



ULANDSSEKRETARIATET – DTDA
DANISH TRADE UNION DEVELOPMENT AGENCY

LABOUR MARKET PROFILE

Rwanda

2024/2025

This profile provides a comprehensive overview of the labour market situation in the country.



PREFACE

The Danish Trade Union Development Agency (DTDA) is the development organisation of the Danish trade union movement.

DTDA's work is in line with the International Labour Organization's global Decent Work Agenda (DWA), which is based on its four pillars: creating decent jobs, guaranteeing rights at work, extending social protection, and promoting social dialogue. The overall development objective is to eradicate poverty and support the development of just and democratic societies by promoting the DWA.

DTDA collaborates with trade union organisations in Africa, Asia, Eastern Europe, Latin America, and the Middle East. The programmes' immediate objective is to assist the partner organisations in becoming change agents in their own national and regional labour market context, capable of achieving tangible improvements in the national DWA conditions and the labour-related Sustainable Development Goals (SDGs).

The Labour Market Profile (LMP) provides a comprehensive overview of the structure, development, and challenges. It applies several central indicators addressing labour market aspects, including unionism, social dialogue, bi-/tri-partite mechanisms, policy development, legal reforms status' compliance with international standards, just transition, and 4IR.

National partner organisations provide annual narrative progress reports, including information on labour market developments, as part of programme implementation and monitoring.

National statistical institutions and international databanks, such as ILOSTAT and NATLEX, World Bank Open Data, the ITUC Survey of Violations of Trade Union Rights, the U.S. Department of State, and other internationally recognised labour-related global indexes, are used as sources of general (statistical) data and information.

Academia and media sources (e.g., national news) are used to research labour market issues.

The profile is regularly updated; the current version covers 2024 to 2025. Labour Market Profiles for more than 20 countries are available on DTDA's website: <https://www.ulandssekretariatet.dk/>.

DTDA prepared the Labour Market Profile in close collaboration with the Centrale des Syndicats des Travailleurs du Rwanda (CESTRAR). If you have any comments about the profile, please contact Mr Kasper Andersen (kan@dtda.dk) from DTDA.

The front page's picture is taken by Lene Frøslev, displaying a building construction site in Rwanda.

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EXECUTIVE SUMMARY

Rwanda's high but volatile economic growth is driven by an upsurge in the industry sector and one of Africa's major innovation hotspots. The Covid-19 pandemic triggered an economic rupture, bringing deep cuts in real wage growth and poverty reduction into limbo. The country is one of the most climate-impacted nations in the world, facing a challenged Just Transition agenda, which remains underdeveloped.

The labour market's legal and policy framework has improved in recent years, with better compliance with fundamental labour rights and protection of working women. The widespread informal economy tests the realisation of labour regulations, symbolising the poor coverage of social insurance and social contribution. Regional trade agreements with labour provisions have demonstrated a slow pace of regulatory reforms.

Although social dialogue functions at the national tripartite institutional level, it is weak at the enterprise bi-partite level. For example, the Collective Bargaining Agreement coverage of 5.7% is relatively low compared with neighbouring countries due to regulatory hurdles. On the other hand, the trade union membership rate grew fast with increased trade union density. Nonetheless, unionism faces regular rights violations, and the recent government application to raise the minimum number of workers required to register a union from 20 to 100 could negatively affect the upsurge in organised workers. The weak labour court system and the widespread informal economy haunt the scope of conciliation and mediation mechanisms for labour disputes. However, a shift towards an alternative dispute resolution system is in its initial phase.

Rwanda's employment structure has experienced an upsurge of employees until a rupture was triggered by Covid-19, pushing a deep dip in permanent jobs. Instead, it led to rapid employment growth in market-oriented agriculture and informal

employment. The relatively high unemployment rate accelerated, thwarting the government's job creation target. High emigration causes a brain drain but increases the inflow of remittances that supersede foreign direct investments. Trade agreements and migration are thorny themes powered by Rwanda's emerging controversial refugee schemes.

Despite Rwanda having made progress in closing gender labour gaps, including being the first country in the world with a women majority in parliament, legal hurdles affect women's work after having children, running a business, and their pensions. The nature of the labour market is changing, and the mounting number of better-educated youth is putting pressure on job creation, leading to oversupply. It is worrisome to detect that the proportion of youth not in education, employment, or training education (NEET) increased and was among the highest among the neighbouring countries.

The country has demonstrated promising school enrolment results but struggles with education quality. The country's education system has vacillated between the English or French-dominated footprints, often leading to lapses in curricular delivery. It has contributed to rising skills gaps and mismatches in the labour market. Even though the technical and vocational education and training (TVET) sector delivers improvements, including integrating technology in education and training, workers face an emerging impact of freelancing, labour outsourcing, and casualisation in the wave of the Fourth Industrial Revolution

Social protection in Rwanda has progressed during the last two decades, mainly in health safety, while coverage of other social insurance schemes remains immature. Subsidies remain central to the social protection system, covering 40% of expenses. The country has implemented initial steps to develop the first unemployment insurance scheme.

FACT SHEET

Significant developments

- Sustained economic growth has translated into improved education, health, and shifts in the employment structure.
- Progress of labour-related legal and policy frameworks, including protection workers' rights.
- Higher union density rate illustrate advancements in more organised workers.
- More women are entering the labour market at a faster pace than men.
- Large-scale urbanisation has taken place in search of jobs, and others move in search of land in the less populated Eastern Province.
- Higher involvement in the Information and Communications Technology sector.

Social dialogue

- Relatively low collective bargaining coverage rate of 5.7%.
- Uneven bargaining power among social partners at the enterprise level.
- Underdeveloped labour dispute resolution system and alternative dispute resolutions are in its initial phase.

Main challenges

- Recovering the economy in the aftermath of the Covid-19 pandemic, including accelerating formal job creation and enrolment in labour-related social insurance schemes.
- The vulnerabilities of the Rwandan working-age population are growing due to demographic shifts (nearly half the population is below age 18) that pressure the social protection system and employment.
- Climate-related shocks are changing the migration flow, making the Just Transition agenda necessary.
- Technical and Vocational Education and Training (TVET) with workforce skills to enable greater access to quality jobs, investments in roads,

energy, and information communication technologies (ICT) infrastructure.

- Rwanda's relatively high youth unemployment rate could trigger a "socio-demographic bomb".
- The informal economy sector is the main source of employment with over 84% of the estimated eight million-strong workforce.

Unionism

- Trade union density of 6.6% for employees.
- The trade union membership rate increased by 36% from 2019 to 2023.
- Violations of trade union rights rank 3 of 5+.

The trade union movement in Rwanda faces opposition from many employers with anti-union discrimination within their companies and is dealing with issues about globalisation, very high profit-driven political environments, casualisation of work, and technological advancements as the number of digital workers rises daily.

According to the trade union movement, the main challenges in the next two years include restricted union space, political interference, yellow unionisation, privatisation, digitalisation, anti-union sentiment from some employers, and the general lack of unionism awareness.

Workforce

- Working-age population was close to 8.0 million.
- Relatively high unemployment rate of 21%.
- Proportion of informal employment in non-agriculture employment of 71%.
- Child labour rate of 11%.
- Labour share of national income of 44%.
- Men and women employees' rate of 68% and 60%, respectively.
- The not education, employment, or training (NEET) rate of 29%.

COUNTRY MAP



Source: National Online Project.

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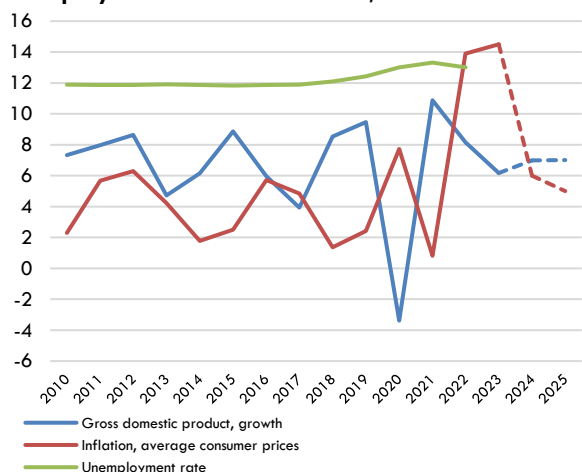
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ECONOMIC PERFORMANCE

Rwanda is a small, landlocked country seeking to transform from a low-income agriculture-based economy into a globally competitive knowledge-based economy. The country aspires to reach Middle-Income Country status by 2035 and High-Income Country status by 2050. The government launched the National Strategies for Transformation (NST1) 2017-2024, aiming to create 1.5 million productive jobs for this period.

The country has demonstrated relatively high but volatile economic growth during the last decade. Extreme ruptures entered the scene at the beginning of the 2020s: a wave from the global Covid-19 pandemic plummeted economic growth by 13 percentage points from 2019 to 2020, triggering an upsurge in unemployment and inflation in consumer prices. The growth rebounded swiftly, though, peaking at 11% in 2021. It dropped afterwards but hovered above 6%. Consumer price inflation skyrocketed in 2022 due to pandemic scars, headwinds from the war in Ukraine, and climate-related shocks. The inflation reached its record-high rate of 15% in 2023, hollowing out workers' income purchasing power (see Figure 1 and Appendix Table 5).

Figure 1: Gross domestic product, inflation, and unemployment trends in Rwanda, 2010-2025



Source: International Monetary Fund, World Economic Outlook Database, October 2023; The World Bank, World Development Indicators.

The public-sector-led development model has supported Rwanda's high economic growth, fueled

by significant public investments. This model has brought hikes in government expenditure and debt.

The scope of the economic transformation in Rwanda is reflected in a slow upturn in the industry sector, but its value-added remains significantly lower than the sub-Saharan African average. The agricultural sector, with a steady flow, is hovering above the regional average. The service sector experienced a slow downturn, which is on par with the regional average.

Foreign direct investment (FDI) has been high compared to regional peers but with a slump at the beginning of the 2020s. The country has benefitted somewhat from well-functioning business regulations: The Doing Business Index ranked Rwanda 38 out of 190 countries (1st is best) (see more details in Appendix Table 12). The informal economy is widespread, creating loopholes in labour and business regulations and obstacles to good governance (see more in the Informal Economy sub-section).

Strong economic growth accompanied by improvements in living standards, structural employment shifts, subsidies, and other transfers have trickled down into poverty reduction: The extreme poverty rate dropped from 75% in 2000 to 52% in 2016. At the beginning of the 2020s, the poverty reduction stalled due to the Covid-19 pandemic's economic and labour impact, high inflation stymieing income value, and weather-related shocks with negative implications on business. The Economic Recovery Plan was established to support the recovery of businesses severely affected by Covid-19 so that they can quickly resume operations and safeguard jobs, including food distribution, subsidised agricultural inputs, cash transfers to casual workers, ensuring poor households access to basic health and education, and tax deferral and relief measures to support formal and informal sectors.

Just Transition

Rwanda is one of the most climate-impacted nations in the world: The Notre Dame Global Adaptation

Initiative (ND-GAIN), which calculates a country's vulnerability to climate change alongside its readiness to improve resilience, ranked Rwanda as the 10th most vulnerable country to climate change. Average temperatures are rising, and heavy rainfall, flooding, and landslides are frequent.

The country has been an early frontrunner in the interlinkage of economics and climate change. It established an award-winning National Fund for Environment in 2012, the largest of its kind in Africa. Today, several institutions, central laws, and consistent climate policy development support the climate governance framework, including the National Strategy for Transformation 2017-2024 and the Green Growth and Climate Resilience Strategy (see more in Appendix Table 6). These strategies aim to guide policy and planning, mainstreaming climate change preparedness and mitigation into all sectors of the economy. Policymakers further incorporated climate change considerations into the national budget planning processes. However, the country is still missing comprehensive climate mitigation legislation.

The costs of humanitarian response and reconstruction following the recent floods are projected to generate spending needs, scaling up public and private climate finances. Rwanda initiated the Resilience and Sustainability Facility (RSF) programme in December 2022, the first for an African country.¹ This programme aims to build resilience to climate change by improving the transparency and accountability in the planning, execution, reporting, and oversight of budget resources dedicated to addressing climate change.

Stakeholder consultation occurs regularly in policy development and includes trade unions. Consultations often suffer, though, from a lack of engagement with local stakeholders on decision-making matters or monitoring of project implementation. Rwanda does not have a climate-focused inter-ministerial coordination body with a mandate to lead and coordinate climate policy and action. Also, the country does not have a formal body or policy to ensure a Just Transition agenda, just as the knowledge basis to support advocacy for

the transition is limited. On the other hand, the trade union movement has developed a just transition strategy to sensitise their members and lobby the decision makers to ensure a just transition process for workers.

The high vulnerability of agriculture to climate change shocks could devastate work and food security. This situation might hit female-headed households harder, which have a higher rate of poverty and are more dependent on agricultural work as opposed to more diverse income sources. This situation raised attention on women's labour force participation needs support to affordable and quality childcare; improving women's labour productivity via vocational training; and increasing access to adaptative social protection programmes in improving individual resilience against climate shocks.²

Rwanda was the first African country to submit its revised climate action plan (NDC) in May 2020. It planned to achieve a 100% electrification rate by 2024, but challenges have abounded, resulting in many households still unlit. It prioritises a revolution in clean cooking, not to mention gaining a focus on tracking and indicators of greenhouse gas (GHG) emissions.

Enhancing climate-related education has long been a policy focus in Rwanda. Consideration of climate change has been incorporated into Rwanda's basic K-12 curriculum, and tertiary-level programmes are being developed.

Special Economic Zones

After a slow upstart of initial export processing zone initiatives in Rwanda in 2008, the Special Economic Zones (SEZ) regulatory framework was developed into the SEZ policy in 2010 and the SEZ Law in 2011. This law spells out all the guidelines for SEZs to operate, the structures and the roles of key players. The government revised the SEZ law in 2018 to streamline regulations and generate more involvement from the private sector.

The government launched the Special Economic Zones programme in Kigali (KSEZ) in 2012, developed in two phases. Phase I is fully occupied, attracting investment in all sectors, specifically agribusiness, information and communications technologies, trade, and logistics. Phase II has exceeded 70% coverage so far. Infrastructure development is underway, mainly improving access road construction, electricity roll-out, and water systems. Nine other SEZs are in the pipeline by the government, including the development of Kigali Innovation City (KIC).

KSEZ is operated as a public-private partnership in cooperation with Prime Economic Zones (PEZ), a Rwandan firm designated as the operator of KSEZ. Partners with academic institutions are promoting the creation of new pools of high-skill talents; for instance, Carnegie Mellon University's first campus on the African continent was located within the KSEZ. Other universities inside KSEZ include the University of Rwanda and Africa Leadership University. Two notable tenants within KSEZ that have directly benefited from this ecosystem are Mara Phones, a company specialising in designing and producing affordable smartphones for African markets, and Volkswagen, the German automobile manufacturer. These factors allow the country to test the newest technologies.

Among African countries, Rwanda had the highest growth rate of trading goods from SEZs.³ Part of this was the favourable investment climate, as indicated by the Doing Business Index's high rankings (revisit Appendix Table 12). A study found that working conditions improved in Rwanda's SEZ.⁴ It is worth mentioning that most of the FDI in KSEZ comes from businesses from Africa, especially South Africa, Morocco, and Kenya.

The number of KSEZ employees rose from 4,000 in 2013 to about 15,000 in 2023, equalling approximately 0.6% of employees.⁵ Workers regularly walk long distances through the park to reach their employers' premises. A bus service system is being planned and shall be piloted by 2024. There is scarce information available on the

practice of rights of organising workers and collective bargaining in KSEZ.

Two trade unions, STRIGEP and STECOMA, are registered in the manufacturing and construction sectors in KSEZ. The trade union movement has engaged with the Private Sector Federation to conduct joint organising and recruitment initiatives in KSEZ from 2024 onwards. The zone shall have completed its construction phases, allowing more workers and companies to operate from the zone.

LABOUR LEGISLATION

Rwanda's labour market legal framework is covered by nine central laws (see Appendix Table 7). At the policy level, the latest revised five-year National Employment Policy (NEP) was launched in 2019, aiming to create new jobs and enhance the productivity of existing jobs through skilling and promoting entrepreneurship.⁶ The Second Economic Development and Poverty Reduction Strategy (EDPRS2) targets annually creating at least 200,000 off-farm jobs. The status of central labour-related laws is summarised below.

Constitution

Rwanda's constitution of 2003, the latest amended in 2023, recognises the freedom of association, free choice of employment, equal pay for equal work, basic trade union and employers' organisation rights, and the right to strike as fundamental human rights. The constitution also set a 30% quota for women in elected positions, and the political parties adopted their voluntary quotas for women candidates on party lists. The trade union movement had lobbied for all the above improvements, strengthening the foundation for the decent work agenda. Domestication of the now formalised labour rights is therefore high on the trade union agenda in the coming years.

Labour Code

Law No. 13/2009 regulates labour in Rwanda, amended in 2018 and 2023. This process has been linked with bringing the legal framework more in line with the East African Community (EAC) framework (see more in the Trade Agreements sub-

section). Although the law provides for the right to form and join unions and employer associations, bargain collectively, and strike, it restricts these rights (see more in the Observations on Labour Legislation sub-section).

Two ministerial orders from 2022 and 2023, respectively, define the implementation of the Labour Code and specify guidelines for labour inspections, providing the modalities of electing employee representatives, list acts considered gross misconduct, determine the core elements of a written employment contract, define essential services that may not be interrupted by a strike or lockout, health and safety at work, workers' and employers' organisations, child labour, employment of a foreigner and on vacation. The reforms include that the time frame to process the application for the registration of a trade union or an employers' organisation has been reduced from 90 days to 60 days, as well as a trade union must have at least 100 members working in the sector of activity, up from previous 20 members (see more in the Trade Union sub-section).

General Statute Governing Public Servants Code

General Statutes for Public Service Law of 2013, amended in 2020, establishes the general statute governing public servants and working relations between a public servant and the State as the employer. These regulations cover maternity leave, sick leave, prescription of salary and allowances, health and safety at the workplace, and retirement benefits, among others. The law further establishes that a public servant may establish or join a trade union of choice in accordance with the relevant legislation.

Governing the Organisation of Pension Schemes Code

Law Governing the Organisation of Pension Schemes of 2015 directs the organisation of pension schemes. The Board of Directors of a public entity is in charge of pension schemes. Persons subject to a mandatory pension scheme are mainly all employees, employees governed by the General Statutes for Public Service and civil

servants governed by special statutes and political appointees.⁷

Observations on Labour Legislation

The International Trade Union Confederation (ITUC) listed several specific observations of the labour-related legal framework in Rwanda concerning the international standards in the right to freedom of association, the right to collective bargaining, and the right to strike (see details in Appendix Table 10).⁸

Reports found that the government does not enforce applicable laws effectively.⁹ Although the Labour Code protects the right to unionise, restrictions bring flaws; for instance, it does not automatically reinstate workers fired for union activity. The right to collective bargaining generally is not respected by the government or employers, and put pressure on employees to settle grievances individually rather than collectively. In addition, a union must include a majority of workers in the enterprise.

It is important to realise that the Labour Code applies to all employees but sidelines workers operating in the informal economy, representing about 84% of employment. These circumstances bring loopholes in labour and business regulations, often due to a lack of awareness or incentives.

Ratified ILO Conventions

The International Labour Organization's (ILO) conventions enumerate international principles and rights at work. Rwanda has ratified 35 conventions. Appendix Table 8 shows that ten of ten fundamental conventions and three of four Governance Conventions are approved, and eight of 176 Technical Conventions are Up-To-Date and actively promoted. The latest ratified convention was the Violence and Harassment Convention (C190) in 2023, the first international labour standard to address violence and harassment of work.

The independent ILO body, the Committee of Experts on the Application of Conventions and Recommendations (CEACR), listed observations and

direct requests about the Freedom of Association and Protection of the Right to Organise Convention (C087): The CEACR noted with regret that Law No. 017/2020, establishing the General Statute governing public servants, still does not include provisions recognising the right of public servants to strike. The reduced time frame to process the application for the registration of a trade union or an employers' organisation via the Ministerial Order No. 02/MIFOTRA/22 of August 2022, the committee considers that this still represents a lengthy registration procedure, which may constitute a serious obstacle to the establishment of organisations without prior authorisation. CEACR also had observations and direct requests about the Right to Organise and Collective Bargaining Convention (C098); for instance, all acts of anti-union discrimination should be adequately prevented through dissuasive sanctions and adequate compensation. CEACR noted with regret that the Labour Code of 2018 did not contain specific provisions prohibiting and punishing acts of anti-union discrimination and interference beyond the dismissal of trade union representatives and was less protective than the repealed legislation.

The Sustainable Development Goals indicator 8.8.2 measures compliance with fundamental labour rights. Based on ILO textual sources and national legislation, Rwanda scoring improved from a peak of 2.3 in 2018 down to 1.3 since 2019 (0 out of 10; 0 is best), landing better than the sub-Saharan Africa average (see details in Table 1).

Table 1: Level of national compliance with labour rights among Rwanda and neighbouring countries, 2021

Country	Value
Burundi	2.7
Congo (Dem. Rep.)	3.2
Rwanda	1.3
Tanzania	1.4
Uganda	1.3
Sub-Saharan Africa	2.0

Note: The value ranges from 0 to 10, with 0 being the best possible score (indicating higher levels of compliance with freedom of association and collective bargaining (FACB) rights) and 10 the worst (indicating lower levels of compliance with FACB rights based on ILO textual sources and national legislation).

Sources: International Labour Organization, Key Indicators of the Labour Market (KILM).

Trade Agreements

Rwanda is a World Trade Organisation (WTO) member and is linked with four regional trade agreements (RTAs) with labour provisions: the East African Community (EAC), the Common Market for Eastern and Southern Africa (COMESA), the Economic Community of the Great Lakes (ECGL), and the Economic Community of Central African States (ECCAS).

African economies further initiated an ambitious regional integration programme in the form of the African Continental Free Trade Area (AfCFTA), which aims to promote trade liberalisation in Africa. It has relations with the African Union's Agenda 2063, a blueprint plan for transforming Africa into the global powerhouse of the future. Rwanda hosted the signing ceremony for the AfCFTA agreement in 2018 and was one of the first countries to ratify the deal. However, it has not brought more trade due to delays in negotiations. The Tunis declaration from September 2022 by trade unions from 39 African countries stresses the inclusion of labour provisions in the AfCFTA agreement to ensure compliance with international labour standards and the decent work agenda.¹⁰

The EAC brings together Burundi, Democratic Republic of Congo, Kenya, Rwanda, Tanzania, South Sudan, and Uganda to establish a common market with free movement for workers, goods, services, and capital. Freedom of association and collective bargaining are protected in the common market. A slow pace of regulatory reform, lack of harmonisation, non-tariff barriers, and bureaucratic inefficiencies have challenged the EAC's aspirations. The free labour movement has been a concern in some member countries due to differences in productivity and educational levels. For example, in Rwanda, English teachers from Uganda are highly valued labour, and many have found families and wish to stay in Rwanda. If they remain, they are typically cut off from the pensions to which they are entitled through their Ugandan savings. On the positive side, steps to protect migrant workers are in progress; for instance, ensuring that social protection follows along when citizens in one member country/partner state move to another for

work, fast-tracking the migration policy and involving stakeholders through social dialogue. Rwanda introduced legal changes in recent years to align it more with EAC's framework.

The EAC finalised negotiations for an Economic Partnership Agreement (EPA) with the European Union. So far, only Kenya and Rwanda signed the EPA in September 2016, and Kenya ratified it. However, the EPA could not be applied as it required signature and ratification by all the EAC countries. This stalled situation has opened for bilateral implementation of the EU-EAC EPA, with the addition of trade and sustainable development provisions. Rwanda has not reached a political conclusion of their negotiations for an EPA. Besides, the country is already a beneficiary of the EU's Generalized System of Preferences (GSP) in the Everything But Arms (EBA) scheme, where all imports to the EU from the LDCs are duty-free and quota-free except for arms and ammunition.

The 2000 Cotonou Agreement set the framework for European Union (EU) relations with African, Caribbean, and Pacific (ACP) countries. It is the most comprehensive partnership agreement between developing countries and the EU, covering the EU's relations with 79 countries, including 47 African. The deal reaffirms commitment to ILO's fundamental conventions and collaboration on various labour and social issues. Negotiation on a 'post-Cotonou' agreement was initiated in 2018, facing increased migration flows, climate change, and terrorism. Preparing for the new deal was slow due to the Covid-19 pandemic and difficulties in reaching an agreement on sensitive issues, such as migration management as well as sexual and reproductive health. A new partnership agreement was finally achieved in July 2023. It still needs to be signed by the parties, and further legal procedures will be required before it can be provisionally applied or entered into force. The deal covers priority areas such as democracy and human rights, economic growth and investment, climate change, poverty eradication, peace and security, migration, and mobility.

Migration and the return of irregular migrants have been a thorny theme. European Parliament's position is that the proposed management of legal migration should be more ambitious to support the decision to attribute importance to the fight against illegal migration. As a group, ACP states have not been willing to include migration in the new agreement and insist that returns must occur on a "voluntary basis". However, Rwanda's immigration policy, whereby people whom Denmark and Britain identify as illegal immigrants or asylum seekers, can be relocated to Rwanda for processing, asylum, and resettlement purposes. This asylum plan is still in legal limbo in Denmark and Britain (see more in the Migration sub-section).

Rwanda's trade with the United States has increased during the last decade. Except for apparel products, Rwanda is eligible for trade preferences under the African Growth and Opportunity Act (AGOA). It also qualifies for special tariff treatment under the Generalised System of Preferences (GSP). An annual AGOA eligibility review process examines efforts to implement and enforce internationally recognised worker rights. It is only recently that Rwanda benefitted from the AGOA and the GSP, covering a meagre export volume of US\$2.1 million and US\$1.8 million in 2022, respectively.¹¹

Rwanda also has other active bilateral investment treaties, and several treaties have yet to enter into force.

SOCIAL PARTNERS

Social partners are central to promoting the realisation of core labour rights and social justice for workers by protecting freedom of association and collective bargaining. These organisations are usually represented as the government, trade unions, and employers' organisations.

Government

The Ministry of Public Service and Labour (MIFOTRA) aims to institutionalise efficiency and effectiveness in public service administration and

enhance professionalism and ethics that enable these services to improve the Rwandan population's lives. MIFOTRA further focuses on a conducive environment for creating decent jobs and equipping the workforce with skills to increase productivity and competitiveness for sustainable development. The Director of Labour Administration heads the Labour Administration organ and is responsible for formulating and monitoring national policy and employment-related laws. In addition, the labour inspectorate plays a central role in monitoring compliance, implementing orders, following up upon collective agreements, and giving information and advice relating to labour laws and social security.

Other ministries like the Ministry of Education (MINEDUC), the Ministry of Health (MoH), the Ministry of Gender and Family Promotion (MIGEPROF), the Ministry of Agriculture (MINAGRI), and the Ministry of Local Government (MINALOC) are also involved in labour-related and social protection issues.

The Workforce Development Authority (WDA) is an institution that provides a strategic response to Rwanda's skills development across all economic sectors, focusing on enhancing the country's competitiveness and employability. This institution supports upgrading skills to the labour market via Technical and Vocational Education Training (TVET) (see more in the Vocational Training sub-section). Over the years, WDA implemented the National Employment Programme (NEP), which includes skills development for informal workers. The latest revised five-year NEP (2019-2023) focuses on employment integrated into all policy frameworks, including macroeconomic and sectorial policies..

Trade Unions

The Trade Union Centre of Workers of Rwanda (CESTRAR) is a national trade union centre, founded in 1985. Two other federations have emerged, representing the Labour and Worker's Brotherhood Congress (COTRAF) and the National Council of Free Trade Union Organizations in Rwanda (COSYLI).

In 2023, Rwanda's trade union movement affiliated around 300,000 members. CESTRAR has the largest share of 75%, COTRAF represents 14%, and COSYLI is at 11% (see more details in Table 2 and Appendix Table 9). Trade union federations are officially independent of the government, but some maintained links with the government.

Table 2: Status of trade union federations in Rwanda, 2023

Indicators	Values
Members of trade unions	299, 973
Trade union density (employment)	6.9%
Trade union density (employees)	6.6% *
Trade unions women membership share	40%
Share of affiliated workers from the informal economy (CESTRAR)	41%

* Excluding organised workers from the informal economy.

Source: CESTRAR and DTDA research; own calculations of trade union density based on ILO employment projections.

The trade union membership rate almost doubled (188%) during the last decade, superseding the employment growth and grasping a trade union density of total employment at 6.9% in 2023. This hike was driven not only by workers from employees but also by organised workers from the informal economy. Data suggest that the trade union membership rate increased 36% from 2019 to 2023 despite the economic rupture caused by the Covid-19 pandemic. Rwanda's trade union density rate is at the medium level compared with the neighbouring countries.

About 40% of trade union affiliated members are women. According to CESTRAR's constitution, committees for women and youth are established, and the chair of each committee is entitled to a seat on the National Council of Trade Unions. These committees are a component of every affiliated organisation. Data from CESTRAR show that in leadership positions and decision-making bodies there are 43% women and 17% below 30 years (men/women).

The share of organised workers from the informal economy represented around two out of five (41%) in 2023, which is a step ahead to enter formal trade

union structures. This group is not paying similar dues but is linked as affiliated members.

Rwandan trade unions face several challenges. For example, they score poorly regarding transparency around the processes of carrying out the Sustainable Development Goals (SDGs) and the involvement of trade unions through social dialogue.¹² Other factors are i) employer organisations are less committed to social dialogue than the labour movement; ii) the government is aware of the decent work agenda, but it is hesitant to allow trade unions to get formal influence; iii) low incentives for workers to pay trade union membership dues; iv) high casualisation is accepted and almost encouraged by employers and government actors; v) the new Ministerial Order n° 02/MIFOTRA/23 of 01/08/2023 increased that a trade union must have at least 100 members working in the sector of activity up from 20 members, challenging the trade unions density.

Reports found that national elections for trade union representatives occurred regularly depending on the trade union. In workplaces with multiple unions or employee organisations, all the available organisations must work together to conduct collective bargaining. If they disagree, the union with the largest number of members automatically assumes the authority to negotiate on behalf of all the workers collectively.¹³

Employers' Organisations

Employers – those working on their account or with one or a few partners, hold the type of jobs defined as “self-employment jobs” – represent just 0.1% of the total employment in Rwanda, pointedly lower than the sub-Saharan Africa average of 2.3%. Besides, this segment is dominated by men (see more in the Gender sub-section).¹⁴

The Global Competitiveness Index provides Rwandan employers' views on various aspects, including labour market efficiency, based on surveys among employers in the country. This latter efficiency landed at the high-medium level, ranking 45 of 141 countries (1st is the best) (see more in

Appendix Table 11). Based on the list of 35 risks in the Global Risks Report 2023, identified by the Rwandan Executive Opinion Survey, the five risks that are the most likely to pose the biggest threat to the country in the next two years are rapid and/or sustained inflation, cost-of-living crisis, severe commodity price shocks, natural disasters and extreme weather events, and interstate conflict.¹⁵

The Private Sector Federation (PSF) is the main umbrella organisation for employers in Rwanda, encompassing ten chambers for different sectors.¹⁶ Their membership reaches around 6,000 companies. PSF was initiated more as a business organisation than an employers' organisation, focusing more on private sector interests than broader industrial relations issues. PSF is present in several tripartite forums, and its willingness to engage in bi- and tripartite negotiations is rising, albeit relatively low.

PSF is a member of the East African Employers Organization (EAEO) and of the International Organisation of Employers (IOE).

SOCIAL DIALOGUE

Rwanda has experienced progress in social dialogue on the tripartite mechanism and the bipartite relationships during the last two decades. In 2018, the country ratified ILO's central social dialogue conventions (C144 and C154) (revisit Appendix Table 8). Generally, legislation prescribes a general duty to bargain in good faith, not in specific obligations; for instance, no provision found in legislation regarding the scope of collective bargaining nor representativity requirements for an employer or employers' organisation to negotiate a collective agreement.¹⁷ There are neither provision in legislation concerning types of union security clauses or agreements permitted, nor a binding effect of collective agreements on signatory parties.¹⁸

Social dialogue at the national level is present in the tripartite National Labour Council (NLC) that follows the labour market status (see more in the

Central Tripartite Institutions sub-section). Also, a tripartite steering committee on social dialogue and collective bargaining has been revitalised, functioning as a forum for consultations between the social partners. This committee is part of national structures, spearheading labour related meetings during the national employment forum, held four times a year on interprovincial rotational basis.

Social dialogue likewise occurs in bipartite relationships, usually represented by Collective Bargaining Agreements (CBAs) and Memorandums of Understanding (MoUs). Some improvements include establishing more workplace negotiation committees as mandatory, subject to a minimum number of enterprise workers. In cases where the workplace cooperation forums coexist with unions, it is common for workers to stand for election to the workplace committee or works council on a union ticket.¹⁹ Employers have assessed relatively effective cooperation in labour-employer relations (revisit Appendix Table 11).

Although the right to collective bargaining is recognised by the Labour Code and broadly protects the social dialogue, there are hurdles; for example, public servants are not allowed to bargain collectively, and no labour union has established CBA with the government (revisit Appendix Table 10).

Based on the latest available national labour force survey data, the collective bargaining coverage rate reached just 5.7% of employees in 2019, significantly lower than neighbouring countries like Uganda at 30%.²⁰

The low CBA coverage mirrors the fact that the efficiency of social dialogue remains contested. The government or employers have not respected the right to collective bargaining. For instance, many private-sector businesses do not allow collective bargaining negotiations and the law does not compel them to do so. The government controls collective bargaining with cooperatives and mandatory arbitration, as well as intervening in the settlement of collective bargaining disputes.²¹

Another central issue of CBAs' meagre coverage is the widespread informal economy that sidelines collective bargaining. It is often due to a lack of awareness or incentives among stakeholders; for instance, workers and employers often lack negotiation techniques/skills experiences. On the positive side, organised workers from the informal economy have taken initial steps ahead, signing a novel CBA with the City of Kigali to empower the informal workers. Other bipartite initiatives emerged, signing a MoU with the Workforce Development Authority (WDA) on the implementation of a partnership that leads to skills development, certification, and categorisation of informal workers in the construction and mining sectors, carpentry, and art crafts.²²

Central tripartite institutions

Several tripartite institutions are functioning in Rwanda but with relatively short track records. The leading institution's status is summarised below.

National Labour Council

The National Labour Council (NLC) is responsible for giving advice on policies and laws regulating labour, e.g., the minimum wage, occupational safety and health, collective bargaining, and temporary employment. The institution comprises fifteen members with five representatives from the government, organised workers and employers. The council can also establish committees to act as arbitrators and settle collective labour disputes when the parties cannot settle.

In practice, the NLC plays a relatively limited role in labour relations and policymaking, lacking autonomy and resources. The council has struggled to effectively carry out its mediation and advisory mandates, as well as not yet emerged as an influential or autonomous actor in labor relations

Other bi/tripartite organs

- Economic and Social Development Council.
- Rwanda Social Security Board.
- Rwanda Health Insurance for Public Sector Workers.
- Teacher Service Commission.

- District Council.
- Rwanda Public-Private Dialogue (RPPD).
- National Commission Against HIV/Aids.
- Rwanda NGO's Forum on HIV/AIDS.
- Employment Stakeholders' Forum.

The abovementioned bodies meet less frequently than envisaged by law and are often undersourced.

Labour dispute resolution system

Rwanda's Labour Code sets conciliation and mediation mechanisms for disputes connected with industrial relations. Handling labour disputes is initially via social dialogue and conflict resolution on workplace committees. These establishments are in companies with at least 20 workers. Mediation sessions and negotiation committees have been set in some formal workplaces to promote collective negotiations. If it does not succeed, local and national labour inspectors mediate labour disputes are inserted before they could end to a court, which may refuse to hear the case. No functioning specific labour courts or other formal mechanisms exist to resolve anti-union discrimination complaints. Labour disputes cases could take years to be settled through the civil courts. Legislation applies to all employees with contracts, sidelining the dominating widespread informal employment. Regulations give the government authority to intervene to settle collective labour disputes. In practice, many Rwandan employers and workers lack information about dispute settlement procedures.

The country attempts to shift away from the traditional court system towards an alternative dispute resolution (ADR) system to decrease the case backlog of courts. The Ministry of Justice launched the Alternative Dispute Resolution Policy (ADRP) in 2022. This system focuses on becoming more flexible and creative to make the best use of available resources in a context most conducive to constructive outcomes. The policy promotes a Communication and Awareness Plan to enhance awareness of dispute resolution mechanisms in workplaces, business, labour, administrative and other civil matters. The ADRP recommends creating Pre-Filing Mediation for labour. It is still novel and

too early to assess the ADR system's results on the labour market.²³

There have been no registered strikes nor reports of unlawful strikes in recent years. In some cases, the government acted to resolve labour disputes in workers' favour to avert the threat of a strike.²⁴ It is worth mentioning that in Kigali, government authorities have tried implementing a cashless and GPS-enabled system for motorcycle taxis. This led to several hundreds of commercial motorcyclists (boda-boda) protesting the newly introduced electronic taxi meter. With the metering system, the drivers would receive less than 90% of the paid fare and be forced to buy insurance. This pushed the cost of travelling higher, yet motorcyclists claimed that the deducted money was neither fully accounted for nor were there any consultations before introducing the meter. The practice of motorcycle meter has gradually become dormant following the protest. The initiative demonstrates that formalising workers from the informal economy, which often lives from hand-to-mouth, can be difficult unless the workers get immediate benefits (see more in the Informal Economy sub-section).

TRADE UNION RIGHTS VIOLATIONS

The Global Rights Index ranked Rwanda as 3 out of 5+ (5+ is worst) in 2023, categorizing "regular violations of rights", i.e., governments and/or companies often interfere in collective labour rights or fail to guarantee important aspects fully of these rights. There are deficiencies in legislation and practices, making frequent violations possible.²⁵

The International Trade Union Confederation registered no cases of regular violations of labour rights in Rwanda in recent years, nor has ILO any active Freedom of Association cases.

Reports argued that freedom of association and the right to collective bargaining were often not respected in practice. Trade union leaders stated that the government interfered in the elections and pressured some candidates not to run, and employers in small companies frequently used

transfers, demotions, and dismissals to intimidate union members.²⁶

In Rwanda, compulsory labour is present in Umuganda, a national community service that takes place once every month. While Umuganda is widely believed to benefit the community, the practice is compulsory for those aged 18 to 65 years, and failure to participate may result in a fine or other penalty under Law No. 53/2007 Establishing Community Works in Rwanda. While the prescription of fines in practice is unclear, the law establishes a threat of penalty for non-participation. ILO's Committee of Experts on the Application of Conventions and Recommendations requested that the Rwandan government ensure community works are limited to "minor services" in line with international standards.

About 55,000 people were living in modern slavery in Rwanda, ranking as number 28 out of 50 African countries on the Global Slavery Index (1 is the worst score) in 2023.²⁷ This index measures modern slavery, i.e., slavery-like practices (such as debt, bondage, forced marriage and sale or exploitation of children), human trafficking and forced labour. Rwanda has one of the most robust responses to modern slavery in the region.

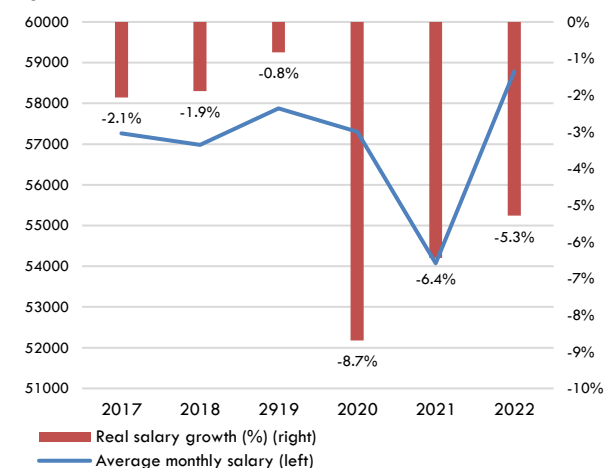
WORKING CONDITIONS

In Rwanda, the national minimum wage has not been adjusted since 1973. Thus, it is outdated, becoming one of the lowest in Africa that does not match the extreme poverty line. As a part of reforming the Labour Code in 2018, the government was supposed to pass the revised minimum wage law in a separate ministerial order, but it has not yet been issued.

The latest Rwanda Labour Force Survey (RLFS) presented that the monthly average salary from paid employment rebounded after downturns, reaching RWF 58,7840 (US\$57) in 2022. The average nominal salary increased by just 2.7% from 2017 to 2022. In contrast, the real salary growth (deducting inflation in consumer prices) fell during the same period, not only due to average

salary downturns but also accelerated inflation in consumer prices, especially at the beginning of the 2020s (see more details in Figure 2).

Figure 2: Monthly average salary from paid employment and real salary growth in Rwanda, 2017-2022



Source: Rwanda Labour Force Survey, 2022; own calculations of real salary growth.

Monthly salaries diverge significantly between the three aggregated sectors: the agriculture sector was RWF 22,532 (US\$ 22), the industry sector was RWF 75,148 (US\$ 73), and the service sector was RWF 122,879 (US\$ 119). These salaries grew fastest in the service sector than the industry and the lowest in the agricultural sector (see Appendix Table 13),.

To curb the deteriorated real salaries trend that limits low-income earners' ability to meet basic needs, the government initiated reducing tax rates via the 2022 income tax law, starting from November 2023, which only benefits employees. In addition, many families ended to regularly supplement their incomes by working in micro-businesses or subsistence agriculture activities.

Violations of wages, overtime, and occupational health and safety (OHS) standards are generally common in Rwanda. The informal employment rate represents almost nine of ten workers, creating loopholes in labour and business regulations, including income tax. This situation gives a glimpse of the low scope of regulations application in practice.

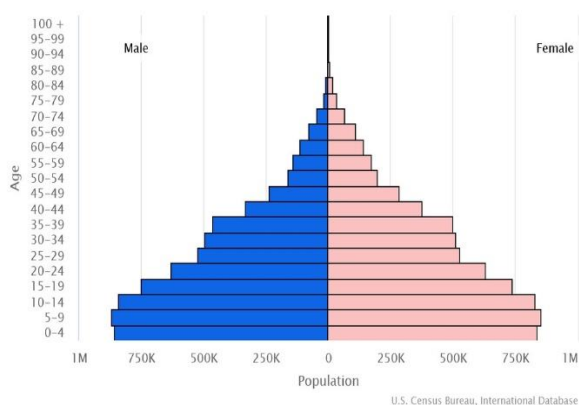
In Rwanda, labour inspection is decentralised to the district level, which is under-resourced and facing a long-term decrease in resources. The number of labour inspectors reached 37 in 2022. The inspectors' coverage of employees was estimated at one inspector per 70,000 workers. The ILO recommended one per 40,000 workers in less developed countries.²⁸ It suggests that Rwanda must employ at least 65 labour inspectors among employees.

WORKFORCE

Rwanda's population reached 14.4 million in 2024. The population growth rate fell during the last four decades, turning below the sub-Saharan African average and supported by a drop in the fertility rate.

Figure 3 below visualises an initial stage, transforming the population structure by age with a drop in dependence ratio, known as the 'demographic dividend'. Rwanda also faces an ageing population, supported by an upsurge in life expectancy. The share of persons over 60 years of age is projected to increase from 4% in 2010 to 12% in 2050. It is anticipated to bring mounting financial pressure on social protection, such as health and pension coverage (see more in the Social Protection section). Studies found that Rwanda's older population will be increasingly made up of women, many of them widows, in the aftermath of the Rwandan Civil War 1990-1994.²⁹

Figure 3: Population pyramid based on the Age-Sex structure of the population in Rwanda, 2023



Source: Central Intelligence Agency, the World Factbook, Rwanda.

Based on the latest Labour Force Survey from 2022, Rwanda's working age population was close to 8.0 million where there were more women than men, representing 53% vs. 47%, respectively. Around 56% (4.5 million workers) represent the workforce and 44% (3.4 million) are outside the workforce (including subsistence foodstuff producers). Close to one of four (24%) workers is in urban areas while three of four (76%) operate in rural areas (see more in Appendix Table 14).

The workforce participation rate was on the rise until a downturn emerged as an impact of the global Covid-19 pandemic in 2020/2021. The pandemic triggered also other employment ruptures; for instance, the group of workers in subsistence foodstuff production experienced a steady declining trend, except a minor upturn in 2020. Employed in market-oriented agriculture rapidly increased in 2021 while the aggregated sectoral employment fell significantly in the industry and service sectors.

Status in employment has experienced some improvement: the employees' segment share increased from 57% in 2019 to 61% in 2022. In contrast, the self-employed segment chop from 43% to 39%. It was backed by a dip in the employment-to-population ratio during that period. It is worrisome to detect that the proportion of permanent jobs in total paid employment peaked at 30% in 2019 but plummeted to 19% in 2021 and only slowly rebounding.

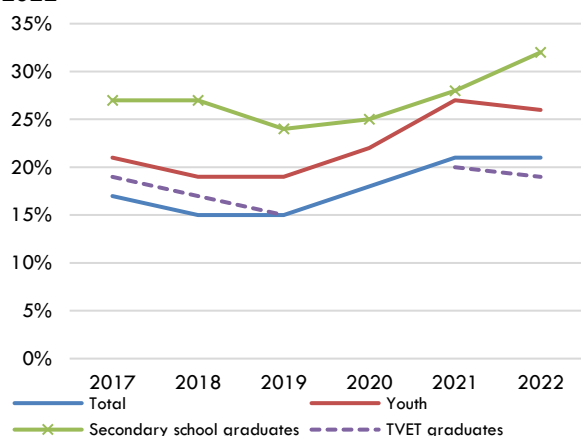
Rwandan micro, small and medium enterprises (MSMEs) are dominating the private business environment, comprising about 98% of all enterprises. A vast majority of MSMEs (93%) work in commerce and services.³⁰ Most enterprises are operating in the informal economy, often with insufficient entrepreneurial training in building human capacity, technical and managerial skills. Micro and small enterprises are exempted from paying several administrative fees as part of the registration process. This group is challenged, though, by the application of unionism, collective bargaining, and general labour and business regulations in practice.

Rwanda's labour share of national income has been stable during the last decade at around 44%. This share stands higher than the closet neighbouring countries, except Tanzania's at 53%. A transformation involving the rising power of new technology, Just Transition, and the widespread informal economy question Rwanda's capacity to reach the Sustainable Development Goal dealing with adopting policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality (SDG 10.4.1).

Unemployment

Rwanda's official data shows that unemployment was already high at the end of the 2010s, but it accelerated at the beginning of the 2020s due to the Covid-19 pandemic and economic ruptures; the unemployment rate reached 21% in 2022. Unemployment is dominated by youth, grabbing 26%. On the positive side, the upsurge in unemployment has been curbed. It is worth mention that the unemployment rate among secondary school graduates continues to rise, peaking at 32% in 2022 (see more in Figure 4). Other ILO estimations suggest that Rwanda's unemployment rate is remarkably higher than the sub-Saharan Africa average, but authorities usually contest this trend.

Figure 4: Unemployment trends in Rwanda, %, 2017-2022



Source: National Institute of Statistics of Rwanda, Rwanda Labour Force Survey, 2022.

Unemployment is an urban phenomenon in Rwanda. However, subsistence farming is occupied during

planting and harvesting but not engaged full-time throughout the year, creating some “disguised unemployment.”

The country's relatively high unemployment rate parallels that the labour market is not generating sufficient new jobs, suggesting the SDG's target to achieve full and productive employment and decent work is in limbo.

Currently, there is no provision for unemployment benefits under Rwandan labour legislation. But, employees are entitled to terminal benefits if they have served for at least 12 consecutive months before contract termination. Besides, there are no functioning unemployment insurance schemes. Instead, many are entering casual or informal activities as a survival strategy to generate some earnings (see more in the Informal Economy and the Social Protection sections).

Unemployment is statistically a part of the employed group, excluding people outside the workforce. As previously noted, around 44% of Rwanda's working-age population was estimated to be economically inactive in 2022, hiding significant potential unemployment.

Migration

Rwanda has undersigned central international migration conventions, but not ratified ILO's migrant-specific instruments. The national migration legal and policy framework is based on several instruments (see more in Appendix Table 16).

The stock of the migrant population is 1.2 million persons, representing 9.1% of the total population. Many Rwandans migrate to improve their job opportunities, higher earnings, and social aspirations to follow their family members, marriage, or education. Among them, an estimated 44% are migrant workers.³¹ A dual migration pattern of internal migration is emerging: a move toward urban areas in search of work, and a move away from density in search of land, flocking to Rwanda's less populated Eastern Province.

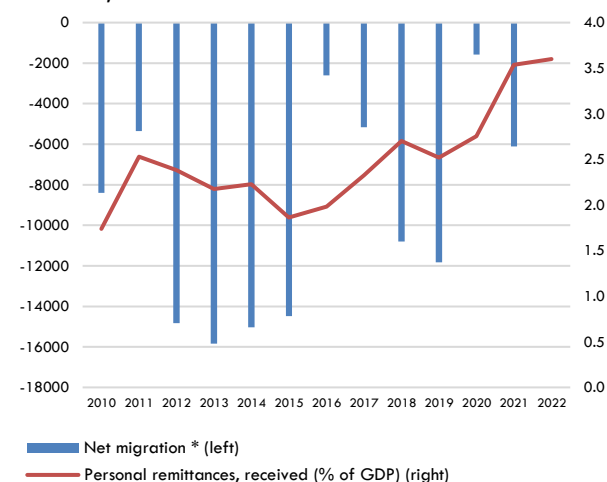
The adverse impacts of climate change worsen each year with high economic and labour costs; for example, the agricultural-based economy employs 60% of Rwandan workers (including subsistence foodstuff producers), and usable land is being eroded and degraded to meet these agricultural needs. A glimpse of its scope is displayed by a large segment of internally displaced persons (IDPs) triggered by disaster events – earthquake, flood, wet mass movement, and storm – that affected 121,000 people from 2008 to 2022, mainly from recent years.³² It supports the fact that the urban share of Rwanda’s total population has increased far faster than official records, grasping 27% at the mid-2010s.³³ Rwanda’s government promoted an ambitious aim of accelerating the urbanisation to a portion of 35% of the urban population by 2024.³⁴ Fast urbanisation often grows unsustainable; for instance, it would require rapid job creation, although the country is already haunted by a high urban unemployment rate of 20% in 2022.

The global stock of Rwandan emigrants was estimated to be up to 500,000, about 4% of the total Rwandan population, and with equalled gender distribution.³⁵ The top five destination countries are the Democratic Republic of Congo, Burundi, Uganda, the Republic of the Congo, and Belgium.

Rwandan diaspora sends personnel remittances, and its volume has increased during the last decade, peaking so far at 3.6% of GDP in 2022. These transfers are used by families to solve their day-to-day livelihood, supporting poverty reduction. Remittances have superseded the inflow of foreign direct investments but are significantly below the development aid of 12% of GDP. Remittances mainly come from neighbouring countries, Western and Central Europe, and North America. Interestingly, the inflow of remittances was expected to plummet in 2020 as an impact of the Covid-19 pandemic but instead increased (see Figure 5). One reason was that homecoming migration increased, and they returned their savings.

More leave than enter the country reflected in an unbalanced net migration flow. It has led to a critical brain drain in the healthcare, education, and energy sectors. Figure 5 visualises that the net migration balance was somewhat volatile during the last decade, especially with returnees in 2016 and 2020, respectively.

Figure 5: Net migration and personal remittance in Rwanda, 2010-2022



* Net migration is the number of immigrants minus the number of emigrants, including citizens and noncitizens.

Source: The World Bank, World Development Indicators.

The Immigration Law from 2011 was part of the National Migration Policy to attract skilled workers, promote investments and tourism, and enhance national security. The law further harmonised with EAC’s protocol on the free movement of people, labour, and services, including that EAC citizens shall have the right to visit Rwanda for up to six months without a visa. A visitor’s visa should not be used for employment.

Rwanda has been welcoming refugees for almost three decades. They received relatively few refugees until it accelerated fast since 2015 due to instabilities in Burundi and the Democratic Republic of Congo. Rwanda offered asylum to Afghans fleeing the arrival of the Taliban in 2022.³⁶ And some Sudanese fleeing the ongoing conflict home have been offered temporary asylum by Rwanda pending 3rd country resettlement. According to the United Nations High Commissioner for Refugees (UNHCR), 135,000 refugees and asylum seekers were registered in October 2023. Around nine of

ten (91%) refugees live in five refugee camps. Rwanda's policy and legal frameworks facilitate the inclusion of refugees within national systems in line with the Global Compact on Refugees. From health to education, refugees are granted the same level of access and services as Rwandan citizens.³⁷ Refugees are also granted the right to work. However, job opportunities for refugees are quite limited outside the camps in practice, but within the camps themselves, non-governmental and international organisations employ many refugees.³⁸

Somewhat controversial initiatives on refugees emerged in 2021: With deals with Rwanda, both Denmark and Britain are preparing similar plans to shift asylum procedures outside of the EU and Britain. It should find new ways of addressing migration's causes and challenges. These programmes have run into some political and legal hurdles. For instance, the United Nations Committee against Torture expressed concerns in November 2023 about Denmark's ambitions to transfer asylum seekers to third countries like Rwanda while their applications are being considered, citing worries about the safety of migrants. Also, Britain signed a new treaty with Rwanda on December 5, 2023, to overcome a court decision blocking its plan to deport asylum seekers to Rwanda, a ruling that dealt a blow to the government's immigration policy.³⁹

Informal Economy

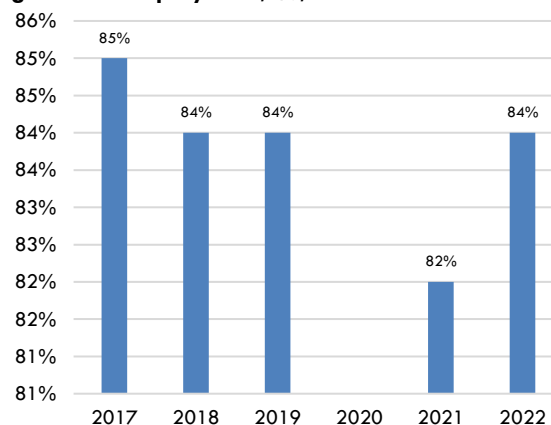
Rwanda's government has been promoting several legal and policy initiatives to facilitate the transition from informal economy to the formal sector by streamlining tax, registration, administrative procedures, and to extend social protections (revisit Appendix Table 12). For example, micro and small enterprises are exempted from paying several administrative fees as part of the registration process. And tax incentives like the Small Business Tax regime have been implemented to encourage informal firms to formalise. Besides, enforcement actions have been used against those operating informally, including fines, confiscation of goods, or arrest in some cases.

Although progress has been made in registering and licensing many informal businesses and vendors, challenges remain to bring informal firms into the tax system and providing social security coverage. Further efforts are needed to simplify bureaucratic processes, provide support and incentives, and tackle root causes of informality.

The tripartite Workforce Development Authority (WDA) addresses the status of workers in the informal economy. The government has not established a specific national forum for formalising the informal economy although trade unions have been vehemently advocating for it.

The proportion of informal employment in non-agriculture employment has slowly fallen in recent years, suggesting that the country took some steps ahead to reach the SDG goal of reducing the proportion of informal employment. However, the rate rebounded in 2022 as an impact of the global Covid-19 pandemic and the crises in food security with waves from the Ukrainian-Russian War (see Figure 6). It is worth mention that a job held by an employee is considered informal if the job does not entail a social security contribution by the employer and is not entitled to paid sick leave and paid annual leave. Thus, the large share of informal employment underlines the need to focus on formalisation and extension of social protection to these informal groups (see more in the Social Protection section).

Figure 6: Proportion of informal employment in non-agriculture employment, %, 2017-2022



Source: Rwanda Labour Force Survey, 2022.

Rwanda's high proportion of informal employment in non-agriculture employment mirrors the limited scope of formal jobs. The drivers of informality are multifaceted, varying from sluggish economic transformation; workers are dominating in rural areas; to inequality of access to quality education, health, and other basic public services; to the lack of awareness or incentives for the labour-related legal and regulatory environment; to the design of the tax and social insurance systems; to the quality of institutions.⁴⁰ These susceptible informal circumstances bring challenges to improve industrial relations like unionism and collective bargaining. On the positive side, many trade unions affiliate organised workers from the informal economy, just as other non-traditional groups have promoted many union initiatives to support informal workers.

Informal workers are vulnerable due to weak or no contractual conditions, minimum wages, vacations, maternity/paternity leave, or other social insurance schemes. This group is often more likely to drop out of the labour market than those from the formal sector, not to mention that there is a clear positive correlation between lower education attainment and informal employment.

At the enterprise level, informality is haunted by insufficient support for entrepreneurship. The application of flexibility in labour contracts frequently weakens job security and workplace safety, not to mention the low labour inspection coverage that complicates this situation. These factors bring uncertainties to developing unionism and strengthening industrial relations. Workers often need more awareness or incentives, frequently linked with education and skill levels.

Child Labour

About 45% of Rwanda's population is under 18, and this group entered its initial stage to curb the dependency ratio (revisit Figure 3).

The country has ratified all key international conventions concerning child labour, including ILO's two conventions on effectively abolishing child labour (see Appendix Table 8). The government has

established regulations linked to child labour, notably the enacted Law No. 54 of 2011 relating to the Rights and Protection of the Child and the Labour Code regulating child labour in the informal economy.⁴¹ The Ministry of Gender and Family Promotion affiliates the National Child Development Agency. Reports argued that the country made "minimal advancement" in efforts to eliminate the worst forms of child labour.⁴²

The latest National Policy on the Elimination of Child Labour was launched in 2010. Trade unions and workers' associations have participated in raising awareness, mainstreaming child labour issues into policies and programmes of workers' groups, monitoring child labour, and promoting enforcement of child labour laws. However, the policy could benefit from being updated to close gaps that exist in the overall framework to protect children from the worst forms of child labour adequately. The government has established institutions like the Child Labour Steering Committees at the district to village level and the Integrated Labour Administration System (ILAS), which aims to strengthen the management of labour administration data, including child labour.

The root of child labour in Rwanda relates to household poverty, low parental education, social norms, lack of access to education or enforcement of compulsory schooling and voided social security. According to the latest child labour survey data, the child labour rate reached 11% (437,000 children 5 to 17 years old) of the total number of children in 2016, significantly below the African average of 20%.⁴³ Child labour is mainly among the oldest segment while it is low among the youngest (age 5 to 12) benefitting access to free primary education.

Child labour is more visible in rural areas, usually in family settings, coupled with cultural heritage interlinking with the tradition of children working alongside adults in the fields. Children in child labour often lack education and weak coverage of government services. In addition, child domestic work is a hidden phenomenon that is difficult to tackle because of its associations with social and cultural patterns.

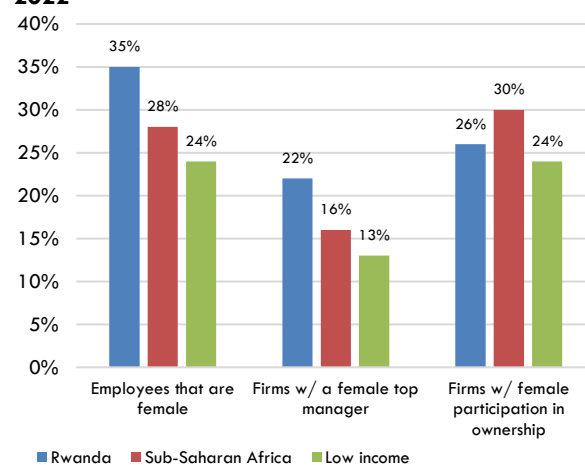
Gender

Rwanda has demonstrated political will to promote gender equality and committed to central regional and international conventions and protocols on gender equality, not to mention women's empowerment via numerous legislative and policy reforms.⁴⁴ The country's laws and regulations around the life cycle of a working woman scores relatively high at 84 out of 100 (100 is best) in 2022, higher than the regional average across sub-Saharan Africa at 72. When it comes to laws affecting women's work after having children, constraints on women starting and running a business, and regulations affecting the size of a woman's pension still have some weaknesses (see more details in Appendix Table 15).⁴⁵

At the policy level, the Revised National Gender Policy (2021) has been developed to ensure that gender equality is mainstreamed across sectors. Also, the National Strategy for Transformation (NST1) sets out to strengthen and promote gender equality and provide equal opportunities for all Rwandans whilst fostering a culture of solidarity with vulnerable groups. In 2023, the country took a bold step towards achieving a gender-equal society, launching the first-ever National Gender Standards and providing guidance and best practices for organisations to adopt and implement gender-sensitive workplace policies and practices. Overall, the laws and policy landscape have moved Rwanda towards greater gender equality in most labour market outcomes, making it one of the top countries in the World for closing the gender gap.⁴⁶ This process has been supported by the National Women's Council.

The participation of Rwandan women in leadership is a path to strengthening gender equality commitment and increased confidence among other women to play a role in decision-making organs around the country. These gender-cultural features are mirrored in results from the latest enterprise survey. Rwanda had a higher rate of female employees and top managers compared to sub-Saharan Africa but lower regarding their participation in ownership (see Figure 7).

Figure 7: Status of women participation in employment, top management, and ownership, %, 2022



Source: The World Bank, Rwanda Enterprise Survey, 2019.

Other remarkable factors are that Rwanda is the first country in the world with female majority in parliament, with 61% in the Chamber of Deputies and 37% in the Senate; and for judges, one of two (51%) are women.⁴⁷ Among employed persons with managerial positions, 26% are women.

Table 3 below displays the scope of Rwanda's gender gaps in the employment structure. Fewer women are employed than men, but the former group has a remarkably higher growth rate. Women have a slightly higher unemployment rate than men. It is worth mentioning that once women are engaged in formal employment, they are paid 27% less than men in comparable jobs.⁴⁸ Most women also face a 'double burden' pushing many into informal part-time activities linked to time constraints from domestic chores.

Table 3: Key indicators for employed gender gaps in Rwanda, 2022

	Men	Women
Participation rate	66%	55%
Employment share	56%	44%
Unemployment rate	14%	17%
Employees rate	68%	60%
Informal employment share	56%	44%
Employment growth rate *	17%	24%

* Period from 2017 to 2022.

Source: National Institute of Statistical of Rwanda, Labour Force Survey 2022; International Labour Organization, Key Indicators of the Labour Market (KILM).

Youth

In Rwanda, youth aged 15-24 years represent 2.8 million (34%) of the working-age population in 2022.⁴⁹ Like many other African countries, Rwanda's population structure is characterised by a 'youth bulge', i.e., the relatively large increase in the numbers and proportion of youthful age population.

The country has a robust policy framework for youth employment. It has been anchored in the latest National Youth Policy, launched in 2015. It is linked with several other central policies, including the National Strategy for Transformation (2017-2024) and the Private Sector Development and Youth Employment Strategy (2018-2024). Youth employment is further mainstreamed into several other sectoral, institutional and inclusiveness policies.⁵⁰

According to Rwanda's constitution, every citizen, including youth, has the right to participate in the country's development process. Although the government has made progress in creating an enabling environment for youth participation, there is still a gap in policy dialogue due to the limited involvement of youth concerning policy issues.⁵¹ It supports the fact that Rwanda's latest ranking on the Global Youth Development Index was 142 of 181 countries (1 is best) in 2020, placed among 'low youth development'.

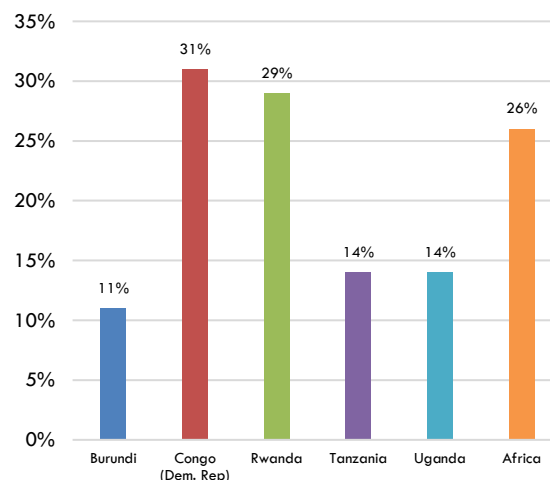
Rwanda's government promotes employment programmes and training of job seekers for young people. But the nature of the job market is changing, and the mounting group of better-educated youth brings pressure on decent job creation, gearing to oversupply today. Educated youth face hurdles entering the labour market, including a lack of access to job availability and job training information. It further supports the high emigration outflow, considered one of the youth's solutions to escape unemployment.

The average income per capita should increase if young workers can be fully employed in productive activities increases. Data show that Rwanda's income per capita is rising, suggesting that the youth

bulge supports a demographic dividend. On the other hand, many young Rwandan workers cannot find employment and earn satisfactory income, mirrored in the high youth unemployment rate (revisit Figure 4). While unemployment rates are naturally higher for young people, given their limited work experience, Rwanda's double higher youth unemployment rate compared with the sub-Saharan Africa average indicates a worrisome tendency in the country. It could end with a "demographic bomb" because a large mass of frustrated youth will likely become a potential source of social and political instability.

The not education, employment, or training (NEET) rate increased by three percentage points from 2017 to 2022, landing among the highest compared with the neighbouring countries (see Figure 8).

Figure 8: Status of proportion of youth (aged 15-24 years) not in education, employment, or training (NEET), %, latest data



Source: International Labour Organization, ILOSTAT.

Those young men and women who work often lack job security or insurance benefits. Instead, most have activities in the informal economy with underemployment, temporary or part-time, often under poor working conditions. These groups often need more training and career opportunities, among those earning less than the minimum wage compared to the non-youth groups. It is worth mentioning that the share of youth in non-agricultural paid employment peaked in 2021 at

55%. However, it plummeted to 44% in 2022 due to the ruptures triggered by the Covid-19 pandemic and skyrocketing inflation in consumer prices.

EDUCATION

Rwanda's government has anchored equitable access to education, supported by a broad legal and policy framework. It has delivered some educational improvements; for instance, the youth literacy rate increased by 15 percentage points from 2000 to its peak of 93% in 2020, with no gender gap and significantly higher than the sub-Saharan African average of 78%. Another reflection is that net enrolment in primary school education grew rapidly, peaking at 99% in 2016.

Despite some positive results, the education system still faces many challenges. The need for basic mass education runs out when it comes to raising quality standards; for instance, the education system is under-resourced and a fast pace of changes in labour market demand. A critical issue is that government expenditure on education started to fall at the end of the 2010s, and they ended up spending less on education than several other neighbouring countries. However, this expenditure was boosted in 2021 and 2022, finally reaching the international Education 2030 Framework for Action's benchmark for government financing of education, allocating at least 4% to 6% of its GDP.

A reflection of Rwanda's education system evolution is mirrored in net enrolment in primary schools, which was dropped at the end of the 2010s and even chopped to 88% in 2022 as in the impact of the Covid-19 pandemic. This situation is projected to push child labour upsurge and oppose other facets like teacher absenteeism, overcrowded schools, learners' long distances to and from schools, and a general lack of quality education delivery. The dropout rate rose, caught by 9.5% in 2021, challenging the government's ambitious target of reducing school dropouts from primary and secondary school to nearly 1% by 2024.

The young population transitioning from education to work gets better educated. Still, the labour market is not offering sufficiently decent jobs, which is echoed by the relatively high youth unemployment rate and emigration flow (revisit Figure 4 and Figure 5). Many graduates struggle to find employment due to the mismatch between the skills they acquire through the education system and those required by employers. The age up to which education is compulsory makes children between 12 and 15 vulnerable to child labour because they are not legally required to attend school but are not legally permitted to work.

Vocational Training

The Technical and Vocational Education and Training (TVET) sector has emerged as a priority for Rwanda's transformation into a knowledge-based economy. The government projects to create 214,000 productive jobs annually, linked with policy objectives under Rwanda Vision 2050.⁵² TVET is a strategic driver to tackle youth unemployment and a pathway to socio-economic inclusion through job access and affordability.

The TVET sector is governed by the Rwanda TVET Board (RTB), which was established in 2020. This institution coordinates and fast-tracks technical and vocational education and training programmes. The Workforce Development Authority's (WDA) also plays a role but it is reduced to overseeing TVET policy strategic orientation and quality assurance after parenting Rwanda Polytech (RP), which is the largest public TVET institution.

At the policy level, the government operates with the TVET Policy of 2015 and the Polytechnic Strategic Plan (2019-2024), linking to the Revised National Employment Policy (2017-2024). As previously indicated, this policy framework entered an unexpected challenge by Covid-19 at the beginning of the 2020s, triggering school closures and disruptions to face-to-face learning for youth, especially in TVET. It further brought a need for revamping the TVET system's policy framework, prompted by emerging factors for Just Transition and the Fourth Industrial Revolution.

Official data registered 366 TVET institutions and eight public and nine private Polytechnics in 2020. Based on the limitations of data availability, enrolment in secondary vocational training reached about 88,600 in 2018, of which 47% were females.⁵³ Other data show that Rwanda's government expenditure on secondary and post-secondary non-tertiary vocational education is significantly higher than other neighbouring countries, reaching 0.5% of GDP. The proportion of 15–24-year-olds enrolled in vocational education, grasping 3.9%, similarly higher than the neighbouring countries.⁵⁴

Business development centres have been promoted in all districts to support business and job creation for Rwandans. These centres offer entrepreneurial training in central business competencies and other services necessary to support successful business development. Although small and medium enterprises (SMEs) are prioritised, all economic operators are eligible for these services. Rwandan firms (excluding micro-enterprises) offering formal training programmes fell during the 2010s, reaching 30% of firms in 2019. It remains higher than the sub-Saharan Africa average at 27%.⁵⁵ Formal firms remain relatively small compared to the widespread informal micro and small enterprises, left without a voice in TVET policy.

Public TVET institutions struggle financially to procure the necessary equipment, tools, and consumables to skill TVET students. Parents and trainees are responsible for paying school fees to get the required resources, pointing towards the fact that the TVET system is not affordable for many impoverished families. On the positive side, the proportion of employed TVET graduates rose from 54% in 2017 to 64% in 2022.⁵⁶

TVET's formal Rwanda Qualifications Framework (RGF) was revised in 2021, promoting three interrelated functions: communication, reforming, and regulatory function. Non-Formal TVET private companies also provide different upgrading short courses depending on the need of the trainee or employer, sidelined for the RGF.

In partnership with Microsoft, the government is building “smart” classrooms nationwide, aiming to bring computers, internet connectivity, and basic software packages to all of Rwanda's schools. The country's development strategy prioritises science and technology education and Information and Communications Technology (ICT) skills, not to mention vocational and technical training in technology, engineering, and management, to develop human capital and turn Rwanda into a knowledge-based economy.

The unemployment rate among TVET graduates has stayed relatively high and in line with the total unemployment rate (revisit Figure 4). This factor signals an apparent mismatch between the skills taught and the market needs, reflecting the rapid evolution of technology, globalisation, and the Fourth Industrial Revolution are affecting skills development (see more in the Fourth Industrial Revolution sub-section). It is important to realise that TVET training focuses on several areas but somewhat sidelines agriculture, although it is the largest employer. Studies found fewer opportunities for individuals with agricultural skills than those with digital literacy skills. In addition, TVET schools mainly focus on hard skills while overlooking soft skills such as job search and interview skills needed to find decent employment or start their own business. Poor information flow between TVETs and industry, outdated training curriculums, inadequate leadership, and low language literacy significantly contributed to the employability of TVET graduates.⁵⁷

Rwandan trade unions in the construction and mining sectors are working closely with TVET schools under Rwanda Polytechnic in recognition of prior learning to their members. This helps workers to also transit from informal to formal employment as their skills are being recognised.

Fourth Industrial Revolution

The labour market is encountering the dual challenges of employing a sizeable young population while coping with the disruptions caused

by the Fourth Industrial Revolution (4IR). The 4IR phenomenon is in its infancy phase, using artificial intelligence (AI), digitalisation, biotechnology, and global connectivity, intertwining into production systems, management, and governance. The fear factor for AI and automation is replacing many low-skilled and medium-skilled workers.

In Rwanda, ICT integration in education has been instituted; for example, various improvements have been made to integrate technology in education and training, facilitate learning for teachers and students, and improve technology literacy. The country is quickly becoming one of Africa's major innovation hotspots, ranking 4th among start-up ecosystems in Africa.⁵⁸ It is worth mentioning that Rwanda launched its first telecommunications satellite, Rwa-Sat-1, into space in 2019 in partnership with the Japan Aerospace Exploration Agency (JAXA). This satellite obtains data from terrestrial sensors to help keep the government informed on national water resources, agriculture, meteorology, and disaster risks.

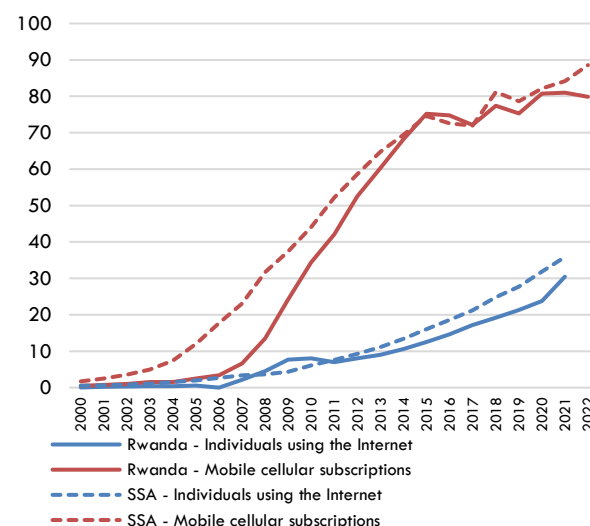
Recent estimations suggest that Rwanda's technology sector represents about 3% of GDP. The government's goal is to more than triple this figure and reach 10% within the 2020s.⁵⁹ The ICT sector had no exports in 2018 but is now expected to reach 7% of all exports in 2025. The proportion of people employed in ICT has been volatile, between 0.2% to 0.5% of total employment in recent years. The share of ICT professionals remains relatively small. However, given the current and future growth prospects, the ICT sector still offers employment opportunities, especially for young graduates with market-relevant skills.⁶⁰

During the last two decades, Rwanda's population has experienced a growing application for ICT factors. Figure 9 shows that the number of individuals using the internet increased but was superseded by the regional tempo. Other data from the latest population census suggested that just 14% of households will have access to the internet in 2022.⁶¹ Instead, more people are becoming connected with mobile devices, and the country's mobile cellular subscription demand has caught the

regional average. In Rwanda, higher 3G coverage was positively associated with productivity, especially in the service sector.⁶²

Figure 9 also indicates that the country still faces relatively low digital literacy, making it a barrier to accessing education services, especially for students from low-income families. Many schools lack the necessary infrastructure to support technology use, such as electricity or internet connectivity. Data show that the percentage of schools using ICT for teaching and learning increased but fell in 2021 due to the Covid-19 pandemic: In 2021, TVET schools using ICT for teaching and learning was relatively high at 70% compared with general secondary at 23%.⁶³

Figure 9: Individuals using the Internet (% of population) and mobile cellular subscriptions (per 100 people) in Rwanda and sub-Saharan Africa (SSA), 2000-2022



Source: The World Bank, World Development Indicators.

Rwanda's ICT industry is mainly driven by its young entrepreneurs and the government's strategic policies. The country's business process outsourcing (BPO) industry, including global business services (GBS), is emerging. Currently, over 15 GBS firms, employing approximately 1,500 Rwandans in formal jobs (0.1% of employees), provide a range of BPO and IT outsourcing services to global markets.⁶⁴ Rwanda's economic development suggests that BPO is likely to create more jobs and bring in foreign currencies, not to mention international competitiveness due to low wages.

Struggling to survive in a competitive job market of digital automation can bring extra stress for Rwandan workers, commanding new challenges for the trade union movement. For example, the effects of “casualisation” and “externalisation” emerged with an increasing number of part-time and contractual workers. These factors occurrence led to employment vulnerability, including making it more difficult to unionise. On the positive side, Rwanda's trade union movement has already started preparing its membership base and affiliates to embrace the inevitable 4IR and AI. It is a priority for CESTRAR to ensure that the workforce is prepared for the developing skills demands. Against this backdrop, CESTRAR is currently working with the Ministry of Education, the Rwanda TVET Board and the Ministry of Public Services and Labour to establish a Nation Fund for Skills Development to fund updated vocational training.

SOCIAL PROTECTION

The country has ratified ILO's two central occupational safety and health conventions (C155 and C187) but none of the fifteen social security conventions (see Appendix Table 8). The right to social protection was inscribed in the constitution and promoted through several laws, policies and strategies; for instance, the Labour Code states that all workers (formal and informal) benefit from the same protection via social security (see more in Appendix Table 17). The National Social Protection Policy (2020 – 2024) introduced a broad vision for social protection, capturing social security, short-term social assistance, social care services targeted livelihood, and employment support.

The Rwanda Social Security Board (RSSB) was established in 2010 as a merger of the Social Security Fund of Rwanda (SSFR) with the Rwanda Health Insurance Fund (RAMA). RSSB manages six schemes: pension scheme, occupational hazards scheme, maternity leave scheme, medical scheme, community-based health insurance scheme (CBHI), and EjoHeza - a relatively new saving scheme open for the whole population.

The national social protection system includes contributory and non-contributory schemes. The mandatory public pension scheme covers all public and private sector employees with regular salaries (formal sector). Social security contributions by employees, employers, and self-employed individuals reached 8.4% of revenue in 2020. However, the high informality in Rwanda is echoed in the very low coverage of the social insurance schemes. For example, although the coverage of persons above retirement age receiving a pension rose at the end of the 2010s, it halved in 2020, falling to 3.1% due to the Covid-19 pandemic impact (see Appendix Table 18).

Several non-contributory programmes aim to cover the most vulnerable. Still, just 3.8% of vulnerable persons are covered by social assistance. The Umurenge Programme (VUP) flagship social protection programme directly supports impoverished and labour-constrained households. Data shows that poor persons covered by social protection systems reached just below 10% in 2021 (see more in Appendix Table 18). It suggests that providing adequate coverage to all needy households remains a major challenge in Rwanda.

The EjoHeza Programme has successfully enrolled new members, grasping over one million subscribers today. However, further extending membership remains challenging due to the widespread informality.

There is no provision for unemployment benefits under Rwandan labour legislation, nor unemployment insurance or other social safety net programs for workers laid off for economic reasons. Although employees are entitled to terminal benefits if they have served for at least 12 consecutive months before contract termination, these are not common in practice. The Covid-19 pandemic forced some companies to lay off employees, leading the labour union movement to propose an unemployment benefits scheme. Initial steps are taken to assess developing an unemployment insurance scheme in Rwanda.

The Maternity Law of 2016 settled that mothers working for public and private employers apply for 12 weeks of maternity leave, a standard among East African countries. By law, women's maternity leave gets 100% of their salary: The employer pays for the first six weeks; the insurance scheme managed by RSSB finances the remainder. Data reveal that mothers with newborns receiving maternity benefits coverage are deficient, at 1.3% (see Appendix Table 18). Women on maternity leave often receive just 60–80% of their salaries as a compromise to dissuade employers from replacing mothers on leave for good. Rwandan fathers are entitled to unpaid leave of up to four working days in one calendar year. No data is available on paternity leave coverage.

Subsidies have been a part of Rwanda's social protection system for decades and contributed to poverty reduction. Overall, subsidies and other social benefits covered 40% of expenses in 2020.⁶⁵

The country has achieved remarkable progress in its healthcare sector during the last two decades, marked by substantial reductions in maternal and child mortality rates, increased life expectancy, and extending immunisation coverage. Community-based health insurance covers over 85% of the population. The population with some health insurance increased from 43% in 2005 to around 90% at the beginning of the 2020s. It has helped to protect households against financial risks associated with sickness. The universal health service coverage index has more than doubled during the last two decades, peaking at 49 (on a scale of 0 to 100; 100 is best) in 2021. Significant challenges

persist in ensuring equitable access to quality and affordable healthcare services, especially in rural areas.

The country's spending on health increased during the last two decades, reaching one of the highest share of government health expenditure of general government expenditure and the lowest health out-of-pocket expenditure compared with the neighbouring countries. It has grasped by far the World Health Organization's minimum threshold of minimum 4% of GDP. On the other hand, the country's health expenditure per capita remains lower than the region's average (see more details in Table 4).

Table 4: Status of expenditure on health in Rwanda and sub-Saharan Africa (SSA), 2021

Service	Rwanda	SSA
Total health expenditure, % of GDP	7.3%	4.9%
Current health expenditure per capita	US\$ 57	US\$ 75
Universal Health Service coverage index (2021)	49 *	-

* Coverage index for essential health services (based on tracer interventions that include reproductive, maternal, newborn and child health, infectious diseases, noncommunicable diseases and service capacity and access). It is presented on a scale of 0 to 100.

Source: The World Bank, World Development Indicators; World Health Organization, Data Portal.

Rwanda made an example of managing the Covid-19 pandemic and safeguarding public health, benefitting the lessons learned from the 2014 and 2018 Ebola outbreaks in neighbouring countries. This system was built on equity, trust, community participation, and patient in focus.

APPENDIX: ADDITIONAL DATA

Table 5: Rwanda's key economic data, projections, 2019-2025

Values	2019	2020	2021	2022	2023	2024	2025
GDP (current, US\$)	10.3bn	10.2bn	11.1bn	13.3bn	13.9bn	13.8bn	14.3bn
GDP per capita (PPP, US\$)	2,272	2,145	2,325	2,460	2,563	2,671	2,796
Total investment (% of GDP)	23%	25%	26%	24%	24%	29%	30%
Gross national savings (% of GDP)	12%	13%	15%	15%	12%	18%	20%
General government expenditure (% of GDP)	28%	33%	32%	30%	28%	30%	28%
Government gross debt (% of GDP)	50%	66%	67%	61%	63%	72%	74%

Source: International Monetary Fund, World Economic Outlook Database, October 2023.

Table 6: Rwanda's Climate Governance

Climate Governance
Key Laws and Regulations
Law No. 48/2018 on Environment and the Law No. 39/2017 Establishing the National Fund for Environment.
Key Plans and Strategies
Green Growth and Climate Resilience Strategy of 2011. National Environment and Climate Change Policy of 2019. Rwanda Vision 2050 National Strategy for Transformation 2017-2024
Key Institutions
Ministry of Environment. Rwanda Environment Management Authority. National Fund for Environment.

Source: Climate Action Tracker: Rwanda, December 2023.

Table 7: Rwanda's labour market legal framework

Laws/orders/decrees
Law No. 11 September 2013 Establishing the General Statutes for the Public Service Organic Law instituting the penal Code No. 01/2012/OL of 2 May 2012 Ministerial Order No. 09 of 13 July 2010 Determining the Modalities of Electing Workers Representatives and Fulfillment of their Duties Ministerial Order No. 11 of 7 September 2010 determining the modalities and requirements for the registration of trade unions or employer's professional organizations Ministerial Order No. 04 of 13 July 2010 determining essential services that should not stop and the terms and conditions of exercising the right to strike in these services Law No. 13/2009 of 27 May 2009 regulating labor in Rwanda Presidential Decree No. 64/01 of 31 December 2007 on the establishment and functioning of the National Council for Economic and Social Development Constitution de la République rwandaise. General Statutes for the Rwandan Public Service

Source: International Labour Organization, Rwanda – 2019, IRLEX, Legal Database on Industrial Relations.

Table 8: Ratified ILO Conventions in Rwanda

Subject and/or right	Convention	Ratification date
Fundamental Conventions		
Freedom of association and collective bargaining	C087 - Freedom of Association and Protection of the Right to Organise, 1948	1988
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1988
Elimination of all forms of forced labour	C029 - Forced Labour Convention, 1930	2001
	C105 - Abolition of Forced Labour Convention, 1957	1962
Effective abolition of child labour	C138 - Minimum Age Convention, 1973	1981
	C182 - Worst Forms of Child Labour Convention, 1999	2000
Elimination of discrimination in employment	C100 - Equal Remuneration Convention, 1951	1980
	C111 - Discrimination (Employment and Occupation) Convention, 1958	1981
Occupational safety and health	C155 - Occupational Safety and Health Convention, 1981	2018
	C187 - Promotional Framework for Occupational Safety and Health Convention, 2006	2018
Governance Conventions		
Labour inspection	C081 - Labour Inspection Convention, 1947	1980
	C129 - Labour Inspection (Agriculture) Convention, 1969	Not ratified
Employment policy	C122 - Employment Policy Convention, 1964	2010
Tripartism	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	2018
Technical Conventions (Up-to-date)		
Working time	C014 - Weekly Rest (Industry) Convention, 1921	1962
Wages	C094 - Labour Clauses (Public Contracts) Convention, 1949	1962
Social security	C118 - Equality of Treatment (Social Security) Convention, 1962	1989
Industrial relations	C135 - Workers' Representatives Convention, 1971	1988
	C154 - Collective Bargaining Convention, 1981 (No. 154)	2018
Labour administration and inspection	C150 - Labour Administration Convention, 1978	2019
Employment policy and promotion	C181 - Private Employment Agencies Convention, 1997	2018
-	C190 - Violence and Harassment Convention, 2019	2023

Note: Fundamental Conventions are the ten most important ILO conventions that cover four fundamental principles and rights at work. Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. There are also 73 Technical Conventions, which ILO considers "up-to-date" and actively promoted.

Source: ILO, NORMLEX, Country Profiles, Rwanda.

Table 9: Status of Rwanda's trade union federations and estimations of membership growth, 2023

Trade Union Centre	Number of affiliated unions	Total members	Women	Informal workers	Share of women	Share of informal workers	Federation share
Rwanda Confederation of Trade Unions (CESTRAR)	16	225,973	81,267	113,697	36%	50%	75%
Labour and Worker's Brotherhood Congress (COTRAF)	6	42,000	27,300	2,100	65%	5%	14%
Confederation of Free Trade Unions of Rwanda (COSYLI)	10	32,000	10,560	7,800	33%	24%	11%
Total	32	299,973	119,127	123,597	40%	41%	100%

Source: Rwanda Confederation of Trade Unions; DTDA, SRO-East Africa, data-collection, February 2024; own calculations on membership growth

Table 10: Central legal reservations concerning the rights to organise, collective bargaining, and strikes in Rwanda

Right to organize
<ul style="list-style-type: none"> • The labour Code does not specifically protect workers from anti-union discrimination. • Power to refuse official registration on arbitrary, unjustified, or ambiguous grounds. • Other formalities or requirements which excessively delay or substantially impair the free establishment of organisations: There is a 90-day timeframe for the authorities to complete an application for registration of a trade union. • Unions seeking most representative status must allow the labour administration to check its register of members and property. • Section 51 of Act No. 86/2013 issuing the General Statute of the Public Service recognises the right of public servants to join any trade union of their choice, with the exception of “political office holders” and “officers of the security services”.
Right to collective bargaining
<ul style="list-style-type: none"> • Previous authorisation or approval by authorities required to bargain collectively: A union must be registered to obtain statutory bargaining status and must publish its articles of association in the Official Gazette to obtain legal capacity. • Absence of criteria or discretionary, unclear, or unreasonable criteria for determining representative organisations: The meaning of section 93 of the 2018 Labour Code is unclear. It provides that if in an enterprise there are several employees’ organizations in a company, they team up to conduct collective bargaining. However, if they fail to team up, the organization representing the majority of workers carries on the collective negotiations on behalf of other employees’ organizations. • Compulsory conciliation and / or binding arbitration procedure in the event of disputes during collective bargaining, other than in essential services: The Government may intervene in the settlement of collective labour disputes, within limits established by an Order of the Minister in charge of labour, which, under section 103 of the 2018 Labour Code, determines the organization, functioning of labour inspection and procedure for labour disputes settlements. This Order has not been adopted yet. • All agents of the security services are exempt from the right to join unions.
Right to strike
<ul style="list-style-type: none"> • There is a mandatory conciliation and arbitration process for collective disputes, which can take more than two months. The right to strike following these procedures is restricted to just two situations: (1) where the arbitration committee fails to reach a decision within 15 days, or (2) where agreements reached under conciliation procedures are not implemented. • Undue restrictions for “public servants”: Act No. 86/2013 issuing the General Statute of the Public Service does not include provisions recognising the right to strike for public servants. • Discretionary determination or excessively long list of “essential services” in which the right to strike is prohibited or severely restricted.

Source: International Trade Union Confederation, *Survey of Violations of Trade Union Rights, Rwanda: Legal*, December 2023.

Table 11: Labour market efficiency in Rwanda, 2019

Indicator	Rank
Total	45
Redundancy costs (weeks of salary) **	44
Hiring and firing practices *	27
Cooperation in labour-employer relations *	36
Flexibility of wage determination *	60
Active labour market policies *	67
Workers' rights *	40
Ease of hiring foreign labour *	38
Internal labour mobility *	100
Reliance on professional management *	36
Pay and productivity *	73
Ratio of wage and salaried female workers to male workers **	92
Labour tax rate **	21

* Survey data. ** Ranked by per cent.

Note: Rank from 1 to 141 (1 is highest).

Source: The Global Competitiveness Report, 2019, 8th pillar: Labour market efficiency.

Table 12: Ease of Doing Business in Rwanda, 2020

Topics	Ranking
Overall	38
Starting a Business	35
Dealing with Construction Permits	81
Getting Electricity	59
Registering Property	3
Getting Credit	4
Protecting Minority Investors	114
Paying Taxes	38
Trading Across Borders	88
Enforcing Contracts	32
Resolving Insolvency	62

Note: Doing Business 2020 indicators are ranking from 1 (top) to 190 (bottom) among other countries. The rankings tell much about the business environment, but do not measure all aspects of the business surroundings that matter to firms and investors that affect the competitiveness of the economy. Still, a high ranking does mean that the government has created a regulatory environment conducive to operating a business.

Source: World Bank & IFC, Ease of Doing Business 2020 in Rwanda

Table 13: Rwanda average and sectoral monthly salary from paid employment, 2017-2022

	2017	2018	2019	2020	2021	2022	Growth, 2017-2022
Average	57,262	56,982	57,878	57,306	54,073	58,784	2.7%
Agriculture	21,134	20,352	20,384	20,813	21,215	22,532	6.6%
Industry	67,232	58,509	63,346	61,547	69,787	75,148	12%
Services	105,784	108,722	103,694	104,749	11,4224	122,879	16%

Source: Rwanda Labour Force Survey, 2022.

Table 14: Rwanda's key workforce data, 2022

Indicator	Value
Working Age Population	7,963,586
Workforce	4,463,296
Outside labour force	3,500,290
Employed population	3,546,352
<i>Urban share</i>	24%
<i>Rural share</i>	76%
Employed by aggregated sector share	
<i>Agriculture</i>	47%
<i>Industry</i>	17%
<i>Service</i>	36%

Source: Bangladesh Labour Force Survey 2022.

Table 15: Rwanda - Scores for Women, Business and the Law 2022

Mobility	Workplace	Pay	Marriage	Parenthood	Entrepreneurship	Assets	Pension	Index score
100	100	100	100	20	75	100	75	84

Note: Overall scores are calculated by taking the average of each indicator, with 100 representing the highest possible score.

Source: The World Bank, Rwanda Women, Business and the Law 2022.

Table 16: List of laws for Rwanda's migration legal framework

Laws
Law N°57/2018 of 13/08/2018 on Immigration and Emigration in Rwanda
Organic Law N° 002/2021 of 16/07/2021 Relating to Rwandan Nationality
Ministerial Order N°06/01 of 29/05/2019 Relating to Immigration and Emigration
Ministerial Instructions N° N°003/19.18 of 04/04/2013 Determining Occupations in Demand List
Occupation on Demand List
Law N° 13ter/2014 of 21/05/2014 Relating to Refugees
Presidential Order N° 129/01 of 16/12/2020 Relating to Border Posts and the Border Posts Steering Committee
Ministerial Order N° 007/01 of 23/03/2022 Relating to Rwandan Nationality

Source: Rwanda Directorate General of Immigration and Emigration, 2023.

Table 17: List of Rwanda's social protection legal and policy framework

Laws
The social protection law and National Strategy for Transformation (2018-2024) reaffirms the central role of social protection in eradicating poverty and enhancing the standard of living of Rwandans.
The National Social Security Policy (2009) and the National Social Protection Policy (2020 – 2024).
National Policy on Elderly Persons. (2021-2025).
Law n°05/2015 of 30/03/2015 governing the organization of pension's schemes and Decree law of 22/08/1974 modified and complemented by the Law no 6/2003 of 22/03/2013 governing Occupational Hazards scheme,
Law n°29/2017 of 29/06/2017 governing a Long-Term Saving Scheme (LTSS) for salaried and non-salaried people, poor and rich people, in formal and informal sector.
Law n°003/2016 of 30/03/2016 to compensate all female employees absent from employment because of pregnancy, giving birth and subsequently caring for the new-born child.
Law n°24/2001 of 27/04/2001 on the establishment, organization and functioning of health insurance scheme for government employees (OG n°13 of 01/07/2001; modified and completed by law n°29/2002 of 19/09/2002).
Law n°03/2015 of 02/03/2015 governing the organization of the Community Based Health Insurance Scheme (CBHI).
Law n°08/2012 of 29/02/2012 establishing Military Medical Insurance (MMI) and determining its mission, organization and functioning.

Source: International Labour Organization.

Table 18: Proportion of population covered by social protection systems and health in Rwanda, 2021

Indicator	Coverage
SGD 1.3.1: Population covered by at least one social protection benefit	8.9% *
Persons above retirement age receiving a pension	3.1% *
Persons with severe disabilities collecting disability social protection benefits	1.1% *
Unemployed receiving unemployment benefits	0% *
Mothers with newborns receiving maternity benefits	1.3%
Employed covered in the event of work injury	11%
Children/households receiving child/family cash benefits	5.2%
Poor persons covered by social protection systems	9.4%
Vulnerable persons covered by social assistance	3.8%
SGD 3.8.1: Universal health coverage, % of population	83%

* Year: 2020.

** Year: 2019.

Source: International Labour Organisation, Key Indicators of the Labour Market (KILM); World Health Organization, Coverage of essential health services (SDG 3.8.1) (%).

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