

Establishment Census

2011

ANALYTICAL REPORT

August 2011



Ministry of Trade and Industry (MINICOM)
National Institute of Statistics of Rwanda (NISR)
Ministry of Public Service and Labour (MIFOTRA)
Private Sector Federation (PSF)



Foreword

In collaboration with the Ministry of Trade and Industry (MINICOM), Ministry of Public Service and Labour (MIFOTRA) and Private Sector Federation (PSF), the National Institute of Statistics of Rwanda (NISR) is pleased to publish herein the final results of the 2011 Establishment Census. This Census has been implemented in Rwanda for the first time, with the aim of creating a quantitative profile of all establishments in the country, excluding governmental establishments providing not-for-sale governmental services.

The establishment Census has provided a comprehensive data base that will be utilized in creating business registers and in conducting future business surveys. Furthermore, the census returns have led to an objective definition of formal/informal sectors in Rwanda which is included in **Chapter 9** of this publication.

The Census collaborating organizations mentioned above are full of hope that the

census results would help decision makers setting forth policies and programs that would accelerate the pace of development of non-agricultural economic sectors of Rwanda. In addition, it is hoped that interested research communities would find the census results bridging a long existed information gap for further in-depth policy-oriented economic studies.

MINICOM and its collaborators would like to express their appreciation and gratitude to the Census management team at NISR, and staff members of the collaborating organizations who have been involved in the design and implementation of this important project. Moreover, the cooperation of establishment managers/owners throughout the country was instrumental in making this project a real success; our greatest thanks are due to all of them.

Hon. Francois KANIMBA
Minister of Trade and Industry

August 2011

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Abbreviations

BICS	Business Investment Climate Survey
EAC	East African Community
EDPRS	Economic Development and Poverty Reduction Strategy
GIS	Geographic Information System
ICLS	International Conference of Labour Statisticians
ILO	International Labour Organisation
ISIC	International Standard Industry Classification
MIFOTRA	Ministry of Public Service and Labour
MINICOM	Ministry of Trade and Industry
NISR	National Institute of Statistics of Rwanda
PRT	Personal Revenue Taxes
PSF	Private Sector Federation
RCA	Rwanda Cooperative Agency
RDB	Rwanda Development Board
RRA	Rwanda Revenue Authority
RWF	Rwandan Franc(s)
SMEs	Small and Medium Enterprises
SSF	Social Security Fund
VAT	Value Added Tax

Executive Summary

The Establishment Census 2011 was conducted as a joint undertaking by the Ministry of Public Service and Labour (MIFOTRA), Ministry of Trade and Industry (MINICOM), Private Sector Federation (PSF) and the National Institute of Statistics of Rwanda (NISR). The Census provides a comprehensive picture of Establishments in Rwanda, both formal and informal, for the first time. It will allow Government, private sector associations, researchers and others to base economic planning, policy design, analysis and beyond upon robust information leading to more effective results and findings.

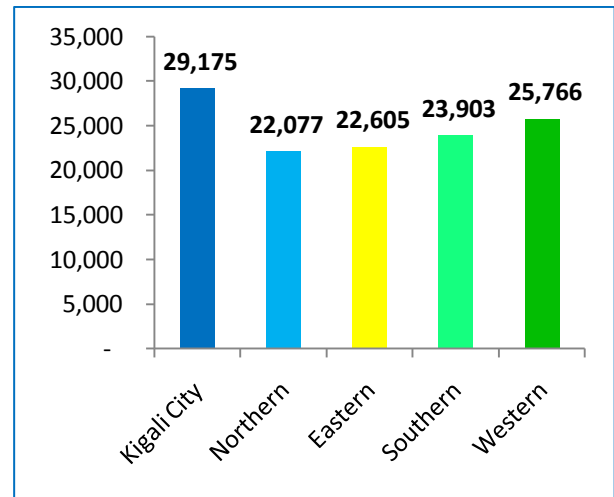
An establishment is defined as an enterprise or (part of) with a constant site that performs one or more economic activities under one administration. The holder of the establishment could be a natural or nominal person, or governmental body. The Establishment Census was conducted over the first 5 months of 2011 and employed a census manager, 2 census coordinators, 10 field coordinators and 43 field teams to exhaustively enumerate and collect data from all existing establishments.

In total, the Establishment Census 2011 enumerated **123,256 establishments**. An additional 3,780 were found to be permanently closed. As a comparative, PSF's Business Operators Census 2008 estimated a total of 72,994 enterprises.

The Census identifies Kigali City as holding the largest number of establishments of any of the five provinces, with a total of 29,175 establishments (23.6%). The Northern

Province has the fewest with 17.9% of total. Around 14% of establishments are concentrated in marketplaces.

Number of Establishments by Province



Key Characteristics of Establishments:

- The private sector accounts for 96.5% of total establishments, with 4,256 non-profit (3.4%), 73 public and 46 mixed establishments
- Sole-proprietorship is by far the most common form of legal status with 112,169 establishments (90.8%). There are 2,520 establishments limited by shares, and 8,573 with other forms of legal status (e.g. non-profit associations, government)
- Since 2010, a total of 60,202 establishments have started operations, almost half of the total population. This compares to 43,287 establishments (35.9%) that started operations between 2005 and 2009, and 9,172 firms (7.4%) in the first five years of the new millennium

- There are 347 enterprises with more than one branch. Looking at total branches, there are 714 branches of national enterprises and 136 branches of international enterprises
- Only 1.2% of establishments are not fully Rwandan-owned within the country, predominantly residing within Kigali City. Owners from the East African Community nations are most numerous, with 463 establishments. Second are other foreign-owned establishments, totalling

452. Within this group, roughly a third are Asian-owned, and another third are African-owned. There are currently 200 joint-venture establishments in the country between Rwandan stakeholders and other parties, mainly between Rwandans and those outside of the EAC (173 establishments)

- Of the 123,526 operating establishments in Rwanda, a total of 32,453 (26.3%) establishments have a female manager.

Economic Sector

Chapter 4 of the full report looks at the characteristics of establishments by economic sector. The largest single sector in Rwanda in terms of the number of establishments is wholesale and retail trade with a total of 64,639 establishments (52.3% of the total). This is followed by the accommodation and food services sector, which records 33,305 establishments (27.0%). The rest of the sectors are small in comparison when looking at the number of establishments in isolation, with professional services at 4.5% and manufacturing at 3.7%.

Key Sector Trends:

- Public sector establishments are focused within utilities (electric, gas, water, waste management etc.) with 29 of the 73 establishments. A total of 10 financial & insurance establishments are publicly owned, and other services (particularly transport) are also sizeable
- Wholesale & retail trade dominates all groups of owner nationality with 406 foreign establishments and 22 joint

ventures, but has a lower share than for Rwandan-owned enterprises

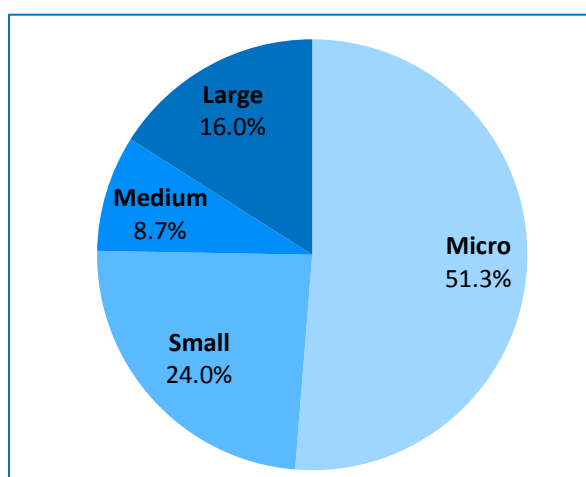
- Of the 46 total public-private mixed ownership establishments, over half are from the financial and insurance sector. The sector also has the largest proportion of joint ventures at 63 establishments, with another 35 being foreign-owned
- Construction has the highest concentration of foreign establishments but remains 85% domestic by number of establishments. Mining and quarrying is a close second with 86% of establishments being domestically-owned
- Professional services sector has the highest proportion of women as managers at 57%, with roughly seven hundred more female than male managers within the sector. Particularly unequal sectors by gender include those dominated by larger firms such as mining & quarrying (4% female managers), construction (7%) and manufacturing (9%).

Employment

Chapter 5 of the report looks at employment levels within establishments and as an aggregated total for off-farm employment. Micro-sized establishments - those employing between 1 and 3 people - account for 92.6% of all establishments with 89,219 having just one worker. The larger the firm size the fewer the number of establishments (see below table).

Size of Establishment (No. of Employees)			
Micro (1-3)	Small (4-30)	Medium (31-100)	Large (101+)
114,329	8,548	513	106
(92.6%)	(6.9%)	(0.4%)	(0.1%)

Establishments surveyed by the Census employ a total of **281,946**, with roughly two-thirds being male. The distribution of workers amongst different size categories of establishments is far more evenly spread, with large establishments (0.1%) employing 16% of the workforce.



Key Trends:

- Kigali City employs more than any other, with 82,473 workers. Larger establishments are more likely to be based

in Kigali, with 36.8% of small, 39.8% of medium and 48.1% of large establishments based in the Capital

- Kigali employs the largest number and share of female workers (37.5%)
- Private sector dominates all ranges of establishment size, whether micro-sized or large
- Mixed ventures between the public and private sector are generally in the small to medium category, but have 5 large employers employing 5,117 workers between them. Non-profit and public sector establishments vary across size categories
- The private sector is the largest employer at 90.8% and 255,873 workers. Non-profit organisations employ more workers than the public sector (6.2% compared to just 0.6%), with the mixed sector employing 1.9% of employees, mainly through larger-sized establishments
- 99.9% of wholesale & retail trade establishments are micro- or small-sized, 99.8% of accommodation & food service establishments and 99.7% of manufacturing establishments. Large firms are from the manufacturing sector (24) and agriculture, forestry & fishing sector (15), namely large factory-based processors
- Wholesale & retail trade is the largest employer ahead of accommodation & food services, employing 92,711 workers (33.1) compared to 59,837 (21.4%)

- Manufacturing and agriculture, forestry & fishing, whilst only totalling 4.2% of all establishments, account for 17.5% of employment
- Only the professional services sector employs more women than men (57%)
- Three quarters of the workforce employed in establishments are educated only up to the primary level, with 22.8% of that total having no formal education qualification. 18.6% have been educated to secondary level, with 5.7% attaining university certification.
- The private sector employs the largest amount of workers for each of the categories of education qualifications, with 77.8% of private sector establishments employing workers with a primary or below level of education
- The non-profit sector employs 5 times more secondary and university educated workers than the public sector
- There are only 4 sectors that employ more secondary and university educated workers than primary educated and non-qualified workers: finance & insurance (80.7%); health & education (72.5%); information & communication (66.8%); and utilities (60.7%).
- 16 large establishments are foreign owned, 2 by EAC nationals. Joint ventures have 9 large establishments
- Foreign firms employ 14,195 workers
- 2,818 foreign nationals are currently being employed, with half having a university qualification; 1% of the workforce provides 10% of university-educated workers.

Capital

The structure of establishments in Rwanda according to capital employed is pyramidal, with a large base of micro-sized and a small upper-level of large-sized establishments. There are a recorded 90,388 micro establishments compared to just 1,095 categorised as large. However, this is over ten times the number of establishments categorised as large by employment (106). The **average value of capital** employed by an establishment in Rwanda is **RWF 16.3 million**.

Micro <Rwf 0.5m	Small 0.5m-	Medium 15m-	Large 75m+
90,388	27,603	2,052	1,095
71.2%	22.3%	1.7%	0.9%

Geographically, micro and small establishments dominate in all provinces although a large number of medium and large establishments reside in Kigali. The mean for Kigali City is more than double that of the next province at RWF 39 million.

Key Trends:

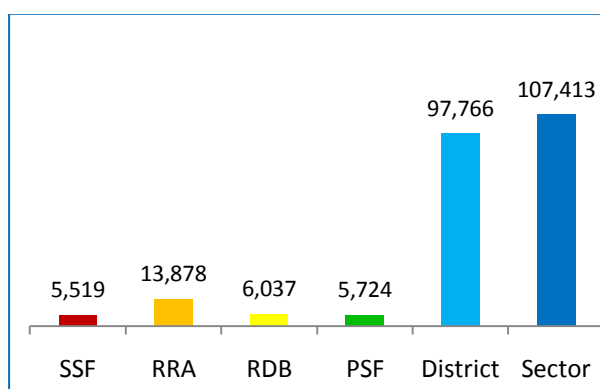
- In the private sector, most are micro-sized (89,826 establishments). For both the public and non-profit sector however, small-sized establishments are most common.
- 83.9% of large establishments are within the private sector, however non-profit

organisations employ almost 4 times the amount of capital that private sector establishments do on average, at RWF 57 million

- The 73 public establishments recorded average RWF 939 million of capital - more than 60 times that of the average private establishment
- Establishments with some level of limited or unlimited liability are likely to be highly capitalised in comparison to the national average, with those limited by shares averaging RWF 502 million of capital in comparison to just RWF 3 million for sole proprietorships
- Wholesale & retail trade establishments average RWF 3 million yet have the highest number of large firms (203)
- The financial & insurance sector employs RWF 781 million per establishment on average. Other capital-intensive sectors include construction (RWF 275 million), mining & quarrying (RWF 244 million) and utilities (RWF 131 million).
- Investors from outside of Rwanda and the EAC inject the highest level of capital, whether as fully foreign investors (average of RWF 244 million) or as joint investors (RWF 2 billion). Joint ventures in general invest more than exclusively foreign-owned establishments.
- Whilst large, capital-intensive establishments will generally employ more workers, capital may also directly replace the need for labour. This may explain why there are 1,095 large establishments by capital employed but only 106 large establishments by labour employed.

Registration

Chapter 7 looks at the number of total establishments that are registered with a list of national institutions. It finds that, of the 123,526 establishments recorded, only 11.2% are registered with RRA and 4.8% with RDB. At the sector level however there are 107,413 registered establishments (87.0%).



Despite only contributing 23.6% of total establishments, Kigali City accounts for 44.2% of establishments registered with SSF, 43.3% registered with RRA, and 47.2% registered with RDB.

Whilst 13,878 establishments are registered with RRA, only 39.8% of these are registered for Value Added Taxes (VAT), only 33.9% for Personal Revenue Taxes (PRT) and just 11.3% for income taxes.

The Census records 1,877 established cooperatives, 1,084 of which were registered with RCA (57.8%). The largest number of cooperatives is in the Southern Province (588), with Kigali having the fewest (188).

Multi-Branch Enterprises

Of the 347 multi-branch enterprises in Rwanda, most (180) have just one branch other than the head office. More than half (193) have their head offices in Kigali, whilst the wholesale & retail trade has the largest number of such enterprises with 108. The financial & insurance sector is characterised by enterprises with numerous branches, with 12 having more than 10 branches.

Informal Sector

Chapter 9 provides a definition for separating informal and formal establishments along guidelines based on international best practice. It categorises firms according to the number of employees, registration with national institutions and whether or not they maintain regular operational accounts. Specifically, a formal establishment must:

- (a) Have a physical address
- (b) Be registered with RRA, RDB, RCA or SSF
- (c) Be engaged in the production of goods/services for sale or barter in non-agricultural (except value addition) activities

Using this definition reveals that 88.6 percent of all establishments in Rwanda can be classified as informal (see below table).

Sector	Number	%
Formal	13,275	11.4
Informal	103,142	88.6
Total	116,417	-

Most multi-branch enterprises started operations reasonably recently, with 137 started between 2005 and 2009 and another 58 beginning operations since 2010. However, older enterprises are proportionally more likely to have 8 or above branches, with 16 such enterprises starting between 1950 and 1999 and 13 between 2000 and 2004.

Furthermore there is a clear geographical divide in the distribution of formal as opposed to informal establishments within Rwanda. Whilst 45.7 percent of all formal establishments are found in Kigali City, only 21.6 percent of informal establishments are found in the capital. The Northern Province has far fewer formal establishments (9.8 percent of the total) in comparison to other areas, with (behind Kigali City) the Southern Province having the highest proportion at 16.9 percent.

The informal sector is dominated by wholesale & retail trade, with the construction, mining & quarrying and finance & insurance sectors having no informal enterprises. This is likely due to the nature of the sectors, being far more capital and labour intensive than other sectors and thus more likely to be registered with a national authority.

1. Introduction

1.1. Background

1.1.1. The Establishment Census 2011

The Establishment Census was conducted in the first five months of 2011 as a joint undertaking by the Ministry of Trade and Industry (MINICOM), Ministry of Public Service and Labour (MIFOTRA), the National Institute of Statistics of Rwanda (NISR) and Private Sector Federation (PSF). The Census provides a comprehensive picture of Establishments in Rwanda, both formal and informal, for the first time. It will allow Government, private sector associations, researchers and others to base economic planning, policy design, analysis and beyond upon robust information, leading to more effective results and findings.

Especially, the results elaborated in this report will feed into the implementation of national planning strategies such as the country's Vision 2020 and Economic Development and Poverty Reduction Strategy (EDPRS) programme. The 2010 Kivu Leadership Retreat in particular recommended that an establishment census be conducted to have a clear and

comprehensive picture of Small and Medium Enterprises (SMEs).

The report will enhance institutional capacity to facilitate the creation of a vibrant entrepreneurial private sector utilising skilled human capital. The comprehensive nature of the statistics means those interested in national, provincial or district-level data will find plentiful information available.

1.1.2. Previous Estimates

In 2008, the Private Sector Federation (PSF) conducted the Rwanda Business Operators Census Report. This Census enumerated a total of 72,994 businesses countrywide, looking at all sizes and sectors. Other sources include those registered with RRA, RDB and PSF as well as RCA and District and Sector Authorities, but as this report will show, this accounts for only a fraction of total enterprises and excludes informal establishments.

Table 1.1 presents an estimation of the number of enterprises based upon the size of the enterprise.

Table 1.1: Estimation of Rwandan Enterprises in 2008

Enterprise Category	Number of Employees	Number of Enterprises
Family or mobile	Family or sole trader	40,000
Micro	Less than 10	21,000
Small	10 to 29	4,200
Medium	30 to 99	240
Large	100 and above	50

1.2. Objectives

The 2011 Establishment Census is designed to achieve the following objectives:

- a) To produce a comprehensive and updated data profile of all economic activities practiced by establishments operating in Rwanda;
- b) To provide detailed tabulations for the establishments' characteristics, e.g. geographical location, number of employees, registration status, legal status, ownership, sector, manager/owner gender;
- c) To produce data necessary to classify establishments according to size into Micro, small, middle, large and very large;
- d) To lay out the data foundation needed to identify formal and informal economic sectors in Rwanda;
- e) To help establishing a Business Register that can be utilized in carrying out future economic sample surveys and creating comprehensive data base and Geographic Information System (GIS) of the business community in Rwanda.

1.3. Establishments

The purpose of the Establishment Census 2011 is primarily to provide a comprehensive picture of all economic activities in Rwanda, whether formal or informal, as indicated in the aforementioned objectives. In conducting the Census it has been necessary to provide clear guidelines regarding the classification of an establishment, defined herein as

An enterprise or (part of) with a constant site that performs one or more economic activities under one administration. The holder of the establishment could be a natural or nominal person, or governmental body.

Accordingly, the identifying elements of an establishment are:

- a) A constant site.
- b) Practice of economic activity.
- c) A Holder (natural or nominal)

A number of further rules are used:

- If the establishment practices its activity in more than one place, whether an identical, integrated or similar activity, all places are treated as one establishment, as long as the holder is the same.
- If there is more than one activity practiced in one or several places, each activity will be treated as separate establishment, as long as there is separate account for each activity.
- In the case that data cannot be separated for each activity, all will be treated as one establishment and the predominant activity will be considered as the main activity of the establishment.
- If there many holders practicing their activities in one place, each holder's establishment is considered a separate establishment, even if the activity is the same.

The definition of an establishment used in the 2011 Census does not include:

- a) Street Vendors
- b) Taxis and Motor drivers

- c) Roads and buildings construction sites
- d) Temporary booths
- e) Closed stores of establishments without workers.

1.4. Report Structure

The rest of the report is structured around eight chapters, from Chapter 2 to Chapter 9. **Chapter 2** details the methodology employed in designing, implementing and analysing the Census. **Chapter 3** includes statistics and graphical representations of the basic characteristics of establishments surveyed.

Chapters 4 through to 7 summarise statistics on specific characteristics of the establishment, namely economic sector (**Chapter 4**), labour employment (**Chapter 5**),

capital stock (**Chapter 6**) and registration with authorities (**Chapter 7**). **Chapter 8** looks at those establishments that have more than one branch, and **Chapter 9** looks at the definition of the formal and informal sector in Rwanda.

Finally, **Annex 1** contains maps illustrating the geographical distribution of results for certain variables and **Annex 2** includes the Census Questionnaire in both English and Kinyarwanda

Full results tables will be made available electronically on the NISR website, at: www.nisr.gov.rw

2. Census Methodology

2.1. Organisational Structure

The team responsible for the implementation of the Census' methodology consisted of several parties and ranged from field work teams on the ground to a high-level Steering Committee:

Steering Committee: The Committee was chaired by the Permanent Secretary of the Ministry of Trade and Industry (MINICOM) and formed from representatives of the four organisations participating in the census project, namely MINICOM, the Ministry of Public Service and Labour (MIFOTRA), the Private Sector Federation (PSF) and the National Institute of Statistics of Rwanda (NISR). The Census manager also attended the Steering Committee meetings so as to report on the work progress on a regular basis. The Final version of the questionnaire as well as the work plan have been discussed and endorsed by the Steering Committee. Likewise, the major census results and final report were presented and ratified by the Steering Committee.

Census Manager: Being the census implementing agency, NISR appointed one of its senior staff members to be the Census manager with a mandate to supervise and follow up the census execution in all its stages.

Census Coordinators: Two census coordinators were appointed to assist the Census Manager on a full-time basis. One coordinator was responsible for technical issues (Technical Coordinator) and the other for administrative issues (Administrative Coordinator).

Field Supervisors: 10 Field Supervisors were employed for a three month period with the responsibility of supervising implementation of the Census in the field within the areas designated to them. The field supervisors reported directly to the Census Manager. The geographic distribution of field supervisors saw 3 in Kigali City (1 for each district); 2 in the Eastern Province; 1 in the Southern Province; 3 in the Western Province; and 1 in the Northern Province.

Field work Teams: 43 field teams were formed to carry out the data collection. Each team was composed of enumerators, a field editor and the team leader. In most cases each district had one designated team. However, for certain districts more than one team was deployed in according to the anticipated number of establishments in larger districts. The team leader was responsible for providing a weekly progress report to the field supervisor.

2.2. Implementation Phases

2.2.1. Census Questionnaire

The questionnaire was developed according to the objectives specified in Chapter 1 in English, and then translated into Kinyarwanda. In order to minimise potential problems arising in the field, several tests were performed. Feedback was provided by trainees in the central training centre in Kigali, which was then followed by a formal pre-test (see below). After this, revisions were incorporated into the survey with additional feedback being given by trainees at the local training centres around the country.

The final version of the questionnaire was developed in Kinyarwanda and translated back into English, with both versions available in Annex 2 of this report.

2.2.2. Pre-Test

Following the training of trainers programme, the pre-test was undertaken in both urban and rural areas. It was carried out in three districts. The key objectives of the pre-test were to test the procedures of data collection starting from delineating the village boundaries; drawing a sketch map for the village; preparing a list of the establishments and locating them on the sketch map and finally completing the Census questionnaire. Some villages including market places were considered in the pre-test, which has proven useful in ascertaining how many establishments the enumerator can complete in a day whether inside or outside market places.

2.2.3. Training

A number of stages of training were conducted to different hierarchical levels of the team:

Training of trainers: A two-day training session was administered to field supervisors. The training took place at the PSF premises in Kigali in mid-January 2011. The purpose was to train senior field personnel responsible for the field work in provinces and districts. In addition they would bear the responsibility of conducting local training sessions to train enumerators working in their respective areas. An evaluation test was given to trainees at the end of the session.

Training of enumerators: Five local training centres were set up in all provincial capitals. Field supervisors were responsible for the training following their 'training of trainers' session in mid-January. The training of enumerators followed the pre-test and took place at the end of January/early February 2011. Based on an evaluation test the trainees who obtained higher scores were appointed as field editors.

Training of coders: Most of the Census questions are either self-coded or pre-coded. Only two data items needed coding after data collection, the first item being the administrative identification information and the second being the economic activity. Enumerators were given an administrative coding book pertinent to their work assignment areas and they were requested to insert the administrative codes into the designated coding boxes in the questionnaire.

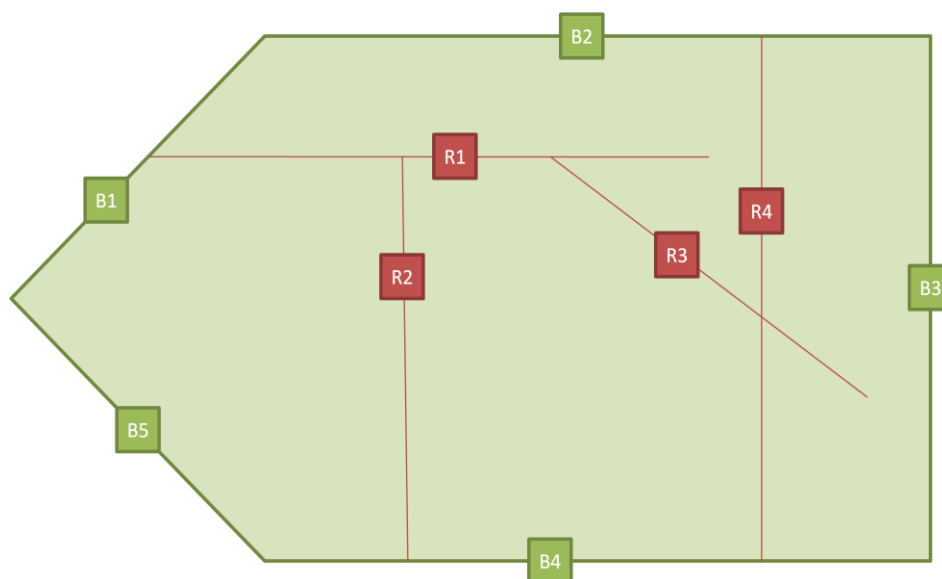
However, due to the importance of accurate and consistent economic activity coding, the Census management decided that this coding be carried out centrally in Kigali by a specially recruited team. The team received training on the coding procedures of the International Standard Industry Classification (ISIC-Ver. 4). The training, held in late February 2011, was attended by nearly 40 people. Several examples and exercises were given to trainees. In addition, as a part of the practical training, trainees were requested to perform economic activity coding to the completed pre-test questionnaires. The results and corrections needed were then discussed with trainees.

2.2.4. Data Collection

With the aim of avoiding omissions and/or duplications the enumerators followed a rigorous approach in enumerating all establishments in a village. A thorough and systematic canvassing of the whole village was performed by the enumerator before completing the Census questionnaires.

Step 1) In the first working day, the enumerator started with identification of the village boundaries and illustration of a sketch map showing these boundaries. This indicated whether one or two banks of a boundary are included in the village.

Figure 2.1: Illustrative Diagram of Village Canvassing



Step 2 (Boundaries): Boundaries are then allocated a number, with the first being selected in such a way that the whole village is located on the right hand side (B1 on the Illustrative Diagram of village canvassing). Whilst walking along this boundary, the enumerator lists the establishments along the right bank by entering their serial numbers on the sketch map and on the wall right to the

entrance as well as in the Establishment Listing Form of serial numbers, establishment names and establishment addresses. If both banks of the boundary lied in the village, the enumerator returned back on the boundary to count the establishments existing on the other bank of the boundary.

Step 3 (Roads): Once establishments along the boundary are listed, the enumerator enters the first road inside the village from the boundary, counting all establishments on the right bank of this boundary followed by the establishments on the left bank (R1 on the Illustrative Diagram). After counting, listing and locating on the sketch map each of the establishments on the road (R1), the enumerator enters the first branch on the right hand side (R2) following the same process, and then carries the same out for all other branches.

When all roads and branches associated with the boundary (B1) are finished, the enumerator continues the process from the next boundary (B2). However attention is paid to the possibility that some of the establishments may have already been counted (for example R3 has already been counted as an associated branch of R1).

In the case of a market place that include several establishments, the enumerator need not to locate on the sketch map each and every establishment present in the market, instead writing a range of serial numbers and filling in the listing form for each establishment.

2.2.5. Data Processing

The coding of information on the economic activity of establishments was conducted between February 28th and April 8th 2011. Some 32 coders were recruited and trained to complete the coding.

Data entry took place between March 8th and May 6th 2011, by 32 experienced data entry clerks. Both activities were executed at the premises of MINICOM.

2.2.6. Data Validation and Table Generation

Data editing was continuously performed during and after the data entry phase in order to detect out-of-range and/or inconsistent data values. Appropriate actions were taken to introduce necessary corrections or deal with incorrect data. In many cases follow up contacts with the establishments were made in order to verify previously reported data. Upon producing the clean data file, statistical tabulations have been generated and are subsequent chapters present these census tabulations.

3. Basic Characteristics

3.1. Operational Status

Chapter 3 highlights the major results and trends of the Census relating to the basic defining characteristics of establishments.

In total, the Establishment Census 2011 enumerated **127,662 establishments**. This is clearly in excess of the 72,994 estimated establishments suggested by previous reports produced in 2008. A very large proportion of the establishments surveyed are informal, and **Chapter 9** provides a comprehensive analysis of this and the surrounding issues of defining the informal sector.

Despite 127,662 establishments being recorded, the majority of the results presented within this report focus on a slightly reduced sample of **123,526 operating establishments**. Table 3.1 below illustrates the breakdown of

recorded establishments by operational status.

Table 3.1: Operational Status of Establishment

Working Status	Number	Percentage
Operational	123,526	96.8%
Closed	3,780	3.0%
Refusals	356	0.2%
Total	127,662	100%

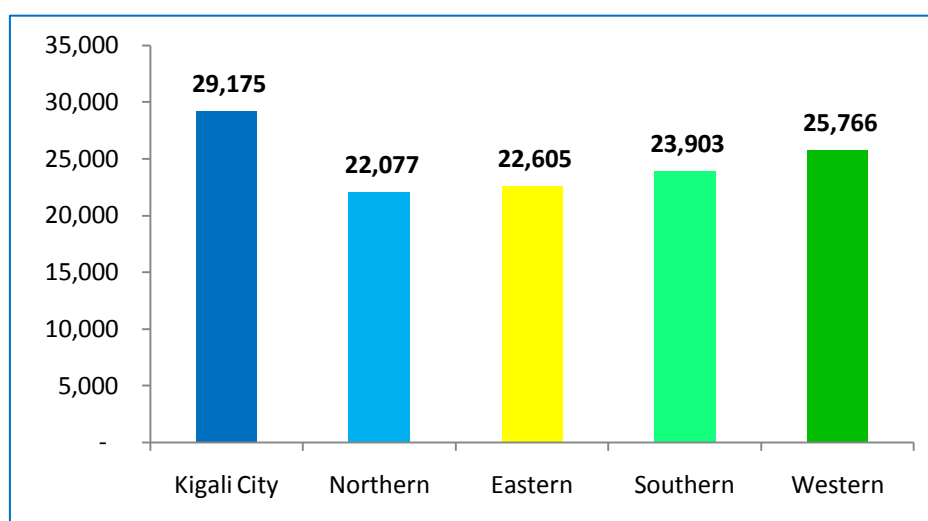
A permanently closed establishment is defined as having stopped practicing its works for any reason (bankruptcy, desire of holder to leave work ... etc.), and therefore does not have any workers practicing any economic activity. A total of 3,780 establishments were permanently closed, whilst 356 refused to provide details.

3.2. Geographical Distribution

The Census identifies Kigali City as holding the largest number of establishments of any of the five provinces, with a total of 29,177 establishments or 23.6 percent of the total. The Northern Province has the fewest number of establishments of the provinces, with a total of 22,075 establishments (17.9

percent of total). Figure 3.1 illustrates the number and share of establishments in each of the five Provinces. At the district level, Nyarugenge district in Kigali City is the largest single district, with 12,356 operating establishments (10% of total); this is graphically represented in Map 1 of Annex 1.

Figure 3.1: Geographic Distribution of Establishments by Province



3.3. Classification

The Census questionnaire classifies establishments according to four categories, namely private, public, mixed and non-profit. Specifically:

- A **private** establishment is owned and run by one or a group of people. It may be a household establishment that employs unpaid family workers or an establishment that exclusively employs regular wage workers. This includes cooperatives and private health/education institutions;
- A **public** establishment is one whose capital is totally owned by any governmental organisation;
- A **mixed** establishment is partially owned by the State, with the rest of the capital being owned by another

body (national, foreign or joint venture);

- A **non-profit** establishment does not seek profits against the activities it performs. Examples of such establishments are: Sports and social clubs; political parties; and unions and syndicates.

The results, presented in Table 3.2 below, indicate that private establishments are by far the most dominant class of establishment in Rwanda in simple numerical terms. However, the size of the firm (defined by labour and/or capital employed) should also be considered when considering the impact of private, public and other forms of establishment in Rwanda. This is investigated in **Chapters 5 and 6** of this report.

Table 3.2: Establishment Classification by Province

Province	Private	Public	Mixed	Non-Profit	TOTAL
Kigali City	28,657	24	9	486	29,175
Northern	21,030	9	8	1,030	22,077
Eastern	21,809	15	9	778	22,605
Southern	23,180	15	7	701	23,903
Western	24,482	10	13	1,261	25,766
TOTAL	119,158	73	46	4,256	123,526
	96.5%	0.1%	0.0%	3.4%	

Numerically, there are 119,158 private establishments in Rwanda (96.5 percent of total establishments). There are also over four thousand non-profit establishments in

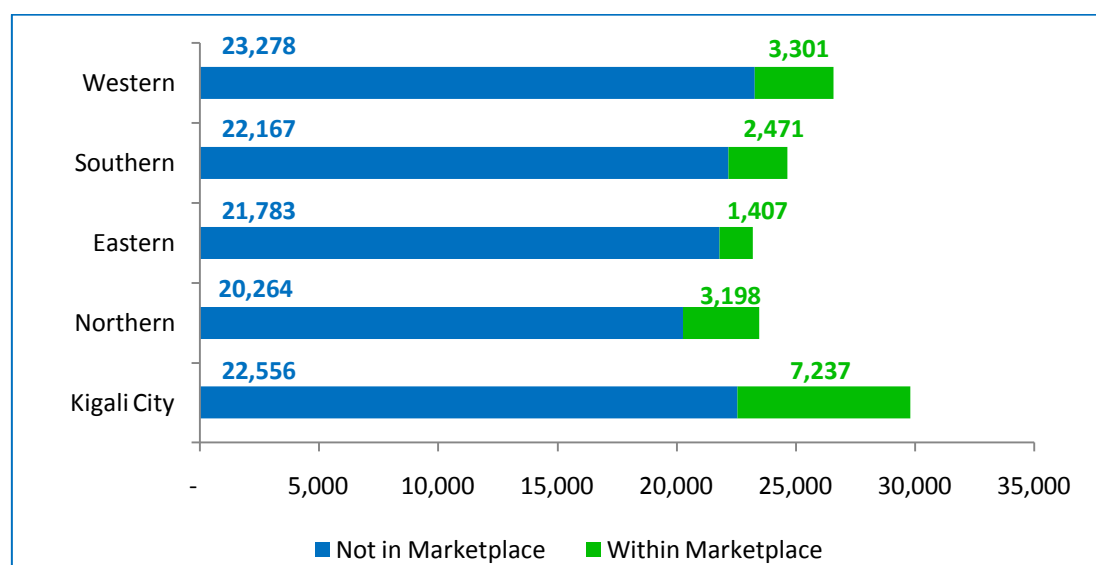
Rwanda or 3.4 percent of the total. Exactly 73 public establishments were recorded, along with 46 mixed establishments.

3.4. Agglomeration (Marketplaces)

Agglomeration occurs where establishments group together within a marketplace to sell products and services of identical, similar or differing type. A marketplace is typically characterised by a single boundary with one

or more entrance and exit points. Figure 3.2 illustrates the number and distribution of establishments that are either within or not in a marketplace, broken down by province.

Figure 3.2: Number of Establishments by Working Place and Province



There are a total of 17,614 establishments agglomerated within marketplaces in Rwanda (14 percent of all establishments). A

large proportion of these are within Kigali City, where over seven thousand establishments are based in marketplaces. The

Northern and Western Provinces both have in excess of three thousand establishments in marketplaces each. Outside of Kigali City, the districts of Musanze (1,951 establishments)

Rubavu (1,629) and Rusizi (929) have the largest concentrations of establishments in organised in marketplaces.

3.5. Legal Status

The legal status of a business establishment can take one of the following forms:

- **Sole Proprietorship:** A private establishment/enterprise in which the owner is a single individual;
- **Limited by shares:** An establishment/enterprise in which the liability of shareholders is limited to the total value of subscribed shares, whether paid or not;
- **Limited by guarantee:** An establishment/enterprise formed on the principle of having the liability of its members limited by its constitution to such amount as the members may respectively undertake to contribute to the assets of the company in the event of it being wound up;
- **Limited by shares and guarantee:** An establishment/enterprise formed on the principle of having the following liability of its members limited to:
 - The amount paid by shareholders or the amount agreed to pay on the shares held by them;

- The security issued by shareholders equivalent to the amount agreed as surety in case of going out of business;

- **Unlimited:** A private establishment/enterprise formed on the principle of having no limit placed on the liability of its shareholders (owners);
- **Other:** This category includes all non-profit associations and governmental establishments whether for profit or not.

Table 3.3 portrays the number of operating establishments by their legal status, and indicates that sole-proprietorship is by far the most common form of legal status with 112,169 establishments (90.8 percent). Establishments with other forms of legal status (those including non-profit associations, governmental and others) total 8,573 (6.9 percent). There are 2,520 establishments limited by shares.

Table 3.3: Number of Operating Establishments by Legal Status

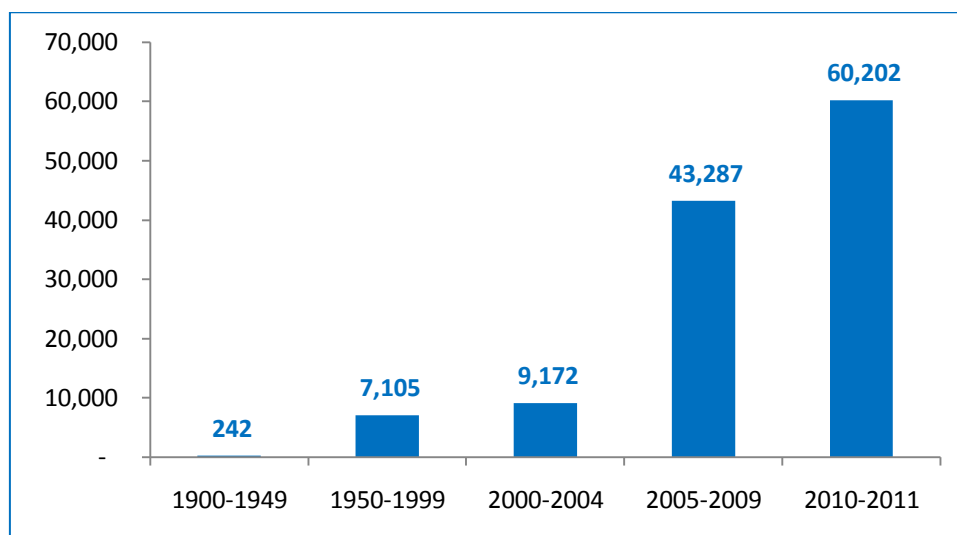
Legal Status	
Sole proprietorship	112,169
Limited by shares	2,520
Limited by guarantee	45
Limited by shares and by guarantee	67
Unlimited	152
Others	8,573

3.6. Year of Starting Operation

The Census questionnaire also asked respondents to indicate the period in which the establishment became operational. There is a clear and exponential upward trend in the number of currently operational establishments as the period of start-up moves closer to the present day, shown in Figure 3.3. Since 2010, a total of 60,202

establishments have started operating in Rwanda, almost half of the total population (48.7 percent). This compares to 43,287 establishments (35.9 percent) that started operations between 2005 and 2009, and just 9,172 firms (7.4 percent) in the first five years of the new millennium.

Figure 3.3: Number of Establishments by Year of Starting Operation and Province



Whilst this may be a result of an increase in the number of establishments starting every year the overriding factor is likely to be establishments that close after a number of years. The currently operational establishments that started in 2000-04 are a fraction of the total that started in that period,

with the rest having since terminated operations. Whilst this Census can only record information of currently operating firms, future Censuses would be able to identify the attrition rate of establishment between time periods.

3.7. Multi-Branch Enterprises

Regarding head offices and branches of establishments, the Census categorises establishments in four groups:

- **Head office:** When an enterprise has several branches located in different parts in the country, the head office includes the managerial staff for this enterprise. In addition to management, the head office may practice other economic activities such as sale and advertisement. The head office is generally located in a different place from that of the branches; however, it can be located within the same premises as of one of its affiliated branches. In the latter case, it will be considered a separate establishment so long as it maintains separate records than that of the branches
- **Single unit establishment:** A stand-alone establishment which does not belong to any bigger enterprise whether located in Rwanda or abroad;
- **Branch of national enterprise:** An establishment which belongs to a bigger enterprise (i.e. having several branches). The head office of such an enterprise must be located *within* Rwanda;
- **Branch of international enterprise:** An establishment which belongs to a bigger enterprise (i.e. having several branches). The head office of such an enterprise must be located *outside* of Rwanda.

Table 3.4: Establishment by Type (Head Office, Branch, Single Unit)

	Single Unit	Head Office	Branch of National	Branch of International
Kigali City	28,486	193	360	95
Northern	21,669	34	347	15
Eastern	22,364	18	211	5
Southern	23,315	36	494	10
Total	121,235 (98.1%)	315 (0.3%)	1,714 (1.4%)	136 (0.1%)

The above Table 3.4 indicates that the vast majority of establishments are single unit establishments. Branches do exist, though predominantly branches of national establishments (1,714 in total). These relate to

the 315 head offices in Rwanda, of which 61 percent are situated in Kigali City. There are currently 136 branches of international establishments in Rwanda.

3.8. Owner Nationality

The Census sought to discover the structure of establishment ownership in Rwanda by

researching whether, for each establishment, the capital is totally owned by: (a) Rwandan

citizens or a Rwandan organization; (b) foreign investors or organizations; or (c) a joint venture between (a) and (b). It is important to note that, in this context,

ownership refers to capital (fixed assets and operating capital) rather than any other measure.

Table 3.5: Operational Establishments by Nationality of Owner and Province

	Kigali	Northern	Eastern	Southern	Western	Total
Rwanda	28,462	21,896	22,494	23,772	25,461	122,085
Foreign (EAC)	237	61	60	47	58	463
Foreign (Other)	335	27	19	28	43	452
Joint (Rwanda + EAC)	18	3	0	4	2	27
Joint (Rwanda + Other)	65	31	17	29	31	173

Table 3.5 disaggregates the Census results by the nationality of the establishment’s owner. It is clear that there are a very small proportion of establishments that are not fully

Rwandan-owned within the country, at around 1.2 percent of the total. Those that are not fully domestically-owned predominantly reside within Kigali City.

Figure 3.4: Foreign and Joint-Venture Establishments by Nationality of Owner

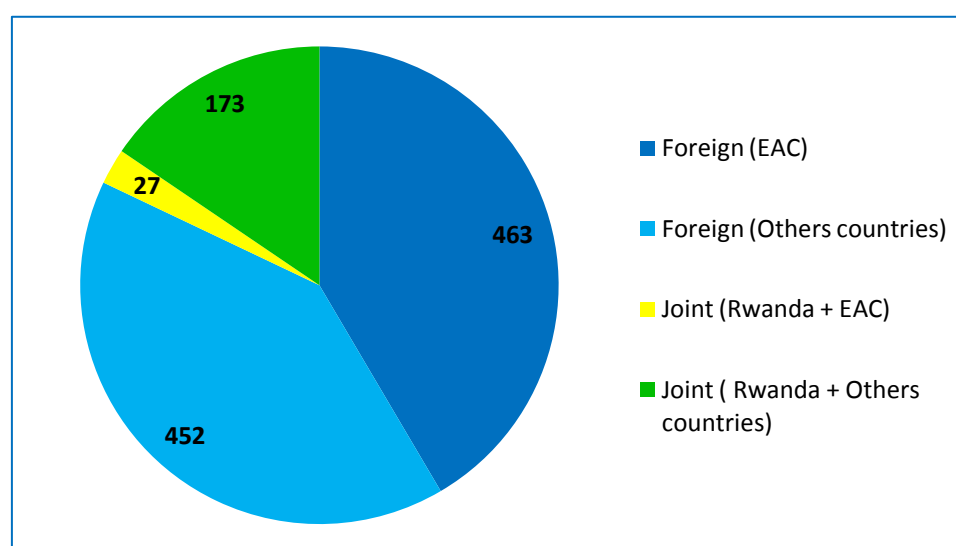


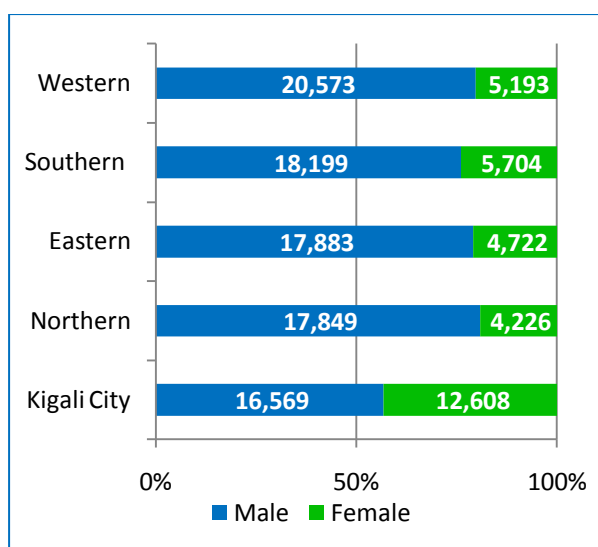
Figure 3.4 isolates foreign- and joint-venture-owned establishments, and illustrates the share of total establishments for a particular nationality of ownership. Owners from the East African Community nations are most numerous, with 463 establishments in Rwanda. Second are other foreign-owned establishments, totalling 452. Within this

group, roughly a third are Asian-owned, and another third are African-owned. There are currently 200 joint-venture establishments in the country between Rwandan stakeholders and other parties, mainly between Rwandans and those outside of the EAC (173 establishments).

3.9. Gender of Manager

Of the 123,526 operating establishments in Rwanda, a total of 32,453 (26.3%) establishments have a female manager. Figure 3.5 below shows the percentage share of male to female managers for each of the five provinces in Rwanda.

Figure 3.5: Ratio of Male to Female Managers by Province

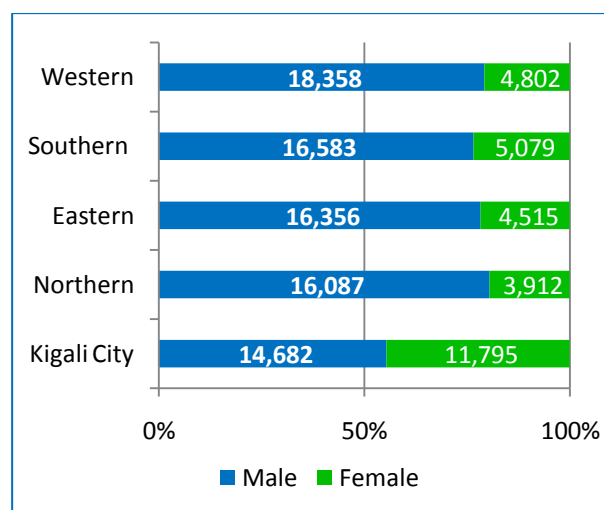


It is clear that Kigali hosts the largest number of female managers, but also is the province with the most equal distribution of male to female managers at 43 percent female. The Northern Province has the most unequal distribution of male to female managers, with

less than 20 percent of all managers being female.

Figure 3.6 presents the same breakdown, but this time exclusively for sole proprietors. This sample of 112,169 contains 30,103 female sole proprietors (26.8 percent). This is marginally more as a proportion than for the population as a whole. The ranking of provinces remains the same, with Kigali City sole proprietor establishments being 44.5 percent owned by women. The Northern Province continues to have the highest level of gender inequality as measured by management gender.

Figure 3.6: Ratio of Male to Female Sole Proprietors by Province



3.10. Maintenance of Regular Operational Accounts

The Census questionnaire investigated whether or not the respondent establishment maintains regular accounts. According to national law N° 16/2005, the following entities are requested to keep account books and records:

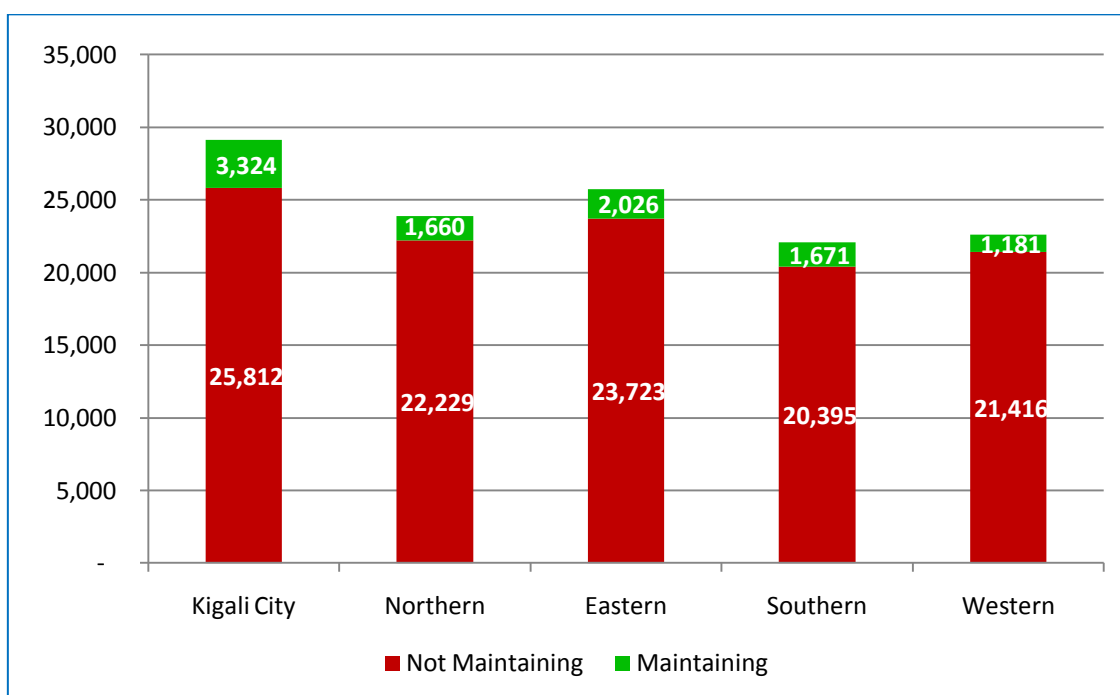
- a) All companies operating in Rwanda established in accordance with domestic or foreign law;
- b) All persons engaged in a business activities, professional or vocational

c) occupation, except when such taxpayers have an annual turnover not exceeding one million two hundred thousand (1.200.000 RWF).

As **Chapter 9** will show, the vast majority of establishments in Rwanda can be defined as acting in the informal sector. This may explain why, as shown in Figure 3.7 below,

such a small proportion of establishments maintain regular operational accounts. Only 8.0 percent of all establishments in Rwanda maintain regular accounts, with the largest proportion being in Kigali City where 11.4 percent of establishments do so. The Western Province has the lowest level of account maintenance at just 5.2 percent of total provincial establishments.

Figure 3.7: Status of Maintaining Regular Accounts by Province



4. Economic Sector

The following Chapter looks at disaggregated data from the 2011 Census results by economic sector. This is the type of activity practiced by the establishment, whether it is relevant to goods production or service provision. The key economic activity practiced by the establishment is detailed, and in the case where the establishment practices several economic activities, only the

activity which is practiced most of the time is reported as the major economic activity.

The economic activity is reported in detail in accordance with the International Standard Industry Classification (ISIC), with some grouped together for presentation purposes in the below tables and figures.

4.1. Economic Sector by Province

The largest single sector in Rwanda in terms of the number of establishments is, by far, wholesale and retail trade. There are a total of 64,639 establishments within this category, or 52.3 percent of the population total. This is followed by the accommodation and food services sector, which records 33,305 establishments (27.0 percent). The rest of the sectors are small in comparison when looking at the number of establishments in isolation,

with professional services (4.5 percent) and manufacturing (3.7 percent) being noteworthy. However, it should be noted that the average size of a firm, in terms of labour and capital employed, is likely to vary greatly by sector. For instance, mining and quarrying accounted for less than 1 percent of total establishments in the 2011 Census yet provided 28 percent of export earnings in 2010.

Table 4.1: Establishments by Economic Sector and Province

Economic Sector	Kigali	North	East	South	West	Total	%
Agriculture, forestry & fishing	75	212	69	88	231	675	0.5
Mining & quarrying	11	12	11	5	11	50	0.0
Manufacturing	798	891	985	945	940	4,559	3.7
Utilities	134	61	64	69	32	360	0.3
Construction	88	5	2	4	8	107	0.1
Wholesale & retail trade	18,649	9,401	11,350	12,602	12,637	64,639	52.3
Accommodation & food	3,661	8,084	6,617	7,111	7,832	33,305	27.0
Information & communication	227	65	91	87	88	558	0.5
Financial & insurance	203	162	178	185	242	970	0.8
Professional services	2,419	989	684	621	798	5,511	4.5
Health & Education	540	147	191	207	186	1,271	1.0
Other Services	2,372	2,046	2,363	1,979	2,761	11,521	9.3

Table 4.1 shows the number of establishments for each economic sector by province. Certain

sectors are distributed relatively evenly across provinces, such as manufacturing, finance &

insurance and other services. There are also certain sectors that are highly concentrated within Kigali City, such as construction (82 percent), professional services (44 percent) and information & communication (41

percent). Reversely, the agriculture forestry & fishing sector is predominantly situated within the Northern and Western Provinces, presumably due to the location of natural resources such as fertile land and Lake Kivu.

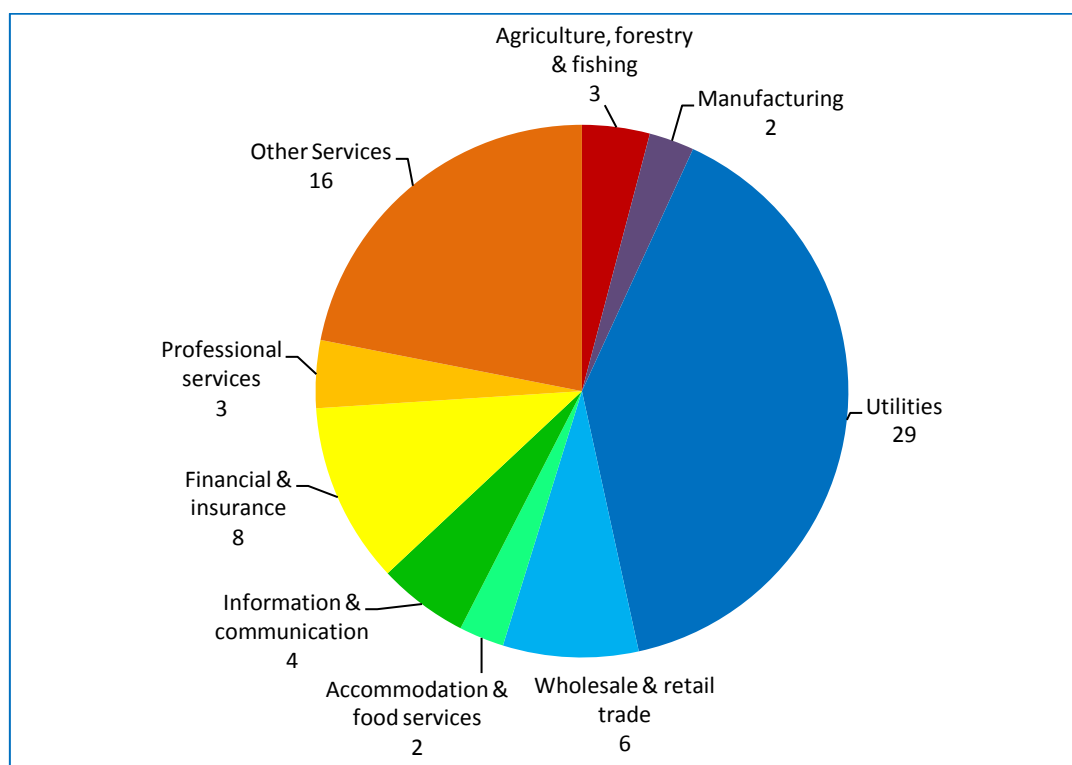
4.2. Economic Sector by Establishment Classification

Chapter 3 revealed that 96.5 percent of establishments are classified as being within the private sector exclusively. Outside of this large majority, 3.4 percent of establishments are non-profit organisations (4,256). Only 73

establishments were public, and 46 were a mix of public and private ownership.

Figures 4.1 and 4.2 show the proportion of establishments in each economic activity for public- and mixed-sector respectively.

Figure 4.1: Public Sector Establishments by Economic Sector

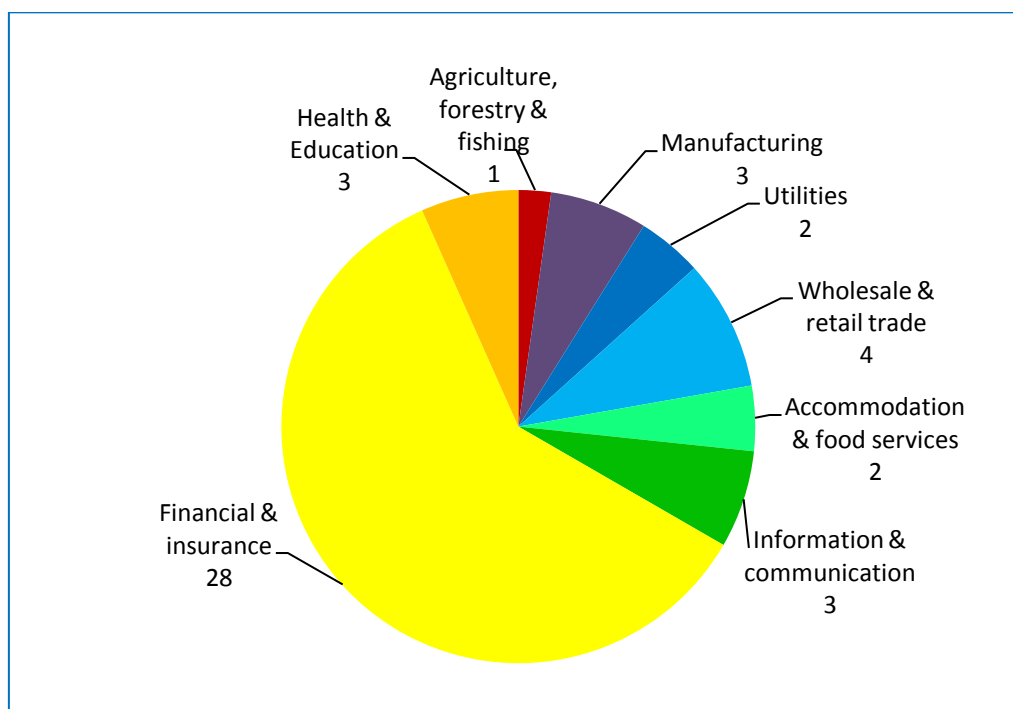


Public sector establishments are predominantly focused within utilities (electric, gas, water, waste management etc.) with 29 of the 77 establishments. A total of 10 financial & insurance establishments are publicly owned, and other services

(particularly transport) are also noteworthy.

Of the 46 total public/private mixed ownership establishments, over half (28) come within the financial and insurance sector.

Figure 4.2: Mixed Sector Establishments by Economic Sector



In the non-profit sector, a total of 4,256 establishments currently exist. There are some 243 establishments within the health (177) and education (66) sector. However, the vast majority of remaining non-profit

establishments are classified as 'other services', acting across several sectors or not within one of those offered by the Questionnaire. Further analysis is not possible with the current data.

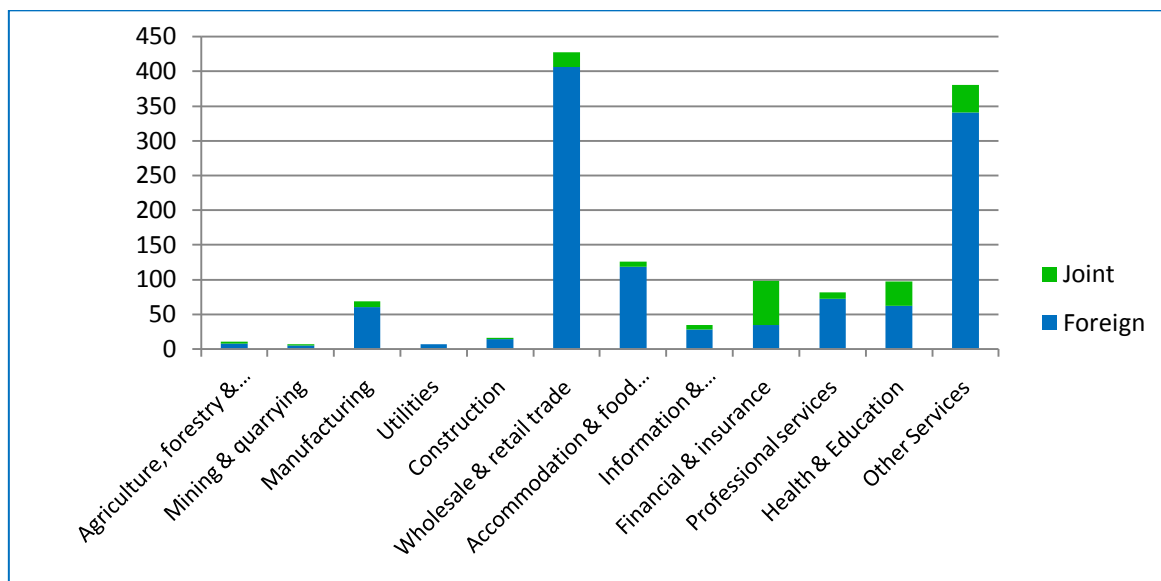
4.3. Economic Sector by Owner Nationality

The Establishment Census recorded a total of 1,157 foreign-owned establishments in Rwanda in 2011, with 200 more being joint ventures between domestic and foreign shareholders. By sector, construction has the highest concentration of foreign establishments but remains 85 percent domestic, at least in terms of the number of establishments. Mining and quarrying is a close second with 86 percent of establishments being domestically-owned.

Figure 4.3 illustrates the distribution of foreign and joint-venture establishments by

economic sector. Wholesale & retail trade remains the largest sector with 406 foreign establishments and 22 joint ventures, although does not dominate as convincingly as in the whole population. 'Other services' accounts for 341 foreign and 40 joint venture establishments, and accommodation & food services for 119 and 7 respectively. Financial & insurance services have the largest proportion of joint ventures at 63 establishments, with another 35 being foreign-owned. The preceding section identifies this sector as having a number of public-private mixed establishments.

Figure 4.3: Foreign and Joint-Venture Establishments by Economic Sector



There are a total of 463 establishments run by owners from EAC countries, with wholesale & retail trade as well as accommodation & food services being key sectors. Other African-owned establishments (161 in total) are particularly concentrated in wholesale &

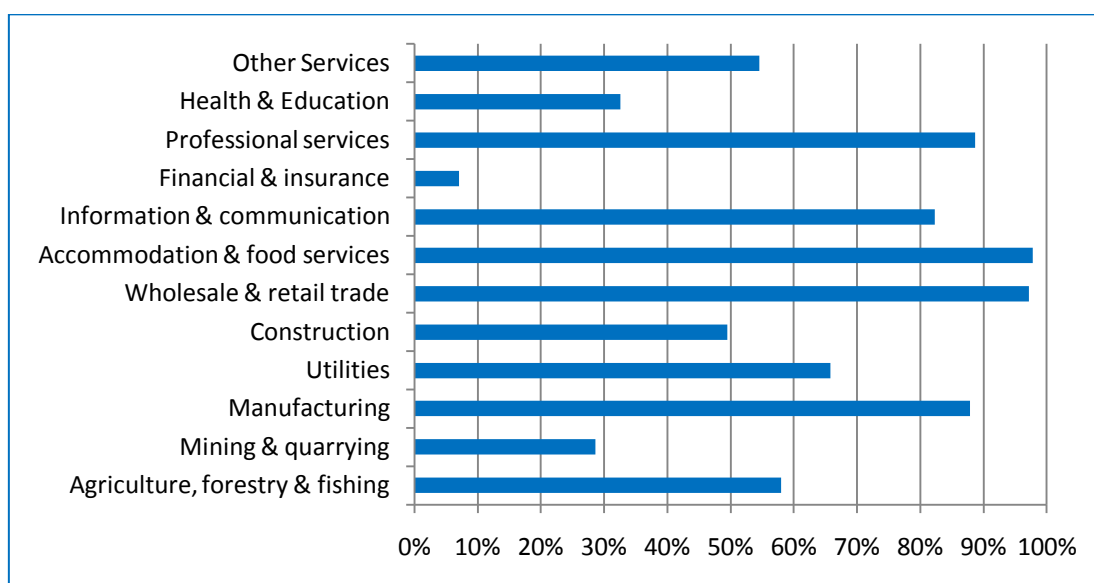
retail trade as well as professional services and manufacturing. Asian-owned firms (148 in total) are highly concentrated in wholesale & retail trade, accommodation & food services and manufacturing.

4.4. Economic Sector by Legal Status

Chapter 3 revealed that 90.8 percent of establishments in Rwanda are sole proprietorships in terms of legal status, with 2.0 percent being limited by shares. The remaining establishments are either limited by guarantee, by shares and guarantee, unlimited, or another type (public, non-profit). However, a look at the legal status of establishments by economic sector reveals that there is much divergence across different activities. Figure 4.4 indicates the percentage of establishments in each economic sector that are sole proprietorships. Heavily populated sectors dominated by smaller establishments such as wholesale & retail trade and

accommodation & food services have very high percentages of sole proprietorships, with 97 and 98 percent respectively. At the other end of the spectrum, only 7 percent of financial and insurance sector establishments are sole proprietorships, being mainly limited by shares (380 establishments) but also with the highest number of limited by guarantee (10), limited by shares and guarantee (18) and unlimited (37) establishments. There is a clear relationship between the size of the average firm and the level of legal protection against financial risks, with mining & quarrying and construction also having smaller shares of sole proprietorships.

Figure 4.4: Percentage of Establishments that are Sole Proprietorships by Economic Sector

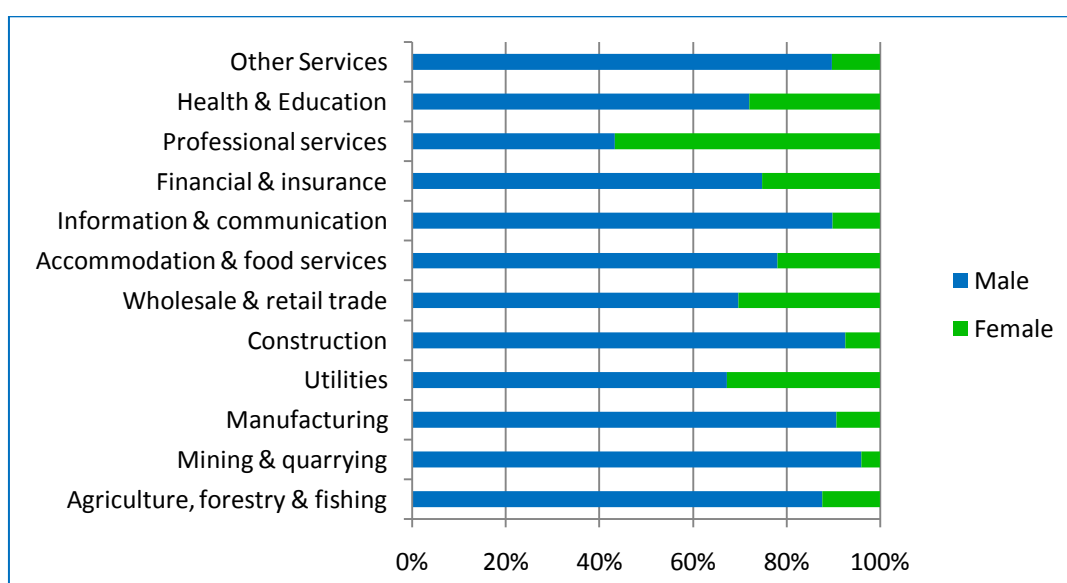


4.5. Economic Sector by Manager Gender

Representative of the population as a whole, the wholesale & retail trade sector hosts the largest number of female managers of establishments in Rwanda of any sectors with 19,554. It is also has the 3rd highest level of gender equality with 30 percent female managers. Figure 4.5 illustrates that the professional services sector distinctly has the

highest proportion of women as managers at 57 percent, with roughly seven hundred more female than male managers within the sector. Particularly unequal sectors include those dominated by larger firms such as mining & quarrying (4 percent female managers), construction (7 percent) and manufacturing (9 percent).

Figure 4.5: Ratio of Male to Female Managers of Establishments by Economic Sector



5. Employment

This Chapter includes information on employment of labour in Rwanda, disaggregated by a variety of variables and characteristics of establishments. The Establishment Census 2011 records a total of **281,946 employees hired by establishments**. Including estimations of civil service employment (estimated at 81,858 in 2010 by NISR), a relatively strong measure of off-farm employment can be arrived at (363,804). The Government aims to see Rwanda increase this figure to 1.4 million by 2020 from a baseline of around 200,000 in 2000 under the Vision 2020 strategic document.

A total of 186,902 men are employed in establishments, with 95,044 women being

employed. There are almost two men in employment by establishments for every one woman, with 66.3 percent of total employees being male. Further investigations into gender equality are provided throughout the Chapter.

The Chapter looks at both the total number of employees disaggregated by a given characteristic (e.g. economic sector) as well as using establishment size categories. This uses the definition provided in the national SME Policy to classify establishments as micro (1-3 employees), small (4-30), medium (31-100) or large (more than 100), thereby using the number of establishments within each size category.

5.1. Employment by Size of Establishment and Province

Table 5.1 below shows that 92.6 percent of all establishments can be classified as being micro in size. Establishments with only one worker account for 72.2 percent of the total. The larger the firm size the fewer the number

of establishments, with 8,548 small-sized establishments (6.9 percent), 513 medium-sized (0.4 percent) and 106 large-sized (0.1 percent) existing.

Table 5.1: Number of Establishments by Size and Province

Province	Size of Establishment (Number of Employees)			
	Micro (1-3)	Small (4-30)	Medium (31-100)	Large (101+)
Kigali City	25,769	3,147	204	51
Northern	20,748	1,242	71	12
Eastern	21,412	1,133	41	5
Southern	22,253	1,508	123	16
Western	24,147	1,518	74	22
Total	114,329	8,548	513	106
	(92.6%)	(6.9%)	(0.4%)	(0.1%)

Whilst micro-sized firms are spread reasonably evenly across all five provinces, as

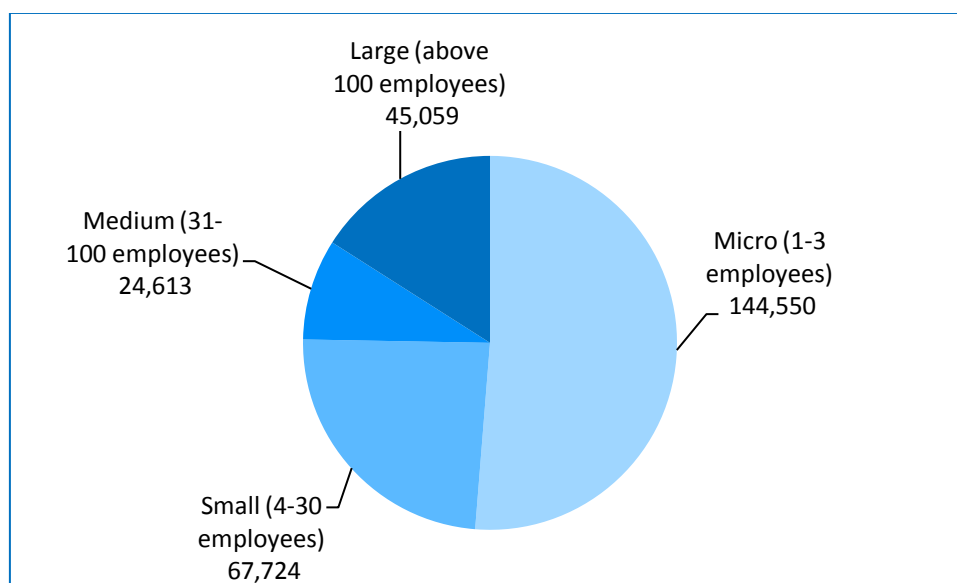
establishment size increases the percentage situated in Kigali City increases: 36.8 percent

of small-sized, 39.8 percent of medium –sized and 48.1 percent of large-sized establishments. A graphical representation of the average size of establishments by province is presented in Map 2 of Annex 1.

By definition the share of micro-sized establishments in the total population will be larger than the share of total employment coming from micro-sized establishments.

Figure 5.1 shows that, whilst micro-sized enterprises account for over half of all employment by establishments in the country, a significant number of workers are employed in small (24.0 percent), medium (8.7 percent) and large-sized establishments (16.0 percent). There are 89,219 establishments with only one worker, roughly a third of all workers employed in establishments.

Figure 5.1: Total Employees by Establishment Size



Disaggregating by province, Kigali City employs more than any other, with 82,475 workers. This amounts to 29.3 percent of total employment by establishments, with the

Western Province employing 62,199 and 22.1 percent of labour. The Eastern Province has the lowest employment figures at 37,422 workers (13.3 percent of total).

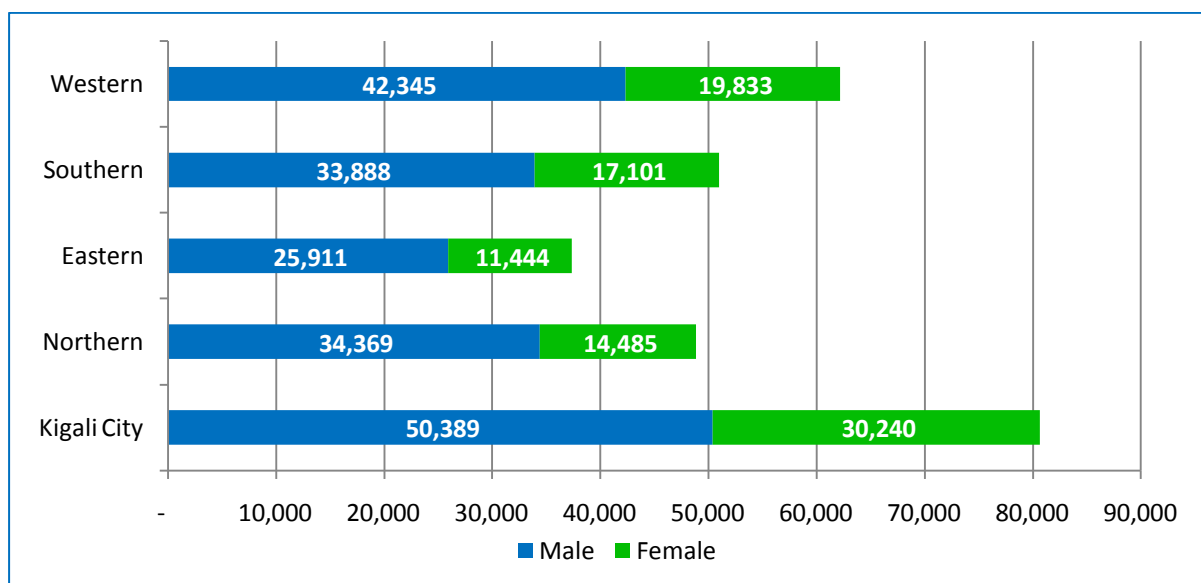
Table 5.2: Total Employees by Establishment Size and Province

Province	Size of Establishment (Number of Employees)				Total
	Micro (1-3)	Small (4-30)	Med (31-100)	Large (101+)	
Kigali City	34,306	25,445	10,079	12,645	82,475
Northern	27,026	9,712	3,361	8,759	48,858
Eastern	26,405	8,201	1,901	915	37,422
Southern	27,416	12,847	5,833	4,896	50,992
Western	29,397	11,519	3,439	17,844	62,199
Total	144,550	67,724	24,613	45,059	281,946
	(51.3%)	(24.0%)	(8.7%)	(16.0%)	

Figure 5.2 below shows total employment by province and by gender, showing that Kigali City employs the largest number of workers, the largest number of female workers, and also has the most equal balance of employees according to gender with 37.5 percent of

workers being female. This compares to the Northern Province which employs 14,485 women (29.6 percent of total) and the Eastern Province which sees just 11,444 female employees working in establishments.

Figure 5.2: Total Employees by Province and Gender



5.2. Employment by Establishment Classification

Table 5.3 shows a number of interesting trends regarding the number of establishments by size and classification. Firstly, the private sector dominates all ranges of establishment size, whether micro-sized or large where the share of private establishments is 97.2 and 94.3 percent respectively. Again, 97.2 percent of establishments with one worker are in the

private sector. Mixed ventures between the public and private sector are generally in the small to medium category, but have 5 large employers employing 5,117 workers between them. Non-profit organisations vary in size, although with few large employees. The public sector establishments also vary across size categories.

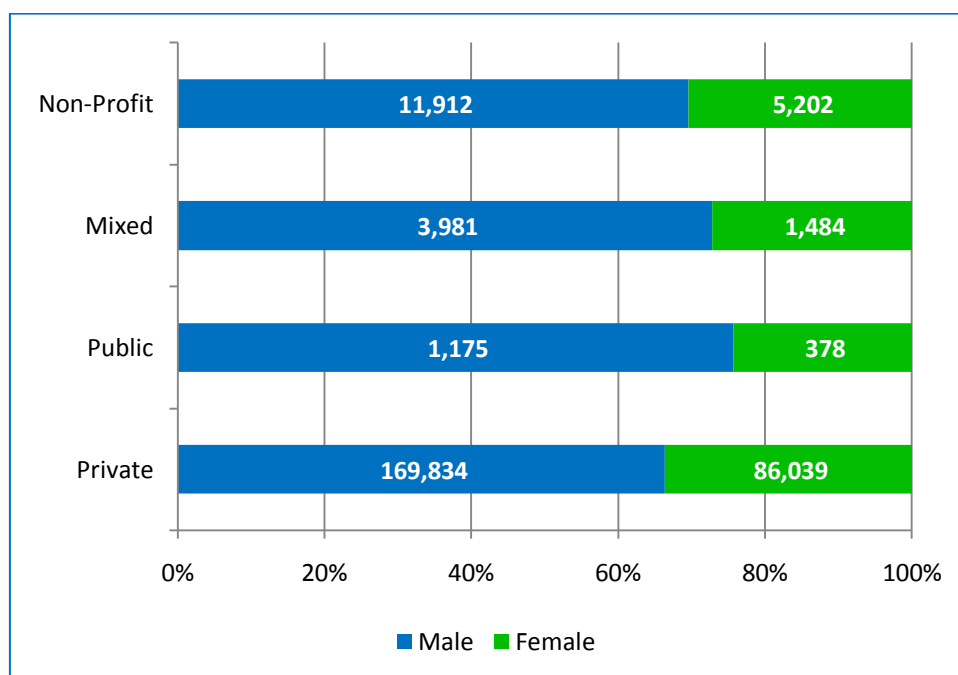
Table 5.3: Number of Establishments by Size and Classification

	Micro (1-3)	Small (4-30)	Med (31-100)	Large (101+)
Private	111,176	7,440	421	100
Public	25	28	15	4
Mixed	14	24	3	5
Non Profit	3,125	1,069	60	1
Total	114,329	8,548	513	106

The private sector is the largest employer, with 90.8 percent of the total labour market or 255,873 workers. Non-profit organisations employ more workers than the public sector (6.2 percent compared to just 0.6 percent), with the mixed sector employing a total of 5,465 employees (1.9 percent), mainly through larger-sized establishments.

In terms of gender equality, the private sector is the most egalitarian sector with 33.6 percent of all employees being female. It is also by far the largest employer of women, at 86,309 workers compared to 5,202 in non-profit organisations.

Figure 5.3: Total Employment by Establishment Classification and Gender



5.3. Employment by Economic Sector

Table 5.4 illustrates that the economic sectors with the largest number of establishments are generally concentrated in micro- and small-sized establishments; 99.9 percent of wholesale & retail trade establishments are micro- or small-sized, 99.8 percent of accommodation & food service

establishments and 99.7 percent of manufacturing establishments.

Large firms are from the manufacturing sector (24) and agriculture, forestry & fishing sector (15), namely large factory-based processors.

Table 5.4: Number of Establishments by Size and Economic Sector

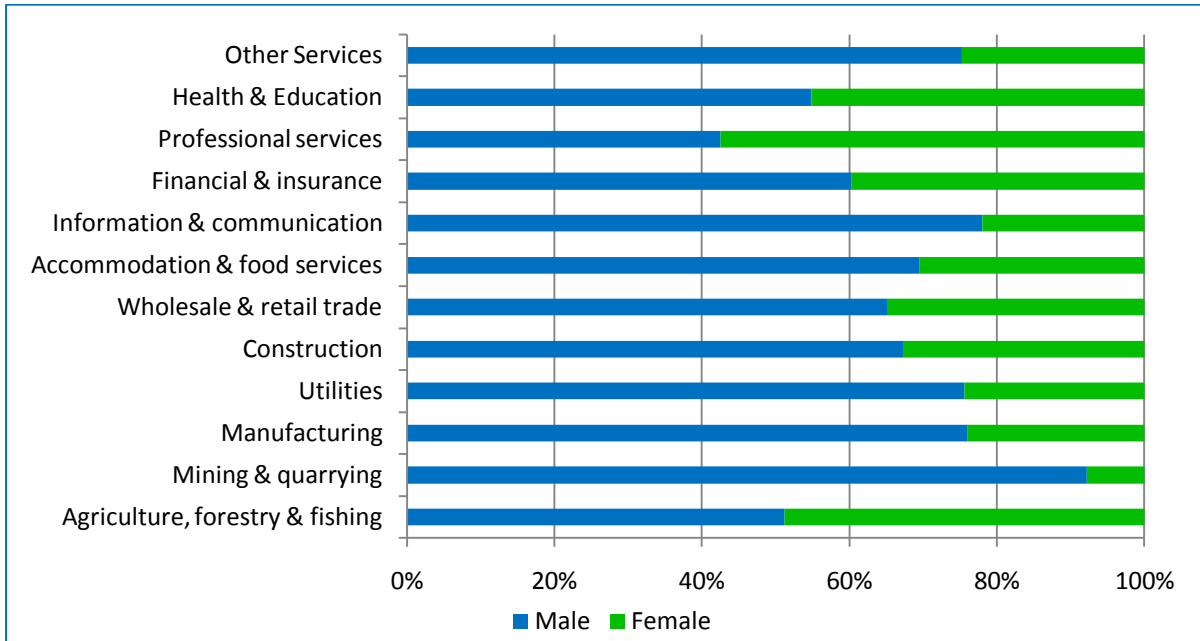
	Micro (1-3)	Small (4-30)	Med (31-100)	Large (101+)
Agriculture, forestry & fishing	411	211	37	15
Mining & quarrying	9	24	13	4
Manufacturing	3,663	781	87	24
Utilities	298	45	14	1
Construction	36	49	11	11
Wholesale & retail trade	63,153	1,418	51	15
Accommodation & food services	31,109	2,111	73	7
Information & communication	484	67	6	1
Financial & insurance	436	513	12	5
Professional services	4,870	625	13	1
Health & Education	411	703	145	7
Other Services	9,449	2,001	51	15

In terms of overall employment, wholesale & retail trade remains the largest employer ahead of accommodation & food services, with the sectors employing 92,711 and 59,837 workers respectively (33.1 and 21.4 percent). Manufacturing and agriculture, forestry & fishing, whilst only totalling 4.2 percent of all establishments, account for 17.5 percent of employment.

Figure 5.4 presents the equality of employment in terms of gender, and indicates

that only the professional services sector employs more women than men (57 percent). This is in fact the exact same ratio as female to male managers in the sector. This is influenced by the large number of micro-sized firms, so that the managers are also the sole employees often within the sector. For this reason the results are very similar across most sectors, with the exception of construction which sees a much larger proportion of female workers (32.7 percent) compared to managers (7.5 percent).

Figure 5.4: Total Employees by Economic Sector and Gender Share

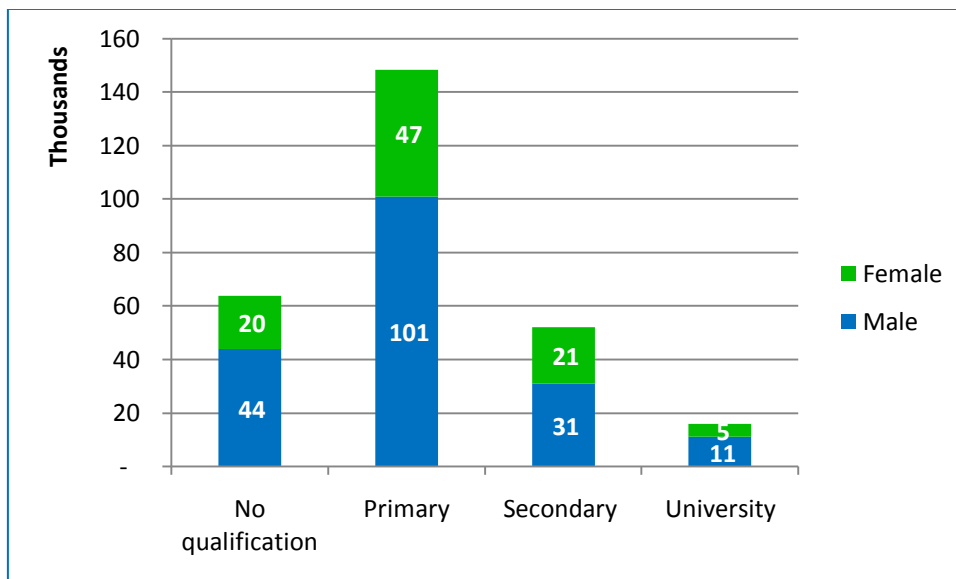


5.4. Employment by Education Status

Three quarters of the workforce employed in establishments are educated only up to the primary level, with 22.8 percent of that total having no formal education qualification. A further 18.6 percent have been educated up to the secondary level, with 5.7 percent attaining

university certification. Women account for around 30 percent of the total number of employees in all categories of education status except for secondary education; here there are 21,159 female employees compared to 30,987, or a 40.6 percent share (Figure 5.5).

Figure 5.5: Employment by Education Status and Gender



The private sector employs the largest amount of workers for each of the categories of education qualifications, with 77.8 percent of private sector establishments employing workers with a primary or below level of education. The public sector employs predominantly secondary level educated

workers (49.6 percent of total public sector employees) as well as university educated workers (26 percent). The non-profit sector employs 5 times more secondary and university educated workers than the public sector.

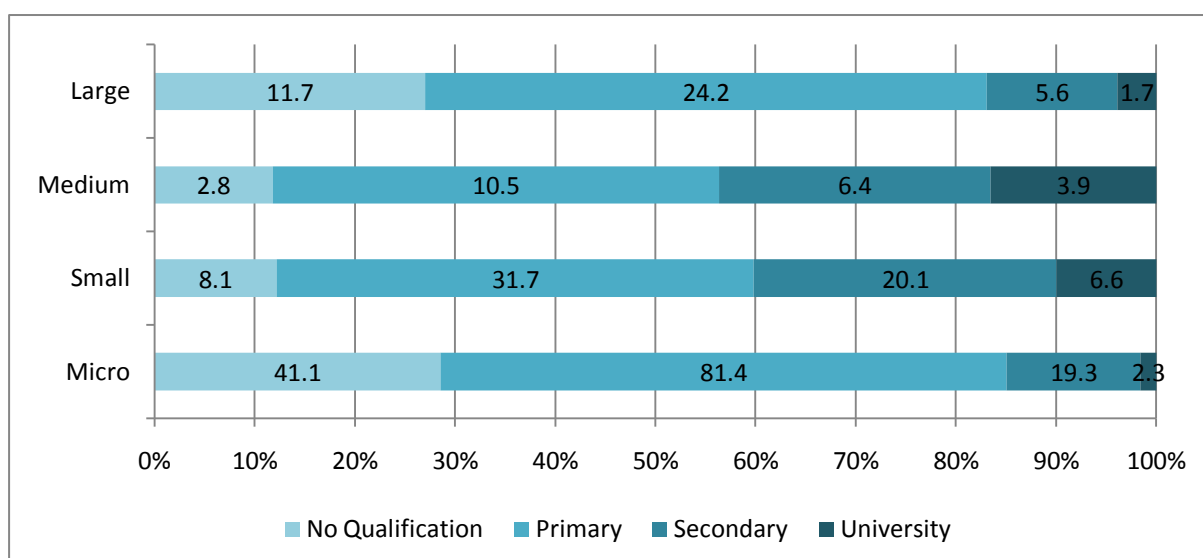
Table 5.5: Total Employment by Establishment Classification and Education Status

	No Qualification	Primary	Secondary	University
Private	61,010	136,240	44,498	11,647
Public	54	325	769	403
Mixed	1,156	2,465	1,649	193
Non-Profit	1,383	8,748	4,448	2,199
Total	63,603	147,778	51,364	14,442

Figure 5.6 below illustrates the number and share of employees for each size category of establishment according to the level of education they have attained. It indicates that around 85 percent of micro-sized establishments' employees have primary education or no qualification at all, increasing to 88 percent for those with a single worker. Strikingly, the same can be said for large establishments, although this is likely to be

because they employ a large amount of unskilled, manual workers whilst having a few highly educated management staff. Small- and medium-sized firms employ proportionally more secondary and university educated staff than other categories, yet still less than half of total employees for these firms have attained such qualifications.

Figure 5.6: Number of Employees ('000) by Establishment Size and Educational Status

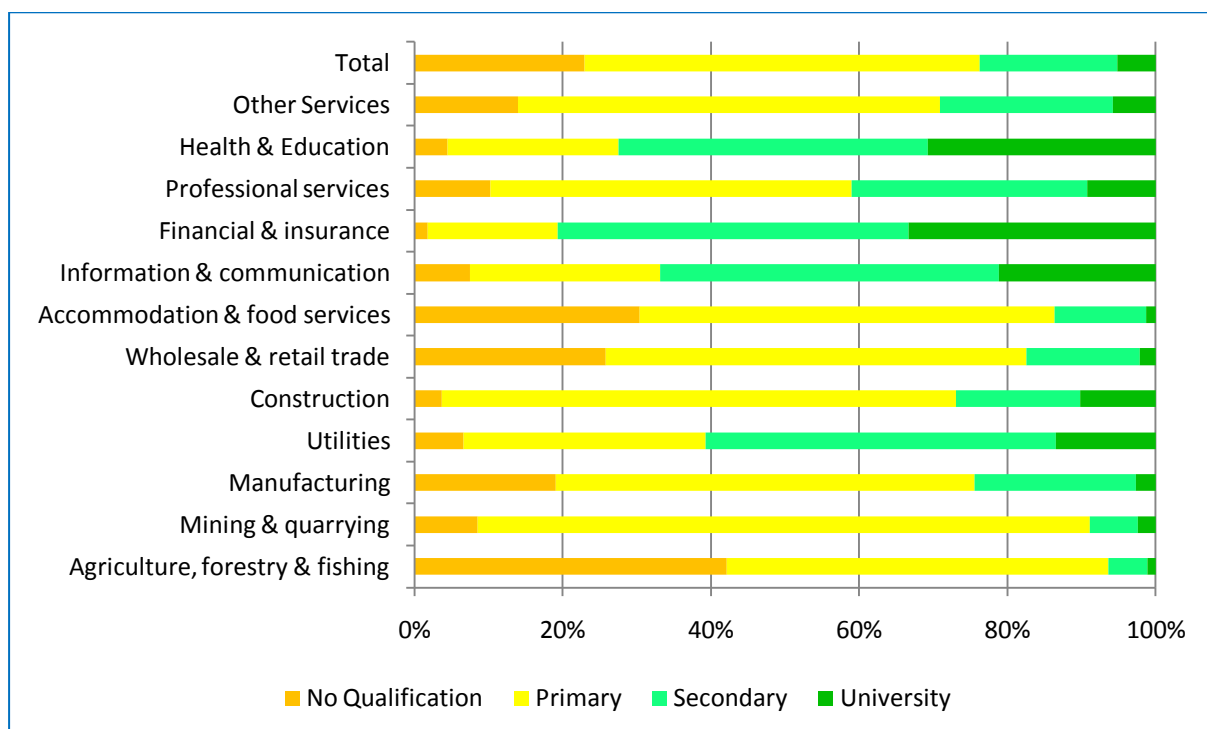


Disaggregating by sector and educational status, as represented in Figure 5.7, shows that there are four sectors that employ more secondary and university educated workers than primary educated and non-qualified workers: finance & insurance (80.7 percent); health & education (72.5 percent); information & communication (66.8 percent); and utilities (60.7 percent). Finance & insurance employs the highest proportion of university educated workers for a sector at 33.3 percent and 1,886 workers. Education & health employs the

largest number of university educated workers however at 4,787 employees.

At the other end of the scale, agriculture, forestry & fishing employs 93.6 percent low-skilled workers (primary level or no qualification), and mining & quarrying employs 91.1 percent low-skilled workers. Wholesale & retail trade remains the highest employer of no qualification, primary and secondary level educated employees in terms of numbers.

Figure 5.7: Share of Employees by Educational Status and Economic Sector



5.5. Employment by Owner Nationality

Rwandan owners dominate all categories of establishment size, although foreign and joint-venture investors play an increasing role as the size of the establishment increases. Of the 106 large establishments in Rwanda, 16 are foreign owned, 2 of which are owned by nationals of East African Community states.

Owners from the EAC are concentrated heavily in micro- (353) and small-sized (101) establishments. Joint ventures have 48 micro-establishments as well as 112 small, 23 medium and 9 large establishments. In total, foreign firms employ 14,195 workers of which 6.8 percent are foreign workers and joint

ventures employ 9,001 workers of which 12.4 percent are foreign. Of the 89,219 establishments with a single worker, 99.5

percent are Rwandan-owned with 231 being owned by EAC nationals and 214 by other foreign owners.

Table 5.6: Number of Establishments by Size and Nationality of Ownership

	Micro (1-3)	Small (4-30)	Med (31-100)	Large (101+)
Rwanda	113,504	8,026	445	81
Foreign (EAC)	353	101	7	2
Foreign (Other)	401	252	26	14
Joint (Rwanda + EAC)	8	14	4	1
Joint (Rwanda + Other)	48	98	19	8

5.6. Foreign Employees

The 2011 Establishment Census records 2,818 foreign nationals currently being employed by Rwandan establishments, of which roughly one-third are female and two-thirds are male. Figure 5.8 below illustrates that just over half of all foreign nationals have a university qualification, so that 1 percent of the workforce provides 10 percent of university-educated workers.

The largest number of foreign employees is situated in the health & education sector, whilst wholesale & retail trade as well as construction (where 296 of the 309 employees are university-educated) are both notable.

Figure 5.8: Foreign Employees by Educational Status and Gender

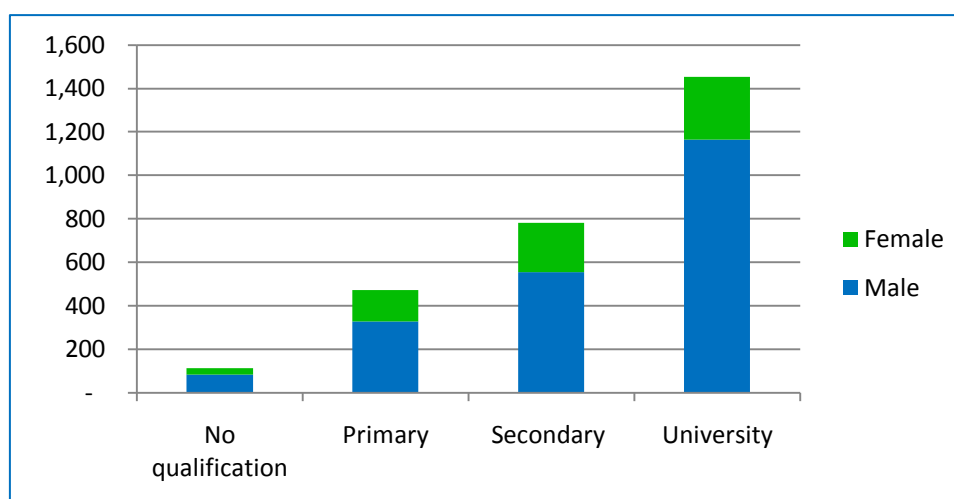
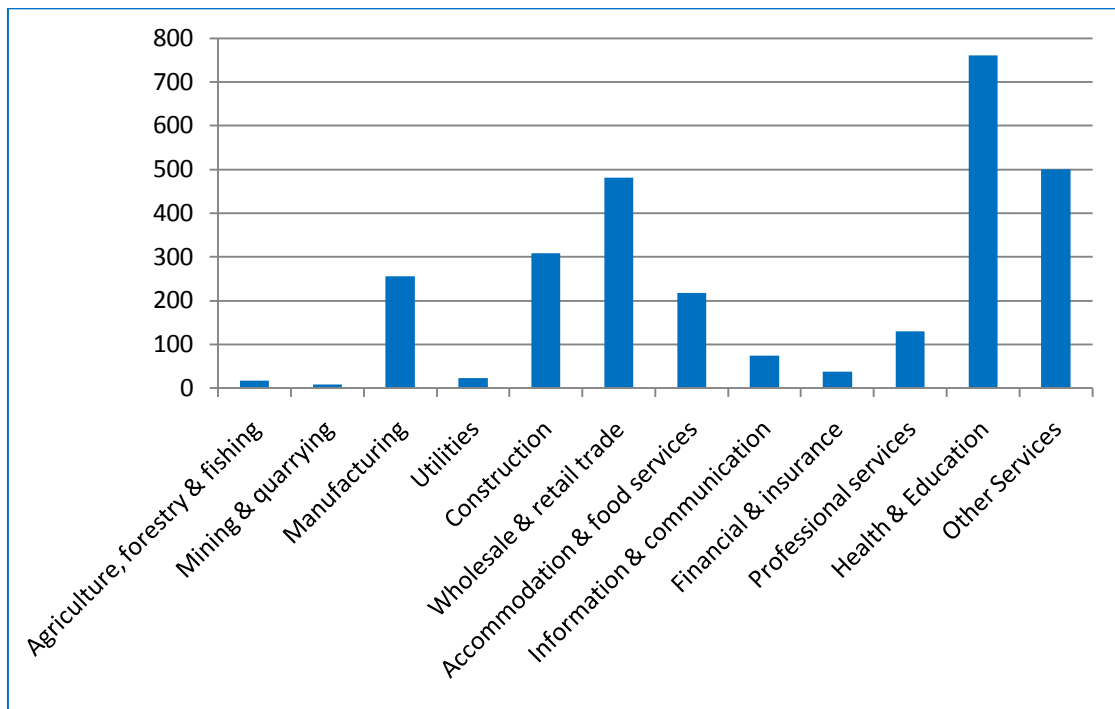


Figure 5.9: Total Foreign Employed Persons by Economic Sector



6. Capital

Chapter 6 looks at the value of capital employed by establishments in Rwandan Francs, disaggregated by a series of other variables and characteristics. Whilst information provided by respondents was given as continuous data, for the purposes of presentation and applicability establishments have been grouped within the ‘micro’, ‘small’, medium’ or ‘large’ category. Just as in Chapter 5 establishments were grouped according to the number of employees using the definition presented in the national SME

Policy, the same definition is utilised for the value of capital employed. Establishments are categorised as follows:

- **Micro:** Less than RWF 0.5m of capital employed
- **Small:** Between RWF 0.5m and RWF 15m
- **Medium:** Between RWF 15m and RWF 75m
- **Large:** More than RWF 75m

6.1. Capital Employed by Province

The structure of establishments in Rwanda according to capital employed is pyramidal, with a large base of micro-sized and a small upper-level of large-sized establishments. The Census recorded 90,388 micro-sized establishments, accounting for 71.2 percent of the total population. This compares to just 1,095 establishments categorised as ‘large’, or

0.9 percent. It should be noted that whilst the overall trend is the same as when using number of employees, there are far more ‘large’ establishments when using the capital ruling. In comparison, there are just 106 large employers of workers, or 0.1 percent of the total.

Table 6.1: Number of Establishments by Capital Employed and Province

	Micro	Small	Medium	Large
	< RWF 0.5m	RWF 0.5m-	RWF 15m-	RWF 75m+
Kigali City	19,864	7,211	767	496
Northern	15,857	5,390	317	136
Eastern	17,300	4,626	255	102
Southern	18,492	4,556	302	158
Western	18,875	5,820	411	203
Total	90,388	27,603	2,052	1,095
	71.2%	22.3%	1.7%	0.9%

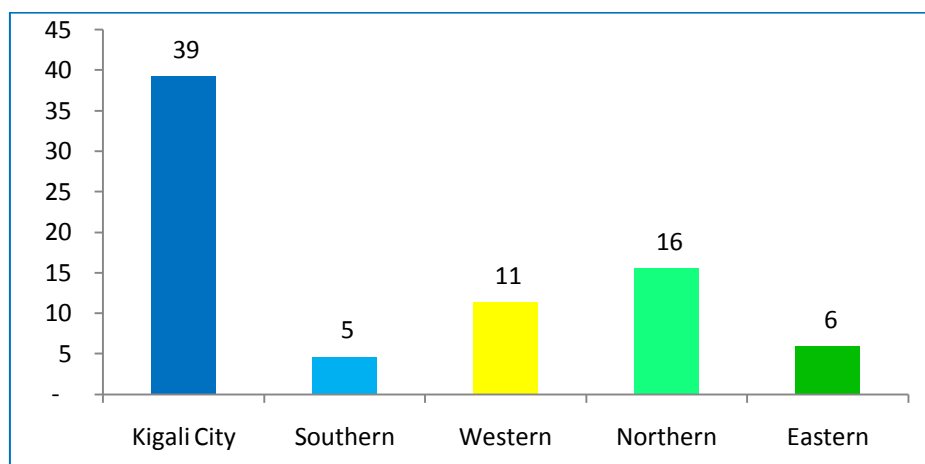
Table 6.1 looks at provincial level data, and it is clear that micro- and small-sized establishments dominate in all provinces. As would be expected, a large number of

medium- and large-sized establishments reside in the capital, Kigali, in comparison to other regions. District-level data indicates that Nyarugenge has the largest number of large-

sized establishments, housing 231 or 20.8 percent of the total. Gasabo and Kicukiro account for another 23.9 percent together,

with Rubavu and Musanze being the next largest hubs with 80 and 58 large-sized establishments each respectively.

Figure 6.1: Mean Value of Capital Employed by Province (RWF m)



The average value of capital employed by an establishment in Rwanda is RWF 16.3 million. Figure 6.1 indicates that there is a noticeable level of divergence between provinces in terms of average capital employed, with the mean for Kigali City more than double that of the next province. Northern and Western

Province establishments employ the highest level of capital on average, with RWF 16 million and 11 million respectively. There is then a large gulf between until the Eastern and Southern Provinces, which employ just RWF 6 and 5 million respectively on average.

6.2. Capital Employed by Establishment Classification

In the private sector, most establishments are micro-sized (89,826 establishments). For both the public and non-profit sector however, small-sized establishments are most common. The highest number of large-establishments by capital employed is within the private

sector, accounting for 83.9 percent of the total. The next largest group is non-profit organisations, with a total of 165 establishments employing in excess of RWF 75 million.

Table 6.2: Number of Establishments by Capital Employed and Classification

	Micro < RWF 0.5m	Small RWF 0.5m-	Medium RWF 15m-	Large RWF 75m+
Private	89,826	25,055	1,615	919
Public	7	17	9	11
Mixed	1	10	7	10
Non-Profit	555	2,531	428	165
Total	90,388	27,603	2,052	1,095

Figure 6.2: Mean Value of Capital Employed by Establishment Classification (RWF m)

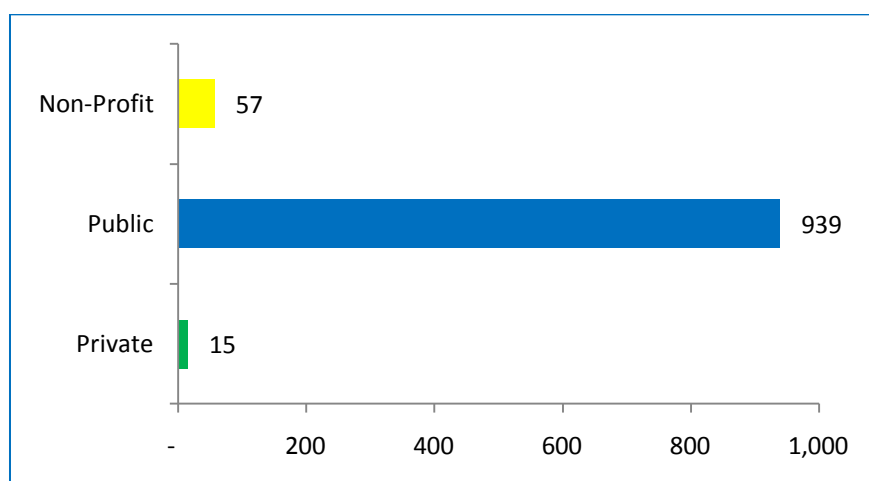


Figure 6.2 shows the mean value of capital employed by establishment classification. With 96.5 percent of all establishments, the private sector is very similar to the overall average level of RWF 16 million, at RWF 15 million. The 4,256 non-profit organisations however employ almost four times the

amount of capital that private sector establishments do on average, at RWF 57 million. There are 73 public establishments recorded in the Census, and these average RWF 939 million of capital, more than 60 times that of the average private establishment.

6.3. Capital Employed by Legal Status

Table 6.3 exhibits a clear trend regarding the legal status of establishments when breaking down results by the amount of capital employed; the larger the firm the more likely that liability will be limited by shares,

guarantee, both, or will be unlimited altogether. There are more large firms limited by shares than there are sole proprietorships, unlike the other three categories of smaller firms.

Table 6.3: Number of Establishments by Capital Employed and Legal Status

	Micro < RWF 0.5m	Small RWF 0.5m-	Medium RWF 15m-	Large RWF 75m+
Sole proprietorship	87,980	21,898	808	269
Limited by shares	492	1,055	341	353
Limited by guarantee	7	19	5	10
Limited by shares and by guarantee	8	26	10	16
Unlimited	22	56	22	33

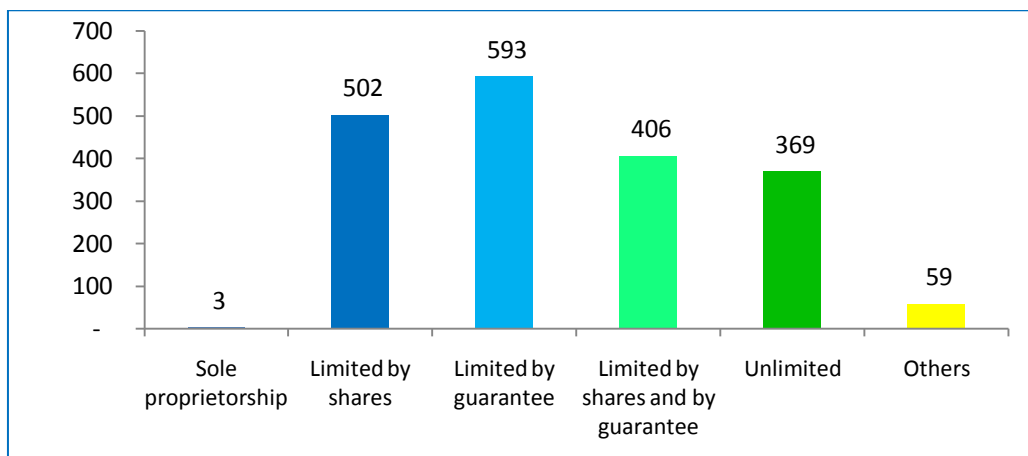
Figure 6.3 below shows that establishments with some level of limited or unlimited

liability are likely to be highly capitalised in comparison to the national average, with

those limited by shares averaging RWF 502 million of capital in comparison to just RWF 3 million for sole proprietorships. Those limited

by guarantee have the highest average capital stock at RWF 593 million.

Figure 6.3: Mean Value of Capital Employed by Legal Status (RWF m)



6.4. Capital Employed by Economic Sector

The wholesale & retail trade sector accounts for the largest number of establishments in each of the capital-value groups, with the exception of medium-sized establishments (excluding 'other services'). Accommodation & food service establishments are found predominantly within the micro-sized group, with the median establishment employing

very little capital. However, there are still a large number of high-capital establishments in the sector, with 219 medium- and 112 large-sized employers of capital.

Table 6.4 also indicates that the financial & insurance sector is characterised by high levels of capital, with 184 large-sized establishments.

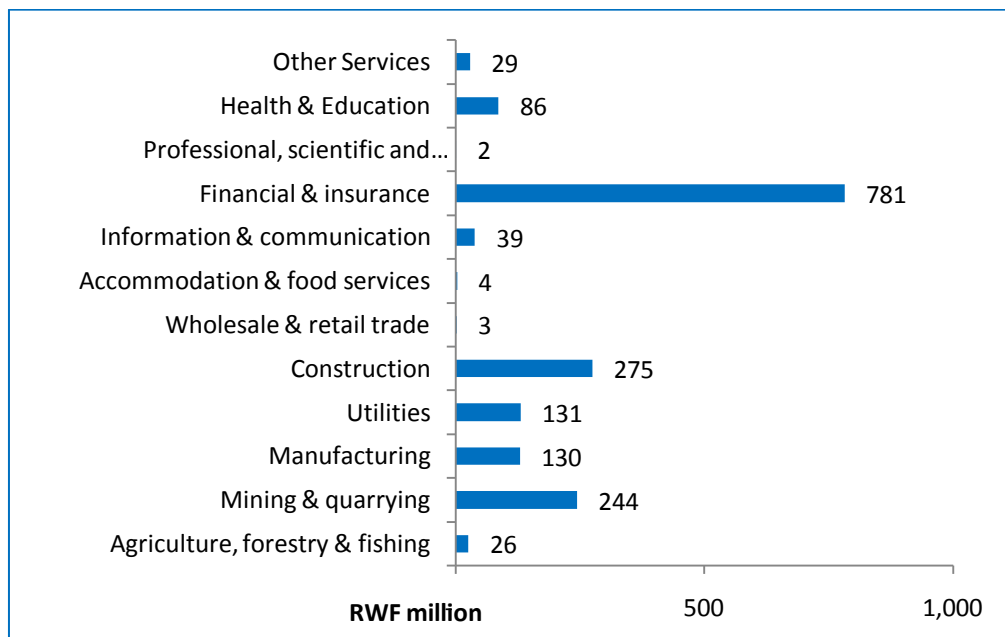
Table 6.4: Number of Establishments by Capital Employed and Economic Sector

	Micro <RWF 0.5m	Small RWF 0.5m-	Medium RWF 15m-	Large RWF 75m+
Agriculture, forestry & fishing	78	446	93	26
Mining & quarrying	5	24	6	6
Manufacturing	2,431	1,844	118	90
Construction	8	42	27	22
Wholesale & retail trade	49,225	13,922	589	203
Accommodation & food services	27,980	4,702	219	112
Information & communication	263	234	23	14
Financial & insurance	29	388	170	184
Professional services	4,327	992	48	15
Health & Education	123	267	146	155
Other Services	5,919	4,742	613	268

Looking at the mean value of capital across economic sectors, there is a large variance in results, with wholesale & retail trade establishments averaging RWF 3 million compares to financial & insurance sector

firms who employ RWF 781 million on average. Capital-intensive sectors include construction (RWF 275 million), mining & quarrying (RWF 244 million) and utilities (RWF 131 million).

Figure 6.4: Mean Value of Capital Employed by Economic Sector (RWF)



6.5. Capital Employed by Owner Nationality

Table 6.5 reveals that foreign- and joint-owned establishments are proportionally more likely to employ sizeable capital than domestic owners. Whilst Rwandan-owned establishments dominate across all groups, 12.1 percent of all foreign-owners from outside the EAC employ a large amount of

capital compared to just 0.8 percent of Rwandan-owners. For joint ventures between Rwandan and foreign owners from outside the EAC, this share leaps to 48 percent. Establishment owners from the EAC are most likely to own micro- or small-sized establishments.

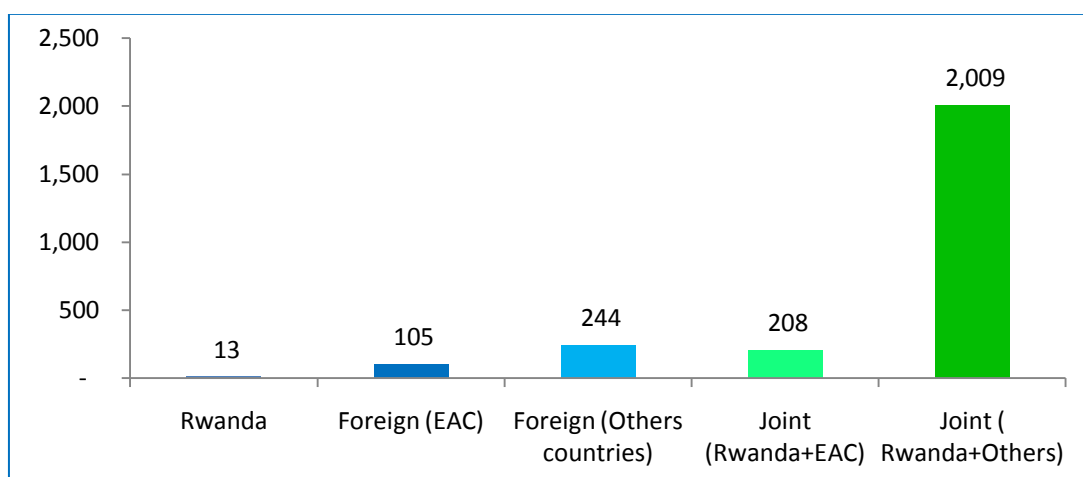
Table 6.5: Number of Establishments by Capital Employed and Owner Nationality

	Micro <RWF 0.5m	Small RWF 0.5m-	Medium RWF 15m-	Large RWF 75m+
Rwanda	90,004	27,100	1,905	927
Foreign (EAC)	251	129	30	26
Foreign (Other)	123	338	77	75
Joint (Rwanda + EAC)	1	11	6	7
Joint (Rwanda + Other)	8	25	33	60

Figure 6.5 reflects the results suggested in the above table that investors from outside of Rwanda and the EAC inject the highest level of capital, whether as fully foreign investors (average of RWF 244 million) or as joint investors (RWF 2,009 million). The extremely high level of capitalisation for the 60 joint ventures between Rwandan and foreign

investors from outside the EAC shows that they invest far in excess of the RWF 75 million needed to be categorised as 'large'. Rwandan-owned establishments own RWF 13 million on average. Joint ventures in general invest more than exclusively foreign-owned establishments.

Figure 6.5: Mean Value of Capital Employed by Owner Nationality (RWF)



6.6. Capital Employed by Labour Employed

The SME Policy categorises enterprises within the four size groups according to three conditions: net capital investments; annual turnover; and number of employees. Two of the three conditions of a group must be met in order for an enterprise to be categorised within it. Table 6.6 indicates that whilst a large number of establishments match the same category for both labour and capital

conditions, a large number have conflicting groupings. Specifically, large, capital-intensive establishments will generally employ more workers but this positive trend is not always apparent. This may be because capital directly replaces the need for labour. This explains why there are 1,095 large establishments by capital employed but only 106 large establishments by labour employed.

Table 6.6: Number of Establishments by Capital and Labour Employed

Capital:\nLabour:	Labour:			
	Micro\n1-3 employees	Small\n4-30	Medium\n31-100	Large\n101+
Micro (<RWF0.5m)	87,985	2,354	39	3
Small (RWF0.5m-)	23,544	3,888	137	25
Medium (RWF15m-)	948	1,019	73	16
Large (RWF75m+)	206	658	190	52

7. Registration

Chapter 7 looks at the number of total establishments that are registered with a list of national institutions, as well as

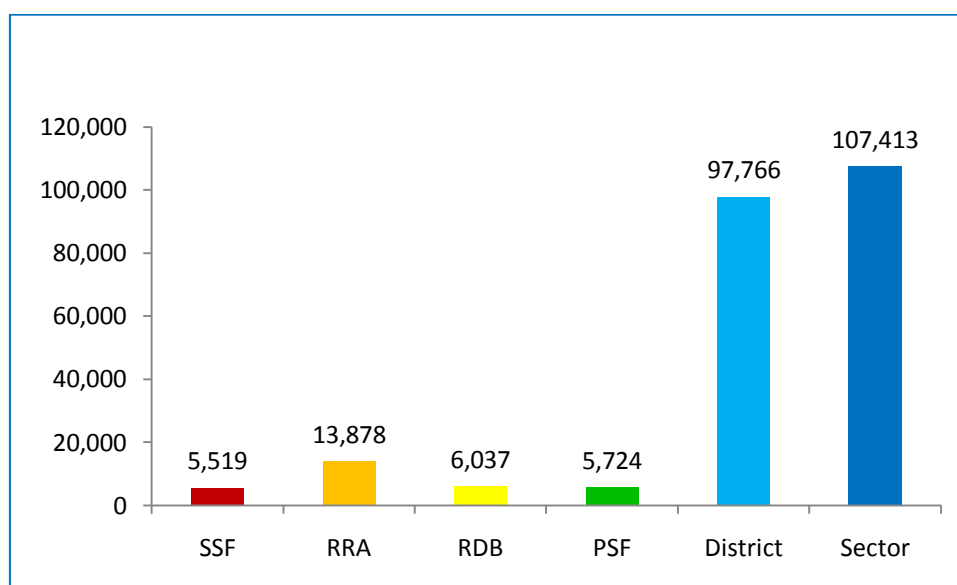
investigating the proportion of those who are registered to pay a variety of taxes and those that are registered as cooperatives.

7.1. Registration with National Institutions

Figure 7.1 presents registration levels for 6 institutions: the Social Security Fund (SSF); Rwanda Revenue Authority (RRA); Rwanda Development Board (RDB); Private Sector Federation; District authorities; and Sector authorities. It gives an insight into the

number of informal establishments that exist (see **Chapter 9**), with only 11.2 percent of firms being registered with RRA and just 4.8 percent with RDB. At the sector level however there are 107,413 registered establishments, or 87.0 percent of the total.

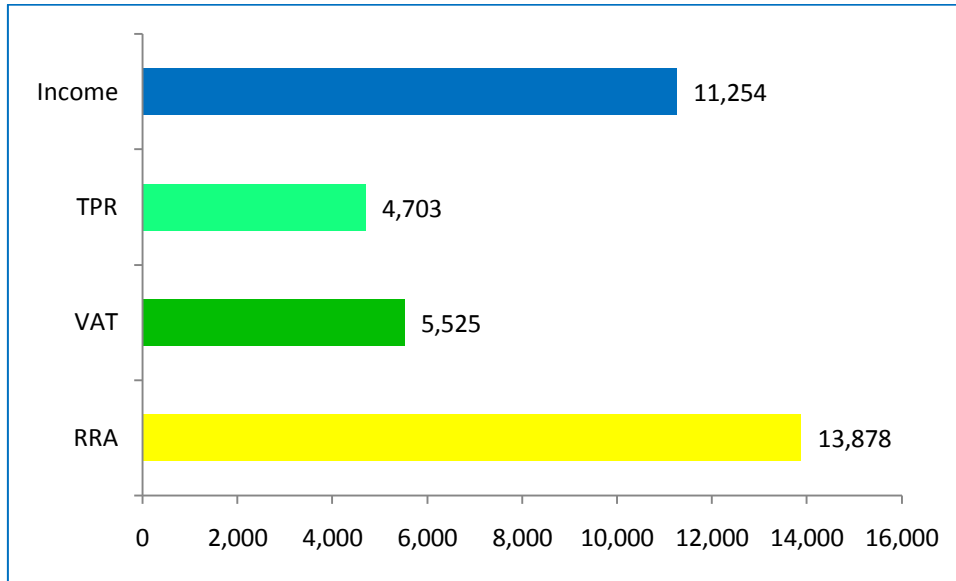
Figure 7.1: Number of Establishments Registered with National Institutions



By province, Kigali City has a substantially larger share of registered establishments for many of the institutions. Despite only contributing 23.6 percent of total establishments, Kigali City accounts for 44.2 percent of establishments registered with SSF, 43.3 percent registered with RRA, and 47.2 percent registered with RDB.

Figure 7.2 indicates that, whilst 13,878 establishments are registered with RRA, only 39.8 percent of these are registered for Value Added Taxes (VAT). Furthermore, only 33.9 percent are registered for Personal Revenue Taxes (PRT) and just 11.3 percent for income taxes.

Figure 7.2: Status of Registration at RRA by Taxation Type

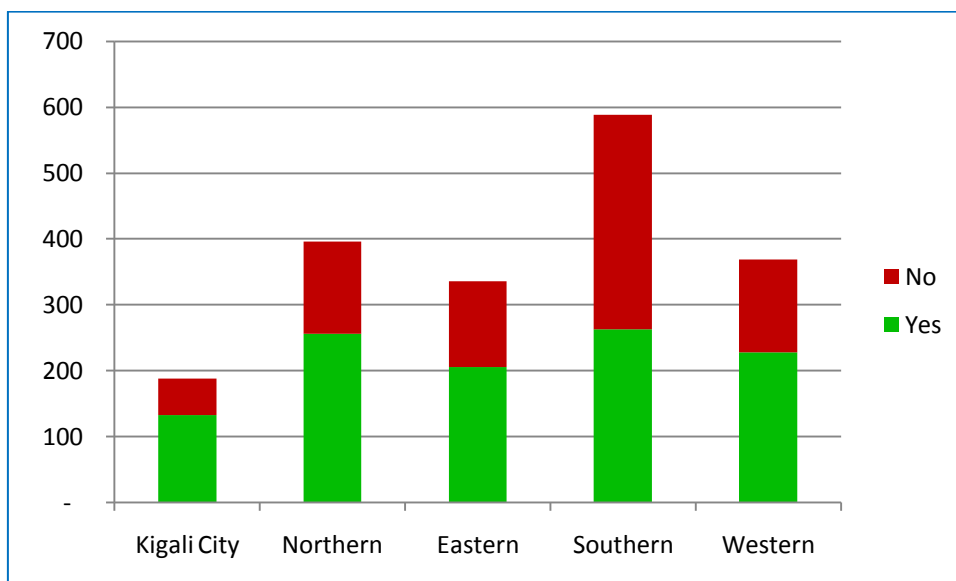


7.2. Registration with Rwanda Cooperative Agency (RCA)

The Census collects information on all establishments fitting the definition elaborated in 1.1, and this includes cooperatives. It recorded a total of 1,877 cooperatives, of which 1,084 were registered with the Rwanda Cooperative Agency (RCA). This is a total of 57.8 percent. Figure 7.3

illustrates that the largest number of cooperatives are in the Southern Province (588 cooperatives), with Kigali City having the fewest (188). Registration levels are particularly low in the Southern Province, where only 44.7 percent of recorded cooperatives are registered with RCA.

Figure 7.3: Cooperatives by Status of Registration with RCA and by Province



8. Multi-Branch Enterprises

8.1. Multi-Branch Enterprises by Province

Chapter 3.7 of this report indicated that of the 123,526 establishments in Rwanda, 315 were head offices of multi-branch enterprises, with 1,714 branches of national enterprises and 136 branches of international enterprises. When all head offices and branches are compiled there are 347 multi-branch enterprises in Rwanda. Table 8.1 shows that, including head offices, the majority of multi-branch enterprises have just one other branch, with 180 enterprises having two branches in

total. Furthermore, 193 of the 347 enterprises have their head offices in Kigali, with larger chains almost always being located in the capital city.

Outside of Kigali the Southern Province is the most popular location for the head office of a multi-branch enterprise, with 66 located there. Of these 66, 20 are located in the Nyaruguru district.

Table 8.1: Multi-Branch Enterprises by Number of Branches and Province of Head Office

	2	3 to 4	5 to 7	8 to 10	11 to 14	15+	Total
Kigali	80	54	27	8	8	16	193
Northern	19	12	1	1	0	1	34
Eastern	13	2	1	1	0	1	18
Southern	47	12	3	1	3	0	66
Western	21	11	0	2	2	0	36
Total	180	91	32	13	13	18	347

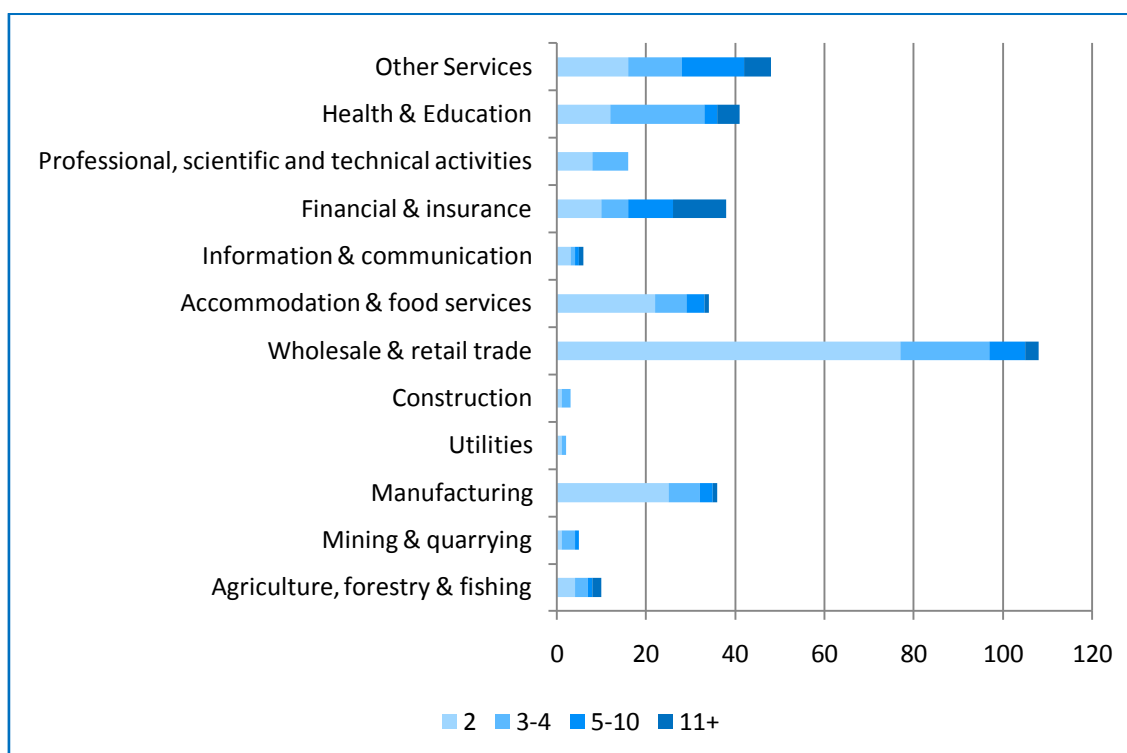
8.2. Multi-Branch Enterprises by Economic Sector

Wholesale & retail trade has the largest number of multi-branch enterprises with 108, a likely result due to the sheer volume of establishments within the sector. Three-quarters of these have only 2 branches in total however, including the head office, which is the highest proportion of any of the sectors (see Figure 8.1). The financial & insurance sector has the highest number and proportion of enterprises with more than 10 branches, with 12 enterprises fitting the criteria within

the sector. The accommodation & food services sector has a total of 34 enterprises with more than a single unit, with 22 of these having two branches in total. Only one has more than 10 branches.

The construction and utilities sectors have just 3 and 2 enterprises with branches respectively, and the most any of these have is 4 branches.

Figure 8.1: Multi-Branch Enterprises by Number of Branches and by Economic Sector



8.3. Multi-Branch Enterprises by Start Year

The largest number of multi-branch enterprises started in the last six years according to the results presented in Table 8.2, with 137 started between 2005 and 2009 and another 58 beginning operations since

2010. Older enterprises are proportionally more likely to have 8 or above branches however, with 16 such enterprises starting between 1950 and 1999 and 13 between 2000 and 2004 from a total of 43 enterprises.

Table 8.2: Multi-Branch Enterprises by Number of Branches and Start Year

Start Year	2	3 to 4	5 to 7	8 to 10	11 to 14	15+	Total
1900-1949	1	0	0	0	0	1	2
1950-1999	30	29	12	6	4	6	87
2000-2004	27	15	4	2	6	5	59
2005-2009	78	36	13	2	3	5	137
2010-2011	42	10	3	2	0	1	58

Just 2 enterprises that started before 1950 currently have more than one branch in Rwanda, with one having two branches and the other having in excess of 14 branches. The evidence suggests that whilst older

enterprises have had time to build upon prior success and increase their capital stock through expansion of activities, modern entrants have been able to set up multiple branches within just a few years in Rwanda.

9. The Informal Sector

The results of the Establishment Census 2011 indicate that a large proportion of establishments in Rwanda employ very few workers (**Chapter 5**), do not maintain regular sets of accounts (**Chapter 3.10**) and are not registered with RDB, RRA or SSF (**Chapter 7**).

As such, there is a large informal sector of economic activity within Rwanda. Arriving at reasonably accurate estimations of informal economic activity requires a concrete definition however.

9.1. Defining the Informal Sector

The 15th International Conference of Labour Statisticians (ICLS) of the International Labour Organisation (ILO) in 2000 defined informal sector enterprises on the basis of the following criteria:

- a) They are **private unincorporated enterprises**, i.e. enterprises owned by individuals or households that are not constituted as separate legal entities independently of their owners, and for which **no complete accounts** are available that would permit a financial separation of the production activities of the enterprise from the other activities of its owner(s). Private unincorporated enterprises owned and operated by individual household members or by several members of the same households, as well as unincorporated partnerships and co-operatives formed by members of different households, if they lack complete set of accounts,
- b) All or at least some of the **goods and services produced are meant for sale or barter**, with the possible inclusion in the

informal sector of households which produce domestic or personal services in employing paid domestic employees,

- c) Their **size in terms of employment is below a certain threshold** to be determined according to national circumstances (**below 5 employed persons is recommended**), and/or they are not registered under specific forms of national legislation (such as factories' or commercial acts, tax or social security laws, professional group's regulatory acts, or similar acts, laws or regulations established by national legislative bodies,
- d) They are engaged in **non-agricultural activities**.

Enterprises are defined broadly to refer to units employing hired labour or those operating with single individuals or with the help of unpaid family members. Economic activity may occur inside or outside the enterprise owner's home, at identifiable or unidentifiable premises, or without a fixed location (ILO, 2004).

9.2. The Informal Sector in Rwanda

The 2011 Establishment Census has enumerated all functional establishments in Rwanda. An establishment is defined as an enterprise or part of an enterprise with a constant site, performing one or more economic activity under one administration. The holder of the establishment could be a natural or nominal person or governmental body (**Chapter 1.3**). An enterprise, on the other hand, is either a standalone establishment or a multi-branch entity; each of such branches is considered an

establishment. An enterprise rather than establishment is the unit which has been used for the definition of the formal and informal sector in Rwanda.

The 2011 establishment Census comprises several data items that can be utilised in creating an objective and evidence-based definition of formal/informal economic sectors in Rwanda. These data items are summarised in Table 9.1 below.

Table 9.1: Possible Criteria for Definition of Informal/Formal Sector Activity based on ILO

Possible Criterion	Formal Sector	Informal Sector
Regular Operational accounts	Yes	No
Employment size	4+	1-3
Registration (RRA, RDB, RCA and SSF)	Yes	No
Production of goods/services for sale or barter in non-agricultural activities	Yes	Yes

The Establishment Census questionnaire does not specifically measure whether production of goods/services for sale or barter occurs, however the Industry Classification (ISIC-R 4) of the enterprise's main economic activity has been used as a proxy to determine whether the enterprise produces goods/services for sale or barter.

Satisfaction of the first three criteria (and assumption that the fourth is met) results in a relatively small number of formal sector establishments, with just 2,386 in total (2.1 percent of all establishments). However, the employment size criteria is very restrictive, given that there are 206 firms with a capital

stock in excess of RWF 75 million that employ less than 4 workers. The maintenance of regular operational accounts also seems a restrictive criterion at this time, but should be targeted by policy makers in ensuring more enterprises do so.

Specifically, a formal establishment must:

- (a) Have a physical address **and**
- (b) Be registered with RRA, RDB, RCA or SSF **and**
- (c) Be engaged in the production of goods/services for sale or barter in non-agricultural (except value addition) activities

Table 9.2: Number of Enterprises by Formal/Sector Categorisation

Sector	Number	Percentage
Formal	13,275	11.4
Informal	103,142	88.6
Total	116,417	-

For the given definition, there are 13,275 enterprises within Rwanda’s formal sector compared to an informal sector of 103,142 enterprises. Therefore the formal sector

encompasses 11.4 percent of total establishments in Rwanda. Table 9.3 below presents some of the key characteristics of establishments according to whether they are classified as informal or formal. Generally, formal sector establishments employ 4 times more employees than the informal sector (6.3 as opposed to 1.4), yet employ just 3 percent of all workers due to the vast number of informal establishments.

Table 9.3: Characteristics of Establishments in Formal and Informal Sector

Characteristic	Formal	Informal
Average employment size	6.3	1.4
% of establishments with 10+ workers	10.6	0.5
% of total employment	36.0	64.0
% registered in RRA	91.7	0.0
% registered at RDB	38.8	0.0
% of (RCA registered) cooperatives	5.7	0.0
% registered at Social Security Fund	27.9	0.0

9.3. Informal Sector Activity by Province

Figure 9.1: Distribution of Formal Establishments by Province

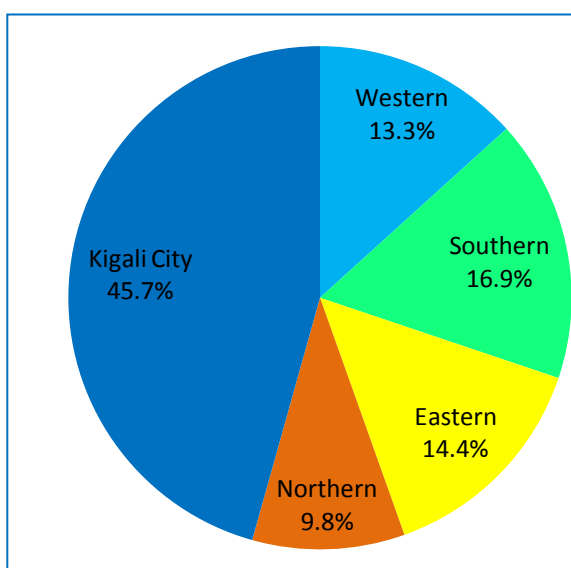


Figure 9.2: Distribution of Informal Establishments by Province

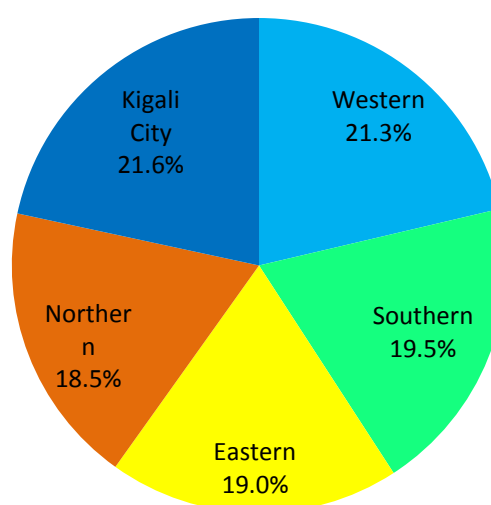


Figure 9.1 and Figure 9.2 above reveal a clear geographical divide in the distribution of formal as opposed to informal establishments within Rwanda. Whilst 45.7 percent of all formal establishments are found in Kigali City, only 21.6 percent of informal establishments are found in the capital.

Whilst the distribution of informal establishments is relatively even across all provinces, the Northern Province has far fewer formal establishments (9.8 percent of the total) in comparison to other areas, with (behind Kigali City) the Southern Province having the highest proportion at 16.9 percent.

9.4. Informal Sector Activity by Economic Sector

The informal sector is dominated by wholesale & retail trade, with the formal sector being even more so (58.0 percent in comparison to 54.7 percent). Table 9.4 shows the share of formal sector establishments in each economic sector (column 2) and the same for the informal sector (column 3). It indicates that the accommodation & food services sector forms a large proportion of both sides, however proportionately less of the formal sector (11.2 percent of all formal establishments compares to 30.6 percent of

informal ones). The construction sector, mining & quarrying the financial & insurance sector have no informal sector establishments. The health & education sector is also much more focused within the formal sector (5.9 percent of total compared to 0.4 percent of informal establishments). This is likely due to the nature of the sector, with construction as well as mining & quarrying far more capital and labour intensive than other sectors and thus more likely to be registered with a national authority.

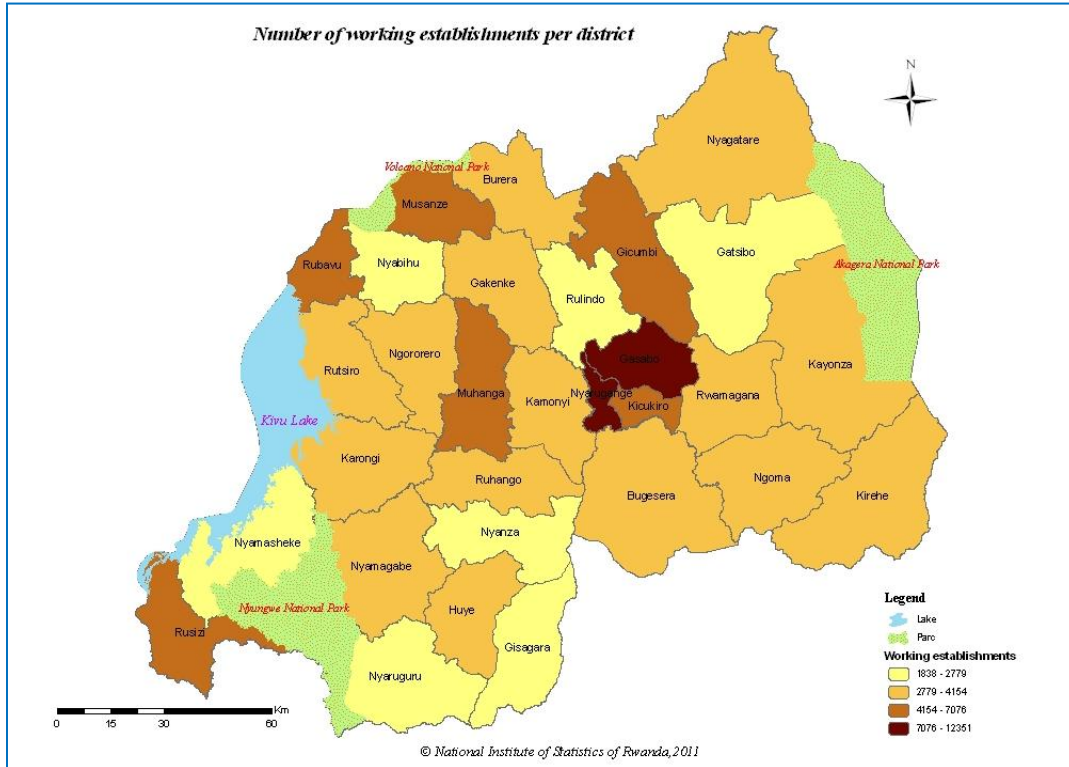
Table 9.4: Formal and Informal Sector Establishments by Economic Sector

	% of all Formal	% of all Informal
Mining & quarrying	0.2	0.0
Manufacturing	5.6	3.6
Utilities	0.5	0.3
Construction	0.7	0.0
Wholesale & retail trade	58.0	54.7
Accommodation & food services	11.2	30.6
Information & communication	1.3	0.3
Financial & insurance	4.0	0.0
Professional, scientific and technical activities	6.2	4.4
Health & Education	5.9	0.4
Other Services	6.4	5.7
Total	100.0	100.0

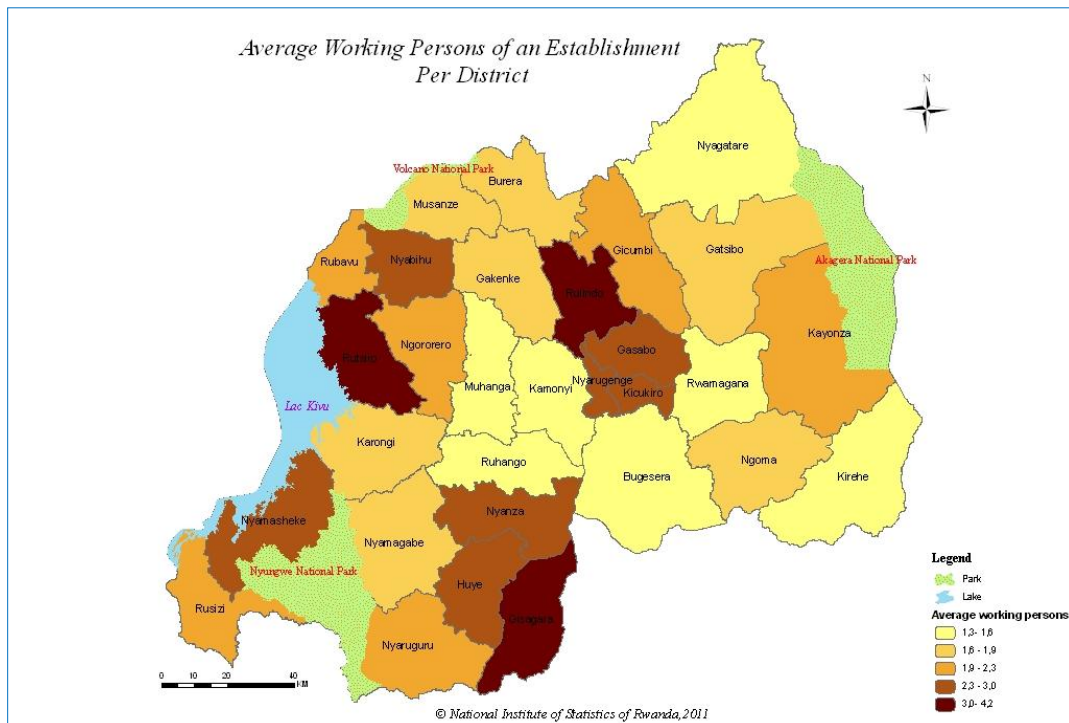
ANNEX 1

Mapped Results

Map 1: Number of Operating Establishments per District



Map 2: Average Working Persons of an Establishment per District



ANNEX 2

Census Questionnaire (English and Kinyarwanda)

REPUBULIKA Y' U RWANDA



**MINISITERI Y'ABAKOZI BA LETA N'UMURIMO
MINISITERI Y'UBUCURUZI N'INGANDA
IKIGO CY'IGIHUGU CY'IBARURISHAMIBARE
URUGAGA RW'ABA KORERA**

**IBARURA RY'IMIRIMO
N' AHO IKORERWA, 2011**

GUSABA KWEMERA IKIGANIRO NYUMA Y'IBISOBANURO

Muraho, Nitwa, ndi intumwa y'Ikigo cy'Igihugu cy'Ibarurishamibare mu Rwanda. Turi mu gikorwa cy'ubushakashatsi mu gihugu hose ku birebana n'imirimo n'aho ikorerwa. Ibizava muri ubu bushakashatsi bizafasha Leta y'u Rwanda gutegura igenamigambi rijyanye no guteza imbere ubukungu bw'Igihugu. Muri rusange ibibazo tubabaza ntibirambiranye, bitwara nibura iminota 5. Tubijeje ko ibisubizo mutanga bizaba ibanga ritagomba guhishurwa ku mpamvu iyo ariyo yose.

Niba mubinyemereye twatangira.

UBAZWA YEMEYE IKIGANIRO.....1

.UBAZWA NTIYEMEYE IKIGANIRO.....2

**IKIGO CY'IGIHUGU GISHINZWE IBARURISHAMIBARE
GIFATANIJE NA MINISITERI Y'UBUCURUZI N' INGANDA, MINISITERI Y'ABAKOZI
BA LETA N'UMURIMO N'URUGAGA RW'ABIKORERA
IBARURA RY' IMIRIMO N'AHO IKORERWA (ESTABLISHMENTS CENSUS)
2011**

Ibanga ku bisubizo by'ibibazo

Amakuru atangwa ku rutonde rw'ibibazwa azakoreshwa gusa mu bijyanye n'ibarurishamibare. Nkuko bitegenywa n'amategeko mu bijyanye n'ibarurishamibare ibitangajwe bigomba kuguma ari ibanga ritagomba guhishurwa ku mpamvu iyo ari yo yose.

1. AHO IKIGO KIBARIZWA

- 1-1. INTARA/UMUJYI WA KIGALI:
- 1-2 AKARERE.....
- 1-3 UMURENGE.....
- 1-4 AKAGALI.....
- 1-5 UMUDUGUDU.....
- 1-6 INOMERO Y'IKIGO MU MUDUGUDU.....
- 1-7 IZINA RY'IKIGO/ETABULISOMA:
- 1-8 NUMERO ZA TELEFONE Z'IKIGO:

2. UMUYOBOZI W'IKIGO

- 2.1. IZINA RY'UMUYOBOZI:
- 2.2. IGITSINA: 1- gabo 2- gore
- 2.3. NIMERO YA TELEFONE:

**3. AHO IBIKORWA BY'IKIGO
BIKORERWA:**

1. Mu isoko
2. Ahatari mu isoko

4. IMIKORERE (UBUZIMA BW'IKIGO)

1. Barakora
2. Hafunze by'agateganyo
3. Hafunze burundu

**5. MU BYICIRO BIKURIKIRA IKIGO
CYANYU KIBARIRWA HE?**

1. Umurimo ubeshaho urugo
2. Ikigo cy'abikorera (Private)
3. Ikigo cya Leta
4. Ihuriro rya Leta n'abikorera
5. Amakoperative
6. Ikigo cy'amashuri cyigenga
7. Ivuriro ryigenga
8. Imiryango idaharanira inyungu (Rwanda)
9. Imiryango mpuzamahanga

**6. UBWENEGIHUGU BWA BA NYIR'IGIKORWA NI
UBUHE?**

- 01 Abanyarwanda
- 02 Abakomoka muri EAC
- 03 Abakomoka mu bindi bihugu by'afurika
- 04 Abakomoka mu bihugu by'aziya
- 05 Abakomoka mu kindi gihugu
- 06 Abakomoka (Rwanda + EAC)
- 07 Abakomoka (Rwanda + Ahasigaye ha AFURIKA)
- 08 Abakomoka (Rwanda + AZIYA)
- 09 Abakomoka (Rwanda + ibindi bihugu)
- 10 Abafatanije bo mu bindi bihugu hatarimo u Rwanda

Niba igisubizo ari 9 jya ku kibazo cya 7, icya 8 nurangiza usimbuke ujye ku cya 14, hanyuma usoze

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7. NI MU WUHE MWAKA IBIKORWA BYANYU BYATANGIYE MU RWANDA?

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8. NI UWUHE MURIMO W'INGENZI IKIGO GIKORA ? : IKIRANGO CY'UMURIMO:

.....

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9.UBURYO BW'AMATEGEKO

9.1. Muri ibi bikurikira ikigo cyanyu kiri mu kihe cyiciro? (Hitamo igisubizo kimwe)

1. Umutungo w'umuntu umwe
2. Isosiyete ifite uburyozwe buhiniye ku migabane (LTD)
3. Isosiyete ifite uburyozwe buhiniye ku ngwate
4. Isosiyete ifite uburyozwe buhiniye ku migabane n'ingwate
5. Isosiyete ifite uburyozwe busesuye (unlimited)
6. Ubundi buryo

Niba igisubizo ari "1" baza ikibazo gikurikira(9.2). Ku bindi bisubizo, jya ku kibazo cya 10.

9.2. Ese nyiri ikigo niwe muyobozi wacyo? 1-Yego 2-Oya

Niba igisubizo ari "Oya" baza igitsina cya nyiri ikigo.

9.3 Igitsina cya nyiri ikigo 1- Gabo 2- Gore

10. Ese ikigo cyanyu cyaba cyarandikishijwe mu bigo bikurikira? (Subiza ibibazo byose)

- | | | |
|--|--------|-------|
| 1. Isanduku y'Ubwiteganyirize bw'Abakozi | 1-YEGO | 2-OYA |
| 2. Ikigo cy'Imisoro n'Amahoro (RRA) | 1-YEGO | 2-OYA |
| 3. Ikigo cy'Iterambere (RDB) | 1-YEGO | 2-OYA |
| 4. Ikigo cy'Amakoperative RCA | 1-YEGO | 2-OYA |
| 5. Akarere | 1-YEGO | 2-OYA |
| 6. Umurenge | 1-YEGO | 2-OYA |
| 7. Urugaga rw'abikorera (PSF) | 1-YEGO | 2-OYA |
| 8. Ikindi kigo cya Leta | 1-YEGO | 2-OYA |

Niba ari YEGO, kivuge

Niba Ikigo cyanditswe muri RRA (Ni ukuvuga niba igisubiza ku kibazo cya 10.2 ari "yego") Jya ku kibazo cya 11. Ku bindi bisubizo jya ku kibazo cya 12.

11. Mwishyura ubuhe bwoko bw'imisoro? (Subiza ibibazo byose)

- | | | |
|------------------------------------|---------|-------|
| 1. Umusoro ku nyongeragaciro (TVA) | 1- Yego | 2-Oya |
| 2. Umusoro ku bihembo (PRT/PAYE) | 1- Yego | 2-Oya |
| 3. Umusoro ku nyungu | 1- Yego | 2-Oya |

12. Ese ikigo cyanyu cyaba gikora ibaruramari rihoraho mu bitabo byabugenewe ry'ibikorwa ?

1- YEGO 2- OYA

13. Agaciro rusange k'igishoro gikoreshwa ubu (Muri Frw):

14. Umubare w'abakora hakurikijwe igitsina, ubwenegihugu, amashuri n'ubwoko

bw'amasezerano y'akazi

Amashuri barangije batsin ze	Abanyarwanda				Abanyamahanga				Igiteranyo			
	Abakozi bahoraho		Abakozi b'Igihe gito		Abakozi bahoraho		Abakozi b'Igihe gito		Abanyarwanda		Abanyamahanga	
	Gabo	gore	Gabo	gore	Gabo	gore	Gabo	gore	Gabo	gore	Gabo	gore
Ntaho yarangije												
Amashuri abanza												
Amashuri yisumbuye/Imyuga												
Amashuri makuru												
Igiteranyo kuri buri gitsina												
Igiteranyo ku bitsina byombi												
Igiteranyo ku bwene gihugu												

Iyo ari ku cyicaro gikuru; muri iyi mbonerahamwe huzuzwamo abakora ku cyicaro gikuru gusa

15. ICYICIRO CY'IKIGO

1. Icyicaro gikuru → **Q 16**

- 2. Ikigo gifite aho gukorera hamwe
- 3. Ishami ry'ikigo cyo mu gihugu
- 4. Ishami ry'ikigo cyo mu mahanga

} soza

16. Niba ari icyicaro gikuru

16.1 Umubare w'amashuri mu Rwanda harimo n'icyicaro gikuru

16.2 Umurimo w'ingenzi w'ikigo

.....

Ikirango cy'umurimo

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16.3 Umubare wose w'abakora mu mashuri yose yo mu Rwanda harimo n' icyicaro gikuru.....

Umukarano w'ibarura _____ Tel:.....

Itariki : ___/___/___ Umukono

Umugenzuzi _____ Tel:

Itariki : ___/___/___ Umukono

Ikigo cy'Igihugu gishinzwe ibarurishamibare kibashimiye ubufatanye bwiza mwagaragaje.

REPUBLIC OF RWANDA



MINISTRY OF PUBLIC SERVICE AND LABOUR

MINISTRY OF TRADE AND INDUSTRY

NATIONAL INSTITUTE OF STATISTICS OF RWANDA

PRIVATE SECTOR FEDERATION

ESTABLISHMENT CENSUS, 2011

Confidentiality Note

The Information you give in this questionnaire will only be used for statistical purposes. According to the Statistical law individual data are kept confidential and will not be disclosed for any reason what so ever.

1. ADDRESS/ LOCATION

1-1. PROVINCE / KIGALI CITY:

1-2 DISTRICT.....

1-3 SECTOR.....

1-4 CELL.....

1-5 VILLAGE.....

1-6 SERIAL NUMBER WITHIN THE VILLAGE.....

1-7 ESTABLISHMENT NAME:

1-8 ESTABLISHMENT PHONE NUMBER

2. MANAGER:

2.1 NAME:

2.2 Gender: 1-Male 2- Female

2.3. PHONE NUMBER:

3. WORKING PLACE

- 1. within market place
- 2. outside market place

4. WORKING STATUS

- 1. Working
- 2. Closed Temporally
- 3. Closed permanently (*End the interview*)

5. SECTOR

- 1. Household sector
- 2. Private sector
- 3. Public sector
- 4. Mixed sector
- 5. Cooperative
- 6. Private education Institution
- 7. Private health Institution
- 8. Non-profit organization (local)
- 9. International Organization

6. NATIONALITY OF OWNERS

- 01 Rwandan
- 02 Foreign (East African Community)
- 03 Foreign (Other African countries)
- 04 Foreign (Asian countries)
- 05 Foreign (Other countries)
- 06 Joint (Rwandan + East African Community)
- 07 Joint (Rwandan + Other African countries)
- 08 Joint (Rwandan + Asian countries)
- 09 Joint (Rwandan + Other countries)
- 10. Joint (Others without Rwandan)

If the answer is 9 skip to question 7,
Question 8, then skip to question 14, then
end interview

7. YEAR OF STARTING OPERATIONS IN RWANDA

8. MAJOR ECONOMIC ACTIVITY OF THE ESTABLISHMENT

ISIC CODE

.....

.....

9. LEGAL STATUS

9.1 In the following categories which corresponds to your establishment

- 1. Sole proprietorship
- 2. Limited by shares
- 3. Limited by guarantee
- 4. Limited by shares and by guarantee
- 5. Unlimited
- 6. Others

If the answer is "1" go to question 9.2; For others answers go to question 10

9.2 Is the owner of the establishment its manager? 1- YES 2- NO

If the answer is " NO" go to ask the sex of the owner

9.3 The sex of owner 1- MALE 2- FEMALE

10. IS THE ESTABLISHMENT REGISTERED IN ANY OF THE FOLLOWING INSTITUTIONS? (ANSWER ALL QUESTIONS)

1. Social Security Fund	1-YES	2-NO	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. Rwanda Revenue Authority (RRA)	1-YES	2-NO	
3. Rwanda Development Board (RDB)	1-YES	2-NO	
4. Rwanda cooperative Agency	1-YES	2-NO	
5. District	1-YES	2-NO	
6. Sector	1-YES	2-NO	
7. Private sector Federation (PSF)	1-YES	2-NO	
8. Other government agencies	1-YES	2-NO	

If YES specify.....

IF REGISTERED IN RRA (i.e. the answer to question 10.2 is "yes") proceed to question 11, otherwise skip to question 12.

11. WHAT TYPE OF TAXES DO YOU PAY? (ANSWER ALL QUESTIONS)

- 1. VAT 1- yes 2-No
- 2. PRT 1- yes 2- No
- 3. Income tax 1- yes 2- No

12. DOES THE ESTABLISHMENT MAINTAIN REGULAR OPERATIONAL ACCOUNTS?

1- YES 2- NO

13. CAPITAL EMPLOYED IN RWANDAN FRANCS:

14. Number of working person according to gender, nationality, education and contract type

Education qualification	Rwandan				Non Rwandan				Total			
	Permanent		Temporary		Permanent		Temporary		Rwandan		Non Rwandan	
	M	F	M	F	M	F	M	F	M	F	M	F
Without qualification												
Primary												
Secondary												
University												
TOTAL by sex												
Total of both sex												
Total by nationality												

If it is the head office, only persons work at the head office will be included in the table

15. ESTABLISHMENT TYPE

1. Head office

2. Single unit establishment

3. Branch of National enterprise



End of interview

16. IF HEAD OFFICE

16.1 Total Number of Branches in Rwanda including the

head office

16.2 Main Economic Activity of the Enterprise

.....

ISIC CODE

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16.3 Total Number of working persons in all branches in Rwanda including the head office.....

Enumerator name _____ Tel:.....Date : ____/____/____ Signature _____

Field Editor _____ Tel: Date : ____/____/____ Signature _____

The National Institute of Statistics of Rwanda thanks you for your cooperation



Ministry of Trade and Industry (MINICOM)
National Institute of Statistics of Rwanda (NISR)
Ministry of Public Service and Labour (MIFOTRA)
Private Sector Federation (PSF)

