Consumer Protection Authority (RICA) | All sectors | RICA is responsible to carry out investigations on anti-competitive trade practices and protect consumer interests in the sectors that are not regulated by RURA. | |

| | | | | |
|-----------------------------|--|-----------|--|--|
| International / Regional | ITU (International | ICT | ITU is the United Nations specialized agency for ICT striving to connect the world and ensure access to ICT services worldwide. | RURA could reach out to these International / Regional organizations with mutually beneficial propositions for each and optimize their resources for; Capacity building Quality Intelligence Resources / Experts / Technical assistance Financial assistance Other international / regional cooperation |
| | African | ICT | ATU provides a platform for stakeholders involved in ICT to formulate effective policies and strategies aimed at improving access to ICT services and support Africa's development. | |
| | GSM Association (GSMA) | ICT | GSMA represents the interests of mobile operators worldwide, uniting more than 750 operators with almost 400 companies in the broader mobile ecosystem. Providing services such as industry events, intelligence, capacity building, etc. | |
| | East African Communication Organization (EACO) | ICT | EACO brings together key ICT stakeholders in Burundi, Kenya, Rwanda, South Sudan, Tanzania and Uganda to strengthen and promote cooperation in the development and provision of postal, telecommunication and broadcasting services in the region. | |
| | International Association of Public Transport (UITP) | Transport | UITP is the international association for public transport authorities, operators, policy makers, scientific institutes and the sector services and supply. | |
| | Universal Postal Union (UPU) | Postal | The Universal Postal Union is a United Nations specialized agency and the postal sector's primary forum for international cooperation. | |

5

STAFF STRUCTURE



The intent of this module is to align the organizational structure and staffing to the strategies developed in (Module 4. Strategy).

- Accordingly, for RURA, 2 Strategic Initiatives have been identified:

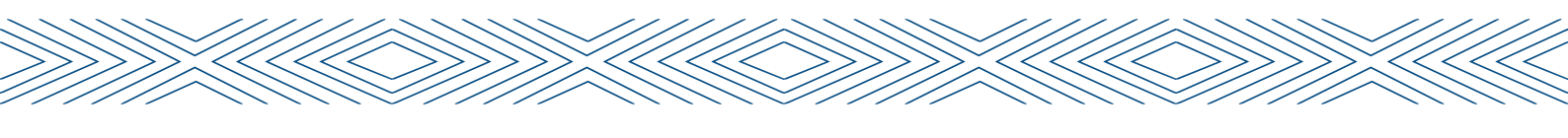
| Title | What? (Scope) | Why? (Rationale) | How? (Measurement) |
|--|---|--|---|
| Functional Structure Review | To review the Functional Organizational Structure of RURA - considering the emerging opportunities, challenges, expectations, and implications from this Strategic Plan (to fill-in the vacant positions will be an integral part). | 35 positions in the current legacy structure is vacant and this is impacting both the ability for RURA to discharge its duties and the performance of the current staff (some of whom are overloaded as a result). | Successful completion of Milestones Staff Satisfaction Level (%) > Performance Management |
| Strategy Enabling Competency Development | Mapping and identifying the Competencies that RURA needs to have in place – to meet the emerging opportunities, challenges, and expectations. Based on the above, map RURA's existing competencies, thus identifying the Competency Gaps – that needs to be developed and /or acquired. This will be followed by Competency Development (Training). | RURA is required to acquire and improve strategy-critical competencies to meet the future challenges and opportunities addressed in this Strategic Plan. This has a direct impact on both RURA's staff performance and the ability to implement the Strategic Plan. | Successful completion of Milestones No. of Training Programs, Participants, Training Hours (Per competency) > Performance Management |

5.1 Review of the Current Structure

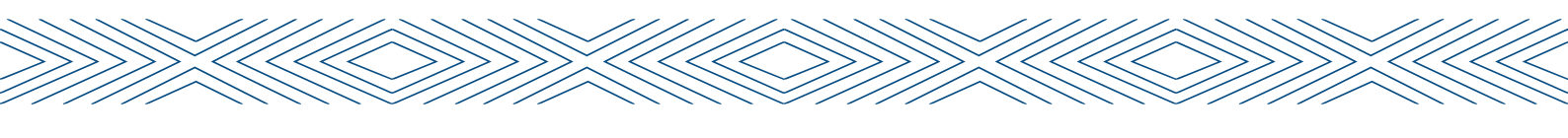
- Based on an extensive initial review of the current structure. RURA will embark on a structural review exercise, there are 2 options available for the Authority (the option will be decided based on a detailed evaluation, carried out as part of the Strategic Initiative above);
 - **Option 1:** Ground-zero based Organizational Structure Development
 - **Option 2:** Adjust the Existing Structure i.e. integrating the key roles arising out of this Strategic Plan which will be filled either via internal rotations / promotions or external recruitments.
- Positions arising out of the Strategic Plan cover the functions of;
 - Institutional Linking & Collaboration – Covering Strategic Initiatives, Enhancing Institutional Collaboration (Page 63) and Strategic Linking with Development Agencies (Page 65)
 - Strategic Impact Assessment – Covering Strategic initiative, Strategic Impact Assessment (Page 68)
 - Risk Management – Covering Strategic Initiative, Risk Management Framework (Page 74)

Why Option 1: Ground-Zero based Organizational Structure Development is the route to take?

- RURA's current structure was last reviewed in 2019 which resulted in some incremental changes to its legacy structure.
- From the client interviews the consultant conducted during the information gathering stage, it was noted that the current structure was not optimal and has to be reviewed to ensure RURA is structurally fit to implement the Strategy i.e. a Strategy-enabling Structure.
- To add to above, it was also noted that there were 35 vacant positions which include senior positions such as Chief Technical Officer, Chief Operating officer, Chief Finance Officer, Head of Policy & Regulatory Strategy, GM - Communications, GM - Research & Economic Regulation etc.



- Which has resulted in about 15 direct reporting lines to the Director General, which can be too complex to manage.
- These vacant positions are also impacting the ability for RURA to discharge its duties effectively and hinders the performance of the current staff (some of whom are overloaded as a result).
- Furthermore, arising from the Strategic Plan, there are three key roles that needs to be created and added to RURA's structure;
 - Institutional Linking & Collaboration Role
 - Strategic Impact Assessment Role
 - Risk Management Role
- Based on the above points and given the highly dynamic sectors RURA is mandated to regulate, it is recommended to undertake a ground-zero based Functional Structure Review.
- Although, filling the vacant positions may seem like a more convenient option as opposed to commissioning on a full overhaul of the structure. In fact, almost all the Strategic Initiatives are implementable with the current structure in place.
- But it is important to note that by only filling the vacant positions will not give the bandwidth and futureproofing that RURA requires to realize the much-needed quantum leap of performance that will be crucial to realize Rwanda's developmental aspirations.
- The consultant also noted that going Ground-zero requires significant commitment and RURA should not embark on this exercise if that commitment is unavailable starting from the top of the organization.
- If RURA selects to proceed with the Ground-Zero option, the following Strategic Initiatives will have to put on hold until the restructuring exercise is completed;
 - Enhancing Institutional Collaboration
 - Strategic Linking with Development Agencies
 - Strategic Impact Assessment
 - Risk Management Framework
- Some of the observations made by the consultant of RURA's current structure is presented below;



| Observation | Concern |
|--|--|
| What is the rationale behind introducing Chief Technical Officer and Chief Operating Officer positions? | The rationale is to reduce the reporting lines and workload of the Director General. However, these positions are mostly seen in commercial organizations and are uncommon for a regulator or a government institute |
| Why does Transport Planning & Industry Development report directly to DG while Transport Regulation is separated, and report to COO? | Is there anything additional / any special significance placed as per mandate on the Transport sector compared to other sectors? - the rationale could be that Transport planning and operations needs to be separate but may need to challenge this rationale |
| Why is Media & Broadcasting regulation separated, and reports to COO while ICT regulation reports to CTO? | Media & Broadcasting should ideally fall under ICT Regulation given its regulatory scope |
| Why is Cybersecurity regulation separated from ICT regulation? What is the rationale behind Cybersecurity directly reporting to DG? | Cybersecurity is very much part of ICT and should technically fall under ICT regulation. Under ICT Regulation it is understood that emphasis is placed on Network Operators and connectivity in general however it is worth challenging this rationale given the high fluidity and converging nature between Telecom and ICT |
| How could capabilities under Cybersecurity & Strategic Integration blend with Information Systems function at RURA? | It is understood that certain capabilities such as Data Science and AI are with Cybersecurity & Strategic Integration while the ICT backbone is with Information Systems – a clear link between these 2 functions will be crucial to initiate the Digital & R&D Strategic Initiatives arising from the Strategic Plan |

5.2 Competency Mapping

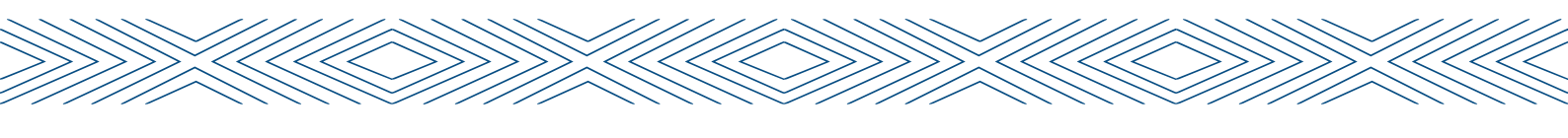
- This Competency Map identifies key competencies RURA needs to develop per each function (across all sectors / sub-sectors). Also, key approaches to acquire / develop these competencies.
- This will be used as a guideline when RURA develops Strategy Enabling Competencies, as per the Strategic Initiative in the previous page.

| Function | Competencies | | How to Acquire / Develop? |
|------------------------------------|--|--|---|
| R&D | Research (various Research Methodologies and Tools) Data Analytics / Data Science | Report / Presentation Development Project Management Strategic Relationship Management | Local & International Internal (within RURA) Knowledge Sharing Cross-Functional Training Cross-Functional On-the-Job Training Academic Collaborations Courses (Postgraduate, Professional) Training Conferences / Symposiums Study Visits / Immersions Institutional Collaborations – Public and Private Sector Industry Exposure / Training Conferences / Symposiums Study Visits / Immersions |
| Legal & Regulatory | Legal – Drafting, Translations Stakeholder Management | Sector specific legalities | |
| Licensing | Proposal Evaluations - Legal Proposal Evaluation – Business, Economic, Financial | Proposal Evaluation – Technical Stakeholder Management | |
| Compliance | Quality Management / Assurance Data Analytics | Stakeholder Management | |
| Enforcement | Negotiations Legal | Stakeholder Management | |
| Accessibility | Research Strategic Relationship Management | Project Management | |
| Strategic Impact Assessment | Research Stakeholder Management | Data Analytics / Data Science | |
| HR | HR Management Negotiation and Conflict Resolutions Organizational Development | Training, Development and Coaching Change Management | |
| Process / Technology | Process Mapping Technical Business Analysis | Vendor Management Project Management | |
| Planning, M&E | Data Analytics Stakeholder Management | Report / Presentation Development | |
| Finance & Corporate Services | Financial Analysis Financial Reporting | Stakeholder Management | |
| RCG (Risk, Compliance, Governance) | Risk Analysis Stakeholder Management | Audit | |

6

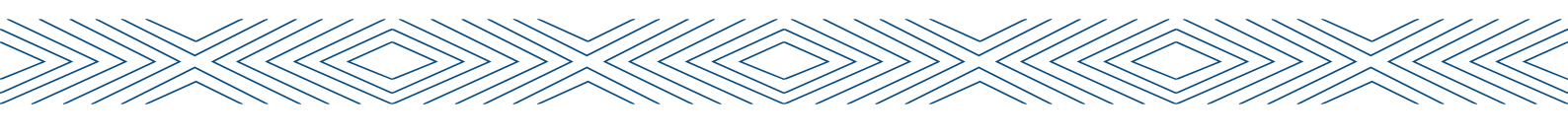
SUSTAINABILITY

(Environment)



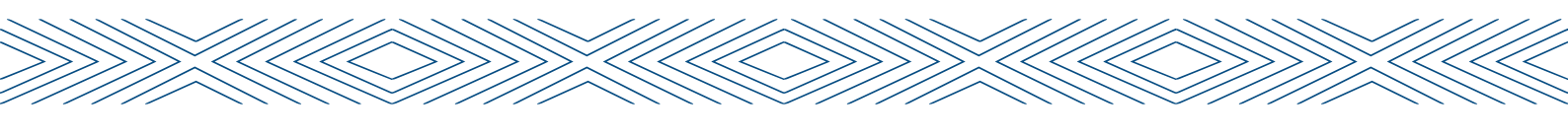
- The intent of this module is to ensure that RURA, via its actions, ensures responsibility for the environmental sustainability of Rwanda.
- Actions in this context refers to both RURA's internal operations and more importantly how it drives the Consumers and Operators to be more environment conscious in their actions.
- Under this module on Sustainability, 1 Strategic Initiative has been identified.

| Title | What? (Scope) | Why? (Rationale) | How? (Measurement) |
|---------------------------|--|--|-------------------------------------|
| Enabling the Green Agenda | <p>Enable the adoption of environmentally sustainable practices – among Consumers and Operators via RURA's regulatory role and how it conducts its day-to-day operations.</p> <p>Through its regulatory role, RURA could initiate the need for environmentally sustainable policies, laws and develop appropriate regulations.</p> | <p>The criticality of sustainable practices – given the impact it has on Rwanda's environment.</p> <p>The vantage position that RURA is in, to be able to influence sustainability practices among a significant proposition of the Consumers and Organizations in Rwanda.</p> | Successful completion of Milestones |



7

SYSTEMS



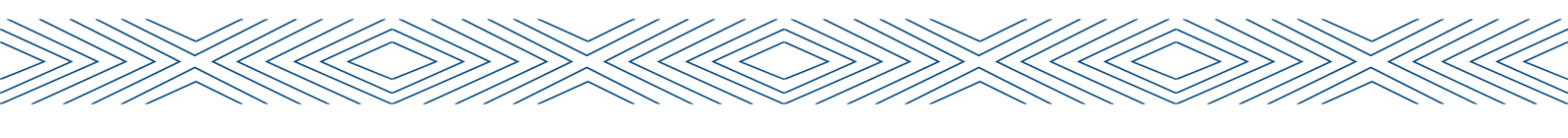
- The intent of this module is to align the organizational processes and performance management to enable the effective implementation of the Strategic Plan. It also identifies the strategic risks that RURA needs to monitor and mitigate.
- Accordingly, 3 Strategic Initiatives have been identified.

| Title | What? (Scope) | Why? (Rationale) | How? (Measurement) |
|-----------------------------------|---|--|--|
| Operations Digital Transformation | To carry out an organization-wide, comprehensive digital transformation of RURA's back-end operations leading to the elimination of both human and process inefficiencies. | The current level of digitization is inadequate given the number of sectors that RURA must regulate and the type of functions that RURA is expected to perform for the sectors it regulates. | Successful completion of Milestones Action Plan Progress (%) > Performance Management |
| Risk Management Framework | Identifying the potential risks that RURA is likely to encounter and proactively mitigating them hence in the event of encountering the risk, RURA can minimize its negative impact to itself and its stakeholders. Refer framework in Page 50 as a guideline. | Given the dynamics in RURA's operating environment, risks are likely to occur, and it is important for RURA to be able to respond effectively with minimum damage. | Successful completion of Milestones Risk Mitigation Plans Progress (%) > Performance Management Annual Review completed > Performance Management |

| | | | |
|----------------------------------|--|--|---|
| Performance Management Framework | <p>To develop comprehensive evaluation framework, that will facilitate RURA to effectively monitor its performance with regards to implementation of this strategic plan and take remedial actions.</p> <p>There are two aspects in this Performance Management Framework:</p> <p>M&E Framework for Strategic Plan Implementation</p> <p>KPIs arising from Strategic Initiatives – refer M&E Framework</p> | To ensure that RURA's staff efforts are focused on achieving the goals formulated in the Strategic Plan. | <p>Successful completion of Milestones</p> <p>Strategic Plan Implementation Progress (%) – as per M&E Framework > Performance Management</p> <p>KPIs (Arising from Strategic Plan) Achievement (%) > Performance Management</p> |
|----------------------------------|--|--|---|

7.1 Risk Management Framework

- The Risk Management Framework will identify the Strategic Risks RURA may encounter when performing its role. The table below include the types of risks, based on each key function RURA performs, the probability of that risk being materialized, the likely impact if the risk does materialize and initiatives to mitigate the risk.
- This will be used as a guideline when RURA develops a comprehensive Risk Management Framework, as per the Strategic Initiative in Page 74



| Risk Category | Type of Risk | Probability (Qualitative evaluation from current RURA perspective) | Likely Impact (Qualitative evaluation from current RURA perspective) | Mitigation |
|-----------------------------|--|--|--|--|
| R&D | Industry outpacing the regulator in terms of new developments. Outdated industry data leading to erroneous decision making. | High | Moderate to High | Invest in cutting-edge R&D and data science Industry collaborations |
| Legal & Regulatory | Outdated laws and regulations, | Moderate to High | High | Frequent regulatory review and updates |
| Licensing | Unconventional operators with fluid boundaries (e.g.: Fin-tech, Internet Media). | Moderate | Moderate | Sandbox approach to regulate |
| | Cyber risks related to CLMS (e.g.: site crash, data leaks, hacking). | Low | Low to Moderate | Strengthen networks Invest in cyber security |
| Compliance & Enforcement | Possible lawsuits from operators, consumers or interest groups – related to compliance of QoS, standards etc. | Low | Low to Moderate | Strengthen compliance monitoring (tech optimized) |
| Accessibility | Inaccurate tariffs leading to either low utilities penetration (due to high tariffs) or operators struggling financially (due to not being cost reflective). | Moderate | High | Comprehensive tariff review and update |
| | Investments from Universal Access Fund, not delivering intended accessibility results. | Low | Moderate | Comprehensive feasibility studies and due diligence |
| Strategic Impact Assessment | Regulations not serving the intended purpose and not being able to capture and correct that due to lack of Strategic Impact Assessments. | Low | Moderate to High | Comprehensive and consistent Strategic Impact Assessments |
| Capacity Building | Fall short of achieving goals due to institutional capacity constraints. | Moderate | High | Invest in capacity gaps filling and competency development |
| Financial Sustainability | Inability to self-sustain due to reducing income and increasing costs. Lack of funding for strategic initiatives such as Digitization. | Low | Moderate | Cash flow optimization and proactively seek donor funding |
| Other | Reputational damage to RURA due to regulatory matters | High | High | Proactively communicate with consumers on regulatory matters |

7.2 Performance Management Framework

- The Performance Management Framework has two aspects - in order to enable effective implementation of this Strategic Plan:

- 1. Monitoring & Evaluation (M&E) Framework**

- 2. Key Performance Indicators (KPIs)** - arising from the Strategic Plan, refer *M&E Framework*

7.2.1 Monitoring & Evaluation (M&E) Framework*

- M&E Framework has 3 levels of monitoring and evaluation;
 1. Strategic Initiatives
 2. RURA Organizational Goals
 3. National Sector Goals

*M&E Framework is in a separate detailed excel document. Only an overview is presented here.

1. Strategic Initiatives

Strategic Initiatives will be measured based on the achievement of the actions under each milestone (as per the format).



| Milestones | Actions | Timeline | | | | | Achievement (%) | Implementation responsibility | Monitoring Frequency |
|-------------------------------|--|-------------------|-------------------|-------------------|-------------------|-------------------|-----------------|-------------------------------|----------------------|
| | | Y1 (2022-2023) | Y2 (2023-2024) | Y3 (2024-2025) | Y4 (2025-2026) | Y5 (2026-2027) | | | |
| 1. Re-Invent the R&D Function | | | | | | | | | |
| 1. R&D Plan Charter | 1.1 Define R&D Scope & objectives | Q1 | | | | | 0% | | |
| | 1.2 Develop frameworks/methodologies/ templates to be utilised | Q1 | | | | | 0% | | |
| | 1.3 Identify strategic partnerships available to advance research | Q2 | | | | | 0% | | |
| | 1.4 Develop recommendations on structural changes/ technologies requirements | Q2 | | | | | 0% | | |
| | 1.5 Develop recommendations on systems/ technologies requirements | Q2 | | | | | 0% | | |
| | 1.6 Develop relevant KPIs to monitor the execution of the plan | Q2 | | | | | 0% | | |
| 2. Budget | 2.1 Develop a start-up budget for the R&D function to execute the plan | Q3 | | | | | 0% | | |
| 3. Approval | 3.1 Submit and Present the R&D Plan with the budget to the appropriate approval point(Reguratory Board/ Management Committee). | Q3 | | | | | 0% | | |
| | 3.2 Incorporate Feedback/ comments | Q3 | | | | | 0% | | |
| | 3.3 Get approval | Q3 | | | | | 0% | | |
| 4.1 Staff/ Capacity Gaps | 4.1 Appreciate the recommendations developed as per Action #1.4 | Q4 | | | | | 0% | | |
| | 4.2 Map Staff/ Capacity gaps in the R&D function | Q4 | | | | | 0% | | |
| | 4.3 Agree on how to fill the capacity gaps (Via internal rotations or external recruitment) | Q4 | | | | | 0% | | |
| | 4.4 Define/ review job roles and specs as applicable | Q4 | | | | | 0% | | |
| | 4.5 Develop and place advertisement(if external recruitment) | Q4 | | | | | 0% | | |
| | 4.6 Short-listing, Interviews/ Assignments and Selectioin | Q4 | | | | | 0% | | |
| | 4.7 Onboard/ brief the candidates-including a detailed orientation | Q4 | | | | | 0% | | |
| 5. Execution | 5.1 Develop an Action Plan for the R&D plan/ Charter | | Q3 | | | | 0% | | |
| | 5.2 Execute and Monitor Progress | | Q3-Q4 | x | x | x | 0% | | |
| Total | | | | | | | 0% | | |

2. RURA Organizational Goals

Achievement of RURA organizational goals will be based on the achievement of the Strategic Initiatives. This will be automatically calculated in the Excel.

| Function | RURA Goal | | Achievement (%) | Monitoring Responsibility | Monitoring Frequency |
|----------------------------------|-----------|---|--------------------|------------------------------|-------------------------|
| R&D | Goal 1 | Develop a fully-fledged R&D Function - with the capabilities to continuously scan the sector environment and its dynamics experiment and roll- out innovative regulatory responses (including data-driven and high-tech interventions), share knowledge and learnings via thought leadership initiatives. | 0% | Planning, M&E | Quarterly |
| Regulatory | Goal 2 | Ensure that Rwanda's regulatory framework for the sectors regulated by RURA are comprehensive, conducive and update. Thereby enabling high quality service provisions and contributing towards national development(including enabling investments into the | 0% | Planning, M&E | Quarterly |
| Licensing | Goal 3 | Ensure 100% of the service providers (i.e,all those who should be licensed) are identified, tracked and licensed- enabled by service quality and digital efficiencies. | 0% | Planning, M&E | Quarterly |
| Compliance & Enforcement | Goal 4 | Ensure 100% compliance (there by minimizing the need for enforcement)- enabled by service quality and digital efficiencies. | 0% | Planning, M&E | Quarterly |
| Accessibility | Goal 5 | Ensure availability, affordability and accessibilityto ICT, Energy, Water & Sanitation and Transport services via the functions that RURA manages (ensuring Consumer Education, Protection and Safety). This also includes RURA's role to supplement national efforts to develop and advance these critical sectors. | 0% | Planning, M&E | Quarterly |
| Strategic Impact Assessment | Goal 6 | Develop and execute a comprehensive framework to measure the impact of RURA's contribution to the national Goals - based on which take corrective action. | 0% | Planning, M&E | Quarterly |
| Capacity Building | Goal 7 | Develop a future - ready organization to meet the opportunities and challenges in the sectors -via Organizational Structure, Capacity, Competencies, Processes & Systems | 0% | Planning, M&E | Quarterly |
| | Goal 8 | Improve service and operational efficiency via digitizing RURA's key internal and external processes / interfaces | | | |
| Financial Sustainability | Goal 9 | Ensure RURA continues to be financially self- sufficient - considering additional funding required to meet RURA's Strategic Pursuits, possible impact on revenues (due to sector dynamics) and there optimizing international development funding | 0% | Planning, M&E | Quarterly |
| Overall Goals Achievement | | | 0% | | |

3. National Sector Goals

RURA will be only monitoring and reporting the National Sector Goals. The accountability and responsibility of the goal achievement is shared among all relevant government ministries and institutes.

| Sector | National Sector Goal | RURA Goals | | | | | | | | | Total Achievement* |
|------------|--|------------|------------|-----------|------------|---------------|------------------|-------------------|--------|--------------------------|--------------------|
| | | R&D | Regulatory | Licensing | Compliance | Accessibility | Strategic impact | Capacity Building | | Financial Sustainability | |
| | | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goal 5 | Goal 6 | Goal 7 | Goal 8 | Goal 9 | |
| ICT | 80% Internet penetration by 2024 | 0% | 0% | | 0% | 0% | 0% | | | | 0% |
| | Rwanda to differentiate itself as the*proof-of-concept* country | 0% | 0% | 0% | | | | | | | 0% |
| | Position Rwanda as africa's leading ICT hub by 2024 | 0% | 0% | 0% | | 0% | | | | | 0% |
| | Digital literacy for all youth(16-30years) by 2024 | | 0% | | | 0% | | | | | 0% |
| | Accelerate niche emerging sectors, such as nanotech, biotech, blockchain technology or AI | 0% | 0% | 0% | 0% | | | | | | 0% |
| | Vibrant smart cities sustained | 0% | 0% | | | | | | | | 0% |
| | Improve accessibility to broadcasting contents through government led development of promoting the broadcasting industry | | 0% | 0% | 0% | 0% | | | | | 0% |
| | 30% of business/ Companies will participate in ecommerce by 2024 | | 0% | 0% | | 0% | | | | | 0% |
| Energy | 100% Electricity Access by 2024 | | 0% | | 0% | 0% | 0% | | | | 0% |
| | 60% of Installed Capacity via Renewable Energy by 2035 | 0% | 0% | 0% | | | | | | | 0% |
| | Reduce Firewood Dependence to 42% by 2024 | | 0% | 0% | | 0% | | | | | 0% |
| | Generation capacity Increased to ensure that all demand is met and a 15% reserve margins is maintained | | 0% | | 0% | 0% | | | | | 0% |
| Water | 100% Access by 2024 | | 0% | | 0% | 0% | 0% | | | | 0% |
| Sanitation | 100% Access by 2024 | | 0% | | 0% | 0% | 0% | | | | 0% |
| Transport | Improve rural and urban transportation services | | 0% | 0% | 0% | 0% | | | | | 0% |

7.2.2 Key Performance Indicators (KPIs)

Provided below is the format that has been followed for the KPIs for each Strategic Initiative (Refer *M&E Framework* for detailed KPIs for each Strategic Initiatives). These KPIs need to be added to the relevant performance contracts and functional / personal KPIs of relevant staff members.

Format

Strategic Initiative Name

| KPI | Baseline | Target (Overall) | Target (Annual) | | | | |
|--------------|-------------------|-------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| | | | Y1 (2022-2023) | Y2 (2023-2024) | Y3 (2024-2025) | Y4 (2025-2026) | Y5 (2026-2027) |
| (Insert KPI) | (Insert Baseline) | (Insert Overall Target) | (Year 2 Target) | (Year 3 Target) | (Year 4 Target) | (Year 5 Target) | (Year 5 Target) |
| (Insert KPI) | (Insert Baseline) | (Insert Overall Target) | (Year 2 Target) | (Year 3 Target) | (Year 4 Target) | (Year 5 Target) | (Year 5 Target) |
| (Insert KPI) | (Insert Baseline) | (Insert Overall Target) | (Year 2 Target) | (Year 3 Target) | (Year 4 Target) | (Year 5 Target) | (Year 5 Target) |



8

STRACTION

(Converting \
Strategy to Action)



- In this module, each of the Strategic Initiatives identified in Modules 3. Sights to Module 7. Systems and Module 9. \$ (Financials) are converted to step-by-step milestones-based action plans.
- In the case of RURA, there are a total of 17 Strategic Initiatives (see below). Refer Implementation Plan from Page 56 to 77 for detailed milestones for each and refer M&E Framework (excel) for Actions under each Milestone and KPIs for each Strategic Initiative

| Module 4: Strategy | | Module 5: Structure – Staff | Module 6: Sustainability (Environment) |
|---|--|---|--|
| Re-invent the R&D Function Bridge Regulatory Gaps Enabling Investments into Sectors Optimize Digital Interface – Consumers & Operators Advancing Consumer Access and Usage Protect Consumer Interests by Ensuring Quality of Service (QoS) Enhancing Institutional Collaboration Strategic Linking with Development Agencies Improve Operations Quality Management Strategic Impact Assessment | | Functional Structure Review Strategy Enabling Competency Development | Enabling the Green Agenda |
| Module 8: Systems | | Module 9: \$Financials | |
| Operations Digital Transformation Risk Management Framework Performance Management Framework | | 17. Cash Flow & Revenue Optimization | |

- Refer next page for a demonstration of how each of the 17 Strategic Initiatives above link to the RURA's Organizational Goals.

8.1 Strategic Initiatives Linked to Organizational Goals

| MTI's 8S® Module | 17 Strategic Initiatives | Organizational Goals | | | | | | | |
|-------------------------------------|--|----------------------|--------------------|-----------|--------------------------|---------------|-----------------------------|-------------------|--------------------------|
| | | R&D | Legal & Regulatory | Licensing | Compliance & Enforcement | Accessibility | Strategic Impact Assessment | Capacity Building | Financial Sustainability |
| | | Goal 1 | Goal 2 | Goal 3 | Goal 4 | Goals 5 | Goal 6 | Goal 7 & 8 | Goal 9 |
| Strategy | 1. Re-invent the R&D Function | X | | | | | X | X | |
| | 2. Bridge Regulatory Gaps | | X | | | | | | |
| | 3. Enabling Investments into Sectors | | X | X | | | | | |
| | 4. Optimize Digital Interface – Consumers & Operators | | | X | X | X | | X | |
| | 5. Advancing Consumer Access and Usage | | | | | X | | | |
| | 6. Protect Consumer Interests by Ensuring Quality of Service (QoS) | | X | X | X | X | | X | |
| | 7. Enhancing Institutional Collaboration | X | X | X | X | X | | | |
| | 8. Strategic Linking with Development Agencies | X | | | | | | X | X |
| | 9. Improve Operations Quality Management | | X | X | X | X | | X | |
| | 10. Strategic Impact Assessment | | X | | | | X | | |
| Structure- Staff | 11. Functional Structure Review | | | | | | | X | |
| | 12. Strategy Enabling Competency Development | | | | | | | X | |
| Sustainability (Environment) | 13. Enabling the Green Agenda | X | X | | | | | | |
| Systems | 14. Operations Digital Transformation | | | X | X | | | X | |
| | 15. Risk Management Framework | X | X | X | X | X | X | X | X |
| | 16. Performance Management Framework | X | X | X | X | X | X | X | X |
| \$ (Financials) | 17. Cash Flow & Revenue Optimization | | | | | | | | X |

IMPLEMENTATION PLAN

Module: 4. Strategy

Strategic Initiative: 1. Re-invent the R&D Function

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> R&D (in the case of RURA) include; <ul style="list-style-type: none"> Proactively monitor, emerging trends, challenges, and opportunities in the sectors that RURA regulates. Capture, analyze and report on-time / real-time data related to the sectors. Using above, enable Rwanda / RURA to more effectively develop Policies, Laws and Regulations. |
| Why? (Rationale) | <ul style="list-style-type: none"> R&D function (as described in the scope above) is critical for RURA to perform its key roles of Regulation, Tariff, Licensing, Compliance and Enforcement. However, current R&D function at RURA, only addresses routine data collection and analysis for few sectors. Research is only limited to few ad-hoc initiatives. |
| How? (Measurement) | Refer <i>1.1 KPIs for Strategic Initiatives in the M&E Framework</i> |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | R&D Plan / Charter: Develop R&D Plan / Charter, covering RURA R&D function's – scope, objectives, frameworks / methodologies, strategic partnerships, structure, resourcing plan, systems / technologies, KPIs. | Q1-Q2 | | | | | |
| 2 | Budget: Develop start-up budget for R&D function to execute above plan / charter. | Q3 | | | | | |
| 3 | Approval: Present above plan and budget to the appropriate approval point (Regulatory Board / Management Committee) and get approval. | Q3 | | | | | |
| 4 | Staff / Capacity Gaps: Fill the immediate staff gaps in R&D function (External recruitments or internal rotations) – to execute the R&D Plan. | Q4 | | | | | |
| 5 | Execution Execute the R&D Plan and monitor progress. | | Q3-Q4 | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 2. Bridge Regulatory Gaps

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> • To undertake a comprehensive critique of the current policies, laws, orders and regulations for each of the sectors that RURA regulates – based on the emerging opportunities, challenges and national expectations. • With the intent to identify gaps – based on which; • Initiate the need to develop new policies, laws and orders and / or amend the existing ones. • Develop new regulations, amend existing regulations and in some cases make them redundant. |
| Why? (Rationale) | <p>RURA regulates, fast-paced and dynamic sectors.</p> <p>This dynamic nature, can make existing policies, laws and regulations obsolete, more frequently.</p> <p>This has led to the current regulatory gaps in Rwanda (See Appendix 2) and possible future gaps.</p> <p>Need to factor in emerging / futuristic trends into the regulatory development process.</p> |
| How? (Measurement) | Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |



| | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Regulatory Mapping</u> Undertake a comprehensive review of regulatory needs (Policies, Laws, Orders, Regulations) - for all the sectors and sub-sectors RURA regulates, based on emerging trends, opportunities, challenges, and national expectations (including regional policy harmonization efforts). Refer 2. Scan Module to supplement above. | Q2 | | | | | |
| 2 | <u>Critique & Gap Identification</u> Based on above, critique the current regulatory environment and identify the gaps (including the gaps that have already been identified). Segment the gaps based on sectors, sub-sectors, and type of instrument (Policy, Law, Order, Regulation). | Q2-Q3 | | | | | |
| 3 | <u>Gap Filling - Policies, Laws, Orders</u> Based on above gaps (in policies, laws and orders), develop and execute a plan to fill the gaps. From initiating the need to submitting to ministry / parliament and getting approval □Monitor progress. | Q4 | Q1 | | | | |
| 4 | <u>Gap Filling – Regulations</u> Based on above gaps in #2 (in policies, laws and orders), develop and execute a plan to fill the gaps. From drafting to submitting to Regulatory Board and getting approval □Monitor progress. | | Q1-Q4 | X | | | |
| 5 | <u>Continuous Review & Update</u> Repeat step 1-4 every two years - to ensure regulatory environment is continuously updated – linked to Strategic Initiative: Strategic Impact Assessment. | | | X | | X | |

Module: 4. Strategy

Strategic Initiative: 3. Enabling Investments into Sectors

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> RURA could be a key enabler in attracting investments (including FDIs) into Rwanda for the sectors it regulates, by creating a business-friendly regulatory framework and offer incentives with regards to licensing. |
| Why? (Rationale) | <ul style="list-style-type: none"> Rwanda's economy needs a much higher level of investments to develop its key sectors (some of which are regulated by RURA currently). Having a conducive regulatory framework coupled with incentives will be key to enable investments into a country. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Study Investment Gaps</u> Conduct a comprehensive study to identify existing investment gaps for all RURA sub-sectors | Q2 | | | | | |
| 2 | <u>Study Investment Challenges</u> As an extension to the above, conduct a comprehensive study covering inputs from relevant stakeholders and current / potential investors. This study is carried out to help identify and prioritize 'Key Investment Challenges' in the current regulatory environment, licensing and compliance processes, fees and terms (for each sub-sector). | Q2-Q3 | | | | | |

| | | | | | | | |
|---|--|-------|-------|---|---|---|--|
| 3 | <u>Regulatory Responses to Investment Challenges</u> Based on above, develop a plan to resolve the investment challenges using RURA's regulatory framework. Ensure to sync with Strategic Initiative: Bridge Regulatory Gaps. | Q3-Q4 | | | | | |
| 4 | <u>Approval</u> Submit the above plan to the appropriate approval point (Regulatory Board / Management Committee) . | Q4 | | | | | |
| 5 | <u>Execution</u> Post-approval, execute the plan □ Monitor progress. | | Q1-Q4 | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 4. Optimize Digital Interface – Consumers & Operators

| | |
|----------------------------------|--|
| <u>What? (Scope)</u> | <ul style="list-style-type: none"> Optimizing the use of digital channels to interface with both end-consumers and operators – thus ensuring higher service quality, efficiency and complementing RURA's existing marketing / brand-building efforts. |
| <u>Why? (Rationale)</u> | <ul style="list-style-type: none"> Currently RURA is required to interface with end-consumers on consumer awareness / protection related areas and with operators mainly for licensing and compliance. Given the number of sectors RURA is mandated to regulate, manually interfacing with end-consumers and operators on the above will require significant manpower, leading to higher costs and overall inefficiencies. |
| <u>How? (Measurement)</u> | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Touchpoints Mapping</u> Conduct a comprehensive mapping of all end-consumer and operator touchpoints. | Q1 | | | | | |
| 2 | <u>Define Objectives</u> Clearly define RURA's strategic objectives with regards to end-consumers and operators. Ensure sync with RURA's existing marketing and brand-building efforts | Q1-Q2 | | | | | |
| 3 | <u>Prioritize</u> Based on above, prioritize key touchpoints that warrants digitization. | Q2 | | | | | |
| 4 | <u>Validate</u> Conduct a survey among the end-consumers & operators to validate above prioritization. | Q2 | | | | | |
| 5 | <u>Develop Roadmap</u> Research and develop a roadmap with recommendations on systems, processes, capabilities that will be required (Including the projected budget and timelines). Integrate with back-end digital transformation by linking to Strategic Initiative: <i>Operations Digital Transformation.</i> | Q3 | | | | | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 6 | <u>Feasibility Study</u> Conduct a feasibility study to gauge how feasible (technically and financially) the recommendations are. If external consultants are required, this is subject to DG / Regulatory Board / MC approval. | Q4 | | | | | |
| 7 | <u>Develop Action Plan</u> Post-approval, develop a Detailed Action Plan (including timelines, KPIs and budget). | | Q1 | | | | |
| 8 | <u>Approval</u> After completion of above, submit the roadmap (with changes incorporated) to the appropriate approval point (Regulatory Board / Management Committee) for feedback and approval. | | Q1 | | | | |
| 9 | <u>Execution</u> Execute the Action Plan □ Monitor progress. | | Q1-Q4 | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 5. Advancing Consumer Access and Usage

| | |
|---------------------------|---|
| What? (Scope) | To increase the levels of access and usage of the essential public utilities to the wider population of Rwanda. To enable the ability of the wider population to afford these essential services – considering their current socio-economic circumstances. This in turn will require, development of affordable tariffs, consumer education and awareness, and investing on accessibility (via UAF). |
| Why? (Rationale) | Ultimately, the core of RURA's existence is to serve Rwandan citizens by ensuring the affordable accessibility of public utilities, thus leading to the Socio-economic development of Rwanda. |
| How? (Measurement) | Refer <i>1.1 KPIs for Strategic Initiatives in the M&E Framework</i> |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Study Current Status</u> For all the sub-sectors RURA regulates, study the current status of accessibility – including quantification of current levels, accessibility related challenges, gaps and opportunities. This will require going granular on challenges and identifying the root causes. (Refer 2. Scan Module for some top-line insights) | Q2-Q4 | | | | | |
| 2 | <u>Strategic Responses</u> Based on above study, identify the aspects that are within RURA's control to develop strategic responses for above challenges and opportunities. Given RURA's scope, broadly this will cover Tariff, Consumer Education and UAF. | | | | | | |
| 3 | <u>Consumer Education</u> Conduct a consumer survey to identify accessibility related consumer challenges and to identify any awareness / education gaps related to public utilities (linked to Study in Step 1). Based on above, develop and execute a Communications Plan □ Monitor progress. | | Q1-Q4 | X | X | X | |

| | | | | | | | |
|---|---|--|-------|---|---|---|--|
| 4 | <u>Tariff Review and Changes</u> Undertake a comprehensive review of all the Tariffs RURA set for public utilities. Also, a study on the tariff rates of liberalized markets, to evaluate whether RURA should intervene. Based on the review, develop and execute a plan to implement any changes required to tariff structures / formulas and rates □ Monitor progress. | | Q3-Q4 | X | X | X | |
| 5 | <u>Universal Access Fund (UAF)</u> Use the study done under step 1 as inputs to strategize new initiatives on Universal Access for ICT. Discuss with Senior Management and Board to develop a similar fund or expand the UAF to cover all key public utilities (such as electricity, water, sanitation) | | | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 6. Protect Consumer Interests by Ensuring Quality of Service (QoS)

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> Protect the interests and rights of consumers, by playing the role of the intermediary between consumers and operators. Resolve consumer complaints and ensure consumers receive services as per stipulated quality standards and guidelines. |
| Why? (Rationale) | <ul style="list-style-type: none"> Most of the complaints RURA receives from consumers are on quality-of-service (QoS) related aspects. Need to ensure that these complaints are resolved on-time, in a satisfactory manner and possible future issues are prevented. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Contact Centre</u> Set-up a Contact Centre to ensure effective capture of consumer complaints via both traditional modes (e.g. telephone calls) and digital modes (e.g. social media). | Q1-Q2 | | | | | |
| 2 | <u>Integrated Complaints Management System</u> Develop/purchase and implement a Consumer Complaint Management System (with CRM) – integrated with the systems of relevant operators and other government institutes Sync with Strategic Initiative: Optimize Digital Interface. | Q3-Q4 | Q1-Q2 | | | | |
| 3 | <u>QoS Review</u> For all sub-sectors, conduct a comprehensive review of current QoS standards and guidelines. This will include; <ul style="list-style-type: none"> ▪ Gaps in available QoS standards and guidelines ▪ Current QoS compliance levels, challenges and opportunities ▪ Information / Knowledge gaps among operators leading to poor QoS compliance and fulfilling obligations as a licensee ▪ License status of operators delivering services to the consumers ▪ Changing market dynamics and how it could potentially impact QoS expectations ▪ Consumer expectations and challenges in QoS – linked to the Consumer Survey in step 3 of Strategic Initiative: Advancing Consumer Access and Usage ▪ Existing / potential consumer feedback mechanisms (including advocacy groups) | Q1-Q4 | | | | | |
| 4 | <u>QoS Improvement Plan</u> Based on above review, develop and implement a plan to improve QoS for all sectors and sub-sectors - Including developing / revising QoS Standards and Guidelines □ Monitor progress. | | Q1-Q4 | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 7. Enhancing Institutional Collaboration

| | |
|----------------------------|---|
| What? (Scope) | <ul style="list-style-type: none"> RURA to proactively collaborate with a multitude of Rwandan Government Stakeholders – whose roles has an interface, inter-link and /or overlap with RURA's role. So that all parties concerned can work in synergy and create greater value to the Country, Consumers and Operators. |
| Why? (Rationale) | <ul style="list-style-type: none"> Most sector developmental initiatives will require some degree of collaboration between the key players in Rwandan GovernmentEco-System. RURA can benefit by tapping into the resources and know-how of these organizations, whilst sharing RURA's own expertise withthem. In some cases (where there are overlaps in roles), it would be prudent for RURA to proactivelycollaborate. |
| How? (Measure-ment) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achieve-ment (%) |
|---|---|----------|----|----|----|----|------------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Institutional Linking & Collaboration Role</u> Create a role in RURA's organizational structure, with dedicated focus on establishing and managing institutional collaborations (including to manage Strategic Initiative: Strategic Linking with Development Agencies). | Q4 | | | | | |
| 2 | <u>Stakeholder Mapping</u> Map all the key government stakeholders, their scope and how RURA should collaborate – as per the Sectors (refer Page 41 for sample). | | Q1 | | | | |

| | | | | | | | |
|---|--|--|-----------|--|--|--|--|
| 3 | <u>Prioritize</u> Develop a simple Strategic Collaboration Checklist to prioritize key stakeholders from the mapping conducted above. This checklist should provide clarity on the strategic needs each collaboration would serve. | | Q1 | | | | |
| 4 | <u>Tracker Development</u> Based on above, create a tracker (Excel or IT system) with all key stakeholders and their key contacts, with whom RURA should interface with. | | Q1 | | | | |
| 5 | <u>Approach Institutions</u> Based on above tracker, approach the institutions and initiate discussions (Involving relevant internal RURA teams). | | Q2- Q4 | | | | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 6 | <u>Formalize Collaborations</u> Based on the discussions, develop and sign MOUs (Including measures of success for the collaboration). | | Q4 | X | X | X | |
| 7 | <u>Manage Collaborations</u> Execute the MOUs and maintain the collaboration. Including triggers in tracker to engage on a frequent basis. | | | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 8. Strategic Linking with Development Agencies

| | |
|---------------------------|---|
| What? (Scope) | <ul style="list-style-type: none"> To identify international development and donor agencies – with whom RURA can collaborate for R&D, Competency Development, Technical Support, Knowledge Sharing and Thought Leadership Initiatives (that will also help to strengthen the corporate brand position of RURA). Through the above initiatives, to be able to receive funding – in return for the value proposition that RURA will offer these organizations. |
| Why? (Rationale) | <ul style="list-style-type: none"> Many international development and donor agencies are looking to collaborate with / support the sectors that RURA regulates, in particular, the ones that are priorities in their development agenda. Rwanda, as a country, enjoys a positive image for the remarkable post-genocide socio-economic transformation. Within this, RURA is well positioned. With rapid changes taking place in RURA's operating environment and possible impact this will have on RURA's operations and revenue, there is a need for international collaboration and the need for alternate funding sources. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Institutional Linking & Collaboration Role</u> Create a role in RURA's organizational structure, with dedicated focus on establishing and managing institutional linking and collaborations (including to manage Strategic Initiative: <i>Enhancing Institutional Collaboration</i>). | Q4 | | | | | |
| 2 | <u>Development Agency Mapping</u> Map all the key international and regional development agencies, their scope and how RURA should collaborate – as per the Sectors (refer <i>Page 41</i> for sample). | | Q1 | | | | |

| | | | | | | | |
|---|--|--|----|--|--|--|--|
| 3 | <u>Tracker Development</u> Based on above, create a tracker (Excel or IT system) with all key development agencies and their key contacts, with whom RURA should interface with. | | Q1 | | | | |
| 4 | <u>Value Proposition / Proposal Development</u> Based on above agencies and Rwanda's / RURA's needs, develop proposals highlighting why RURA / Rwanda require collaboration / expertise / funding and what's the value proposition RURA / Rwanda will offer to the Agencies. | | Q2 | | | | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 5 | <u>Approach Agencies</u> Approach the Agencies, present the proposals and initiate discussions (Involving relevant internal RURA teams or even other government stakeholders). | | Q2-Q4 | X | X | X | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Institutional Linking & Collaboration Role</u> Create a role in RURA's organizational structure, with dedicated focus on establishing and managing institutional linking and collaborations (including to manage Strategic Initiative: <i>Enhancing Institutional Collaboration</i>). | Q4 | | | | | |
| 2 | <u>Development Agency Mapping</u> Map all the key international and regional development agencies, their scope and how RURA should collaborate – as per the Sectors (refer <i>Page 41</i> for sample). | Q1 | | | | | |

| | | | | | | | |
|---|--|--|----|--|--|--|--|
| 3 | <u>Tracker Development</u> Based on above, create a tracker (Excel or IT system) with all key development agencies and their key contacts, with whom RURA should interface with. | | Q1 | | | | |
| 4 | <u>Value Proposition / Proposal Development</u> Based on above agencies and Rwanda's / RURA's needs, develop proposals highlighting why RURA / Rwanda require collaboration / expertise / funding and what's the value proposition RURA / Rwanda will offer to the Agencies. | | Q2 | | | | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 5 | <u>Approach Agencies</u> Approach the Agencies, present the proposals and initiate discussions (Involving relevant internal RURA teams or even other government stakeholders). | | Q2-Q4 | X | X | X | |
| 6 | <u>Formalize and Manage Strategic Partnership</u> Based on the discussions, develop and sign MOUs (Including measures of success for the partnership). Execute MOU and engage on a frequent basis. | | | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 9. Improve Operations Quality Management

| | |
|----------------------------|---|
| What? (Scope) | <ul style="list-style-type: none"> Ensuring that RURA adheres to defined quality standards – in relation to the serving its Customers and Operators (the front-end) and its Operations (the back-end). These quality standards needs to go beyond simple adherence to the QMS, it needs to be an integral part of the organizational culture. |
| Why? (Rationale) | <ul style="list-style-type: none"> Given the breadth of sectors / functions that RURA needs to regulate and the number of interfaces / transactions it needs to manage, there needs to be a disciplined approach to managing quality. |
| How? (Measure-ment) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Services & Operations Mapping</u> Conduct a mapping of RURA's services & operations across the value-chain functions and the regulated sectors. Develop ideal standards and study the current level of performance vis-à-vis the QMS system | Q1 | | | | | |
| 2 | <u>Baseline Survey on Service Quality and Satisfaction</u> Conduct a 360-degree Service Quality and Satisfaction Survey - covering a sample of consumers, operators, other external stakeholders (Government institutions) and internal stakeholders (Staff) – to set as the baseline for current service quality. | Q2 | | | | | |

| | | | | | | | |
|---|---|-------|-------|---|---|---|--|
| 3 | Quality Improvement Plan Development Based on above, develop a plan to improve quality of services and operations – integrated with Quality Management System (QMS) implementation. This also includes developing Quality Manuals, Reports and Internal Service Level Standards. | Q3-Q4 | | | | | |
| 4 | Execution Execute the above plan □ Monitor progress of the execution. | | Q1-Q4 | X | | | |
| 5 | Annual Service Quality and Satisfaction Survey Conduct an Annual Service Quality and Satisfaction Survey – to review the progress of quality improvements and take corrective actions if needed. | | | X | X | X | |

Module: 4. Strategy

Strategic Initiative: 10. Strategic Impact Assessment

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> To develop a framework and ensure it is periodically tested – to assess the strategic impact of the role and contribution of RURA to the ‘bigger picture’ i.e., National Socio-Economic Development. This should strongly link all RURA’s key functions to the impact it creates in terms of Socio-Economic Development, either directly or indirectly. |
| Why? (Rationale) | <ul style="list-style-type: none"> Given the intermediary / contributory role of RURA to the national agenda, the importance of a strategic check – to ensure the organizational efforts are converted to impact. This can also help RURA to assess its internal efficiencies and productivity, thus ensuring its focus on the strategic priorities. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Strategic Impact Assessment (SIA) Role</u> Create a role in RURA organizational structure, with dedicated focus on assessing strategic impact of RURA's role and collaborate with other departments / units to improve. | | | | | | |
| 2 | <u>SIA Frameworks</u> For each sector and sub-sector, develop SIA frameworks – covering all RURA key functions. Depending on the function, can go granular and specific. | | | | | | |
| 3 | <u>Approval</u> Present SIA Frameworks to the appropriate approval point (Regulatory Board / Management Committee) and get approval. | | | | | | |
| 4 | <u>Strategic Impact Assessment</u> Conduct SIAs as per the frameworks. Present results to Board, Management and Key Stakeholders. | | | | | | |
| 5 | <u>Decisions and Actions</u> Decision making and actions based on above SIAs – link to job roles and KPIs of relevant Sectors. | | | X | | | |
| 6 | <u>Continuous SIA and Actions</u> Repeat step 4 and 5 above, annually. | | | X | X | X | |

Module: 5. Structure-Staff

Strategic Initiative: 11. Functional Structure Review

| | |
|---------------------------|--|
| What? (Scope) | <p>To review the Functional Organizational Structure of RURA - considering the emerging opportunities, challenges, expectations and implications from this Strategic Plan (to fill-in the vacant positions will be an integral part).</p> <p>RURA could choose to review its structure through 2 options;</p> <p>Option 1: Ground-zero based Organizational Structure Development</p> <p>Option 2: Adjust the Existing Structure</p> |
| Why? (Rationale) | <p>35 positions in the current legacy structure is vacant and this is impacting both the ability for RURA to discharge its duties and the performance of the current staff (some of whom are overloaded as a result).</p> <p>Enable the accommodation of the positions / roles arising out of this Strategic Plan</p> |
| How? (Measurement) | Refer <i>1.1 KPIs for Strategic Initiatives in the M&E Framework</i> |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <p><u>Strategic Plan – Implications for Structure</u></p> <p>Conduct a Strategic Plan review covering;</p> <p>RURA Scope as per the sectors and functions</p> <p>All strategic initiatives and their impact on organizational structure and capacity</p> <p>To supplement above, gather inputs and insights from senior management and staff. This can include insights on staff satisfaction, internal co-ordination, communication, and engagement.</p> | Q1 | | | | | |

| | | | | | | | |
|---|---|----|--|--|--|--|--|
| 2 | Option 1: Ground-zero based Organizational Structure Development Based on the above review, RURA could choose to develop the organizational structure on a clean- slate basis, without referring to existing structures, functions, designations, and levels. | Q1 | | | | | |
| 3 | Option 2: <u>Adjust the Existing Structure</u> RURA could choose to adjust the current structure to accommodate the positions / roles arising out of this Strategic Plan | Q1 | | | | | |
| 4 | Select Option Based on a thorough evaluation. RURA to choose the best-fit option from the 2 options provided above □Get Regulatory Board approval if applicable | Q2 | | | | | |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 5 | <u>Migration from / Adjustments to the Current Structure</u> Migrate from / adjust the current structure, functions, designations and levels including who will be filling which positions. | Q2-Q3 | | | | | |
| 6 | <u>Approval</u> Present above to the appropriate approval point (Regulatory Board / Management Committee) and get approval and execute the option. | Q3-Q4 | Q1 | | | | |
| 7 | <u>Capacity Gaps Filling</u> Based on the approved structure and current capacity, identify capacity gaps (vacant positions). Develop and execute a plan to fill the capacity gaps (including internal rotations, promotions and external recruitments). | Q4 | Q1-Q2 | | | | |

| | | | | | | | |
|---|---|--|-------|---|---|---|--|
| 8 | <u>Engagement Plan</u> After above, develop and implement a Staff Engagement Plan (covering internal co-ordination and communication, based on structure changes) □Monitor progress. | | Q3-Q4 | X | X | X | |
| 9 | <u>Staff Satisfaction Survey</u> Conduct annual staff satisfaction survey to assess internal satisfaction levels on structure, capacity, competencies, engagement / coordination and systems. | | | X | X | X | |

Module: 5. Structure-Staff

Strategic Initiative: 12. Strategy Enabling Competency Development

| | |
|---------------------------|--|
| What? (Scope) | <ul style="list-style-type: none"> Mapping and identifying the Competencies that RURA needs to have in place – to meet the emerging opportunities, challenges and expectations. Based on the above, map RURA's existing competencies, thus identifying the Competency Gaps – that needs to be developed and /or acquired. This will be followed by Competency Development (Training). |
| Why? (Rationale) | <ul style="list-style-type: none"> RURA is required to acquire and improve strategy-critical competencies to meet the future challenges and opportunities addressed in this Strategic Plan. This has a direct impact on both RURA's staff performance and the ability to implement the Strategic Plan. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-----------|----|----|----|--------------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Competency Mapping</u> Conduct a comprehensive mapping of RURA's existing and required competencies – covering all functions (for each sub-sector if relevant) □ Refer framework in <i>Page 47</i> as a guide. | Q1 | | | | | |
| 2 | <u>Competency Gaps Prioritization</u> Based on above, identify and prioritize competency gaps to be addressed. | Q2 | | | | | |
| 3 | <u>Develop Training & Development Plan</u> Based on above, develop a detailed Training & Development Plan (including resourcing plan, KPIs, budgets and timelines). | Q3 | | | | | |
| 4 | <u>Approval</u> Submit the plan to the appropriate approval point (Regulatory Board / Management Committee) for feedback and approval. | Q4 | | | | | |
| 5 | <u>Execute</u> Post-approval, execute the plan □ Monitor progress. | | Q1- Q4 | X | X | X | |

Module: 6. Sustainability (Environment)

Strategic Initiative: 13. Enabling the Green Agenda

| | |
|---------------------------|---|
| What? (Scope) | <ul style="list-style-type: none"> Enable the adoption of environmentally sustainable practices – among Consumers and Operators via RURA's regulatory role and how it conducts its day-to-day operations. Through its regulatory role, RURA could initiate the need for environmentally sustainable policies, laws and develop appropriate regulations. As an organization, RURA could encourage sustainable practices by how it performs its day-to-day operations such as Licensing, Compliance, Enforcement, etc. |
| Why? (Rationale) | <ul style="list-style-type: none"> The criticality of sustainable practices – given the impact it has on Rwanda's environment. The vantage position that RURA is in, to be able to influence sustainability practices among a significant proposition of the Consumers and Organizations in Rwanda. |
| How? (Measurement) | <ul style="list-style-type: none"> Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Study National Environmental Plans</u> Study Rwanda's national plans on environmental sustainability and current challenges, gaps and opportunities. Including best practices from other national regulators on promoting Green Agenda. | | Q1 | | | | |
| 2 | <u>Regulatory Responses</u> Based on above, develop a plan to accelerate Rwanda's national plans and resolve challenges / gaps - using RURA's regulatory role and framework. Ensure sync with Strategic Initiative: Bridge Regulatory Gaps . | | Q1-Q2 | | | | |

| | | | | | | | |
|---|--|--|-----------|---|---|---|--|
| 3 | <u>Approval</u> Submit the above plan to the appropriate approval point (Regulatory Board / Management Committee) for feedback and approval. | | Q3 | | | | |
| 4 | <u>Execution</u> Post-approval, execute the plan □ Monitor progress. | | Q3- Q4 | X | X | X | |

Module: 7. Systems

Strategic Initiative: 14. Operations Digital Transformation

| | |
|---------------------------|--|
| What? (Scope) | To carry out an organization-wide, comprehensive digital transformation of RURA's back-end operations leading to the elimination of both human and process inefficiencies. |
| Why? (Rationale) | The current level of digitization is inadequate given the number of sectors that RURA must regulate and the type of functions that RURA is expected to perform for the sectors it regulates. |
| How? (Measurement) | Refer <i>1.1 KPIs for Strategic Initiatives in the M&E Framework</i> |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Process Mapping & Review</u> Undertake a comprehensive mapping of all the back-end processes at RURA. Clearly define objectives on operational efficiency and existing operational pain points. Based on which a thorough review is to be conducted for each process to evaluate its current efficiency, quality and relevance. | Q1 | | | | | |

| | | | | | | | |
|---|---|-----------|---|---|---|--|--|
| 2 | <u>Prioritize</u> Based on above, identify and prioritize key processes to be digitally transformed / optimized. Including the already identified digitization initiatives / systems (Refer Appendix 3 for the list). | Q1- Q2 | | | | | |
| 3 | <u>Develop Roadmap</u> Based on above, develop a roadmap with recommendation (including projected budget and timelines). Ensure sync with Strategic Initiative: <i>Optimize Digital Interface – Consumers & Operators.</i> | Q3 | | | | | |
| 4 | <u>Feasibility Study</u> Conduct a feasibility study to gauge how feasible (technically and financially) the recommendations are. If external consultants are required, this is subject to DG / Regulatory Board / Management Committee approval. | Q3- Q4 | | | | | |
| 5 | <u>Develop Action Plan</u> Post-approval, develop a Detailed Action Plan (including timelines, KPIs and budget). | Q4 | | | | | |
| 6 | <u>Approval</u> After completion of above, submit the roadmap (with changes incorporated) to the appropriate approval point (Regulatory Board / Management Committee) for feedback and approval. | Q1 | | | | | |
| 7 | <u>Execute</u> Execute the Action Plan □ Monitor progress. | Q1- Q4 | X | X | X | | |

Module: 7. Systems

Strategic Initiative: 15. Risk Management Framework

| | |
|---------------------------|---|
| What? (Scope) | Identifying the potential risks that RURA is likely to encounter and proactively mitigating them hence in the event of encountering the risk, RURA can minimize its negative impact to itself and its stakeholders. |
| Why? (Rationale) | Given the dynamics in RURA's operating environment, risks are likely to occur, and it is important for RURA to be able to respond effectively with minimum damage. |
| How? (Measurement) | Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Risk Management Role</u> Create a role in RURA organizational structure, with dedicated focus on risk management. | Q4 | | | | | |
| 2 | <u>Risk Management Framework</u> Develop a comprehensive Risk Management Framework for RURA, covering all its functions (by Sectors / sub-sectors if relevant). Refer framework in <i>Page 50</i> as a guide. | | Q1 | | | | |
| 3 | <u>Risks Identification</u> Based on above framework, identify and prioritize key strategic risks for RURA. | | Q1-Q2 | | | | |

| | | | | | | | |
|---|--|--|-----------|---|---|---|--|
| 4 | <u>Risk Mitigation Plan</u> For each identified strategic risk above, develop a detailed risk mitigation plan. | | Q3- Q4 | | | | |
| 5 | <u>Approval</u> Present outcomes from step 2-4 above to the appropriate approval point (Regulatory Board / Management Committee) for feedback / approval. | | | X | | | |
| 6 | <u>Execution</u> Execute the risk mitigation plans. This could include changes to RURA's processes, policies, compliance, governance, systems and even resourcing □ Monitor progress. | | | X | X | X | |
| 7 | <u>Annual Review</u> Review / the Risk Management Framework annually and repeat step 3-6. | | | X | X | X | |

Module: 7. Systems

Strategic Initiative: 16. Performance Management Framework

| | |
|---------------------------|---|
| What? (Scope) | To develop comprehensive evaluation framework, that will facilitate RURA to effectively monitor its performance with regards to implementation of this strategic plan and take remedial actions. There are two aspects in this Performance Management Framework: M&E Framework for Strategic Plan Implementation (Excel) KPIs arising from Strategic Initiatives – Refer M&E Framework |
| Why? (Rationale) | To ensure that RURA's staff efforts are focused on achieving the goals recommended in the Strategic Plan. |
| How? (Measurement) | Refer 1.1 KPIs for Strategic Initiatives in the M&E Framework |

| # | Milestones | Timeline | | | | | Achievement (%) |
|---|--|----------|----|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Performance Management Framework</u> Appreciate and validate the M&E Framework (Excel) and KPIs in the framework. RURA can expand / revise both as necessary. | Q1 | | | | | |
| 2 | <u>Approval</u> Get approval from the appropriate approval point (Regulatory Board / Management Committee). | Q1 | | | | | |
| 3 | <u>Revise Performance Contracts and KPIs</u> Based on the responsibilities (Strategic Plan Implementation) and KPIs above, revise RURA's internal performance contracts and functional / personal KPIs. | Q2 | | | | | |
| 4 | <u>Team Briefing / Training on M&E Framework</u> Detailed briefing / training to the project champions who are supposed to implement the respective Strategic Initiatives - by Consultant and RURA Planning, M&E Team. | Q2 | | | | | |
| 5 | <u>Monitor & Evaluate</u> Monitor and evaluate the Strategic Plan implementation as per M&E Framework. Assess the KPIs achievement (For the KPIs arising from Strategic Plan – <i>Refer M&E Framework</i>). | Q2 | X | X | X | X | |

Module: 9. \$ (Financials)

Strategic Initiative: 17. Cash Flow & Revenue Optimization

| | |
|---------------------------|---|
| What? (Scope) | To short-term invest the idle cash with RURA, including the idle amounts in the Universal Access Fund. Identify revenue reductions / leakages and address |
| Why? (Rationale) | Currently RURA has excess cash that could be utilized more profitably via investment options. RURA also needs to bridge any revenue reductions / leakages to mitigate any adverse impact on the overall financial sustainability |
| How? (Measurement) | Refer <i>1.1 KPIs for Strategic Initiatives in the M&E Framework</i> |



| # | Milestones | Timeline | | | | | Achievement (%) |
|---|---|----------|-------|----|----|----|-----------------|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | |
| 1 | <u>Cash Flow Forecast</u> Develop a short-term (6-12 months) cash flow forecast for RURA. Based on above, identify the amount RURA can invest and amount RURA need to keep at hand (to pay construction expenses and other immediate expenses). | Q1 | | | | | |
| 2 | <u>Investment Options</u> Based on above amount RURA can invest, develop and evaluate the investment options for RURA. This could include investing on; <ul style="list-style-type: none"> ▪ RURA core operations – UAF projects ▪ RURA capacity building (staff, training, consultancy, technology systems etc.) ▪ Short-medium term financial instruments – Deposits, Bonds | Q2 | | | | | |
| 3 | <u>Revenue Forecast</u> Appreciate the financial forecast provided to RURA by the consultant. Identify and study the potential revenue reductions / leakages | Q3 | | | | | |
| 4 | <u>Revenue Bridging Options</u> Identify initiatives that will enable RURA to address the leakages and reductions identified above | Q4 | | | | | |
| 5 | <u>Board Decision & Approval</u> Present above 1 and 2 to the to the appropriate approval point (Regulatory Board / Management Committee) and decide on the investment options to pursue. | Q4 | | | | | |
| 6 | <u>Execution</u> Execute the above decided investment options. Link to KPIs of relevant departments / units. | | Q1-Q4 | X | X | X | |

Appendix

Appendix 1 | Key Sector Achievements – During Strategic Plan Implementation (2017-2020)

ICT (Including Media & Broadcasting, Postal & E-Commerce)

- Rate of compliance increased from 65% to 81.5% due to strengthened compliance monitoring and enforcement
- The acquisition of Tigo Rwanda by Airtel Rwanda – reducing number of Mobile Network Operators (MNO) in Rwanda to 2
- Mobile telephone subscriptions increased from 8.8 million in 2017 to 9.9 million in 2020 – 12.5% growth
- Internet service subscriptions increased from 4.4 million in 2017 to 7.9 million in 2020 – 79.5% growth
- 4G LTE Technology is deployed on 94.2% of geographic coverage and 96.6% of population coverage
- Construction and operationalization of 10 sites in national parks of Akagera, Virunga, and Nyungwe Forest
- Rwf 200 million was allocated to increase smartphone penetration in Rwanda, via Universal Access Fund (UAF)
- Identified 68 potential sites as nominal points to increase ICT accessibility. The project which will be funded by UAF is valued at Rwf 3.5 billion

Energy (Electricity, Downstream Petroleum & Gas, Nuclear & Radiation)

- 11 new electricity generation licenses were issued with 20.8 MW capacity
- National grid capacity increased from 208.3 MW in 2017 to 228.1 MW in 2020 – 9.5% growth
- Total electricity generation increased from 781,501 MWh to 872,646 MWh (11.7% growth) while active customers connected to the grid increased from 811,129 to 1,092,168 – 34.6%
- The total experienced outages were reduced from 7,471 to 2,460 (67.1% decline) and cumulative hours the outage lasted reduced from 2,372.5 to 1,488 hours (37.3% decline)

- Over 100 LPG business licenses and service station installation licenses were granted
- Total capacity of LPG storage plants increased from 298 MT in 2017 to 693.7 MT in 2020 – 132.8% growth
- Nuclear & Radiation Protection department was started in 2018 to regulate radiation sector

Water & Sanitation

- Water production increased by from 47,709,233 m³ in 2017 to 53,245,484 m³ in 2020 – 11.6% growth
- For rural water supply, 42 new licenses were granted to private service providers and 9 licenses surrendered
- 81 new licenses were granted for sanitation services and 5 new licenses were granted for solid waste management
- The number of customers has increased from 191,684 in 2017 to 230,190 in 2020 – 20.1% growth
- All 27 Districts have established District WASH Boards and 20 Districts have in place WATSAN officers
- Public Private Partnership Agreement (PPA Amendment) was agreed between the Government of Rwanda, WASAC Ltd and Kigali Water Ltd (KWL) for the construction of a bulk water treatment facility of 40,000 m³/day

Transport

- Number of licensed operators in road transport (passenger and goods) and waterways transport increased significantly
- New ICT Applications were introduced in the sector
 - Electronic Ticketing Systems for inter– city buses
 - Mobile phone-based Booking Systems
 - Automated Fare Collection System use in the City of Kigali buses
 - Free Wi-Fi in Kigali City Buses and Internet services in Taxi parks
 - Driver Vocational Cards (DVCs) to monitor behaviors of public transport drivers

- Created a real-time dashboard that collects and visualizes data from e-Ticketing systems. The system allows data visualizations for transport planning purposes
- Introduced an online system of licensing motorcycles through Irembo platform
- RURA in collaboration with stakeholders conducted inspections and approved speed governor gadgets of Sieco 2020 Ltd and Sator Rwanda Ltd

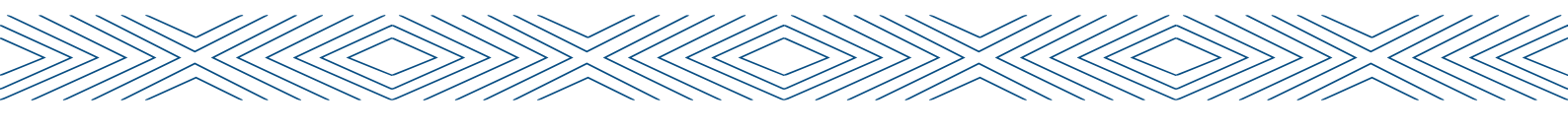
Source: Situational Analysis – Strategic Plan 2017- 2020 (RURA)

Appendix 2 | Gaps in Regulatory Framework

ICT, Media, Postal

- Presidential Order establishing the Universal Access fund in ICT sector
- Prime Minister's order determining the specific responsibilities of RURA regarding Media
- Draft Prime Minister Order determining the list of reserved postal services provided by the operator in charge of the universal postal services
- Draft Prime Minister Order designating the universal postal services operator
- Ministerial Order on radio communication fees
- ICT Policy

Energy, Water & Sanitation

- Draft Law governing gas sector
 - Draft Ministerial Order determining categories of licenses for petroleum and petroleum products trade
 - Draft Ministerial Order determining the minimum quantity to maintain in the stocks and modalities for the release and sale of the government strategic stock
 - Draft Ministerial Order determining the scale of price of petroleum and petroleum products
 - Draft Law governing water supply services in Rwanda
 - Petroleum Product Trade Policy
 - Water Supply Policy
 - Sanitation Policy
- 

Transport

- Draft Law governing road transport in Rwanda
- Draft Law governing inland waterways
- Transport Policy and Strategy

Note: Gaps as at June 2021.

The above regulatory gaps will be reviewed and updated accordingly as per Strategic Initiative: Bridge Regulatory Gaps □ Milestone #1. Regulatory Mapping

Systems & Initiatives

- Converged licensing Management System (90% done) – need to be integrated with SAP
- SAP B1 and S/4 Hana
- Microsoft exchange server 2013 integrated with AD
- Active Directory and NAC
- Drivers/Conductors Vocational Cards Management System
- Payment Gateway
- SMS Gateway
- IGTVS: International Gateway Traffic Verification System
- M3: Mobile Money Monitoring
- SMMS: Spectrum Monitoring and Management System.
- Bus Information System
- GIS-Mapping System
- Attendance System
- Security Access Control
- Extra SIM Registration
- Online Interference Complaint Form
- IMEI VERIFICATION SYSTEM
- E-procurement
- RURA Website

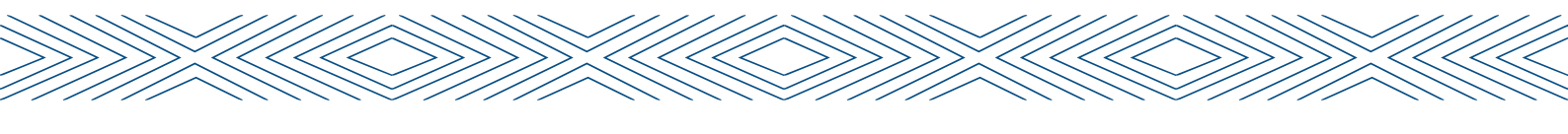
- Printing Server
- Event Management System,
- E-Recruitment
- Hadoop for CDR-data analyses
- E-Ticketing
- Mobile Money Analytics

Appendix 3 | RURA Technology Systems - Current & Planned

Planned Systems, Initiatives & Gaps

- Corporate Digitization - 0%-5% progress
- Financials (including but not limited to Purchasing and Procurement, Asset Management, Materials Management, Inventory Management)
- Human Capital Management module (including but not limited to E-Recruitment, Employee Self-service, Payroll Engine, Personnel Management, Leaves Management, Talent Management, Career Progression)
- Corporate Planning (Strategic & Annual Planning)
- Document & Workflow Management
- Mobility Management
- Integrated Business Data Warehouse (DWH)
- Customer Relationship Management— CRM (CRM Service,
- CRM Channels, Interaction Center)
- Integration with third party systems and data acquisition from operators

Emerging Tech Initiatives

- AI, IoT and MR initiatives
 - Big Data Analytics
 - To store Telecom data for 20 Years
 - Hosting the Smart Transport Initiatives
 - Smart Africa
 - Satellite Data
- 

Appendix 4 | Strategic Plan 2017-2020 – Strategic Goals Achievement | Detailed Breakdown

| Strategic Goal | Strategic Outcome | Targets | Progress |
|--|---|---|----------|
| 1. Interests Of Regulated Services Users Protected | 1. All consumer complaints responded to in the shortest time possible | 100% of complaints resolved | 92% |
| | 2. Increased affordability and availability of regulated services | 10% annual increase in water production | 60% |
| | | 10% annual increase in population with access to affordable clean water | 80% |
| | | 10% increment in number of routes in urban and rural areas | 53% |
| | | 5% annual increase in number of subscribers with internet subscription | 85% |
| | | 100% annual increase in mobile money transactions | 94% |
| | Overall Achievement | | 77% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 28% |

| | | | |
|---|---|--|------|
| 2. Interests Of Service Providers, Investors And Other Stakeholders Are Protected | 1. Increase in number of licenses issued and increase regulated services coverage | 10% annual increase in electricity subscribers | 100% |
| | 10% annual increment in number of water subscribers | | |
| | 10% annual increment in number of operators' fleet | 50% | |
| | 100% mobile penetration across the country | 45% | |
| | 10% annual increase in internet penetration | 83% | |
| | | 85% | |
| | 2. Higher level of compliance among the service providers | 100% compliance by the service providers | 100% |
| | 3. Increased quality of regulated services | 30% annual increase in production of quality electricity | 75% |
| | 10% annual increment in quality water production | 40% | |
| | Overall Achievement | | 73% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 264% |

Appendix 4 | Strategic Plan 2017-2020 – Strategic Goals Achievement | Detailed Breakdown

| Strategic Goal | Strategic Outcome | Targets | Progress |
|---|---|--|----------|
| 3. RURA Contributes to the National, Regional And International Long Term Development Goals | 1. Increased in coverage of regulated services | 20% increase in regulated public utilities services in the rural areas | 81% |
| | 2. Enhanced regional and international relations | | 89% |
| | Overall Achievement | | 85% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 93% |
| 4. Regulated Services Sectors' Legal Framework is Strengthened | 1. Improved processing of legal tools | 100% acceptance of proposal for draft laws by line ministries | 72% |
| | | 100% guideline, regulations and policies covering all regulated public utilities | 74% |
| | 2. Legal function successfully handles all litigation cases | | 76% |
| | Overall Achievement | | 75% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 27% |
| 5. RURA Research And Development Function is Established and Functional | 1. Data available for analysis | 100% of regulated services have available data | 45% |
| | 2. Better decisions made on public utilities regulations | 100% of research reports shared | 25% |
| | Overall Achievement | | 35% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 0.7% |

Appendix 4 | Strategic Plan 2017-2020 – Strategic Goals Achievement | Detailed Breakdown

| Strategic Goal | Strategic Outcome | Targets | Progress |
|---|---|--|----------|
| 6. RURA’s Institutional Capacity Strengthened | 1. Staff motivation and retention improved | 85% staff satisfaction by 2020 | 80% |
| | 2. Service delivery and reporting speed improved | 90% service delivery time by 2020 | 70% |
| | | 100% of RURA services automated | 63% |
| | 3. RURA technical capacity improved | 100% purchase of technical tools by 2020 | 86% |
| | | 100% completion of building construction by 2019 | 55% |
| | 4. Prompt decision making | 100% of reporting within deadlines | 80% |
| | Overall Achievement | | 72% |
| | Overall Executed Budget (as a % of Total Estimated Budget for the Goal) | | 51% |

Source: Situational Analysis – Strategic Plan 2017-2020, Strategic Plan Evaluation (RURA)

Appendix 5 | List of External Stakeholders interfaced with as part of the Strategy Development process

Ministry of ICT & Innovation (MINICT)

Ministry of Infrastructure (MININFRA) – Energy

Ministry of Infrastructure (MININFRA) – WATSAN

Ministry of Infrastructure (MININFRA) – Transport

Ministry of Commerce (MINICOM)

Rwanda Information Society Authority (RISA)

Rwanda Space Agency (RSA)

Rwanda Inspectorate, Competition and Consumer Protection Authority (RICA)

Rwanda Standard Board (RSB)

Water and Sanitation Corporation (WASAC)

MTN Rwanda

Airtel Rwanda

AC Group

Rwanda Governance Board (RGB)

East African Communication Organization (EACO)

Rwanda Consumer's Rights Protection Organization (ADECOR)

Rwanda Development Board



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