



ICT

RURA

ANNUAL REPORT
2015-2016



ENERGY, WATER
& SANITATION



TRANSPORT

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OUR VISION, MISSION & CORE VALUES

Vision

A point of reference in public utilities regulation that inspire development and confidence

Mission

To build an environment that promotes fair competition and quality of public utility services in a transparent, independent and reliable manner

Values

- Independency
- Accountability
- Transparency
- Firmness

Moto

Inspiring development

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ABBREVIATIONS

ADECOR	Association Des Consommateurs au Rwanda	RICTA	Rwanda Information and Communication Technology Association
CcTLD	Country Code Top Level Domain	RINEX	Rwanda Internet Network Exchange
CDMA	Code Division Multiple Access	RMT	Rwanda Mountain Tea
CDR	Call Drop Rate	RNP	Rwanda National Police
CSSR	Call Setup Success Rate	RSB	Rwanda Standards Board
CST	Call Setup Time	RURA	Rwanda Utilities Regulatory Authority
EAC	East Africa Community	SANCs	Signalling Area Network Codes
EACO	The East African Communications organization	UAF	Universal Access Fund
EUCL	Energy Utility Corporation Limited	VSAT	Very Small Aperture Terminal
FM	Frequency Modulation	WASAC	Water and Sanitation Corporation
FY	Fiscal Year		
GDP	Gross Domestic Product		
GoR	Government of Rwanda		
GSM	Global System for Mobile communications		
ICT	Information communication Technology		
IGTVS	International Gateway Traffic Verification System		
ISP	Internet Service Provider		
ISPC	International Signaling Point Codes		
LPG	Liquefied Petroleum Gas		
LTD	Limited		
LV	Low Voltage		
MINEDUC	Ministry of Education		
MPs	Management Prescriptions		
MTN	Mobile Telecommunication Network		
MV	Medium Voltage		
MW	Megawatt		
NCCs	Network Color Codes		
NCIP	Northern Corridor Integrated Projects		
NICI	National Information Communication Infrastructure		
NISR	National Institute of Statistics of Rwanda		
NSPCs	National Signaling Points Codes		
PPP	Public Private Partnership		
QoS	Quality of Services		
REG	Rwanda Energy Group		

ACKNOWLEDGMENT

The Rwanda Utilities Regulatory Authority acknowledges and appreciates the hard work that went into developing this Annual Report. The Authority wishes to thank the following individuals for their dedication, commitment and professionalism in developing this Report.

Mr. Jean Baptiste Mutabazi – Chairman

Mrs. Yvonne Umutoni

Mrs. Chantal Gakima

Mrs. Carine Manirakiza

Mrs. Elisabert Nahimana

Mr. Oscar Ugirashebuja

Mr. Aaron Ndagijimana

Mr. Alexis Mutware

Mr. Vincent Museminali

Mr. Egidius Mbarara

THE REGULATORY BOARD MEMBERS



Standing (Left to right):

Mr. Eugene Kazige - *Vice - Chairperson*, Mrs. Mbabazi Judith - *Member*,
Maj. Patrick Nyirishema - *Ag. Director General - Member*, Dr. Etienne Ntagwirumugara -
Member,

Seated (Left to right):

Mrs. Liliane Mupende - *Member*, Eng. Coletha U. RUHAMYA - *Chairperson*,
Mrs. Fortune Mukandoli - *Member*

FOREWORD



Dear Reader,

Welcome to our 2015/16 Annual Report. I have a great pleasure to introduce this annual report that covers activities of the Authority for the period of July 2015 to June 2016. It has been an exciting and challenging year for both the Regulatory Board and RURA Management. As an organ entrusted to deal with issues central to the Authority's success, the Regulatory Board of RURA set directions through, strategic plan, policy oversight and counsel.

Regulation of public utilities continues to grow and this requires RURA to keep on innovating and creating new ideas that are important and central to the sustainability of businesses in the regulated sectors and continue to protect interests of consumers.

This year under review saw the change of the Authority's organizational structure with an aim of creating efficiency and proper functioning by aligning the structure to our mandate and strategic plan.

The Regulatory Board, the Management and Staff of Rwanda Utilities Regulatory Authority strive to always ensure that we are reflecting on, responding to and anticipating the needs of the general public. As you go through this annual report, I hope that one thing will strike you: the dedication and hard work that the Authority endeavors to make regulation better and be a point of reference not only for Rwanda but the world at large.

2016/17 will bring new challenges but there is no doubt that the Management of RURA, its staff and all stakeholders will work harmoniously towards finding solutions to these challenges and make it a year of innovation, creation and development.

As we continue to work towards meeting our core obligations, I would like to thank all staff for their ongoing efforts and achievement. Their dedication, from top to bottom, is extraordinary. Special thanks go to the engaged and dedicated Regulatory Board. Looking forward towards a challenging year ahead!

Thank You!

Eng. Coletha U. RUHAMYA

Chairperson of the Regulatory Board

EXECUTIVE SUMMARY



During the fiscal year 2015-2016, RURA developed and implemented a new organization structure in tandem with its expanded mandate in ICT, Transport, Energy, Water and Sanitation. The new structure takes cognizance of the country's development strategy.

The year 2015/16 witnessed continued growth in the regulated public utilities with regard to increased access to services, deployment of innovative services and review of the sectors' legal and regulatory framework.

The ICT sector continued to grow remarkably with 9.2% increase in mobile telephone subscriptions and led the penetration rate to reach 79% making inroads into other economic sectors, thus paving way to provision of innovative services.

The financial sector for instance, adopted and expanded mobile technology to offer M-banking solutions to clients. Mobile money platform offered by the three mobile operators continued to facilitate

money transfer, payment of utility bills and purchases.

The number of Internet users increased from 3,542,835 to 3,664,609 as of June 2016 representing an increase of 3.4%. The key drivers of this Internet usage growth were the availability of affordable Internet access devices and social networking applications.

With regard to regional and international traffic, both incoming and outgoing traffic increased by 17.55% and 75% respectively. In order to facilitate attainment of universal access to ICT services, the Regulatory Authority implemented a number of initiatives during the year under review. These include connecting rural schools on broadband Internet services; subsidizing bandwidth acquisition to rural communities; hosting 10k Rwandan Websites and telecommunications networks' monitoring tools and security of E- transactions.

During the year under review, the Electricity sub-sector recorded approximately 190MW of installed generation capacity which represents an increase of 33% compared to June 2015. The share of renewable energy in electricity generation mix currently accounts for 56% of the total installed capacity.

The Authority also approved new end-user electricity tariffs with an increase of 36% for low voltage customers in order to ensure sustainable operations of the newly created Power Utility (EUCL).

On the side of Petroleum sub-sector, the Prime Minister's Order N° 131/03 of 10/05/2016 has designated RURA as the Regulatory Authority for trade of petroleum and petroleum products. In this regard, all regulatory activities of downstream petroleum were transferred to RURA including among other the pricing of pump fuel. In the framework of enforcing the Petrol Station Regulations, RURA has, during the year under review, licensed 24 petrol service stations projects that are under construction countrywide. The water sub-sector has moved toward full cost recovery for

urban water services. The number of customers increased by 10.8%, water production by 3.1% and non-revenue water reduced by 3% compared to the previous year. In rural water supply, the PPP scheme was promoted and the percentage of water supply systems under the management of private operators increased by 56% compared to the previous year. Sanitation sub-sector also recorded developments in terms of number of licensed operators from 18 to 22 in solid waste collection and transportation and from 151 to 208 in cleaning service provision.

In the Transport Sector, significant achievements were made during the reporting period. These include increase of 131% licensed Special Vehicle Rental companies/ cooperatives, 50% of driving schools and 39% motorcycles. Three (3) new companies were also licensed in goods transport as a result of awareness campaigns and enforcement of rules and regulations.

Furthermore, as the year under review was characterised by the decreasing trend of fuel prices on international market, public transport fare was reviewed from 19 to 18 Frw per km. In line with the Country's visibility, RURA contributed and participated in key meetings and conferences organized at regional and international level.

Giving back to society is a key dignifying activity the Authority has continued to engage in. In this regard, RURA extended its support to widows and orphans of genocide against Tutsi by constructing two houses together with the provision of preliminary necessities in Rukumberi-Ngoma District. It also, entered into a partnership with Unity Club for the construction of a hostel that will accommodate 100 widows in Huye District.

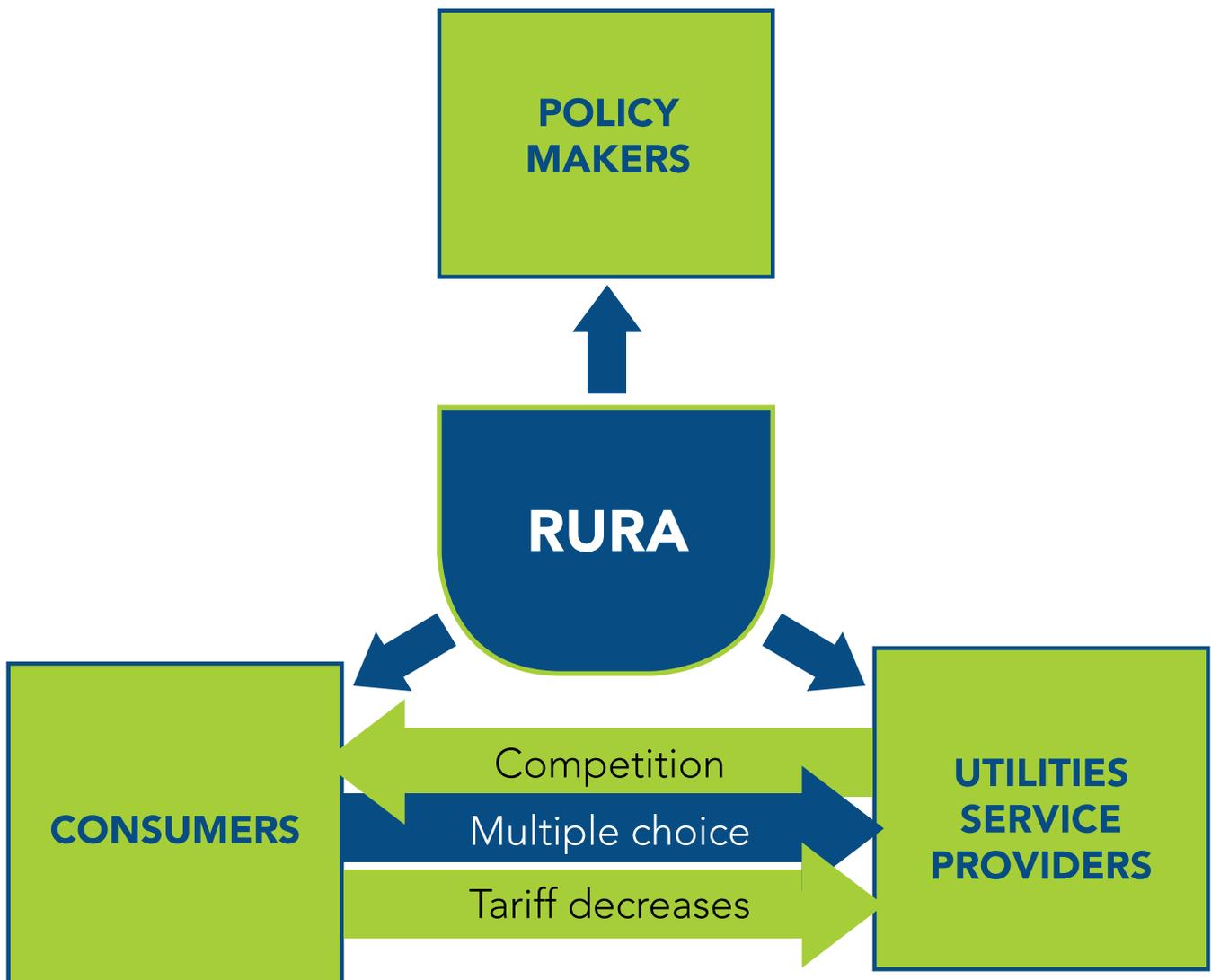
Let me congratulate and thank all the Regulatory Board Members and RURA employees. Without your support, co-operation and dedication to work, all these accomplishments would not have been possible. Keep up the good work and let us continue to strive harder to give the public the best service it deserves.

Thank You,

Maj. Patrick Nyirishema
Ag. Director General

THE SYMBIOTIC RELATIONS OF THE AUTHORITY WITH ITS KEY STAKEHOLDERS

(RURA'S TRIPPLE BOND)



1. INTRODUCTION

1.0. Rwanda In Context

Rwanda is a landlocked country with a surface area of 26,338 km², a population of about 10.9 million (NISR, 2012) and GDP per capita of U\$ 720 as of December 2015. The documents of the Vision 2020 and the Economic Development and Poverty Reduction Strategy [EDPRS II] 2013-2018 set the target to achieve a GDP per capita of USD 1,200 by 2020 at an annual growth rate of 11.5%. In line with its policy of economic development and good governance, the Government of Rwanda (GoR) has established the Rwanda Utilities Regulatory Authority to contribute to the achievement of its socio-economic goals.

1.1. RURA's Operational Framework

Rwanda Utilities Regulatory Authority (RURA) is a multi-sector regulatory body with the mandate to regulate four sectors of the economy: ICTs including Media& Postal, Energy, Water & Sanitation and Transport. With a very high tele-density, lower GDP per capita and highly agrarian economy, the role of the Regulatory Authority in the much-needed transformational development is both crucial and strategic. The effective execution and fulfillment of its mandate will, to a great extent, depend on a clear and effective strategic alignment of its operations. RURA was initially created by the Law N° 39/2001 of 13th September 2001 as an agency with the mission to regulate certain public Utilities, namely: telecommunications network and/ or Telecommunications services, electricity, water, removal of waste products from residential or business premises, extraction and distribution of gas and transport of goods and persons. This Law was later reviewed and replaced by Law N° 09/2013 of 01/03/2013 establishing Rwanda Utilities Regulatory Authority (RURA) and determining its mission, powers, organization and functioning. This Law gives RURA the mandate to regulate:

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

The same Law gives the Regulatory Authority a legal personality, financial and administrative autonomy in the fulfillment of its mandate. The Authority plays a pivotal role between the policy maker, licensed service providers and consumers. The Authority reports to the Office of the Prime Minister and it coordinates with line ministries responsible for each regulated sector in executing its functions. In addition to the law creating RURA, there are a number of other legal and regulatory instruments which help RURA to discharge its responsibilities in each specific sector to be regulated.

1.2. Mission and Powers

The Law N° 09/2013 of 01/03/2013 gives the Authority the following mission:

- to set up necessary guidelines in order to implement laws and regulations in force;
- to ensure compliance by public utilities with the provisions of laws and regulations governing the regulated sectors in an objective, transparent and non-discriminatory manner;
- to ensure the continuity of service delivery by the licensed or authorized service providers and the preservation of public interest;
- to protect users' and operators' interests by taking measures likely to guarantee effective, sound and fair competition in the regulated sectors within the framework of applicable laws and regulations;
- to protect and promote consumers' interests;
- to promote the availability, accessibility and affordability of regulated services to all consumers including low income, rural and disadvantaged consumers;
- to promote efficient development of regulated sectors in accordance with Government economic and financial policy;
- to promote and enhance general knowledge, sensitization and awareness of the regulated sectors
- to issue permits, authorizations and licenses required for regulated sectors, in accordance with the relevant laws and regulations;
- to monitor and ensure compliance by regulated network or service providers in line with their licenses, permits and concession obligations;
- to ensure fair competition in all regulated sectors.

For public interest and consumers protection in particular, and in order to effectively fulfill its mandate, RURA has been vested by the Law with the following powers:

1. to carry out investigations including inspections at service delivery sites of the regulated service providers in the purpose of ensuring compliance with their obligations;
2. to impose administrative sanctions in case of a violation of this Law and other Laws and regulations governing regulated sectors;
3. to settle and facilitate the settlement of disputes related to regulated services;
4. to issue directives to the regulated service provider whose license to operate has been cancelled, suspended, modified or revoked, and appoint an administrator
5. to regulate tariffs and charges
6. to obtain information
7. Judicial police power and RURA's representation before courts

As per the Law, RURA may have access to any commercial premises of any natural person or legal entity, at any time, in accordance with the law, either with or without notice, to inspect and obtain any necessary information when there are reasonable grounds to believe that there is a violation of provisions of the law governing the concerned regulated utility or the Law creating the Authority.

1.3. Corporate Governance

1.3.1. Regulatory Board

The Regulatory Board is by virtue of the law the supreme management and decision making organ. The Regulatory Board consists of seven (7) members including the Director General who equally serves as a rapporteur.

1.3.1.1. Responsibilities of the Regulatory Board

The responsibilities of the Regulatory Board as outlined in the law establishing RURA include:

- a. To participate in developing RURA general policy and monitor its implementation;
- b. To determine the general vision of RURA and ensure its implementation;
- c. To approve RURA's annual budget and action plan;
- d. To approve annual financial statements for the previous financial year;
- e. To adopt the staff statutes, their emoluments, their wage structure, the internal rules and the organizational structure of RURA;
- f. To determine the job descriptions of RURA employees, set related terms and conditions of employment and appoint staff members based on the recommendation of the Director General;
- g. To evaluate the performance of RURA based on its action plan and budget;
- h. To decide on receiving, buying, giving away or selling movable or immovable property and on the use of RURA's property;
- i. To approve the annual activity report of RURA before its submission to the supervisory authority.

1.3.1.2. Powers of the Regulatory Board

The Regulatory Board has the following powers:

1. To set up the general regulations and directives in accordance with the laws in force;
2. To determine at any time tariffs, charges related to networks interconnection or infrastructure shared by public utilities provider
3. To take any decision pertaining to the regulation of public utilities, particularly any decision relating to the granting, suspension and withdrawal of a license, authorization or permit;
4. To take administrative sanctions in case of violation of legal and regulatory provisions or violation of the contents of permits, licenses, authorization and other directives;
5. To take decisions on any disputes referred to it;
6. To conciliate parties in dispute upon request.

1.3.1.3. Regulatory Board Committees

In order to effectively perform its responsibilities, the Regulatory Board formed the following committees entrusted with analyzing in depth all issues of the Authority before any decision is taken:

- Audit and Risk Committee: The Committee consists of 4 members of the Regulatory Board and held three (3) meetings during the period under review mainly to ensure that the financial health of the Authority is in good condition
- Human Resource Committee: The Committee consists of 3 members of the Regulatory Board and held Two (2) meetings during the period under review mainly to review the human resource issues affecting the Authority.
- Technical Committee: the role of the Technical Committee is to advise the Regulatory Board on all technical policies and strategies. This Committee consists of 3 members of the Regulatory Board.

1.3.1.4. Regulatory Board Meetings

The ordinary meetings of the Regulatory Board are held every month and the extra ordinary meetings are held at any time once initiated by the Chairperson/Vice- Chairperson of the Regulatory Board, the supervising Organ of RURA (The Prime Minister's Office), 2/3 members of the Regulatory Board or by the Director General of RURA.

In executing its duties as stipulated in the law establishing the Authority under article 22, 23 and 24, the Regulatory Board held Eleven (11) ordinary Board meetings and Three (3) extra-ordinary meetings during the period under review.

The followings are key resolutions/decisions taken during the period under review:

ICT Sector

- Reviewed the International Gateway Traffic Verification System regulations;
- Approved addendum 6 to the License No 009/RURA/2008 for TIGO;
- Approved a change in the shareholding structure of 4G Network Ltd;
- Approved the National Post Office (NPO) and other courier operators' License for providing postal and courier services;
- Approved Must Carry Regulations;
- Approved addendum 1 to the License No RURA/2013/0128 for AXIOM NETWORKS;
- Approved the Regulations Governing Telecom Network Security in Rwanda;
- Approved addendum 4 to the license No 003/RURA/2011 for Airtel Rwanda;
- Issued an enforcement notice to MTN Rwanda Ltd and Airtel Rwanda for poor services;
- Approved Licenses to provide postal and courier services for EAGLE NET Ltd and UKINE Ltd.

Energy, Water and Sanitation Sector

- Approved the transfer of the electricity production License NO ENERGY/EL/L/003/RURA/2014 of REGREPOWER LTD to MWANGE KAVUMU HPP LTD;
- Approved the simplified licensing framework for rural electrification projects;
- Approved the KIVUWATT generation License;
- Approved the new tariff for electricity and rural water;
- Approved the regulations governing water supply service provision in Rwanda;
- Approved the electricity license for Energy Utility Corporation Limited (EUCL);
- Approved the guidelines on Right –of-Way for power lines;
- Approved the modification of YUMN (Hakan) License;
- Approved the regulations governing electricity quality of service in Rwanda;
- Approved the Rwanda Mountain Tea (RMT) Licenses for Giciye I and II hydropower plants.

Transport Sector

- Reviewed the transport tariff;
- The outcome of the monitoring of SOTRA Tours & Travel Agency Ltd's performance by revoking its Transport of persons License .

Corporate Affairs

- Approved organizational structure of RURA;
- Reviewed the investigation report from the office of the Ombudsman;
- Approved the annual regulatory fee based on a percentage of the turnover from regulated services;
- Approved the Annual Report 2014/15;
- Approved a leave of absence for an undefined period requested by some staff leaving RURA;
- Reviewed the Budget for the financial year 2015/16;
- Approved the Board paper on writing off bad debtors and writing off some money owed by RURA to suppliers;

- Approved the action plan and budget for the financial year 2016-17;
- Delegated powers to the Director General to review the fuel pump price;
- Reviewed the RURA Staff Statutes.

1.3.2. The Management

The Director General of RURA is entrusted with executive powers. He coordinates and directs daily activities of the institution and is answerable to the Regulatory Board on how its decisions are implemented. The Director General is assisted by Six Heads of Departments heading respectively (i) Information and Communications Technology Regulation; (ii) Innovation and Cybersecurity; (iii) Transport Regulation, (iv) Energy, Water & Sanitation Regulation; (v) Legal, Consumer and Economic Regulation and (vi) Corporate Services. In addition to the Head of Department, there are two Division Managers heading (i) Media Regulation and Public Relation who is also the institution's Spokesperson and (ii) Universal Access and Service Fund.

The Director General, Heads of Department and Division Managers constitute the Senior Management of RURA. The entire organizational structure can be found in annex 1.

1.3.3. Responsibility and Accountability

In the conduct of its mission, RURA is supervised by the Prime Minister's Office and it coordinates with line ministries responsible for each regulated sector in executing its functions. The Prime Minister's Order No 89/03 of 11/09/2014 has determined modalities of which Ministries in charge of regulated sectors shall coordinate activities with RURA in the implementation of their respective mandates.

RURA submits an annual activity report to the Prime Minister's office and provides copies to the Parliament, both chambers, Ministry in charge of finance and Ministries in charge of regulated services within three (3) months after the close of the budget year. RURA finances are audited by the Auditor General of the State finances at the end of the budget year and whenever considered necessary.

RURA has also internal control systems that help the organization to achieve its goals in effective, efficient and transparent manner.



CORPORATE PERFORMANCE



Ms. Beata Mukangabo,
*Head of Department Legal,
 Consumer & Economic
 Regulation Affairs. And Ag.
 Head of Corporate services*

2. CORPORATE PERFORMANCE

2.0. WORKFORCE

The Authority is an equal opportunity employer which strives to build a broad-based organization in terms of gender balance and qualification.

The number of RURA staff by June 2016 reached one hundred twenty (120) including 4 on determined contract, the percentage of male and female counts 65.81% and 34.16% respectively.

The figure below presents distribution of RURA staff per qualifications.

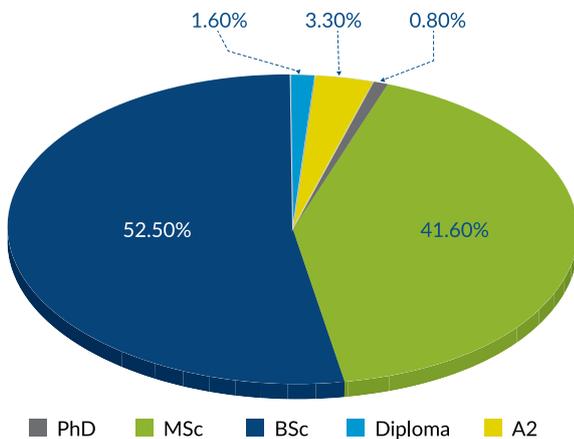


Figure 1: Distribution of RURA staff per qualifications

Compared to the previous fiscal year, the number of staff with masters degree has increased from 37% to 41.6%. On the other side, the statistics on age shows that the majority of RURA staff is between 36 and 45 as illustrated in the following figure.

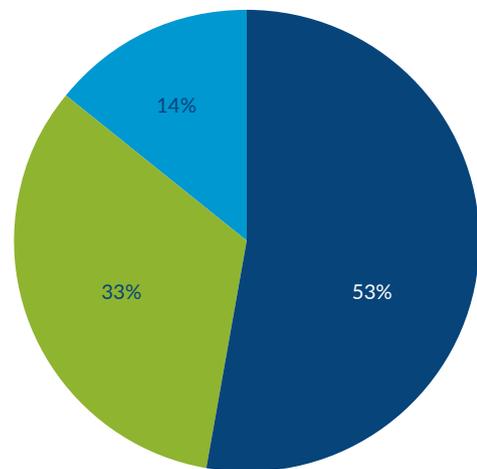


Figure 2: Distribution of RURA staff by age (2015-2016)

From the graph above, the composition of RURA staff by age groups are as follows; 33% are between 25 and 35 years, 53% are between 36 and 45 years and 14% are above 46.

2.1. Key Achieved Milestones in The Financial year 2015/2016

During the year under review, the Authority achieved a number of milestones with regard to corporate related matters including among others the adoption of new organizational structure.

2.1.1. New Organisational Structure

The Authority has adopted a new organizational structure with the aim to align the previous structure of RURA with the Law N° 09/2013 of 01/03/2013 establishing Rwanda Utilities Regulatory Authority (RURA) and determining its mission, powers, organization and functioning.

2.1.2. Training and Development

RURA regularly develops the capacity of its staff to meet the needs of a continually changing regulatory environment. It is in this regard that RURA invested in the development of its staff by providing them with opportunities in short and long term trainings and study tours.

The table below represents the strategic areas of training Programmes conducted:

Table 1: Strategic Area of Training

TYPE OF TRAINING SECTOR	LONG TERMS TRAINING	SHORT TERMS & INHOUSE TRAINING STUDY TOUR, CONFERENCE & ATTACHMENT	STUDY TOUR, CONFERENCE & ATTACHMENT
DG OFFICE	3		1
CORPORATE	3	4	
ICT	3	6	
TRANSPORT		9	
ENERGY, WATER & SANITATION		3	
TOTAL	9	22	1

2.2. Knowledge Transfer

In Water and Sanitation Sector, RURA provided trainings to different operators among others, cleaning companies and solid waste collectors. This exercise aimed at equipping them with the basic knowledge of how to prepare financial reports normally submitted to RURA.

On the side of internship, fifty six (56) students both professionals and academic from different higher learning institutions were provided with internship opportunities.

2.3. Corporate Social Responsibility

While commemorating the 22nd anniversary of genocide against Tutsi, RURA joined other institutions and government to charity actions by constructing two houses together with provision of preliminary necessities for genocide survivors in Rukumberi-Ngoma District. The two houses were handed over to the beneficiaries.

In addition to this, RURA entered into a partnership with Unity Club for the construction of a hostel that will accommodate 100 widows in Huye District. Those two actions aimed at bringing hope to those who suffered from genocide consequences.

Photos below: RURA handed over 2 Houses to the survivors of the Genocide against Tutsi - Rukumberi-Ngoma District







2.4. Financial Performance Review

The review shows the level of performance in terms of generated revenues and how it was allocated to action plan 2015/2016. During the financial year 2015/2016, the Authority generated a total amount of (9,849,905,498Rwf) from various sources including ICT, Energy, Water and Sanitation, Transport sectors and other revenues.

The year under review, RURA marked an increase of its revenues by 19% compared to previous financial year. The figures show the continuous growth of regulated sectors in terms of revenues generation.

On the expenditure side, the total amount decreased compared to the previous financial year by 14% due to the fact that some activities were in progress.

The comparison on the revenues generated and expenditure are shown in table below:

Table 2: Financial Performance in Frw/RURA

	2015/2016	2014/2015	VARIATION
Income from ICT sector	7,805,948,234	7,161,720,690	589,299,696
Income from Energy, Water and Sanitation Sector	229,204,094	132,151,470	94,369,607
Income from Transport Sector	1,619,706,185	877,786,174	615,361,740
Other revenues	195,046,985	108,366,054	63,777,390
TOTAL REVENUE	9,849,905,498	8,280,024,388	1,569,881,110
TOTAL EXPENDITURE	6,561,857,037	7,684,187,945	(1,122,330,908)

During the year under review, the Regulatory Board of RURA determined the contribution levied on annual turnover of the regulated services in accordance with the RURA Law of 2013. This decision 003/BD/ICA-CLIA/ RURA/2015 determined the percentage payable for each regulated sector as follow:

Table 3: Regulatory fee payable per sector

SECTOR	PERCENTAGE
Electronic Communications	1%
Postal services	0.5%
Renewable and non-renewable energy, industrial gases, pipelines and storage facilities	0.3%
Water supply	0.3%
Sanitation	0.3%
Transport of persons and Goods	0.8%

The same Decision introduced the new modalities for quarterly declaration and payment of regulatory fee. With the implementation of this Decision which started on the 1st January 2016, it is expected that the revenue collection will be streamlined.

2.5. UAF Financial Performance Review

Regarding the Universal Access Fund (UAF), an amount of 2,947,496,897Rwf was generated from annual contribution by Telecom Operators representing a decrease of 21.5% compared to previous financial year.

On expenditure side, the total expenditure decreased by 32% and the decrease was due to some big projects which have been unexecuted from the side of the end users.

Table 4: Financial Performance in Frw/Universal Access Fund

	2015/2016	2014/2015	VARIATION
Revenues	2,947,496,897	3,759,457,874	(811,960,977)
Expenditure	2,531,900,929	3,744,750,755	(1,212,849,826)

N.B: The above mentioned financial figures are subject to audit confirmation



ICT REGULATION



Eng. Mutabazi Jean Baptiste
*Head of Department ICT
Regulation*

3. ICT REGULATION

3.0 SECTOR PROFILE

In the last few years, Information and Communication Technologies were used more and more extensively for the social and economic development. Considering the revolutionary changes that ICTs are bringing to our global society, institutions worldwide continue to develop more sophisticated ways to digitize their operations and processes so that they can offer to the public access to their services in more effective and efficient ways. Enhancement in the use of ICT requires proper regulatory framework to create an environment that promotes public confidence and ensure stability, transparency, competition, investment, innovation, and growth in the ICT

sector. In addition to the classic mandate of regulating ICTs, the Government of Rwanda broadened the mandate of RURA by reviewing the media sector and assigning to RURA the mandate of taking overall media regulation.

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

The Rwandan market in telecommunications is composed by three main telecom operators, six Internet Service Providers (ISPs), one Wholesale Network Service provider, two Network facility providers and fourteen Retailers Internet Service Providers by June 2016.

As a result of a conducive Legal and Regulatory Framework in place, the ICT sector continues to experience a significant growth. Indeed, during the period under review, the mobile telephone subscription increased from 8,181,993 to 8,932,108 meaning 9.2% of increase. The Financial Year ended with a mobile penetration of 79%.

Internet service subscription increased from 3,542,835 to 3,664,609 representing an increase of 3.4%. This increase is mainly attributed to the use of mobile Internet segment backed by the use of smart devices.

In regards with One Network Area (ONA), RURA conducted a study analysis on its economic impact on Rwanda. Consequently, it was found that the impact was positive by increasing Mobile Network Operators revenues through voice calls and incoming call termination rates as a result of increased incoming and outgoing voice traffic.

3.1. Legal and Regulatory Framework

The biggest achievement in ICT legal and regulatory framework relates to the promulgation of the Law N°24/2016 of 18/06/2016 governing Information and Communication Technologies (ICT) published in the Official Gazette No 26 of 27/06/2016. This Law repeals the Law n°44/2001 of 30/11/2001 governing telecommunications, the Law n° 18/2010 of 12/05/2010 relating to electronic messages, electronic signatures and electronic transactions and the Law n° 43/76 of

01/12/1976 on the organization of the postal services.

Furthermore, the Authority has put in place the following Regulations:

- Regulations No 001/R/TD-ICS/RURA/016 governing Telecom Network Security in Rwanda. The purpose of these regulations is to secure the Telecommunication networks, its subscribers and the critical communication infrastructure.
- Regulations governing must carry channels.

3.2. Licensing

3.2.1 Telecommunication and Internet Service Provision

The Table below shows the licensed Telecom Operators, Internet Service Providers, Wholesale Network Service provider, Network Facility provider and Retailer Internet Service Providers.

Table 5: Licensed Network and Service Providers as of June 2016

Operators	Licensed From(Year)
Telecom Operators / Internet Service	
MTN Rwanda Ltd	2006
TIGO Rwanda Ltd	2008
AIRTEL Rwanda Ltd	2011
Liquid Telecom Ltd	2014
New Artel Ltd	2004
ISPA Ltd	2006
4G NETWORKS Ltd	2009
BSC Ltd	2010
AXIOM	2014
Wholesale Network Service Provider	
Olleh Rwanda Network (ORN)	2013
Retailer Internet Service Providers	
GMAX	2014
Intercom Technologies	2014
Telecom Network Solution Provider	2014
4NetAfrica Ltd	2014
Piramie Inc	2014
Twinning in Corporation	2015
Simba Supermarket	2015
TRUCONNECT LTD	2015
POPCONN LTD	2015
SUKU NSA LTD	2015
BK Telecom	2015
ECORPONE LTD	2015
WireCell LTD	2015
Universal Links Group	2015
Network Facility Providers	
IHS Rwanda Ltd	2014
Fibernet Telecom Ltd	2015

3.2.2 Postal and Courier Services Providers

In the year under review, RURA licensed twelve (12) applicants for Postal and Courier services, as detailed in the following table.

Table 6: Licensed Postal and Courier operators

No	LICENSED COURIER OPERATORS
1	PANORAMA Ltd
2	DOVE Forwarding and Supply Company Ltd
3	SHAFT Ltd
4	DHL Express
5	PAN AFRICA EXPRESS TRANSPORT LTD (Licensee of FedEX)
6	STELLA Express Ltd
7	SKYNET WORLDWIDE EXPRESS LTD
8	SOTRA TOUR & TRAVEL AGENCY Ltd
9	NATIONAL POST OFFICE
10	SOFAST Ltd
11	HORIZONTAL Ltd
12	KIGALI COACH TOURS & TRAVEL Ltd

3.2.3 Broadcasting

3.2.3.1 TV Broadcasting

The following table illustrates the number of TV on air and TV studio under building.

Table 7: The list of television broadcasting applicants as of June, 2016

S/N	Name of the applicant	Name of TV channel	Current status	
			Building TV studio	On air
1	Tele 10 Rwanda	TV 10		✓
2	Green Media Ltd	SUPER TV	✓	
3	AKLS Lemigo TV Ltd	ROYAL TV		✓
4	Beat Entertainment	FAMILY TV		✓
5	Contact TV	CONTACT TV		✓
6	Digital Media Professionals Ltd	DMP TV	✓	
7	Light House Ltd	LIGHT HOUSE TV	✓	
8	National holdings Ltd	KTV	✓	
9	Capital TV Rwanda Ltd	CAPITAL TV	✓	
10	Broadway Communications Ltd	MAX TV	✓	
11	TV1 Rwanda Ltd	TV 1		✓
12	Isango Stars Limited	ISANGO STAR TV		✓
13	TV& Radio Flash Limited	FLASH TV		✓
14	Goodrich Life Care CO. LTD	GOODRICH TV		✓
15		CLOUDS TV	✓	✓
16	Mak media Limited	MAK MEDIA TV	✓	
17	SPARK MEDIA LIMITED	SPARK TV	✓	
18	ISHEMA MEDIA INCORPORATION Ltd	ISHEMA TV	✓	
19	BIG CONCEPT MANAGEMENT LTD	BTN TV	✓	
20	SHUNGU RWANDA LTD	TV PLUS	✓	
21	SANA GEB TV INTERNATIONAL	SANA TV	✓	
22	VICTORY TV Ltd	VICTORY TV	✓	
23	AUTHENTIC RADIO LTD	AUTHENTIC TV	✓	

3.2.3.2 FM Radio Broadcasters

The table below shows a list of new assigned FM frequencies to Radio Broadcasters registered to operate in Rwanda, by the end of June 2016.

Table 8: List of new assigned FM frequencies

Applicant name	Status	Assigned Frequency (MHz)		Transmitter location		
		New	Existing			
Hobe Rwanda Ltd	New licensee	93.1	-	Jari		
Top 5Sai Ltd	New licensee	88.8	-	Mugogo		
Radio Maria Rwanda	Existing licensee	96.4		Byumba		
				97.3	Jari	
				88.6	Huye	
					Karongi	
Radio 10	Existing licensee	99.0		Rusizi		
					Nyarupfubire	
				102.9	Kinanira	
					87.6	Jari
KT Radio	Existing licensee	101.1		93.6	Rubavu	
					103.3	Karongi
					96.7	Jari
					107.9	Huye
					102.0	Nyarupfubire
Isango Star	Existing licensee	105.5		Mugogo		
					106.5	Kinanira
					91.5	Jari

3.2.3.3 Print Media

With the new mandate of RURA to regulate media industry, and following the enactment of the media law of 2013, RURA licensed Print Media organs. The following table illustrates the licensed media organs.

Table 9: Authorised Print media organs as of June 2016

S/N	Company	Name of print media	Permit Number
1	Ihema Media Group Ltd	Ihema	RURA/PM/001/2013
2	Ishya n'Ihirwe Ltd	Ishya n'Ihirwe	RURA/PM/002/2013
3	Mont Jali News Company Ltd	Mont Jali News	RURA/PM/003/2013
4	Watoto smile Ltd	Watoto smile	RURA/PM/004/2013
5	Umuryango Company Ltd	Umuryango	RURA/PM/005/2013
6	Ijwi rya bose publications limited	Ijwi rya bose	RURA/PM/007/2014
7	Pax Limited	Pax newspaper	RURA/PM/006/2014
8	Umuhuza media limited	Umuhuza newspaper	RURA/PM/008/2014
9	Glance Media limited	The Diva magazine	RURA/PM/009/2014
10	Twiga Media Corporate limited	Panorama newspaper	RURA/PM/010/2014
11	NATION HOLDINGS RWANDA	Rwanda Today Newspaper	RURA/PM/011/2014
12	Journal Imena Ltd	Imena newspaper	RURA/PM/012/2014
13	Ubuto n'ubukuru channels media group Ltd	Angels ubuto n'ubukuru newspaper	RURA/PM/013/2014
14	Igisabo Media Ltd	Igisabo newspaper	RURA/PM/014/2014
15	Kampemu Ltd	Urungano magazine	RURA/PM/015/2014
16	Hi Rwanda for you Ltd	Rwanda for you magazine	RURA/PM/016/2014
17	Focus media Ltd	The Rwanda Focus	RURA/PM/017/2014
18	Gorilla Entertainment Group Ltd	Gorilla24 Ad magazine	RURA/PM/018/2015
19	BUTUYU MEDIA HOUSE LTD	Butuyu Newspaper	RURA/PM/018/2014
20	Link Cube Ltd	Yambi Magazine	RURA/PM/019/2015
21	Construction Rwanda Magazine Limited	Construction Magazine	RURA/PM/021/2015
22	The Service Mag Limited	The Service Mag Magazine	RURA/PM/022/2015
23	Intambwe Newspaper Ltd	Intambwe newspaper	RURA/PM/023/2015
24	Umuyenzi media group Ltd	Umuyenzi newspaper	024/PM/PMT/MP-CMR/RURA/016
25	Master Hand Company Ltd	Novella newspaper	025/PM/PMT/MP-CMR/RURA/016

3.2.4 Public Key Infrastructure

The public key infrastructure (PKI) project was successfully implemented in 2015. In line with this, the digital certificates are now being issued to individual users during the year under review. Digital certificates are also being used in different Government and Private online services such as e-procurement in order to assure the security of electronic transactions or messages sent over internet.

3.3. Market Performance and Statistics

The period under review experienced a growth in terms of mobile telephone subscriptions' from 8,181,993 to 8,932,108 meaning 9.2% increase. This led mobile telephone penetration rate to 79%.

Internet service subscribers increased by 3.4% from 3,542,835 to 3,664,609 as of June 2016. This increase is mainly attributed to the use of mobile internet segment backed by the use of smart devices.

3.3.1. Mobile and Fixed Telephone Services

Mobile telephony continued to spearhead the growth in telecommunications sub-sector while fixed telephony remained on a declining path.

Table 10: Number of Mobile and Fixed Telephone Service Subscribers per Telecom Operator

Operators Name	Active Subscribers		Fixed Teledensity	Mobile Teledensity	General Teledensity
	Mobile Active subscribers	Fixed Telephony			
			0.06	79	79.06
MTN Rwanda Ltd	3,988,604	2,439			
TIGO Rwanda Ltd	3,110,540	4,214			
Airtel Rwanda Ltd	1,183,964	11			
Liquid Telecom Ltd	N/A	1,376			
Total	8,932,108	6,664			

Source: RURA operators' returns

Mobile telephony industry witnessed an important growth. This growth is mainly attributed to the increased competition in the market which resulted into a continuous decrease of retail mobile telephone services tariffs coupled with a number of promotional packages offered by licensed telecom operators to the subscribers and the introduction of mobile financial services.

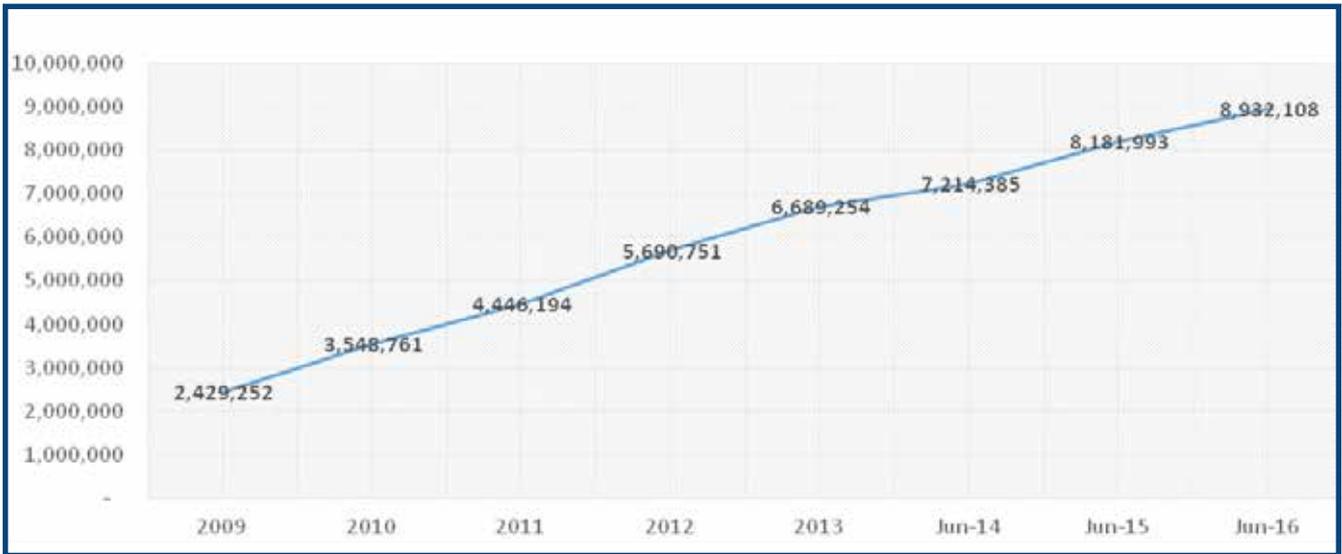


Figure 3: Trends of the Mobile Telephone Subscriber from December 2009 to June 2016

Source: RURA operators' returns

This financial year marked significant decrease in fixed telephone subscription. It dropped down to 6,664 subscribers at the end of June 2016 from 46,645 recorded by end of June 2015. This decrease in fixed telephone subscribers is attributed to CDMA telephones that were disconnected by Liquid Telecom Ltd.

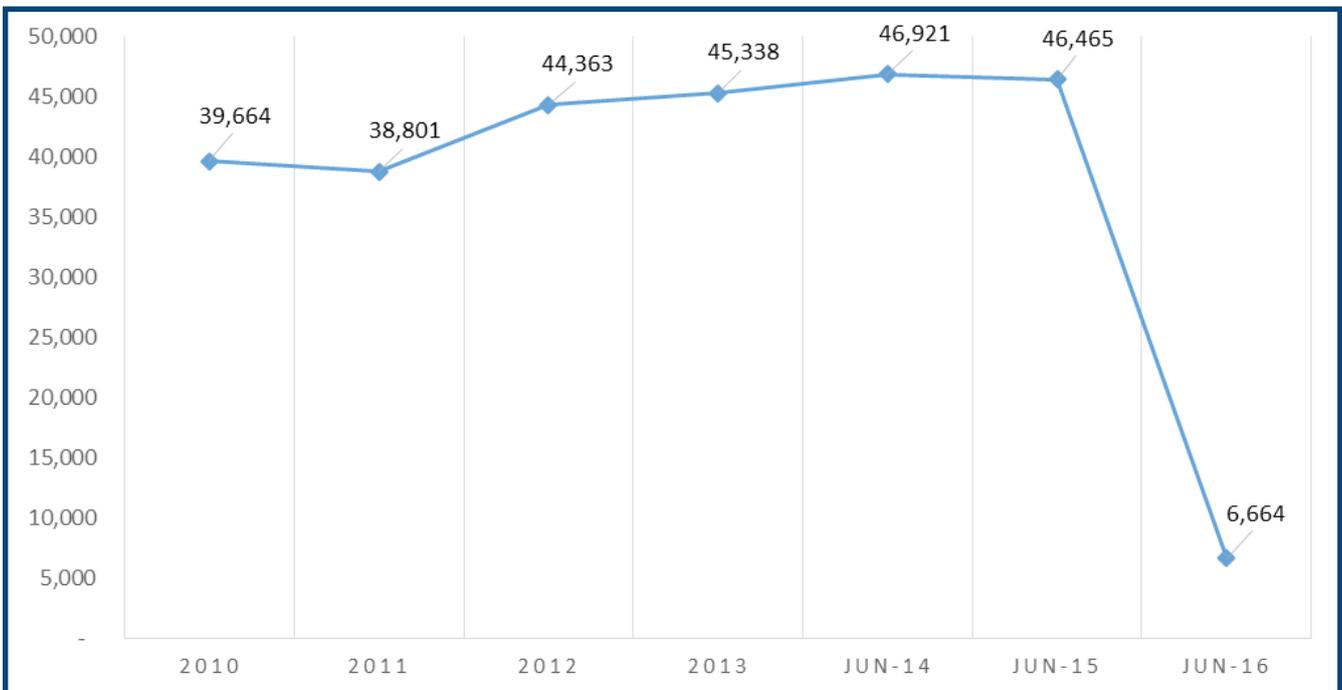
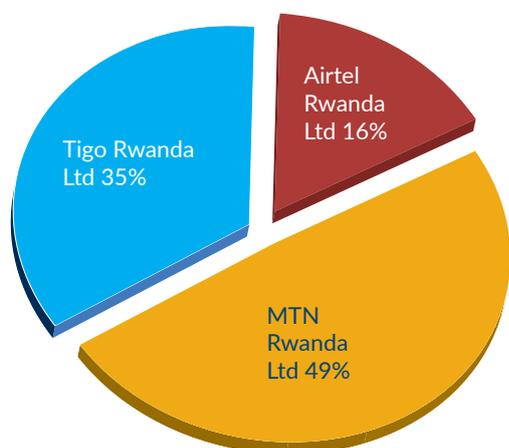


Figure 4: Trends of fixed telephone subscribers for the period 2009-June 2016

This financial year marked significant decrease in fixed telephone subscription. It dropped down to 6,664 subscribers at the end of June 2016 from 46, 645 recorded by end of June 2015. This decrease in fixed telephone subscribers is attributed to CDMA telephones that were disconnected by Liquid Telecom Ltd.

Mobile telephone market share per operator as of June 2015



Mobile telephone market share per operator as of June 2016

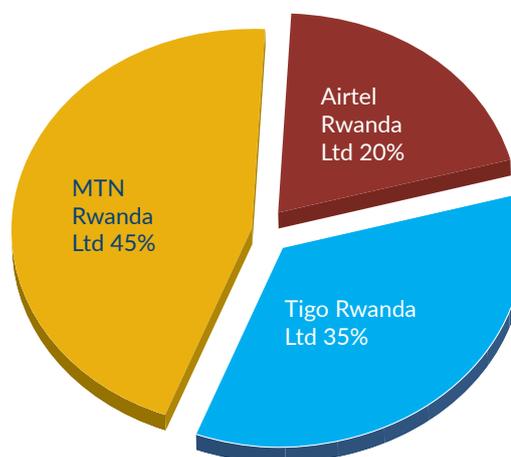


Figure 5: Evolution of Mobile Telephone Subscribers Market Share per Operator

Table 11: Mobile telephone network coverage as of June 2016 per type of technology and per operator

Operator	2G	2.5G	3G	3.5G	4G LTE
GEOGRAPHIC COVERAGE					
MTN Rwanda Ltd	99.12%	99.12%	74.30%	74.30%	
TIGO Rwanda Ltd	89.62%	89.62%	16.00%	16.00%	
AIRTEL Rwanda Ltd	92.02%	92.02%	17.00%	17.00%	
ORN					12%
POPULATION COVERAGE					
MTN Rwanda Ltd	99.92%	99.92%	91.89%	91.89%	
TIGO Rwanda Ltd	99.98%	99.98%	52.43%	52.43%	
AIRTEL Rwanda Ltd	93.45	93.45	23.15	23.15	
ORN					29%

3.3.2. Mobile and Fixed Telephone Service Retail Tariffs

The retail services prices are freely set by licensed operators and the Authority continued to monitor tariffs. As a result of increasing competition some operators continued to cut down their tariffs.

Table 12: Fixed Voice Telephone tariff Trend

	MTN Rwanda				Liquid Telecom			
	Jun-13	Jun-14	Jun-15	Jun-16	Jun-13	Jun-14	Jun-15	Jun-16
On net Tariff	30	30	30	37	20	20	20	20
Off net Tariff	60	60	90	37	90	90	60	60
Regional Tariff	120	120	140	70	135	135	135	135
International	240	240	255	255	245	245	155	155

Table 13: Mobile Voice tariff

Service	MTN			TIGO			AIRTEL		
	Jun-14	Jun-15	Jun-16	Jun-14	Jun-15	Jun-16	Jun-14	Jun-15	Jun-16
On Net Tariff									
Pre-paid	36	46	37	25	34	35	20	28	32
Post-Paid	60								
Off Net Tariff									
Pre-paid	60	60	37	60	60	35	60	62	32
Post-Paid									
Regional and International									
Kenya	120	60	70	120	68	60	120	59	60
Uganda	216	60	70	256	60	60	240	59	60
Burundi	390	398	538	357	165	165	400	169	169
South Sudan	255	70	70	165	69		245		60
USA/ Canada/ China / India/ Belgium	51	49.8	51	40	40	40	31.5	31.5	31.5

3.3.3. Internet Service Provision

Internet service subscribers have continued to show a tremendous increase, this increase is mainly attributed to the use of mobile Internet segment backed by the use of android devices.

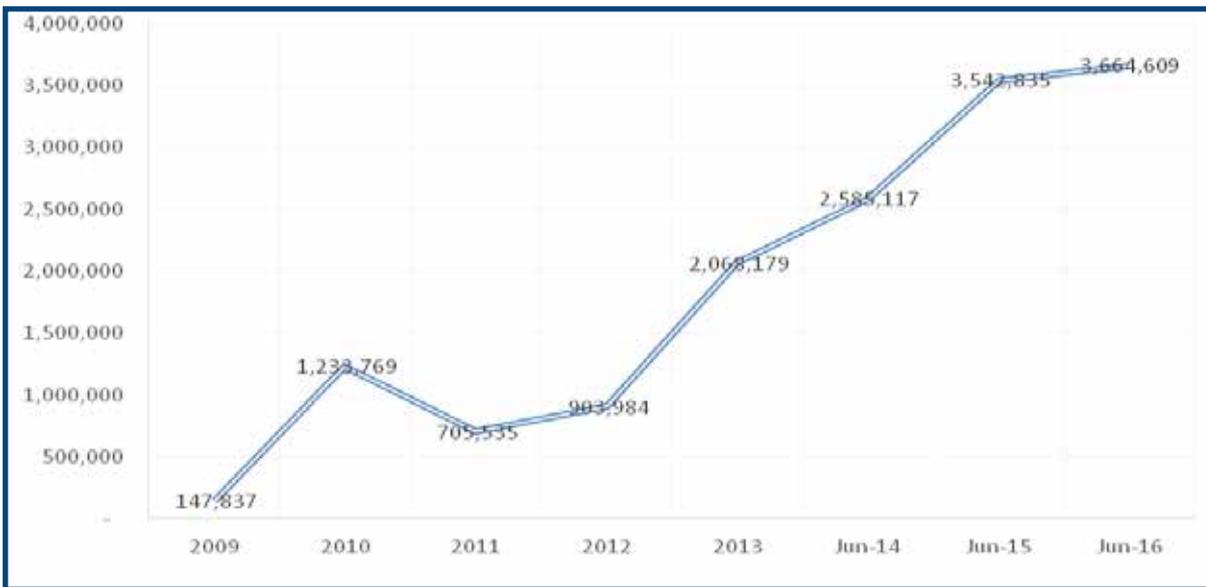


Figure 6: Development of Internet subscribers for the period 2009-June 2016
Source: RURA operators' returns

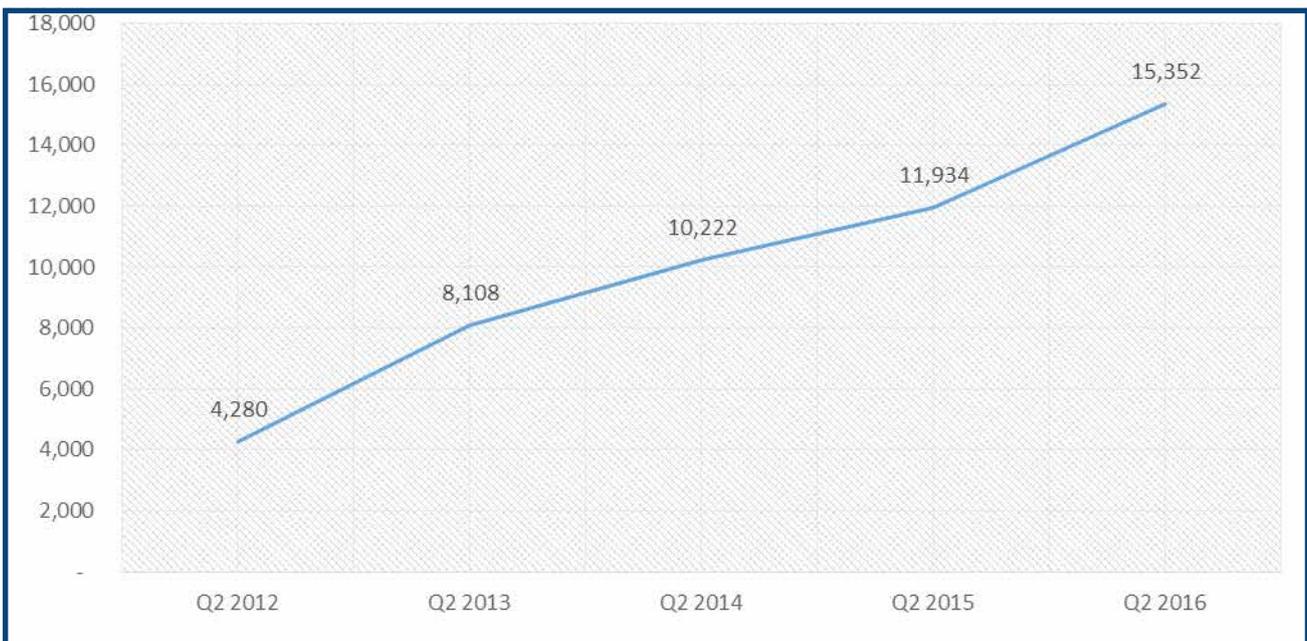


Figure 7: International Internet bandwidth in Mbps

3.3.4. Mobile Money Transfer Service

Mobile technology continues to play a big role to enhance electronic payments. The mobile money platform has transformed from a simple person-to-person money transfer service, to a platform through which an array of financial transactions can be executed. These services include withdrawal and deposit of cash to bank accounts, utilities payment, purchase of goods and services and payment of school fees.

Between December 2012 and December 2015, the number of mobile money increased by 432% from 1,440,541 to 7,663,199. The number of transactions using mobile money services also increased by 659.8% from 22,191,674 to 168,612,455 and the number of agents increased by 1211.7% from 3,085 to 40,467.

Table 14: Mobile Money Services from 2012 - 2015

Period	Number of subscribers	Number of transactions	Value in FRW millions
January –December 12	1,440,541	22,191,674	161,808
January –December 13	2,538,651	57,147,777	330,378
January –December 14	6,480,449	104,773,115	691,477
January –December 15	7,663,199	168,612,455	1,093,497

Source: BNR, Monetary Policy and Financial Stability Statement, February 2016

3.4. One Network Area (ONA) Economic Impact

The implementation of the One Network Area was to increase cross border trade and exchanges, with the citizens able to use their regular SIM cards to place and receive calls while traveling in Northern corridor countries. This resolution further aimed at providing quick solutions to barriers affecting the growth of the ICT sector, to enhance regional socio-economic integration, reduce the cost of doing business, and strengthening access and use of ICTs in the Region.

During the period under review, RURA conducted a study to analyse the economic impact of One Network Area in Rwanda from both the operators' perspective and the governments' perspective. The study considered three variables in order to verify potential policy objectives. These variables are: analysing the trend of traffic and operators' revenues, analysing the Government's revenues, comparing the average length per call, and the responsiveness of mobile subscribers vis-à-vis changed prices of outgoing as well as incoming calls.

After analysis of the above parameters, it was found that the policy objectives that the GoR wished to achieve had positive impact. Due to the decrease in calling tariffs, incoming call termination rates and waving off roaming charges in the Northern Corridor, the following were observed;

- Voice traffic namely roaming, incoming, and outgoing calls increased tremendously;
- Voice total revenues from outgoing traffic increased for all operators;
- Voice average length of call increased for all operators;
- MNOs revenues from incoming call termination charges also increased;
- Price of demand was found to be elastic. This implies that any slight change in calling rates to Uganda, Kenya and Uganda will affect much the minute's subscribers will use to make calls to those respective countries.

3.5. Management of ICT Resources

3.5.1. Management of Frequency Spectrum

During this review period, a number of licenses were issued and most of them were for the use of radio frequency spectrum. A series of monitoring and enforcement work were also done which resulted into withdrawal of some licenses due to failure to comply with their obligations. Others were withdrawn due to the requests of the licensees. The Table below gives a summary of the Licenses issued and revoked in different services

Table 15: Summary of the Licenses issued and revoked in Different Services

Services	Total Number of licenses by the end of 2015	Licenses issued in the year 2015-2016				Revoked or cancelled licenses
		New licenses	Renewed licenses	Not renewed licenses	Temporary	
HF	7	0	5	2		0
VHF	47	7	19	28	0	4
UHF	19	9	11	6	2	1
VSAT	16	8	7	8	2	1
SATPHONES	8	3	3	5	0	0
FM Broadcasting	30	2	6	22	0	0
TV Broadcasting	4	3	0	1	0	0
Telecom operator	3		These licenses do not need to be renewed every year since their validity is more than one year			
ISP	7					
RETAIL ISP	16	2				
AIRCRAFTS	17	3	15	2	0	0
ARMATEUR	2	4	0		4	0

3.5.2. Management of Telecom Numbering Resources

During 2015-2016, 80 new short codes were allocated and given to 75 institutions while 56 institutions renewed their 75 short codes. In addition, one (1) new International Signalling Point (ISPC) was assigned to TIGO while three (3) new ISPCs and 40 National Signalling Points Codes (NSPCs) were assigned to MTN Rwanda.

With new ISPCs assignment in 2015, the level of ISPCs assignment was around 85% from the two Signalling Area Network Codes (SANCS) that were previously assigned to Rwanda. Subsequently, an addition SANC was requested from ITU and SANC 6-073 was assigned to Rwanda on 30th July 2015.

In addition, RURA accomplished the following activities:

i. Coordination and Implementation Of Network Color Codes

Following coordination and agreement within EACO Members States to implement different Network Color Codes (NCC) for avoiding cross border interference and forced roaming in GSM, RURA extended the coordination on NCCs implementation with ARPTC (DRC Regulator). To this effect, an agreement was reached between the two countries (Rwanda and DRC) to implement different Color Codes to all sites along their respective borders. Rwanda will be using 6 as NCC and DRC will be using NCC from 0 to 2.

ii. SIM Card Registration

During the period under review, RURA initiated the introduction of additional features with respect to SIM card registration. Mobile Telecom Operators in collaboration with the National Identification Authority established an interface that allows mobile subscribers to check mobile numbers registered under their names. This feature is accessed through *125*ID Number#.

Within the same framework, an interface was also established to facilitate mobile subscribers to deregister unneeded or unrecognised numbers using *125*1*Telephone Number to deregister*ID Number#.

3.5.3. Management of Internet Resources

In accordance with a 3-year MoU signed between RURA and RICTA, a non-profit association, has been entrusted to manage the top level domain while RURA oversees the management of .rw country top level domain (.rw ccTLD).

RURA monitors and evaluates the performance of RICTA in order to ensure its sustainability and affordability by local Internet community. The findings are that RICTA is becoming self-sustainable because its own revenue is supporting the operations cost (OPEX).

The tables below indicate that there is a growth of domain names registration in Rwanda since the delegation of the management of the ccTLD .rw to RICTA.

Table 16: Domain Names Statistics in Rwanda, as of June 2016

Type of registrar	Action	Type of domain	2013	2014	2015	June 2016
National	Registration	RW	236	255	543	872
International	Registration	RW	61	85	71	71
National	Renewal	RW	77	206	420	789
National	Renewal	RW	441	565	601	616
National	Registration	SLDs	165	192	249	131
International	Registration	SLDs	14	37	15	8
National	Renewal	SLDs	45	127	277	237
International	Renewal	SLDs	2	29	42	46
Total RW			815	1,111	1,635	1,832
Total SLDs			226	385	583	616
Total Domains						2,448

There are some strategies taken to increase the domain name registration as follows:

- To reduce the price of international domains (registration for SLDs from USD 224 to USD 30 since 2016 and renewal of SLDs from USD 224 to USD 30 since 2017);
- To have incentives for local registrars that sells international domains and automates registration and payments systems.

3.6. Monitoring and Enforcement

3.6.1. Frequency Spectrum Monitoring

During the year under review, RURA conducted countrywide monitoring and inspections on all FM, TV and Telecom operators to verify compliance with license obligations. In line with this, the following issues were identified and handled:

- a) TV Signal distributors are still operating in the band reserved for Mobile Broadband (694-862 MHz) while some radio stations are still installed in unauthorised sites.
- b) Interference at Nyarupfubire Broadcasting site and intermodulation interference were found in Studio to Transmitter Link (STL) Receiver.

In addition, RURA conducted countrywide measurements at selected towers of Telecom Operators (MTN, TIGO and AIRTEL) in order to evaluate the level of human exposure to Electromagnetic fields (EMF).

The highest measured EMF radiation was found in Byumba Town and it equals to 17.90 volts / meter which is about 32.56 % of the maximum allowed exposure level to EMF by general public. According to ICNIRP 1998 Guidelines for limiting human exposure electromagnetic fields, the maximum allowed EMF radiation exposure to general public in GSM bands is 41.3 volts / meter. However, according to measurements conducted on most of towers of Telecom Operators, the level of human exposure to EMF is very low and not harmful to human body.

3.6.2. Quality of Service Monitoring

In line with its mandate, RURA conducted QoS monitoring on cellular mobile networks during the fiscal year 2015-2016 to verify their compliance with the quality of service targets. The evaluated QoS parameters are Call Setup Success Rate (CSSR), Call Drop Rate (CDR) and Call Setup Time (CST). During the year under review, RURA performed three QoS measurement campaigns as illustrated in the following table.

Table 17: Statistics of QoS for Mobile Networks of MTN Rwanda, TIGO and Airtel Rwanda in fiscal year 2015-2016

Area Telecom Operator	Quality of Service Parameters								
	Call Setup Success Rate (CSSR): Threshold: ≥95%			Call Drop Rate (CDR): Threshold: ≤2%			Call Setup Time (CST): Threshold: ≤ 9 sec in ≥ 95% of the cases		
	MTN	TIGO	Airtel	MTN	TIGO	Airtel	MTN	TIGO	Airtel
Period: From 3rd August to 9th October, 2015									
Kigali City	99.00%	99.82%	98.28%	0.00%	2.17%	2.34%	91.95%	87.70%	92.56%
Southern Province	94.41%	96.12%	91.98%	0.99%	0.58%	2.40%	93.33%	95.21%	95.73%
Northern Province	99.49%	99.67%	94.07%	0.34%	1.00%	3.86%	94.03%	96.33%	95.50%
Eastern Province	87.78%	99.02%	84.49%	0.49%	0.60%	3.86%	92.59%	97.13%	93.76%
Western Province	97.43%	97.52%	84.56%	0.77%	1.66%	3.23%	94.09%	95.59%	89.29%
Period: From 16th November to 23rd December, 2015									
Kigali City	99.54%	97.04%	97.36%	0.70%	3.41%	3.20%	89.53%	90.24%	93.33%
Eastern Province	98.97%	97.86%	96.59%	0.39%	0.55%	3.38%	94.90%	94.66%	95.29%
Northern Province	97.27%	99.59%	89.35%	0.42%	0.69%	4.37%	93.96%	95.42%	91.06%
Western Province	98.41%	97.41%	68.97%	1.76%	2.78%	3.65%	94.23%	94.41%	96.55%
Southern Province	98.97%	99.45%	95.41%	0.47%	1.39%	5.22%	93.64%	94.45%	92.78%
Period: From 15th to 30th March, 2016									
Kigali City	98.44%	97.71%	98.54%	3.17%	2.74%	10.13%	86.05%	92.19%	94.40%

3.6.3. International Gateway Traffic Verification System

The International Gateway Traffic Verification System (IGTVS) was created by the regulation N° 004/ICT/RURA/2012 of 7/05/2012 as an essential basic but scalable and expandable platform to enforce the regulatory control function. It is an important regulatory tool to all the telecommunications market players.

This system allows collection of real time accurate statistics, assists in dispute settlement with respect to unfair competition and international transit malpractices among operators. The system also helps in detection of illegal call termination and takes care of telecommunications networks end users' needs by supervising key quality of service parameters.

Note 1: Results highlighted in apple green indicate the percentage that does not reach the set QoS threshold

During the year 2015/16, the traffic to and from Northern Corridor Member Countries increased significantly due to the adoption of One Network Area. Both incoming and outgoing traffic registered significant growth with international incoming traffic increasing by 17.55% while the outgoing traffic has increased by 75%. National Off-net traffic has registered a positive growth of 4.70% during this period under review while it was decreasing during the preceding year.

Table 18: Evolution of Incoming, Outgoing international and national off net traffic

Period	International Incoming Traffic (Minutes)		International Outgoing Traffic (Minutes)		National Off-Net Traffic (Minutes)	
	Total	Average	Total	Average	Total	Average
Year 14-15	92,364,629	7,697,052	108,953,679	9,079,473	155,189,189	12,932,432
Year 15-16	108,575,172	9,047,931	190,697,752	15,891,479	162,487,089	13,540,591
Increment	17.55%	17.55%	75%	75%	4.70%	4.70%

3.6.4. Monitoring of Rwanda Internet Exchange Point

RURA undertook the study entitled “assessment of the management and governance of Rwanda Internet Exchange Points”.

The purpose of the study was to define the best model for managing RINEX which would:

- Facilitate the access to internet exchange point,
- Enable efficient domestic bandwidth utilization,
- Encourage development of local contents and web hosting,
- Attract International content providers to locate their servers in Rwanda and promote internet broadband access at affordable cost.

During the year under review, the Telecom operators and ISPs have started to pay port fees as it was recommended in the above study.

Table 19: Port speeds and corresponding charges

S/N	Port speed	Fee (USD)	Fee (FRW)/Month	Fee (FRW) /Year
1	10 Gigabit Ethernet/SFP	655	459,559	5,514,704
2	1 Gigabit Ethernet/SFP	500	350,808	4,209,697
3	100 Megabit Ethernet/SFP	385	270,122	3,241,467

There is more traffic being served locally and not sourced from International. This means that the international links capacity are used for only contents not available on the local content clusters as shown in the table below.

Table 20: Annual aggregate RINEX traffic

Direction	ISP/CSP/Route Server Name	
	AVERAGE	MAXIMUM
Inbound	560.76 Mbps	862.46 Mbps
Outbound	550.96 Mbps	797.60 Mbps

3.6.5. Telecom Infrastructure Inspection and Installation Authorization

RURA has the responsibility to ensure that telecommunication infrastructures have no adverse impacts on the environment and people living in their neighbourhood. It is in this line that RURA issued authorizations to different Telecom Operators in accordance with the ICT Law and RURA Guidelines.

Table 21: Tower and Rooftop Authorization in fiscal year 2015 - 2016

Operators/ISP	Tower Sites Requested	Tower Sites Authorized
IHS	22	22
Olleh Rwanda Network (ORN)	6	6

To ensure the efficiency in use of capacity of existing and planned telecommunication infrastructure, RURA carried out inspections on the various towers for infrastructure sharing purposes.

Table 22: Tower sharing in fiscal year 2015 - 2016

Operators/ISP	Tower Sharing Requested	Tower Sharing Authorized
Olleh Rwanda Network (ORN)	80	80

On the side of Fiber Optic, RURA issued a number of authorizations based on the “Guidelines for Fiber Optic Cables Underground Installation”. The following table illustrates the number of sites requested and authorized by telecommunication operators and ISPs.

Table 23: Fiber Optic Installation Authorization

Operators/ISP	Sites Requested	Sites Authorized	Sites not Authorized
ORN	257	257	0
MTN	133	133	0
Liquid Telecom	131	131	0
TIGO	7	7	0

3.6.6. Type Approval

In order to ensure the quality of imported radio communication and electronic communication equipment, 2000 Type approval applications were processed of which 1985 were successful. In addition, 25 physical inspections on imported radios were conducted.

3.7. Consumer Protection

3.7.1. Consumer Education

Within the framework of consumer empowerment, the Regulatory Authority conducted a number of educational programs to reach the maximum number of consumers through TV and radio emissions/ spots, distribution of brochures and consumer fora. The consumer education focussed on the following topics:

- SIM card registration/deregistration;
- Quality of service in ICT;
- Mobile money safety;
- Avoiding counterfeit ICT products;
- Protection of children from unsuitable programs.

Particularly, Consumer fora provided an opportunity to the Authority to obtain feedback from the general public and promote industry awareness.

3.7.2. Review of Contracts Between Consumers and Operators

Contracts between Internet Service Providers and consumers were analysed to eliminate abusive clauses. The following contracts were analysed and reviewed:

- i. Contracts between Hotels and ISP's.
- ii. Tigo Contract on post-paid services.

3.7.3. Complaints Handling

The main complaints recorded in the ICT sector were related to e-banking and mobile money. As shown in the graph below, complaints increased in July 2015, September 2015 and March 2016 due to consumer education campaigns conducted during those periods.

These complaints were handled by engaging the concerned operators to resolve the raised issues.

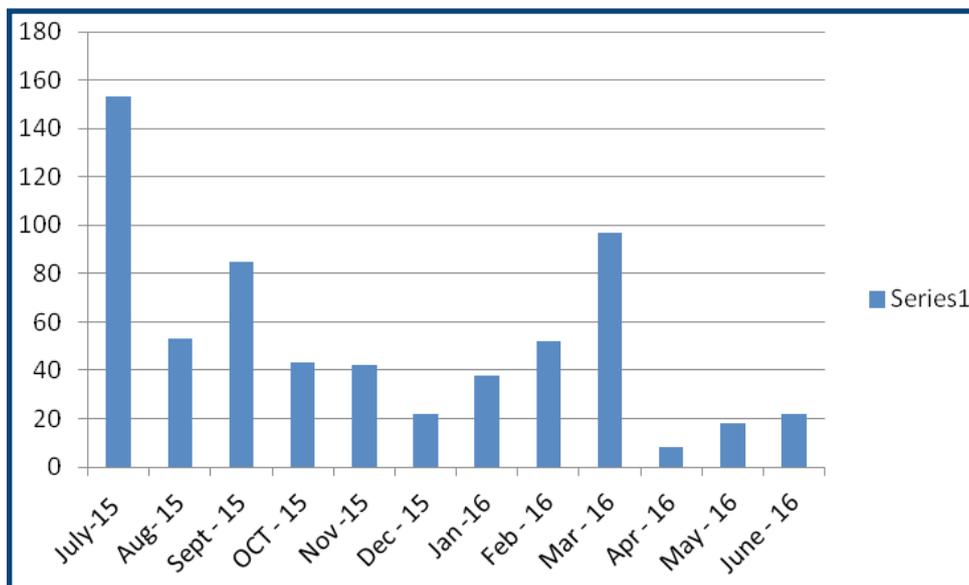
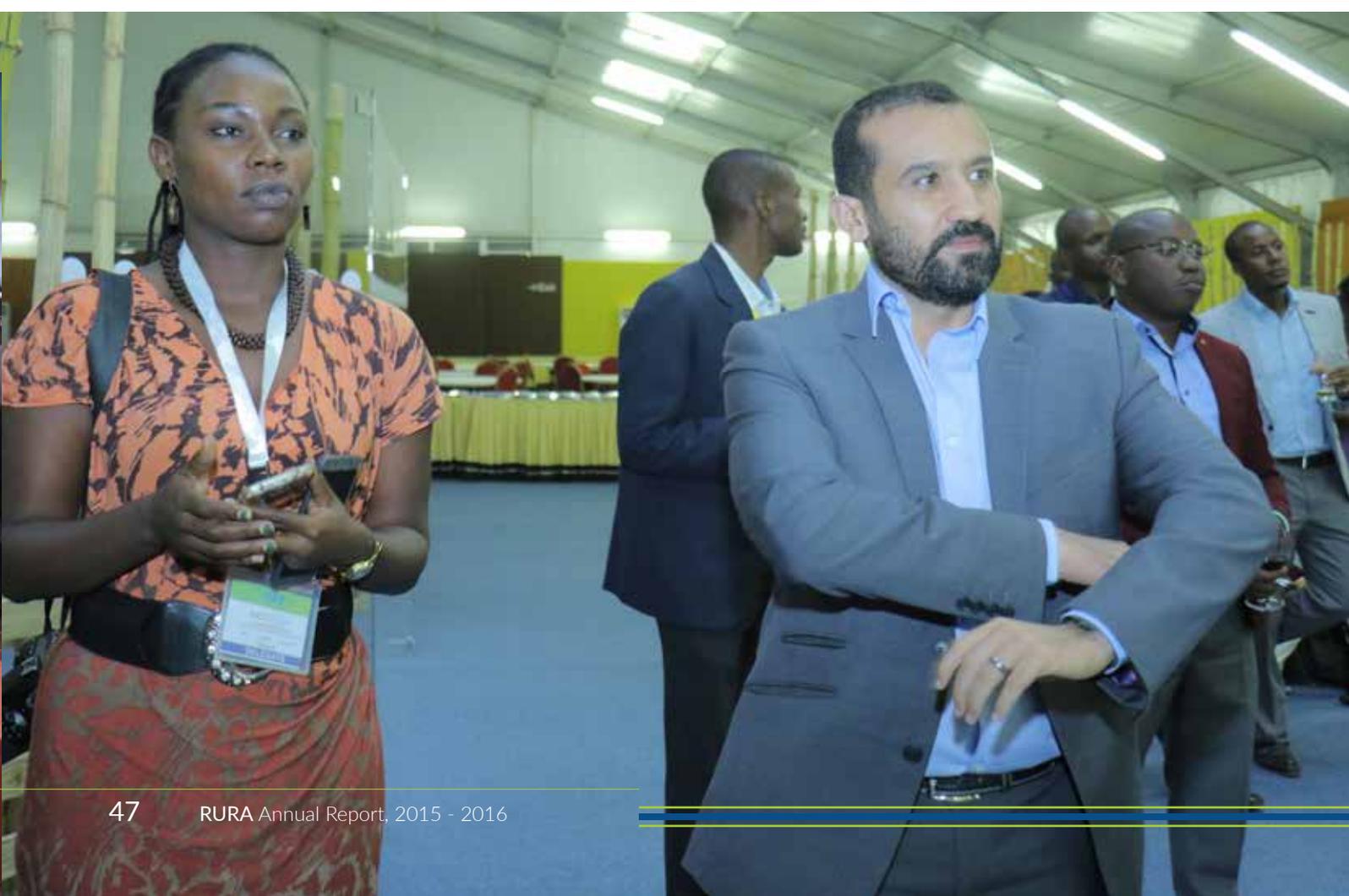


Figure 8: Number of registered complaints

Photos below: Annual EACO Assembly Meeting Participants - 2016, Kigali - Rwanda





3.8. Universal Access Fund (UAF)

The Government of Rwanda (GoR) established the Universal Access Fund (UAF) to accelerate the use of ICT in the country. The functioning and the source of funding of UAF are determined by the Presidential Order No 05/01 of 15/03/2004. The Fund is financed by the licensed operators through the contribution of 2% of their annual turnover. The Regulatory Board has the mandate to manage this fund in a way that favours the spread and take-up of ICTs in designated remote and under-served areas of the country. Projects under Universal Access complement and integrate the overall NICI policy framework for Rwanda.

In this fiscal year 2015-2016, RURA through UAF in collaboration with other institutions developed and implemented the following projects:

a. **Connecting Rural Schools on Broadband Internet Services:**

The Government of Rwanda through the Ministry of Education (MINEDUC) is in a process of increasing penetration of Internet connectivity at all levels of education to improve teaching, learning, research and innovation. It is in this perspective that RURA supported MINEDUC through UAF, in connecting 15 schools to Fiber Optic broadband Internet.

b. **Subsidizing Bandwidth Acquisition to Rural Communities**

UAF continued to support broadband Internet connection to 14 rural sites where fiber optic and Wireless Broadband are not yet present. The supported sites include schools, hospitals and administration offices connected via VSAT provided by NEW ARTEL.

c. **Hosting 10k Rwandan Websites**

Most of the Rwandan websites are hosted outside of the country. This makes the accessibility of that content very expensive to the viewers, and yet it is local content. In July 2015, RICTA came up with the 10,000 websites project that aimed at promoting local content hosting in Rwanda. On this basis, RURA allocated a fund through UAF to support this project. The 10 K project has two phases. The first phase is the trial phase whereas the second phase is the commercial phase. The trial phase ended in June 2016. During this phase, RICTA repatriated 44 websites hosted outside the country in collaboration with three registrars namely Igihe Ltd, Umuseke IT Ltd and Imaginet Ltd. The trial phase was successful and lessons learnt will help to undertake the second phase with confidence.

d. **Telecommunications Networks' Monitoring Tools and Security of E- Transactions**

RURA, using UAF, implemented the project for establishing monitoring tools to deal with network security, quality and performance analysis of the national telecom operators and the project for ensuring reliability and trust of secured electronic transaction at national level for the development of electronic services and businesses.

3.9. Outstanding Issues

It is commonly known that the main outstanding issue in the regulation of ICT Industry is to have a regulatory framework adapted to the rapid evolution of the technology. RURA has also some outstanding issues in this regard as highlighted below:

- Pending secondary legislation of law governing information and communication technologies;
- Pending monitoring equipment, tools to collect data on media content quality;
- Pending Prime Minister's Order specifying RURA mission in regards to media;
- Law and regulatory gaps due to rapid technology development. RURA is required to adapt quickly its rules and regulations to the changing ICT technology and market development.



ENERGY, WATER AND SANITATION REGULATION







Eng. Alfred Byigero
*Head of Energy, Water
& Sanitation Regulation
Department*

4.1. ENERGY

4.1.0. SECTOR PROFILE

The Energy Sector development is one of the top priorities of the Government of Rwanda as this sector constitutes a critical input to other economic sectors such as manufacturing, construction, mining and agro-processing. RURA, in its mandate to regulate the Energy sector, is required to support the ongoing socio-economic transformation and poverty eradication through ensuring sufficient, reliable, affordable and sustainable energy supply. Regulatory activities performed by the Authority in the electricity supply industry include, among other things, issuing licenses, tariff setting and compliance monitoring of operations to ensure quality and reliability of services.

The regulated energy sector in Rwanda consists of four components namely electricity, renewable energy, gas and petroleum. Rwanda's power supply is currently made up of domestic power generating facilities and importation from neighboring countries. As of June 2016, Rwanda recorded approximately 190MW of installed capacity (including imported power) and a demand of 120MW. The share of renewable energy in electricity generation mix so far accounts for 56% of the total installed capacity.

On the side of Gas and Petroleum sub-sectors, Rwanda has initiated different projects on Methane Gas exploration in Lake Kivu and the country continues to rely on importation of petroleum products including Liquefied Petroleum Gas (LPG). The downstream Petroleum industry in Rwanda entails various operations that involve importation, transportation, distribution and retail of petroleum products, related infrastructures of fuel storage facilities / fuel terminals and petrol service stations as well as petroleum retail sites.

The Gas sub-sector also involves the production of industrial gases that are used in medical domain and industrial manufacturing processes. Various Biogas projects have been implemented countrywide as fuel for cooking and lighting at institutional (schools, prisons) and domestic levels.

4.1.1. Legal and Regulatory Framework

4.1.1.1. Electricity Sub-Sector

The Electricity law No 21/2011 of 23/06/2011 is the cornerstone of regulation in Rwanda. It empowers RURA to issue licenses and set tariffs in the electricity sub-sector. During the year under review, the Regulatory Board approved the following regulations and guidelines:

- Electricity Quality of Service (QoS) Regulations: The regulations define parameters to be used by RURA to assess, monitor and evaluate operational performance of regulated power utilities.
- Right of Way (RoW) Guidelines for Power lines: the guidelines provide the required minimum safety corridor around power lines.
- Simplified Licensing Regulations for rural electrification: These regulations encourage private sector's investments in off-grids through establishing a light handed regulatory framework.

4.1.1.2. Downstream Petroleum

The Downstream Petroleum sub-sector is governed by the Law No 85/2013 of 11/09/2013. A Prime Minister's Order N° 131/03 of 10/05/2016 implementing this law has designated RURA as the Regulatory Authority for trade of petroleum and petroleum products. In this regard, all regulatory activities of downstream petroleum were transferred from the Ministry of Commerce and Industry (MINICOM) to RURA including among other the regulation of pump price.

In addition to three regulations that so far have been developed, namely Above ground Petroleum Storage Facilities Regulations, Petrol Service Stations Regulations and Liquefied Petroleum Gas (LPG) Regulations, RURA has embarked on the development of other missing regulations in order to fully operationalize the above mentioned Prime Minister Order.

4.1.2. Licensing

4.1.2.1. Electricity Sub-Sector

The law governing electricity in Rwanda provides for 5 types of licenses namely electricity generation, transmission, distribution, domestic trade and international trade. The licensing framework provides also for an electricity provisional license in order to allow new developers to carry out assessments, studies and other activities necessary prior to conducting electricity generation activities.

In addition, RURA has developed the Electrical Installations Regulations aimed at restricting electrical works to competent and authorized practitioners.

During the year under review, the Authority issued the following 4 licenses to the Energy Utility Corporation Limited (EUCL):

- Electricity Transmission License
- Electricity Distribution License
- Electricity Domestic Trade License
- Electricity International Trade License.

The generation segment is open to competition and so far, 7 generation licenses have been issued.

During the reporting period, the Regulatory Authority issued 3 electricity generation licenses with a combined total generation capacity of 33MW and 1 provisional license as shown in table below:

Table 24: Provisional licenses

	Licensee	Project	Capacity (MW)	Duration	Date issued
1	KIVUWATT Ltd	Kivuwatt Methane Gas Power Plant	25	25 years	30/07/2015
2	RWANDA MOUNTAIN TEA	GICIYE I Hydro Power Plant	4	25 years	31/03/2016
3	RWANDA MOUNTAIN TEA	GICIYE II Hydro Power Plant	4	25 years	31/03/2016
4	GOLDSOL II LTD	Rwinkwavu Solar Power plant	10	1 year	26/01/2016

With regard to electrical installations permits, 16 permits were issued to both individuals and companies.

4.1.2.2. Downstream Petroleum

In the framework of enforcing the Petrol Station Regulations, RURA has, during the year under review, licensed 24 petrol service station projects that are under construction countrywide. Furthermore, a provisional operation license was issued to OIL COM Ltd for the management of its new Oil depot located in Jabana.

4.1.3. Market Performance

4.1.3.1. Electricity Sub-Sector

During the period under review, the installed power generation capacity increased from 160MW (June 2015) to 190 MW. The 33% increase is mainly due to the commissioning of two power plants namely Kivuwatt Methane Gas-to-Power Plant (26MW) and Giciye II Hydro power plant (4MW). This increase in electricity generation capacity represents a significant step towards reaching the target of 563 MW by mid-2018 horizon as set in the Energy Sector Strategic Plan.

As of June 2016, the installed generation capacity (including imported power) comprised of 44% hydro, 27% heavy fuel/diesel oil, 16% methane gas, 5% solar, with the 8% balance coming from imports (Figure 9). The share of renewable energy in electricity generation mix so far accounts for 57% of the total installed capacity.

Regarding operators of the power plants, 56% of the installed capacity is under EUCL management while IPPs share has increased from 11% to 36% during this Fiscal Year (Figure 10). The private sector's contribution has significantly increased due to Kivuwatt project commissioning and the privatization of the management of 17 mini and micro hydropower plants previously owned by the Government of Rwanda. This deliberate move aimed at increasing efficiency in their operations and creating opportunities for private sector participation.

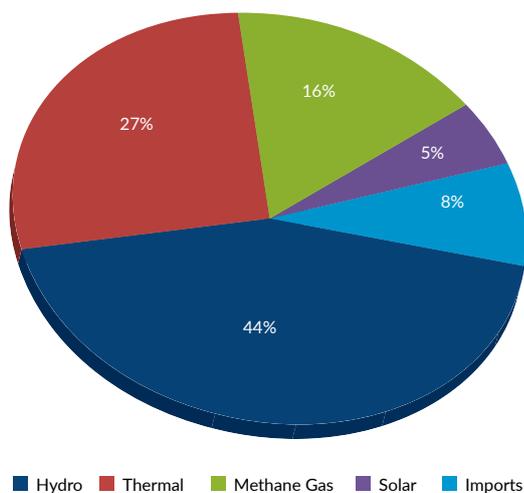


Figure 9: Installed generation capacity mix

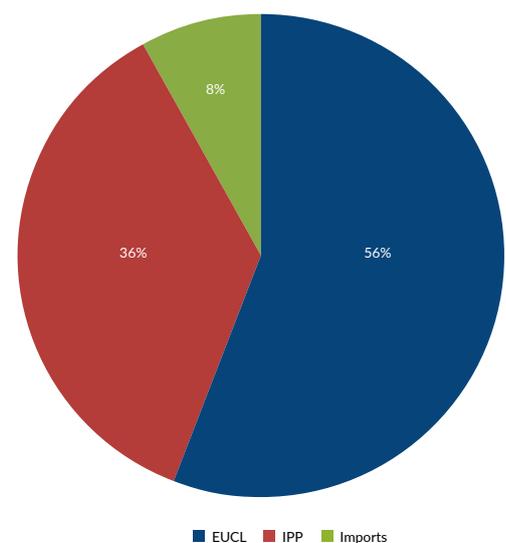


Figure 10: Share of different players in the electricity market

During the Fiscal Year (FY) 2015/16, about 640 GWh of energy was generated. This represents a 6.6% increase in the energy generated in comparison with the previous Financial Year. The total peak demand registered was 120MW in June 2016 representing an increase of 5MW as compared to the year 2014/2015.

Another major achievement in the power generation system is the completion of GISHOMA Peat-to-Power Plant (15MW). The commissioning of this plant is ongoing and is due for completion in August 2016.

With regard to electricity access, the total number of connections to the national grid increased from 513,092 customers at the end of June 2015 to approximately 590,000 customers, corresponding to about 24% of electricity access rate. In addition, Mobisol and other companies that are supplying off-grid solutions in rural areas installed over 14,000 Solar Home Systems. Over the same period, the National Electricity Grid was extended by 676.3 km and 886.23 km of Medium Voltage (MV) and Low Voltage (LV) respectively, reaching a total of about 4,500 km of medium voltage (MV) lines and 2,500 km of LV.

As part of the strategies to accelerate rural electrification in order to achieve the target of 70% electrification rate by mid-2018 from the current 24%, the Government has approved the Rural Electrification Strategy in June 2016. The new strategy defines new approaches towards accelerating electrification in rural areas by encouraging households to access the most appropriate form of electricity based on their income levels and usage patterns through a range of options from standalone solar systems to isolated mini-grids and grid connection.

In a bid to ensure that the newly created EUCL is able to sustain its operations and improve service provision to the Rwandan population, RURA approved new end-user electricity tariffs with an increase of 36% for low voltage (residential and non-residential) customers, effective from 1st September 2015 as shown in the table below. For medium voltage customers which include most of manufacturing industries, the tariff remained unchanged.

Table 25: Electricity end user tariffs (VAT exclusive)

Customer category	Energy charge (Frw/kWh)
Medium voltage	126
Low voltage	182

4.1.3.2. Downstream Petroleum Sub-Sector

Rwanda is one of the land-locked country served from the port of Mombasa via Uganda on the Northern Corridor and from the port of Dar es Salaam on the Central Corridor. For this reason, the country has been striving to build petroleum storage facilities so as to reach the acceptable level of strategic reserves to sustain possible disruptions along the said corridors.

As per the Downstream Petroleum Policy of 2014, the Government of Rwanda had the target of increasing the petroleum storage capacity to 150,000m³ by 2017. With the addition of the two new fuel depots owned by SP Ltd and OIL Com Ltd located in Rusororo (22,000m³) and Jabana (20,375m³) respectively, the total storage capacity reached 72.4 million liters (72,400m³).

The number of petrol service stations increased countrywide with the implementation of 21 new petrol service stations projects from December 2014. As of June 2016, 26 companies were involved in the downstream petroleum business as provided in Annex 2.



Figure 11: SP Petrol service station and petroleum terminal

In order to promote the use of LPG, the Government decided in June 2012 to waive VAT for LPG products and operators introduced a system of payment in installments. As a result, LPG prices were reduced as compared to previous years whereby the price now varies between 1,100 FRW and 1,665 FRW per kilogram across the country while in 2012, the price was ranging from 1,865 FRW to 2,200 FRW per kilogram. During the period under review, a new LPG filling plant owned by ABBARCI Gas Ltd was installed at Jabana with a capacity of 42m³, reaching 186m³ as the total LPG storage capacity for the existing filling plants.

The domestic fuel prices are mainly influenced by international oil prices as well as exchange rate fluctuations. From July 2015, international crude oil prices continued to go down and this resulted in the decrease of fuel pump prices in Rwanda as shown in the chart below:

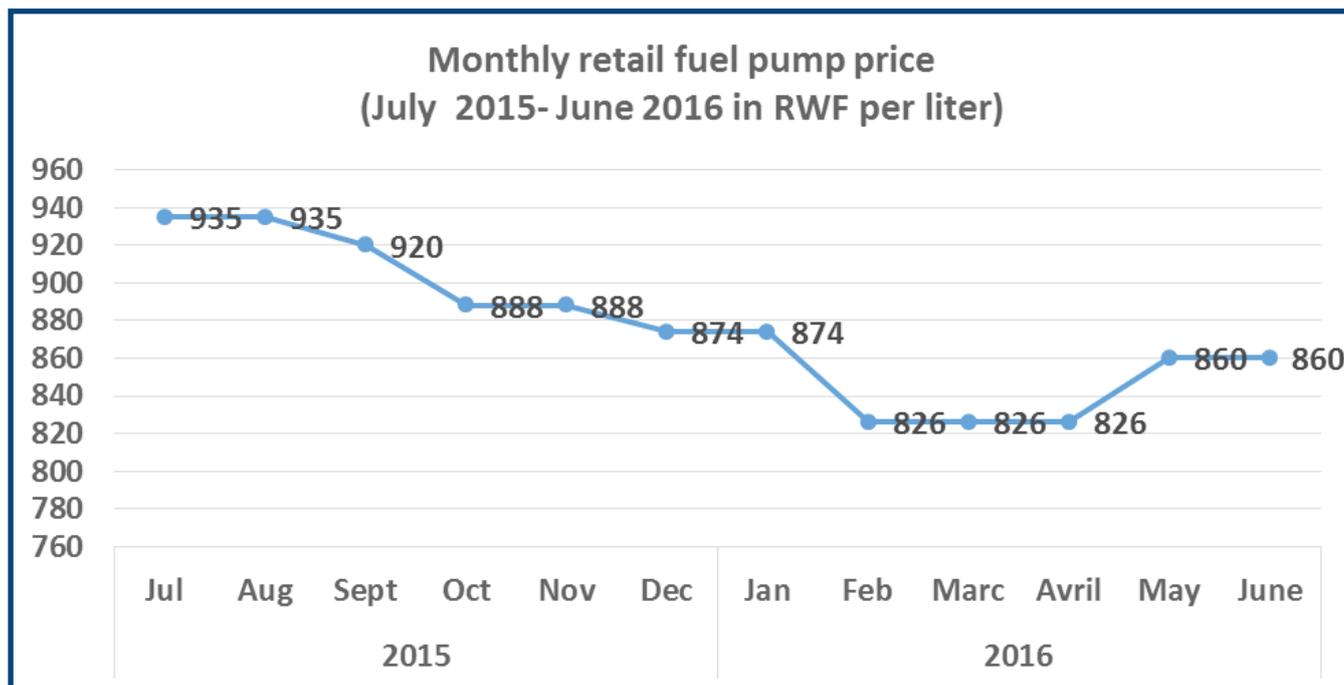


Figure 12: Monthly fuel pump prices in Rwanda

4.1.4. Inspection and Monitoring

4.1.4.1. Electricity Sub-Sector

RURA is required to continuously monitor and evaluate the development of the sector and ensure about technical operational performance of the regulated utilities with regard to reliability and quality of the services rendered to consumers.

Site inspections were conducted in 7 districts namely Kirehe, Ngoma, Gatsibo, Nyagatare, Nyarugenge, Gasabo and Kicukiro to inspect the quality of electricity supply and services rendered to electricity customers. The network performances (power plants production, network peak values, consumption statistics, lake levels, blackouts, accidents, losses) were also assessed on a quarterly basis and recommendations share with the utility for improvement of their performance. Furthermore, RURA carried out inspections to 17 Government owned mini and micro hydro power plants leased to private companies since October 2015. The purpose of the inspections was to understand their status and eventually request the new owners to diligently comply with regulations in place. Consequently, the license applications for these plants were received and their assessment is ongoing.

4.1.4.2. Gas & Petroleum Sub-Sectors

RURA has been monitoring activities relating to the development of methane gas-to-electricity projects by providing technical guidance such as on harmonization of Management Prescriptions (MPs) for Development of Lake Kivu Natural Gas Resources.

RURA also carried out site inspections to medical piped gas facilities, mainly in big hospitals and gas manufacturing plants, to assess the status of installed medical piped gas systems and to get up-to-date information. The outcome of these inspections helped in the formulation of a reliable database for medical gases equipment standards that will contribute to the development of regulations on medical gases. In collaboration with RSB, a number of relevant standards have already been adopted.

4.1.5. Consumer Education and Complaint Handling

In electricity sub-sector, an awareness campaign on energy efficiency was conducted and brochures educating consumers on how to use electricity efficiently were distributed. The chart below shows the number of complaints related to the energy sector received and handled by RURA on monthly basis. The complaints raised by customers were mainly related to power outages and unreliable power supply.

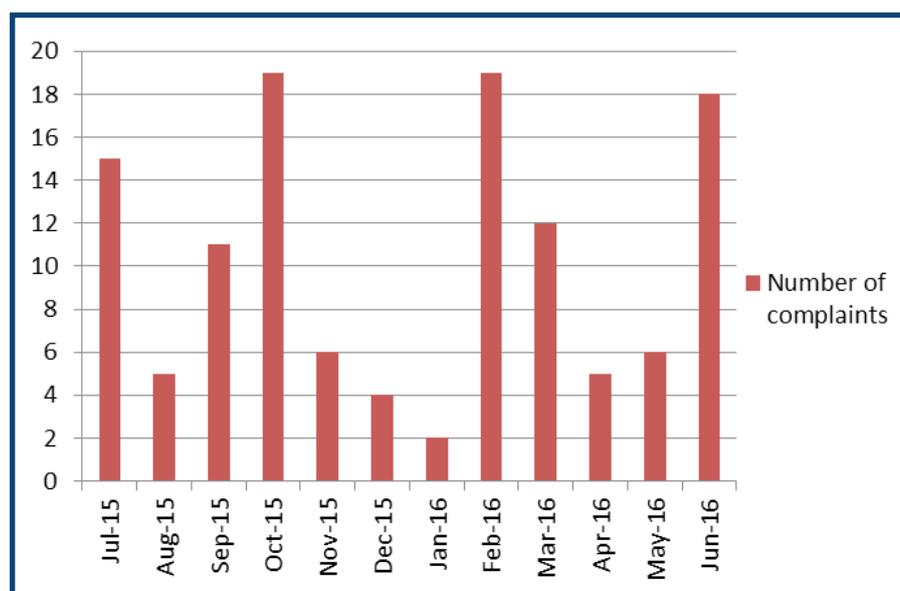


Figure 13: Number of complaints in the energy sector

4.1.6. Outstanding Issues

Though Rwanda's power generation capacity has increased considerably in the year under review and the supply is slightly higher than the demand, the reliability of the National Grid still remains a real concern as the system continues to experience recurrent power outages. These are mainly due to technical faults at power plants or in the transmission/distribution networks. There is therefore an urgent need to rehabilitate and/or upgrade transmission/distribution networks and to speed up the construction of ring circuit distribution system in Kigali and countrywide so as to minimize the occurrence of these power interruptions.

The Gas and Downstream Petroleum sub-sectors still face the following outstanding issues:

- Need to have necessary monitoring tools and testing equipment for gas and petroleum products;
- Absence of enacted gas law to govern various operations performed on Lake Kivu.



WATER AND SANITATION REGULATION

4.2. WATER AND SANITATION REGULATION

4.2.0. SECTOR PROFILE

The importance of adequate water supply and sanitation services as drivers for social and economic development and poverty reduction is fully acknowledged in different Rwanda's flagship policy documents. For this cause, the Government of Rwanda committed itself to reach very ambitious targets of attaining 100% service coverage in water supply and sanitation sector by 2020.

During the period under review, water sub-sector has moved towards full cost recovery for urban water services and a significant improvement was noted as shown by some indicators hereunder discussed.

The number of customers increased by 10.8%, water production by 3.1% and non-revenue water reduced by 3% as compared to the previous year.

In rural water supply, the Public Private Partnership (PPP) scheme was promoted and the percentage of water supply systems under the management of private operators increased by 56% as compared to the previous year.

During the reporting period, the sanitation sub-sector also recorded developments in terms of number of licensed operators from 18 to 22 in solid waste collection and transportation and from 151 to 208 in cleaning service provision.

4.2.1. Legal and Regulatory Framework

Despite the absence of a specific law for water supply and sanitation services, RURA continued to regulate the provision of water supply and sanitation services based on the law establishing RURA and other existing laws such as the law on environment protection, the law on water resource management as well as existing national policy on water supply and sanitation.

During the period under review, regulations governing water service provision as well as the urban water tariffs for end users were approved by the Regulatory Board in September 2015.

In the same vein, emphasis was put on updating existing sanitation regulations and on drafting new ones with the aim to improve on sanitation service delivery. The draft regulations were discussed with stakeholders in validation workshops and now await the approval by the Regulatory Board. These draft regulations govern the provision of the following services:

- Hazardous waste management;
- Management of dumpsites/landfills;
- Liquid waste collection and transportation;
- Cleaning ;
- Decentralized wastewater treatment systems.

4.2.2. Licensing

4.2.2.1. Water Sub Sector

Following the approval of Regulations governing water supply services in Rwanda, RURA embarked on licensing all water service providers. The exercise started with sensitizing both urban (WASAC LTD) and rural water operators about the license requirements. As a result, one license was granted to CFGAE managing water supply systems in Gakenke District while the license applications from WASAC LTD and 33 rural water operators were received and are now being assessed prior to licenses' issuance.

4.2.2.2. Sanitation Sub Sector

For sanitation service provision, 4 operators were licensed for solid waste collection and transportation, making a total of 22 licensed operators in this sub sector. One operator was also licensed for solid waste recycling. Annex 3 shows the list of licensed operators in solid waste collection.

In cleaning service provision, 57 new licenses were issued bringing the total number to 208 licensed operators as indicated in the figure below. One operator (Eco-protection Ltd) was as well licensed for installation of wastewater treatment systems and another one (RITM Ltd) was granted a provisional license for liquid waste collection and transportation. licensed for installation of wastewater treatment systems and another one (RITM Ltd) was granted a provisional license for liquid waste collection and transportation.

Figure below indicates the distribution of licensed cleaning service providers per Province and the City of Kigali.

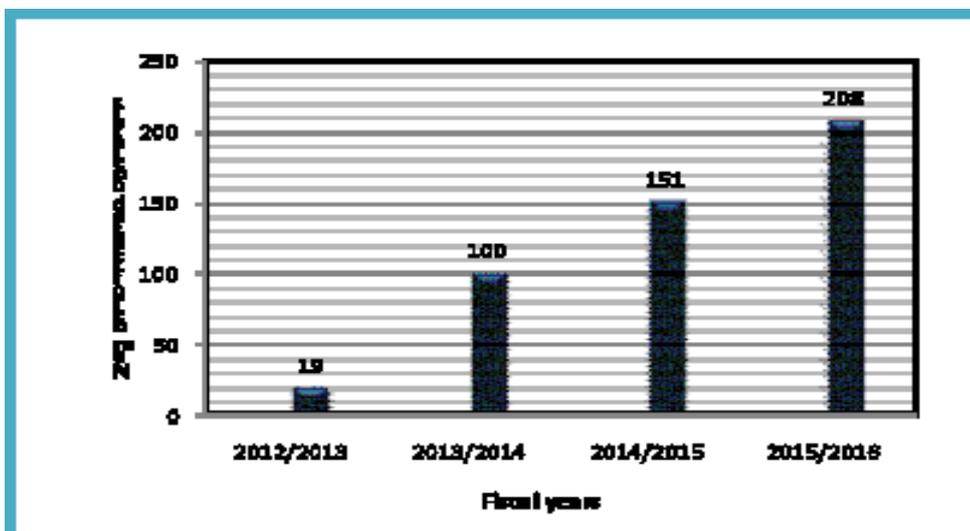


Figure 14: Trend in increasing number of licensed cleaning service providers

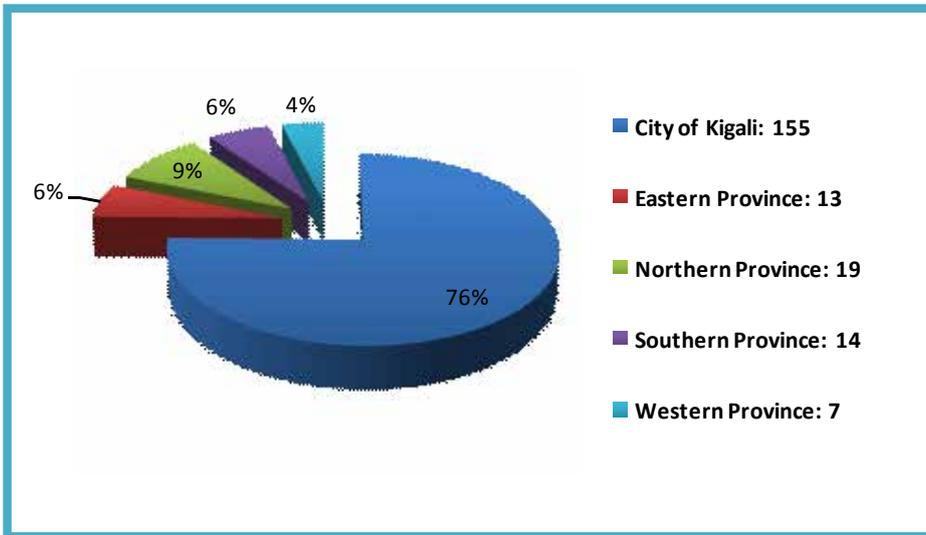


Figure 15: Distribution of licensed cleaning service providers per Province and City of Kigali

4.2.3. Market Performance

The water supply sub-sector has shown a relatively good performance during this reporting period in terms of water production and supply, connection of new customers as well as reduction of Non-Revenue Water and as shown by the figure below, water production capacity increased from 42,193,934 m³ to 43,558,705 m³. In addition, supplied water has equally increased from 39,829,392 m³ to 40,275,536 m³.

The increase of 3.1% in water production was a result of newly constructed water treatment plants of Nzove 2, Gihuma and Cyondo as well as the extension of Gihengeli filtration unit. As shown in the following figure, the number of new connected customers increased by 10% in urban water supply.

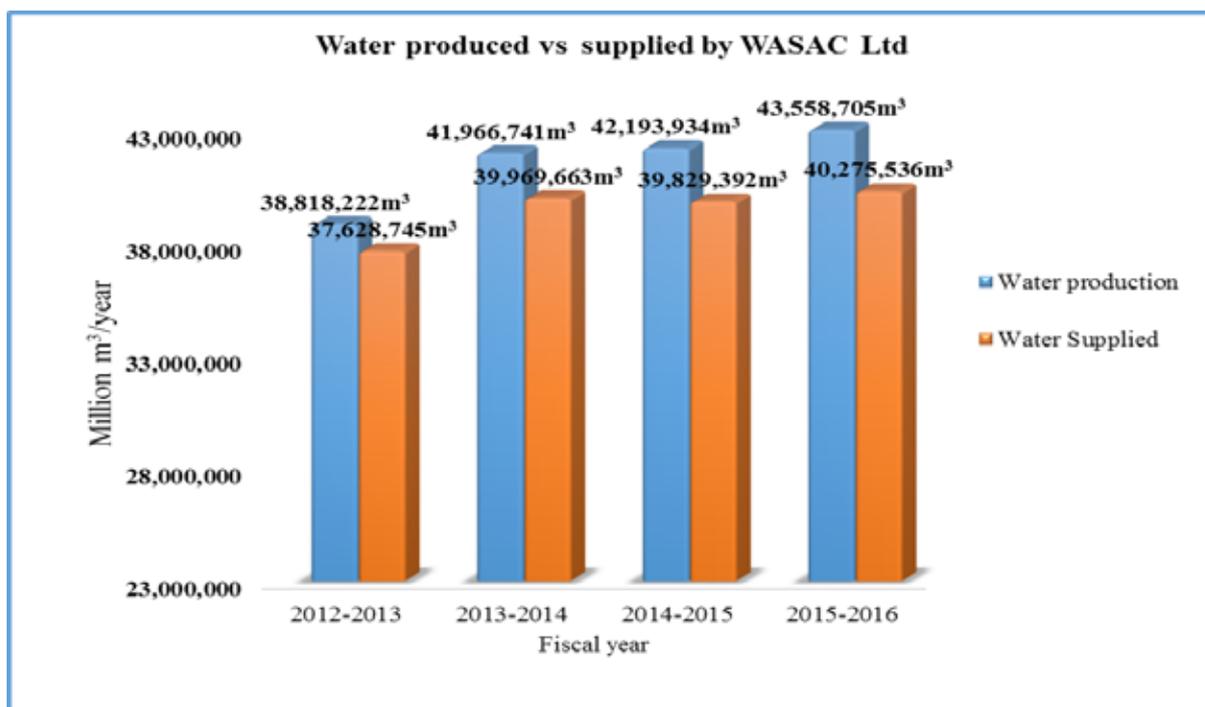


Figure 16: Customers connections in urban water supply

Further improvement was noted in Non-Revenue Water reduction which is one of the indicators used to evaluate the performance of WASAC Ltd branches. The figures reported by WASAC Ltd show that the average Non-Revenue Water was reduced from 40% to 37%.

As shown in figure below, the percentage of Non-Revenue Water is still higher than the maximum allowable value of 25%, except in Ngoma (20%) and Muhanga (22%) branches whose records fall within the acceptable range. In particular, the highest level of Non-Revenue Water of 48% was recorded at Musanze branch.

The high level of Non-Revenue Water is attributed to poor maintenance of water infrastructure as well as old networks that lead to recurrent leakage in the distribution network as well as to the commercial losses.

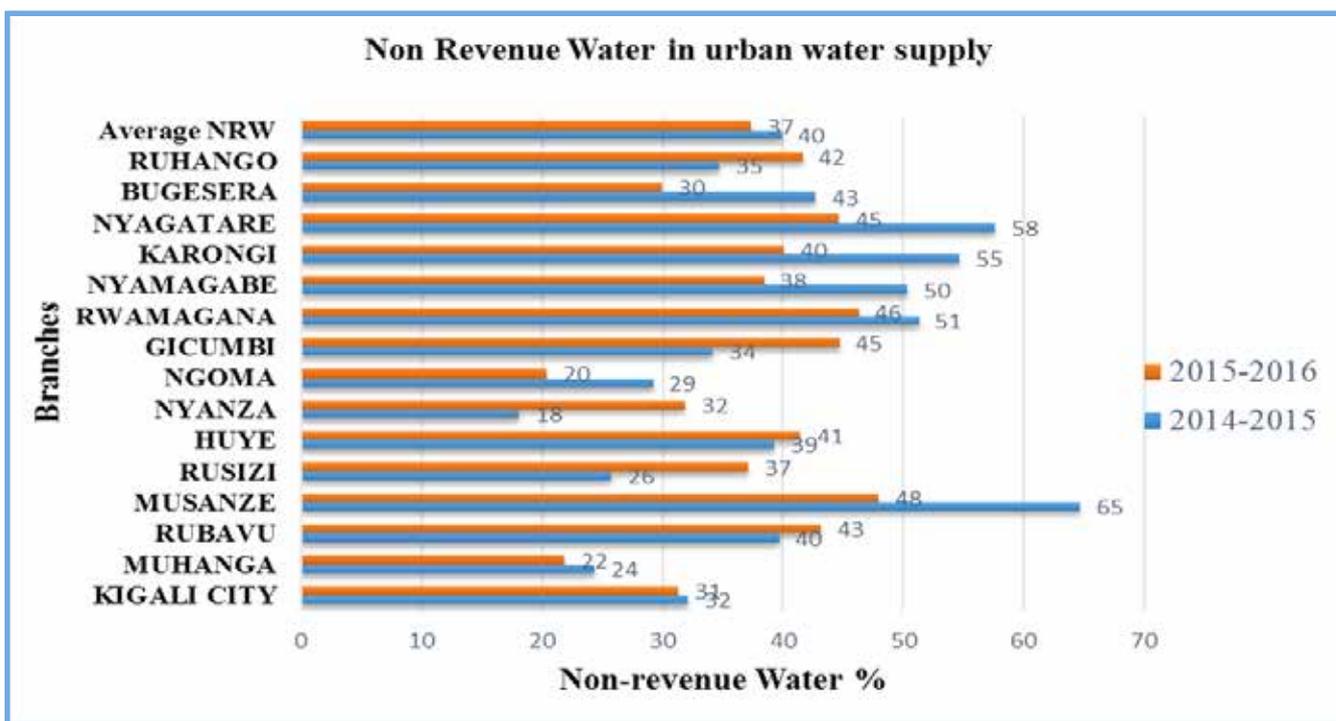


Figure 17: Percentage of Non-Revenue Water in urban water supply

During the period under review, workshops were conducted at both Provincial and District levels with the aim to sensitize Local Authorities and rural water operators about the best practices for the management of water supply systems and licensing framework.

These meetings brought significant impacts on the management of rural water systems:

- PPP schemes were increased from 40% (from previous records) to 62%;
- District Water Boards were created in 10 out of 27 Districts of rural areas;
- Clustering of rural water systems was done in 13 Districts;
- Water and Sanitation Hygiene (WASH) officers were recruited in 15 Districts.

4.2.4. Monitoring And Inspections

Monitoring is part and parcel of Regulator's mandate to assess licensed operators' performance and compliance with regulations as well as the quality of service to consumers. To this effect, technical audits and inspections are regularly conducted to licensed water and sanitation service providers countrywide.

4.2.4.1. Water Sub Sector

During this fiscal year 2015/2016, audits and inspections were conducted to 28 out of 512 rural water supply systems and to all water treatment plants and branches managed by WASAC LTD.



Figure 18: Compact Water Treatment Plants at Nzove and Cyondo.

It was noted that all WASAC branches are well managed and have experienced significant improvements in terms of indicators such as number of customers, water production, metering ratio, and collection efficiency and connection time.

With regard to rural water supply, further improvements are still needed as the issue of poor management of water sources remains real especially those located in farming areas. Water meters are not yet installed at sources and distribution tanks, hence making it impossible to evaluate the water production and distribution as well as the quantity of Non-Revenue Water. Water treatment facilities are yet to be fully equipped, especially laboratories for water quality tests. So far, only two operators have treatment facilities and laboratories to perform the water quality analyses

Sanitation sub sector

4.2.4.2. Sanitation Sub Sector

a. Cleaning Services

In an effort to increase awareness and compliance, audits and inspections were conducted to 43 licensed cleaning service providers operating in different parts of the country. The findings of the inspections revealed the following:

- All cleaners possess health insurance for easy access to medical care;
- Adequate cleaning products and materials are provided as per the contracts signed with clients;
- Some operators do not provide full package of safety equipment;
- Cleaning products are not properly handled and used.

b. Solid Waste Management

Audits and inspections were carried out to twelve (12) and six (6) licensed operators in the City of Kigali and countryside respectively. In the City of Kigali, field inspections showed that:

- The frequency of waste collection complies with regulations (four times per month) in 95% of the Sectors ;
- Employees have basic personal protective equipment,
- The number of households that have contracts has significantly increased (90%) and the collection efficiency has improved (79.3%);
- Waste sorting at generation point is still lagging behind (39%);
- The majority of hauling trucks do not meet requirements.



Figure 19: Trucks used for solid waste collection and transportation

Upcountry, the field visits revealed the following:

- Good quality of service is provided to institutions such as hotels, restaurants, industries and public markets;
- service rendered to households still needs to be improved in terms of subscription to the services as well as in terms of collection frequency;
- Some hauling trucks also do not meet required standards and waste sorting at source is still at very low level.

4.2.5. Consumer Education and Complaints Handling

In water sub sector, 80% of the complaints were related to water shortage in the City of Kigali while the remaining 20% were about billing system.

In sanitation, most of the complaints registered were associated with contract terms not being respected by Operators especially in collection and transportation of solid waste.

As shown in the table below, a total of 379 complaints in water and sanitation were recorded:

Table 26: Complaints in water and sanitation

	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	TOTAL
WATER	23	22	23	20	16	8	14	19	26	16	23	18	228
SANITATION	22	15	13	9	15	2	10	14	2	21	15	13	151
TOTAL	45	37	36	29	31	10	24	33	28	37	38	31	379

Concerning water shortage complaints especially during dry season, WASAC LTD was requested to establish and publish a weekly water rationing program indicating area and time for water supply in various parts of the City. RURA monitors the compliance with this rationing program. It was however noted that the public is not aware of this rationing program as it is published only on WASAC LTD website. In this regard, WASAC LTD was requested to improve on public communication using various media outlets.

4.2.6. Outstanding Issues

Water and Sanitation related outstanding issues which were recorded during the year under review consist of the following:

- Absence of sector specific water supply services law;
- High non- revenue water recorded for the urban water utility;
- Imbalance between water supply and demand in urban areas;
- Lack of budget for the rehabilitation of old and non-functional rural water supply systems;
- Lack of Districts' ownership in monitoring the performance of water service providers;
- Lack of treatment facilities and laboratories to perform water quality analyses;
- Acute shortage of water sources, especially in the Eastern Province.
- Need for proper tariff structure in rural water supply



TRANSPORT REGULATION





Eng. Asaba Katarwa Emmanuel
*Head of Transport Regulation
Department*

5. TRANSPORT REGULATION

5.0. SECTOR PROFILE

The transport sector is a significant segment of Rwanda's economy. Therefore, there is need to put in place a solid regulatory foundation for the sector.

The law establishing RURA gives it a mandate to ensure that transport services are available throughout the Country to meet, in transparency, all reasonable demands of all natural persons and organizations. It also ensures that the interests of both present and future beneficiaries of transport services are catered for and that utility providers comply with laws and regulations in force.

The period under review experienced remarkable achievements. These include increase of 131% licensed Special Vehicle Rental companies/ cooperatives, 50% of driving schools and 39% motorcycles. Three (3) new companies were also licensed in goods transport as a result of awareness campaigns and enforcement of rules and regulations. In Waterways transport, sensitization meetings were conducted with Waterways transport stakeholders that include transporters, Army marine, Police Marine and concerned Local Government Authorities. As a result, forty-four (44) new operators were licensed and one hundred eighty eight (188) authorizations were renewed.

5.1. Legal and Regulatory Framework

The Law establishing RURA gives the Authority the mandate to regulate transport sector. It is in this regards that RURA has developed a number of regulations to organize transport services in the country. However, the industry is still lacking appropriate sector law. During the Fiscal Year under review, RURA has initiated a draft transport law and submitted it to the concerned Ministry for consideration.

5.2. Licensing

In order to improve transport services in the country, security of passengers and management of all transport operations, RURA encourages operators in transport sector to work under companies/ cooperatives. This has been achieved in passenger road transport and driving schools while the process to mobilize waterways and Goods transport operators is underway.

Based on the above mentioned status, licensing is done in two categories which include:

- Authorization issued to Individuals
- Licenses issued to Companies and cooperatives.

Photos below: Best Public Transport Operators' Award Ceremony



5.2.1. Licensed Goods Transport Operators

In goods transport sub sector, three new companies were licensed. This led to a total number of 24 goods transport operators in Rwanda.

The table below shows the working area and fleet of goods transport

Table 27: working area and fleet of goods transport operators

COOPERATIVE/COMPANY	NUMBER OF VEHICLES	PARKING
EAST AFRICAN COOPERATIVE OF TRANSPORTS	56	GASABO
GORILLA MOTORS LTD	2	KICUKIRO
SOCIETE RWANDAISE DE DISTRIBUTION ET SERVICE	5	REMERA ZONE

The total number of authorized vehicles as of June 2016 is 31,150 representing an increase of 736% compared to the previous fiscal year. This sharp increase is due to intensive awareness campaigns and enforcement mechanisms set by the Authority.

5.2.2. Licensed Local Public Bus Transport Companies/Cooperatives

Following the implementation of newly adopted public transport regulations No: 007/TRANS/RT/RURA/2015 of 1/6/2015, four (4) operators were not able to individually meet the requirements in terms of fleet capacity and hence joined other operators.

The number of companies and cooperatives engaged in passenger transportation totals to 42 with a total fleet capacity of 3,375. The list of operating companies and cooperatives is provided in annex 4.

5.2.3. Licensed Motorcycle Transport Cooperatives

The number of authorized motorcycles increased from 19,877 (June 2015) to 27,646 (June 2016) However, due to the new regulation of public transport which requires a minimum number of hundreds of motorcycles for issuance of license, there was no new company/cooperative licensed.

5.2.4. Licensed Car Rental Transportation

Enforcement mechanism of public transport regulations together with sensitizations carried out by RURA where many service providers were encouraged to operate rental services resulted into an increased number of licensed companies/cooperatives. The total number increased from 13 to 30 Special Vehicle Rental Companies/cooperatives representing a total fleet of 369 vehicles.

The list of operating companies and cooperatives is provided in Annex 5.

5.2.5. Driving Schools

During the fiscal year 2015/2016, thirty four (34) driving schools were licensed leading to a total number of 102 licensed driving schools in the country with a total fleet of 804 vehicles. The increment represent a 32% of the total number.

In a bid to improve the service delivery in driving school service, driving schools were requested to register to IREMBO platform. This contributed in combating fraud related to non-compliant driving schools and facilitating driving permit candidates to access services online.

The following comparative chart shows the number of driving schools registered in Rwanda per District for the last two years.

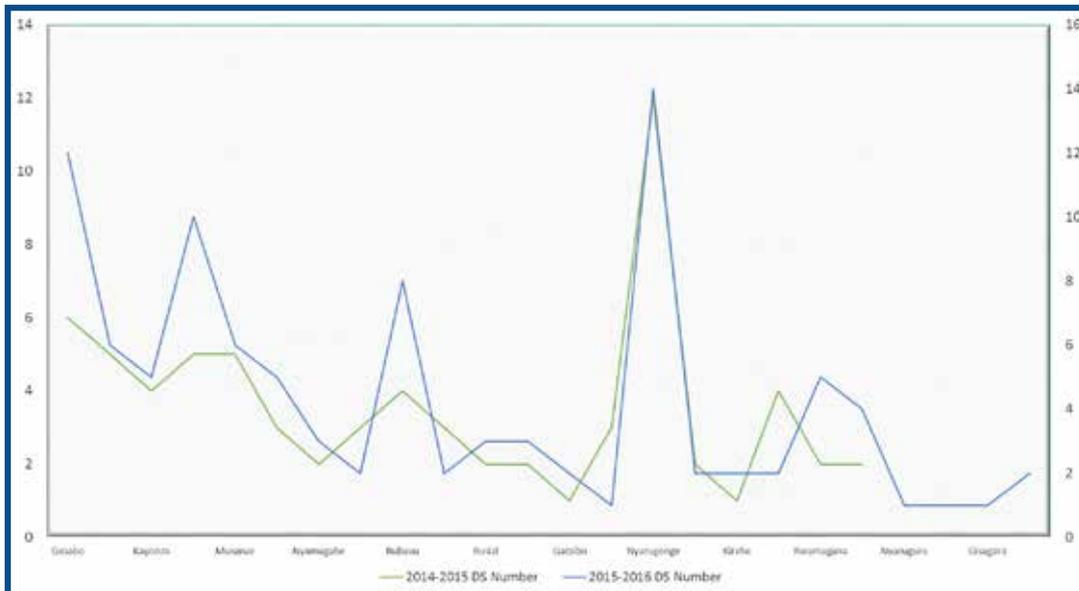


Figure 20: number of driving schools registered in Rwanda per District for the last two years

The above chart shows that:

- Driving schools are now operating in four more districts namely Nyanzonge, Rusizi, Gisagara and Kamonyi;
- 24 out of 30 Districts of Rwanda have one or more driving schools representing 80 percent of driving school coverage.

The list of operating driving schools is provided in annex 6.

5.2.6. Licensed Taxi Cabs

During this year of review, only one taxi cab was licensed leading to a total number of 41 companies/cooperatives with a total fleet of 632 vehicles.

5.2.7. Licensed Waterways Transporters

The Waterways transport sub-sector is one of the oldest economically and environmentally sustainable modes of transportation and in some areas the only means of mobility and access to basic services. It covers the inland waterways transport of goods and the inland waterways transport of persons. The sub sector encompasses vessels ranging from simple non-motorized boats to highly automated pushers, operating on waterways ranging from small tributaries to major rivers and lakes.

During the fiscal year 2015-2016, several consultative and sensitization meetings in Waterways transport sub sector were conducted with stakeholders like Marine, Police, local Government authorities and waterways transport operators. The purpose of these meetings was sensitization of waterways transport operator on working in cooperatives, safety and boat worthiness. The number of waterways licensees increased from 134 to 178 and the number of registered boats increased from 225 to 278. The table below gives detail on the number of registered operators and authorizations issued per districts.

Table 28: Number of registered operators and authorizations issued.

District	Registered operators	Licensed operators	New licensed operators	Registered boats	Authorization issued (Total)	Authorization renewed
Bugesera	2	1	1	3	1	0
Burera	7	3	1	10	5	4
Gasabo	9	8	3	9	9	5
Gatsibo	10	7	2	16	12	10
District	Registered operators	Licensed operators	New licensed operators	Registered boats	Authorization issued (Total)	Authorization renewed
Gicumbi	5	4	2	5	4	3
Karongi	21	13	9	40	33	27
Kicukiro	4	4	3	4	4	1
Musanze	5	5	2	6	6	4
Ngoma	12	12	4	15	15	11
Nyamasheke	29	29	2	38	37	30
Rubavu	24	19	7	33	28	21
Rusizi	52	44	5	43	41	34
Rutsiro	21	14	2	28	21	19
Rwamagana	13	13	2	18	16	11
Toatal	214	178	44	278	232	188
%	100%	82.2%	20.7%	100%	83.4%	64.6%

5.2.8. Licensed Freight Forwarders

In freight forwarders sub sector, three new companies were licensed. This led to a total number of 13 operators in Rwanda.

Table 29: Licensed freight forwarders

1.	PLATINUM LOGISTICS RWANDA LTD
2.	AGACIRO LOGISTICS LTD
3.	DIAMOND WORLDWIDE LOGISTICS LTD
4.	E.C.S LOGISTICS KENYA LTD
5.	RAPID FREIGHT INTERNATIONAL
6.	JAGUAR CARRIER JUNIOR LTD
7.	KENFREIGHT RWANDA LTD
8.	AFRICA WAY SHIPPING LTD
9.	AFRICA DIRECT LTD
10.	GLOBAL SHIPPING LTD
11.	EAST AFRICAN CARGO
12.	SWIFT TRANSPORTERS AND LOGISTICS LTD
13.	FRAMEG CARGO SERVICES LTD

5.3. Market Performance

5.3.1. Tariff Structure

The year under review was characterised by the decreasing trend of fuel prices on world market calling for the review of public transport fares. Therefore, the fare was reduced from 19 Frw to 18 Frw per passenger per kilometre effective from 26th October 2015.

5.3.2. Vehicles Distribution in the Market

Diagram below is reflecting number of vehicles with authorizations operating in different Districts where Gisagara and Musanze Districts have more vehicles operating Transport of good.

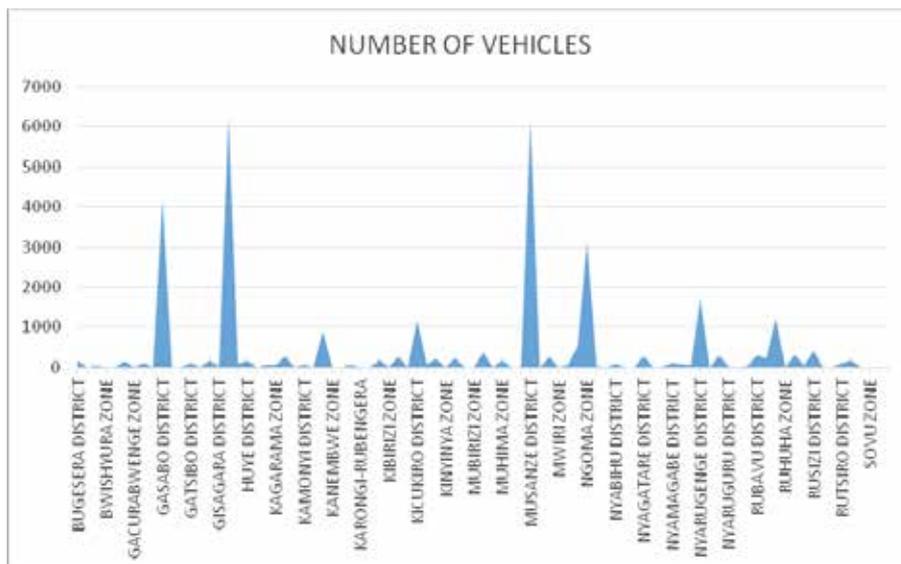


Figure 21: Goods transport vehicle distribution

5.4. Enforcement

To ensure compliance by transport operators with regulations governing the sector, RURA conducted transport inspections in the City of Kigali and upcountry. This activity emphasized on:

- Monitoring operator practices;
- Ensuring that road safety measures are observed;
- Making a follow-up on passenger and freight vehicle inspections.

During this fiscal year, the following cases were found;

- Use of buses without a valid license and operating with expired license;
- Operating with inappropriate Insurance;
- Failure to charge correct fare and violation of the assigned routes;
- Failure to use Electronic Ticketing and to issue tickets to passengers;
- Operating a route/zone not given by the Authority;
- Failure of Driver or passenger assistant to wear ID badge or uniform;
- Bus overloading;
- Failure to provide the required document on demand by enforcement officer;
- Use of brokers (Abakarasi) and Loading at inappropriate place.

During the enforcement process, RURA has identified a number of forged authorizations, and they were all forwarded to Police for further investigation.

The Authority has also revoked transport of passengers' license of SOTRA Tours and Travel Agency pursuant to non-compliance with license obligations. In waterways, monitoring and site visits were carried out on Kivu, Muhazi, Mugesera, Burera and Ruhondo lakes. This led to renewal of 188 authorisations.

The Monitoring of transport services offered to student has been done during the beginning and the end of academic term. This activity focused on facilitating students in getting transport means at a regulated fare.

5.5. Consumer Protection

5.5.1. Consumer Education

During the year under review, the Regulatory Authority conducted TV and radio emissions on issues faced by passengers in public transport. A Consumer Forum on new transport fares was held. The adjusted transport tariffs were also published in newspapers and on RURA website. Five thousand brochures were printed and distributed to operators and consumers.

5.5.2. Complaint Handling

The complaints received in transport sector do not relate only to consumers but they include also those from regulated operators. In September and November complaints were raised due to implementation of new transport fares. And in February, the complaints about delays of license issuance were raised after putting in place the new regulations requesting operators to operate in cooperatives/companies instead of working individually. After analysis of complaints it was found that the delays of issuing transport Authorizations occurred because some operators submit files which do not fulfill all requirements. The figure below indicates monthly complaints received and handled;

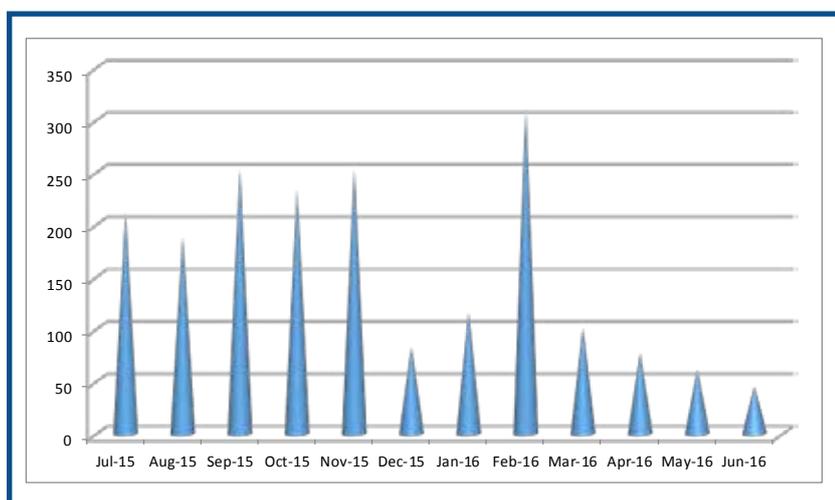


Figure 22: Complaints on Transport Sector

5.6. Outstanding Issues

The specific outstanding issues include:

- Absence of sector law;
- Insufficient fleet compared to the demand In the City of Kigali and rural areas;
- Insufficient Taxi Cab parking space in the City of Kigali limiting new investments in Taxi cab business;
- Insufficient Taxi meter suppliers hence delaying the installation in taxi cabs vehicles;

CONCLUSIONS AND WAY FORWARD

As extensively discussed in this report, a good number of programs in all regulated sectors have been achieved in terms of improving regulatory framework, licensing and monitoring, fair competition, consumer protection, consumer education, regional and international partnerships as well as building capacity of staff.

The ICT sector continued to experience a remarkable growth as a result of a conducive legal and regulatory framework in place. The mobile telephone subscription increased by 9.2 % while mobile penetration rate reached 79% from 72.6% recorded at end of the previous year. As for the Internet data, the number of Internet subscriptions increased by 3.4% and internet penetration rate reached 33% increase compared to 31.5% of previous fiscal year. Also, mobile money transfer services had 7.7 million subscribers as of December 2015 out of 8.9 million total mobile subscribers.

The universal access fund continued to spearhead broadband connectivity in rural areas by subsidizing fiber optic, wireless and VSAT connectivity in schools, hospitals and administration offices.

The energy sector registered a tremendous growth in power generation capacity due to the commissioning of Kivuwatt methane gas-to-power and Giciye hydro power plant. The installed capacity reached 190MW from 160MW in the previous financial year. Water sector registered a significant progress as well especially in urban area: water production increased by 3.1%, number of customers by 10.8% while non-revenue water was reduced by 3%.

In the transport sector, RURA experienced remarkable achievements. Licensed Special Vehicle Rental companies/ cooperatives increased by 131%, driving schools by 50% and motorcycles by 39%.

However, despite tireless efforts made by RURA and other stakeholders, regulated sectors are still facing two main challenges.

Firstly they still need considerable investments to provide accessibility and affordability of services to the whole population of Rwanda. Secondly, some sectors like transport, Water and sanitation are in need of a complete legal and regulatory framework governing the sectors while others need to develop missing regulations.

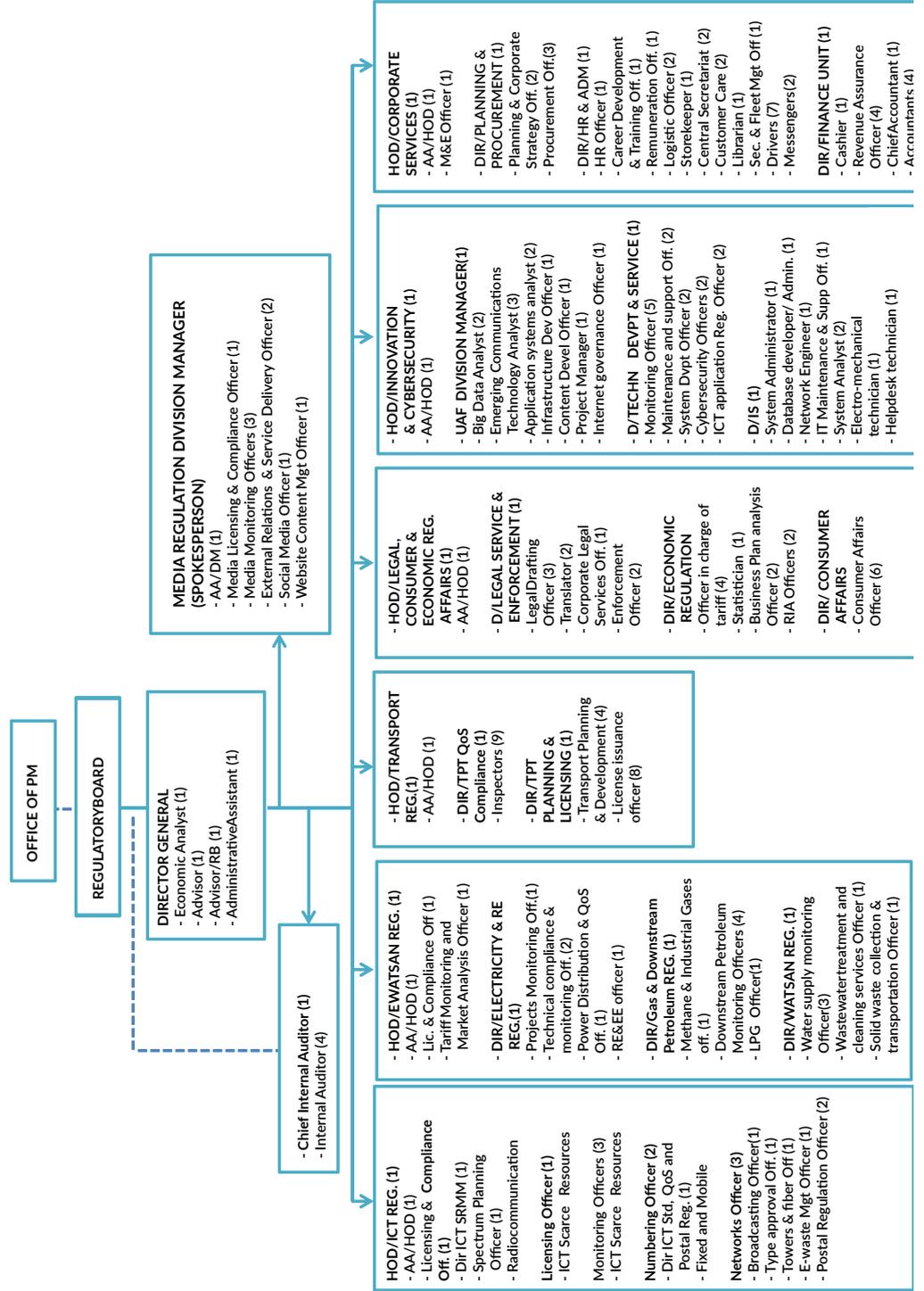
In that regard, ICT sector will have to develop secondary legislations to operationalize the ICT law enacted in June 2016. The energy sector will need to develop missing regulations to fully operationalize the Prime Minister's order mandating RURA to regulate downstream petroleum.

The sectors of Transport, Water and sanitation will continue to engage their respective stakeholders in order to put in place their specific sector law.



ANNEXES

ANNEX 1: RURA ORGANISATIONAL STRUCTURE



ANNEX 2: List of licensed petrol service station developers

SN	Operator / applicant name	License number	SN	Operator / applicant name	License number
1	Mr. KABALISA Gaspard -Kayonza	026/PSS/RURA/2015	7	Mr. GASARABWE Alphonse (Gas Oil) – PoidsLourd	032/PSS/LIC/GP-EWS/RURA/2015
2	Mr. NDAGIJIMANA Emmanuel- Nyamata		8	Mr. NDAGIMANA Francois - Kabeza	033/PSS/LIC/GP-EWS/RURA/2015
3	LAKE PETROLEUM RWANDA Ltd -Rwamagana	027/PSS/LIC/GP-EWS/RURA/2015	9	ADDAX PETROLEUM Ltd -Gatsibo	033/PSS/LIC/GP-EWS/RURA/2015
4	LAKE PETROLEUM RWANDA Ltd - Kayonza	028/PSS/LIC/GP-EWS/RURA/2015	10	MOUNT MERU RWANDA PETROLEUM Ltd -Rwamagana	035/PSS/LIC/GP-EWS/RURA/2015
5	ESCALE GROUP Ltd - Kayonza	029/PSS/LIC/GP-EWS/RURA/2015	11	HOME STATION -Rwamagana	036/PSS/LIC/GP-EWS/RURA/2015
6	Mr. RURANGANGABO Paulin - Kicukiro	030/PSS/LIC/GP-EWS/RURA/2015	12	NDAGIJIMANA Athanase - Kamonyi	037/PSS/LIC/GP-EWS/RURA/2015
13	HOME STATION - Kibeho	038/PSS/LIC/GP-EWS/RURA/2015	19	SOPEFANI Ltd - Musanze	045/PSS/LIC/GP-EWS/RURA/2015
14	Mr. BIDERI Vincent – Kicukiro - Gahanga	039/PSS/LIC/GP-EWS/RURA/2015	20	Mrs. KAMARADE Numutako AbineImmy	044/PSS/LIC/GP-EWS/RURA/2015
15	Station Dicsentre - Rubavu	040/PSS/LIC/GP-EWS/RURA/2015	21	Mr. NTIRUSHWAMABOKO Concorde - Nyamata	046/PSS/LIC/GP-EWS/RURA/2015
16	Mr. MURANGIRA Philippe - Rusumo	041/PSS/LIC/GP-EWS/RURA/2015	22	ADDAX Petroleum Ltd - Muhura	047/PSS/LIC/GP-EWS/RURA/2015
17	MT MERU Petroleum Rwanda -Kayonza	042/PSS/LIC/GP-EWS/RURA/2015	23	SIGEPE Ltd - Rulindo	048/PSS/LIC/GP-EWS/RURA/2015
18	Lake Petroleum Ltd -Musanze	043/PSS/LIC/GP-EWS/RURA/2015	24	ADDAX Petroleum Ltd - Byangabo	049/PSS/LIC/GP-EWS/RURA/2015

ANNEX 3: Provides the list of licensed operators in solid waste collection

No	Operator	Province	Operation area
Operators with first category license			
1	ISUKU KINYINYA	City of Kigali	Kinyinya Sector (Gasabo District)
2	REAL ENVIRONMENTAL PROTECTORS	City of Kigali	Kagarama Sector (Kicukiro District)
3	UMURIMO MWIZA LTD	City of Kigali	Air Port, Inyange Industries, Bralirwa (Kicukiro District)
4	UBUMWE CLEANING SERVICES	City of Kigali	Kicukiro, Gatenga, Niboye and Gikondo Sectors (Kicukiro District)
5	COPED	City of Kigali	Nyarugenge, Kacyiru and Remera Sectors (Nyarugenge and Gasabo Districts)
6	AGRUNI LTD	City of Kigali	Nyarugunga, Kanombe, Kimihurura, Rwezamenyo, Kimironko, Nyamirambo, Gatsata, Kigali, Jali, Rusororo, Bumbogo & Ndera Sectors (Gasabo, Kicukiro, & Nyarugenge District)
7	BAHEZA GENERAL SERVICES LTD	City of Kigali	Kigarama Sector (Kicukiro District)
8	COCEN	City of Kigali	Nyakabanda and Kimisagara Sectors (Nyarugenge District)
9	ACAPE	Western Province	Rubavu District
10	INZIRA NZIZA SERVICES COMPANY LTD	City of Kigali	Muhima Sector (Nyarugenge District)
11	CESCO COMPANY	City of Kigali	Masaka sector (Kicukiro District)
12	INDATWA GITEGA COOPERATIVE	City of Kigali	Commercial areas (Nyarugenge District)
13	NEW LIFE NT & MVK LTD	City of Kigali	commercial entities
14	KEEN KLEENERS LIMITED	City of Kigali	Some institutions and
Operators with second category license			
1	MZI Ltd	Northern Province	Musanze District
2	GEBUR MULTI-BUSINESS LTD	Northern Province	Gicumbi District
3	KOPIBO	Western Province	Rubavu District
4	Develop our families	Western Province	Rubavu District
Operators with third category license			
1	G.A.P.M	Northern Province	Gicumbi District
2	BUSMED Ltd	Western Province	Rubavu District
3	Guma General Services and Suppliers Ltd	Eastern	Nyagatare District
4	RITM Ltd	Northern	-

ANNEX 4: The licensed public bus transport companies/cooperatives

	COMPANY NAME	Number of Vehicles 2015/2016
1.	HORIZON EXPRESS LTD	66
2.	VOLCANO S.A.R.L	77
3.	IMPALA GROUP LTD	23
4.	OMEGA S.A.R.L	30
5.	KIGALI BUS SERVICES LTD	118
6.	KIGALI SAFARI S.A.R.L	21
7.	VIRUNGA EXPRESS LTD	50
8.	INTERNATIONAL EXPRESS LTD	100
9.	STELLA EXPRESS LTD	57
10.	YAHOO CAR EXPRESS LTD	35
11.	RUGALI TRAVEL	43
12.	MATUNDA EXPRESS LTD	27
13.	EXCEL TOURS & TRAVEL AGENCY LTD	56
14.	ROYAL EXPRESS LTD	94
15.	CAPITAL EXPRESS LTD	18
16.	SOTRA TOURS & TRAVEL AGENCY LTD	46
17.	COOPERATIVE URUGENDO RWIZA	Closed
18.	RWINYANA LTD	11
19.	CITY CENTER T/COOPERATIVE	408
20.	RUBAVU T/COOPERATIVE	98
21.	NGOMA T/COOPERATIVE	116
22.	RUSIZI T/COOPERATIVE	122
23.	KAYONZA T/COOPERATIVE	90
24.	NYAGATARE T/COOPERATIVE	147
25.	MUSANZE T/COOPERATIVE	213
26.	HUYE T/COOPERATIVE	141
27.	MUHANGA T/COOPERATIVE	148
28.	REMERA T/COOPERATIVE	318
29.	NYABUGOGO T/COOPERATIVE	343
30.	GICUMBI T/COOPERATIVE	77
31.	RUHIRE EXPRESS LTD	
32.	KIGALI COACH AGENCY LTD	29
33.	CAMEL TOURS AND TRAVEL AGENCY LTD	20
34.	SELECT EXPRESS	28
35.	COSERGI	Closed
36.	CITY EXPRESS	48
37.	UGUSENGA LTD	42
38.	FIDELITY EXPRESS LTD	10
39.	SIMBA EXPRESS LTD	26
40.	LA COLOMBE EXPRESS LTD	27
41.	BISOKE EXPRESS LTD	Closed
42.	KARENGE-KIGALI TRANSPORT SERVICES (K.K.T.S) LTD	Closed
43.	TRIPARTITE TOURS LTD	11
44.	KIVU BELT EXPRESS LTD	8
45.	DIFFERENT EXPRESS	6
46.	EAST AFRICAN BUS SERVICES LTD	6

ANNEX 5: List of special vehicle rental companies/cooperatives

SN	RENTAL COMPANIES OR COOPERATIVES	2015-2016 Number of vehicles	2014-2015 Number of vehicles
1	HORSE TOURISM AND TRAVEL AGENCY LTD	6	6
2	THOUSAND HILLS DRIVER'S COOPERATIVE	7	7
3	PRINCE EXPRESS LIMITED	6	7
4	CAMEL TRAVEL AND TOURS AGENCY LTD	7	8
5	GISENYI TRANSPORT SERVICES LTD	7	7
6	ROCKY TRADERS LTD	19	14
7	J.P LINKER LTD	11	11
8	KIGALI MULTISERVICE COOPERATIVE (K.M.C)	6	6
9	SABYINYO GOLDEN MONKEY LTD (S.G.M LTD)	7	6
10	KAJE TRANSPORT LTD	6	6
11	SGES/ATT LTD (PARTNERSHIP)	16	11
12	GORILLAND SAFARIS LTD (G.S.L)	17	11
13	TOURS DES PAYS DES GRANDS LACS	20	23
14	COOPERATIVE DE DEVELOPMENT DES ANCIENS CHAUFFEURS DE L'ETAT	16	
15	TECHNO STARS LTD	15	
16	GAD HOUSE LTD	10	
17	OXYGEN TRAVEL & TOURS LTD	15	
18	NTIVUGURUZWA BUSINESS COMPANY LTD	13	
19	EXECUTIVE LINE LTD	11	
20	MIRACLE GENERAL TRADING AND SUPPLY LTD	16	
21	BUGANZA TRANSPORT COMPANY LTD	15	
22	QUICK TAXI SERVICES LTD	17	
23	COOPERATIVE DE TAXIMEN-VOITURES-KACYIRU	16	
24	KIGALI BUS SERVICES LTD	10	
25	NYUNGWE INVESTMENT GROUP LTD (N.I.G LTD)	15	
26	PROLAND SAFARIS LTD	7	
27	RWANDA TOURISM AND TRAVEL AGENCY	15	
28	PREMIER TRANSPORT SERVICES LTD	15	
29	LIMOZ RWANDA LTD	21	
30	SOSERGI LTD	7	
	Rental Vehicles Total Number	369	123

ANNEX 6: The list of operating driving schools

No	DRIVING SCHOOL NAME	OPERATION AREA
1	MAYANGE HYDROPOWER DRIVING SCHOOL LTD	BUGESERA DISTRICT
2	SAINTE RITHA V.C.T DRIVING SCHOOL LTD	KAYONZA DISTRICT
3	LINKING DRIVING SCHOOL LTD	RULINDO DISTRICT
4	UNITY DRIVING SHCOOL LTD	GASABO, HUYE, KICUKIRO, MUSANZE
5	KICUKIRO DRIVING SCHOOL LTD	KICUKIRO DISTRICT
6	ASIFIWE DRIVING SCHOOL LTD	HUYE DISTRICT
7	AUTO ECOLE LA PREFERANCE LTD	NYARUGENGE DISTRICT
8	SINAYI DRIVING SCHOOL LTD	KICUKIRO DISTRICT
9	AUTO ECOLE MARANATHA LTD	KACYIRU (GASABO DISTRICT)
10	BLESSINGS DRIVING SCHOOL LTD	NYAMAGABE DISTRICT
11	REOBOTH DRIVING SCHOOL LTD	GISOZI ZONE
12	WELCOME DRIVING SCHOOL LTD	KIREHE DISTRICT
13	AGACIRO DRIVING SCHOOL LTD	NYAGATARE DISTRICT (RWIMIYAGA ZONE)
14	IWAWA DRIVING SCHOOL	RUBAVU DISTRICT
15	INEZA DRIVING SCHOOL LTD	KICUKIRO DISTRICT (MASAKA), RWAMAGANA DISTRICT
16	IKAZE DRIVING SCHOOL LTD	RUBAVU DISTRICT
17	MODERN DRIVING SCHOOL LTD	RUSIZI DISTRICT
18	RIGHT CHOICE DRIVING SCHOOL LTD	KAMONYI DISTRICT
19	NEW PLAN DRIVING SCHOOL LTD	GASABO DISTRICT
20	COOTELRU-VTC RUHANGO	RUHANGO DISTRICT
21	ZION DRIVING SCHOOL LTD	GASABO, MUHANGA, MUSANZE DISTRICT
22	NEW RIGHT DRIVING SCHOOL LTD	NYARUGENGE DISTRICT
23	KARIBU DRIVING SCHOOL LTD	RUBAVU DISTRICT
24	IMANZI DRIVING SCHOOL LTD	RWAMAGANA DISTRICT
25	HERO DRIVING SCHOOL LTD	GATSIBO DISTRICT
26	SINAPI DRIVING SCHOOL LTD	KICUKIRO DISTRICT(BUSANZA)
27	RELIANCE DRIVING SCHOOL LTD	RUNDA ZONE
28	UMUCO DRIVING SCHOOL LTD	RUBAVU DRIVING SCHOOL LTD
29	NEW DREAM DRIVING SCHOOL LTD	GASABO DISTRICT (NDERA)
30	FRANCIS DRIVING SCHOOL LTD	GASABO DISTRICT (KINYINYA)
31	INTEGO DRIVING SCHOOL LTD	NGOMA DISTRICT
32	WINNERS DRIVING SCHOOL LTD	KICUKIRO DISTRICT (KANOMBE)
33	EXPERT DRIVING SCHOOL LTD	GASABO DISTRICT (KIMIRONKO)
34	STAR DRIVING SCHOOL LTD	NGOMA DISTRICT





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📍 Kiyovu-Rue Bigogwe,
KN 6 Av 11,
P.O Box 7289 KIGALI

☎ Tel: (250) 252 584562
📠 Fax: (250) 252 584563
📞 Hotline: 3988
✉ Email: info@rura.rw
🌐 Website: www.rura.rw,