RMS
RWANDA MEDICAL SUPPLY

CLIENT SATISFACTION SURVEY

BUYERS AND SUPPLIERS

SEPTEMBER 2026

FOREWORD

The purpose of Rwanda Medical Supply Ltd is straightforward: that every hospital, health centre and health post in Rwanda has the medicines, medical supplies and equipment it needs, when it needs them, at the right quality and at a fair price. Whether we are achieving that purpose is not for us to decide on our own. It is for the buyers we serve to tell us.

This Client Satisfaction Survey was commissioned so that they could do exactly that. It forms part of the development of our Comprehensive Stakeholder Engagement Strategy 2026-2031, together with parallel surveys of our suppliers and our own employees. A total of 491 buyers took part, comprising 53 hospitals, 280 health centres and 158 health posts, drawn from all 30 districts of the country, between August and September 2026. The survey covered the whole of the client experience: availability of commodities, ordering and digital platforms, accuracy of what is delivered, timeliness, product quality and cold chain, communication, customer care, pricing and billing, returns and recalls, and the overall partnership between RMS Ltd and the buyers we serve.
I thank the facility managers, pharmacists, storekeepers, data managers and district health management teams who gave their time to respond, and who answered frankly. Their responses are the most reliable measure we have of whether RMS Ltd is fulfilling its mandate.

The findings set out in this report show clear progress in several areas and equally clear opportunities for improvement in others. The overall satisfaction rate was 76.1% and the Net Promoter Score was 21.5. Where our clients report that we are doing well, the credit belongs to the teams across our warehouses, branches and hubs who deliver every day. Where respondents report delays, incomplete orders, or challenges in ordering, communication and customer care, we acknowledge these findings and welcome the opportunity to improve. These areas directly affect buyers' experience and, ultimately, the patients they serve.

This report will not remain on a shelf. Its recommendations are being carried into our Stakeholder Engagement Strategy 2026-2031 and into a time bound action plan owned by the Senior Management Team. We will report back to buyers on what we have changed, and we will repeat this survey so that progress can be measured against the baseline established here rather than asserted.

To our clients: thank you for your candour, and for your continued partnership in building a health supply chain that Rwandans can rely on. We ask you to keep telling us what is not working. It is how we improve.

Kigali, September 2026
Dr. LOKO Abraham
Chief Executive Officer
Rwanda Medical Supply Ltd

EXECUTIVE SUMMARY

Rwanda Medical Supply Ltd (RMS) commissioned this Client Satisfaction Survey to assess how its clients and partners perceive the quality, reliability, accessibility and responsiveness of its supply chain services, and to generate practical recommendations for improvement. The survey covered the two groups that stand on either side of the RMS supply chain: the buyers that receive commodities from RMS, and the suppliers that provide them. Fieldwork was conducted between August and September 2026 and obtained 553 valid responses, comprising 491 buyers drawn from all 30 districts of Rwanda (53 hospitals, 280 health centres and 158 health posts) and 62 suppliers (34 Rwanda-based and 28 international). The exercise followed the methodology set out in the approved Inception Report, applying a cross-sectional mixed-methods design with stratified, census and simple random sampling, digital data collection and a combination of descriptive, comparative and inferential analysis.

Overall satisfaction across both respondent groups stands at 76.1%, being the proportion of all individual attribute responses that are positive, against 59.03% recorded on the same basis in the 2024-2025 survey and 35.5% two rounds ago. Among buyers the figure is 75.5% and among suppliers 80.6%, the latter continuing the improvement from the 72.6% reported previously. A second and stricter measure, the composite Client Satisfaction Score, requires a respondent to reach a satisfactory average across every attribute assessed. Both measures are reported throughout, the attribute-level measure as the headline indicator of service experience and the composite measure as a stricter test of consistency across the whole of the service.

Client satisfaction is now more evenly distributed across the health pyramid than in the previous survey. On the attribute-level measure hospitals stand at 76.2%, from 34.0%, health centres at 76.1%, from 51.3%, and health posts at 74.2%, from 39.0%, and the difference between facility levels is no longer statistically significant. Every province improved. The Western Province records the largest gain, at 79.1% from 35.3%, followed by the Southern Province at 78.1% from 45.5% and the Eastern Province at 78.7% from 48.2%, while Kigali City at 71.8% from 51.7% and the Northern Province at 69.1% from 50.0% record the smallest gains and remain the two lowest-scoring provinces. Among suppliers the gap between local and international firms has narrowed substantially, from 16.5 percentage points to 2.2 points, with international suppliers at 81.8% against 79.6% for Rwanda-based suppliers, although international suppliers continue to rate RMS higher overall, at 8.29 out of ten against 7.03.

Loyalty has strengthened. The Net Promoter Score for all respondents combined stands at +21.5, against +11.3 in the previous survey, with detractors falling from 33.3% to 15.2%. Buyers return a score of +23.2 and suppliers +8.1. Eighty-one percent of respondents overall consider that RMS services have improved over the past two years, 81.9% of buyers state that they will continue to use RMS as their principal source of medical commodities, and 88.7% of suppliers would definitely participate in future RMS procurement.

The survey identifies clear strengths on both sides of the supply chain. With clients, RMS performs best on product quality, packaging and cold chain (75.8% of buyers satisfied), on the ease and reliability of the ordering process and the eLMIS interface (67.8%), on the accuracy of orders and documentation (66.8%) and on the professionalism of its staff. With suppliers, it performs best on ethics, fairness and confidentiality (80.7% satisfied), on tendering and supplier selection, on contract award and administration and on regulatory and customs coordination, which together indicate that suppliers do not question the integrity of how RMS awards and manages its business.

The findings also highlight several interrelated areas for improvement. Clients rate availability and range of commodities lowest (51.5% satisfied), followed by timeliness and reliability of delivery (60.1%) and returns and reverse logistics (60.3%); availability is the most frequent issue for 41.1% of buyers and the first improvement priority for 54.2%. Suppliers rate forecasting and demand visibility lowest (50.0%) and invoicing and payment second lowest (54.8%); timeliness of payment against contractual terms is the lowest-rated single attribute in the entire survey at 53.3% satisfied, payment delay is the most frequent challenge for 50.0% of suppliers and the first priority for 40.3%. The two accounts describe one system: limited forward demand visibility and delayed settlement lengthen supplier lead times, which in turn constrains the commodity availability that buyers identify as their principal concern. Laboratory commodities are the clearest shared area for improvement, being the products buyers most often report as unavailable and the category whose suppliers are the least satisfied.

The survey concludes that RMS has consolidated a substantially improved and loyal client base and retains a supplier base that is willing and largely satisfied, and that the remaining dissatisfaction is narrow, specific and, on the client side, geographically concentrated. Ten recommendations are proposed, covering commodity availability and forecasting, the invoice-to-payment cycle, delivery predictability and advance notice, proactive communication with both groups, district-differentiated engagement, the laboratory commodity line, supplier performance management, returns and system-downtime support, buyer capacity building, and continuous measurement of satisfaction.

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ACRONYMS AND ABBREVIATIONS

Abbreviation	Meaning
CSAT	Customer (Client) Satisfaction Score
DHMT	District Health Management Team
eLMIS	Electronic Logistics Management Information System
ERP	Enterprise Resource Planning
FGD	Focus Group Discussion
GoR	Government of Rwanda
HC	Health Centre
HP	Health Post
HSSP	Health Sector Strategic Plan
KII	Key Informant Interview
MoH	Ministry of Health
NPS	Net Promoter Score
NST	National Strategy for Transformation
ODK	Open Data Kit
RBC	Rwanda Biomedical Centre
RMS	Rwanda Medical Supply Ltd
RSSB	Rwanda Social Security Board
Rwanda FDA	Rwanda Food and Drug Authority
SERVQUAL	Service Quality measurement model
SDP	Service Delivery Point
ToR	Terms of Reference
WHO	World Health Organization

1. INTRODUCTION

1.1. Background and context

Rwanda Medical Supply Ltd (RMS) is the public institution mandated to manage the national health supply chain, covering the forecasting, procurement, storage and distribution of essential medical commodities to buyers across the country. Established in 2018 and operational since 2020, RMS took over the functions of the former Medical Procurement and Production Division of the Rwanda Biomedical Centre together with the district pharmacies, as part of a government strategy to streamline and strengthen the medical supply chain. Operating from its headquarters in Kigali and a national network of warehouses, RMS serves hospitals, health centres and health posts in all 30 districts, and works with national and international suppliers, health-sector partners and regulatory institutions.

The institution operates within a national policy framework that gives the health supply chain a central place. The Second National Strategy for Transformation (NST2) and Vision 2050 set the ambition for Rwanda to become a regional hub for health services and supply chain management, while the Health Sector Strategic Plan identifies the continuous availability of essential medicines and health products as a determinant of universal health coverage. Achieving these objectives depends on the reliability with which commodities reach the point of care, and therefore on the quality of the service RMS provides to the buyers it supplies.

Notwithstanding sustained investment, the health supply chain continues to face known constraints, including forecasting and quantification gaps, inventory management challenges, last-mile distribution difficulties, financing and receivable pressures, shortages of trained supply chain personnel and the ongoing transition of logistics information systems. RMS has responded with a series of measures, among them the institutionalisation of a regular client satisfaction assessment. That assessment provides a structured mechanism for hearing from the buyers that depend on RMS, for tracking progress against previous rounds, and for converting client feedback into operational improvement.

This report presents the results of the 2025-2026 round of that assessment. It follows the Client Satisfaction Survey conducted in 2024-2025, which reported an overall satisfaction level of 59.0% across all respondent groups, with buyers at 45.5%, and which recommended action on product availability, communication, lead times and customer support. The present round returns to those themes with a substantially larger and fully district-representative sample of buyers, and measures how far the position has moved.

1.1.1. Client satisfaction

Client satisfaction is generally defined as the extent to which the products and services received meet or exceed the expectations of the recipient. It is the outcome of a process in which clients evaluate the perceived benefit obtained from a product or service against what they expected to receive. Satisfaction matters operationally as well as reputationally: satisfied clients are more likely to remain

engaged, to communicate positively about the institution and to cooperate in the processes on which service delivery depends, such as accurate forecasting, timely ordering and prompt reporting of issues. In a public health supply chain the concept requires careful interpretation. The client of a national medical supply agency is usually not free to choose an alternative source, so satisfaction cannot be read as a proxy for retention in the commercial sense. It is instead an indicator of whether the institution is meeting the operational needs of the buyers that depend on it, and of the quality of the working relationship between them. For this reason the survey measures both satisfaction with specific service attributes and the broader relationship indicators of trust and willingness to recommend, and interprets each in the light of the other.

1.1.2. Service quality

Service quality refers to how well a service meets or exceeds the needs and expectations of those who receive it. The central analytical construct is the gap between what clients expect and what they perceive themselves to have received: where expectation exceeds perceived performance, dissatisfaction follows. Managing this gap, rather than simply raising the absolute level of service, is what improves satisfaction. The widely applied SERVQUAL model organises service quality into five dimensions, namely tangibles, reliability, responsiveness, assurance and empathy, and provides the conceptual basis on which the dimensions assessed in this survey were constructed.

The literature also consistently distinguishes between attributes that clients treat as preconditions, whose satisfactory delivery is expected and therefore attracts little credit, and attributes that actively shape the overall judgement. This distinction is applied in Section 4.9 of this report, where the association between each service dimension and the overall client verdict is examined in order to identify where improvement effort will have the greatest effect.

1.1.3. Rwanda's public health supply chain

The Government of Rwanda has invested substantially in the accessibility and availability of health commodities within a vertically structured health system. The Ministry of Health and its directorates lead strategic planning, policy and resource allocation, while the Rwanda Food and Drug Authority provides regulatory oversight of the safety and quality of medical products through registration, pharmacovigilance and quality assessment.

Service delivery is organised hierarchically. National referral hospitals provide advanced and specialised care; provincial and referral hospitals handle complex cases and act as the final referral point for district hospitals; district hospitals form the entry point to the hospital system and provide preventive, curative and emergency services; health centres deliver primary care and supervise the health posts within their catchment; and health posts, situated closest to communities and often in remote areas, extend basic services with the support of community health workers. Each level places different demands on the supply chain, which is why the survey treats facility level as a principal axis of analysis.

Within this system RMS is responsible for procurement, warehousing and distribution of health commodities, including temperature-sensitive products, and uses digital tools, principally the electronic Logistics Management Information System, to manage ordering and inventory. It works with national and international suppliers and with development partners, and its performance is therefore both a determinant and a reflection of the wider performance of the health system.

1.2. Purpose and objectives of the survey

The overall objective of the survey is to gain an in-depth, evidence-based understanding of satisfaction with the services provided by RMS during the period under review, among both the buyers it supplies and the suppliers from which it procures, and to identify practical opportunities for improvement. The specific objectives, drawn from the Terms of Reference and the approved Inception Report, are set out below.

- Assess buyer perceptions of service quality, with particular attention to the availability and range of commodities, the reliability and timeliness of deliveries, and the effectiveness of communication on order status, product availability and related information.
- Assess supplier perceptions of RMS procurement and contract management, covering registration and prequalification, tendering and award, demand forecasting, order management, importation and customs coordination, delivery and receiving, inspection and acceptance, invoicing and payment, communication, performance monitoring, and ethics and fairness.
- Identify key areas for improvement in service delivery, including responsiveness to enquiries, complaint and dispute resolution, returns and recalls, and overall customer support, as well as challenges related to product availability and order fulfilment.
- Measure overall client satisfaction and client loyalty, and compare the results with those of the previous survey round in order to establish the direction and magnitude of change.
- Disaggregate satisfaction by facility level, ownership, province and district on the client side, and by supplier origin, supply category and procurement arrangement on the supplier side, in order to identify where corrective action is most needed.
- Examine the relationship between the client and supplier findings in order to identify issues that originate at one end of the supply chain and are experienced at the other.
- Develop actionable and prioritised recommendations to enhance service quality, resolve identified challenges and support the continuous improvement of the client experience.

2. APPROACH AND METHODOLOGY

2.1. Introduction

The survey was implemented in accordance with the methodology mutually approved between RMS and consultant. It adopted a cross-sectional mixed-methods design, combining a structured quantitative instrument with open-ended qualitative questions, in order to measure the level of client satisfaction and at the same time to explain the reasons behind it. The design is appropriate to the assignment because the objective is to establish the current satisfaction position at a defined point in time, to compare it with the previous round, to identify service gaps, and to generate practical recommendations for immediate and medium-term improvement.

The implementation was guided by four principles carried forward from previous rounds and reaffirmed at inception. The first is participatory implementation, ensuring that hospitals, health centres and health posts across all districts were represented and that RMS branches and headquarters were engaged throughout. The second is the use of technology, with all data captured electronically on tablets and smartphones in order to reduce collection error and permit real-time monitoring. The third is agility and flexibility, with a work plan agreed at the outset and adapted as field conditions required. The fourth is a structured five-step approach comprising inception and planning, validation of the methodology and tools, field data collection, data analysis, and reporting and validation of the findings.

2.2. Survey design

2.2.1. Target population

The target population comprises the two groups that interact most directly with the RMS supply chain, namely the buyers that receive commodities from RMS and the organisations that supply RMS.

Buyers. This group comprises hospitals, health centres and health posts. These three categories were treated as distinct strata because they interact with RMS in different ways: hospitals order the widest product range and the largest volumes, health centres are the highest-volume ordering points in the primary care network, and health posts represent the last mile of the distribution system and include a large number of privately owned units. In accordance with the Inception Report, the buyer population was taken as 57 hospitals, 526 health centres and 1,280 health posts.

The respondent within each buyer was the person who deals with RMS in practice, being in most cases the pharmacist or store manager or, at health post level, the facility manager. Eligibility required that the respondent had been in post long enough to have direct experience of RMS services, and this was verified during data collection through the questions on role tenure and on recent interaction with RMS.

Suppliers. This group comprises the national and international organisations that supply medicines, laboratory products, medical devices and equipment, consumables and packaging, and logistics and other services to RMS. In accordance with the Inception Report the supplier population was taken as 70 national medical suppliers, 135 international medical suppliers and 7 non-medical suppliers. Suppliers are strategically important to the assignment because their performance determines the

availability, quality and reliability of the products that reach buyers, and because their experience of procurement, contract management and payment provides evidence on transparency, efficiency and partnership effectiveness that no other group can supply. Eligibility required at least one year of experience supplying RMS, and the respondent within each organisation was the person responsible for the RMS account, being in most cases the managing director, country manager, commercial or export manager, or the officer handling RMS contracts.

2.2.2. Sampling techniques and selection criteria

A combination of census, stratified and simple random sampling was applied, consistent with the sampling framework approved at inception. A census was used for hospitals, given the small size and strategic importance of that category. For health centres and health posts the population was stratified by district and by facility level, and units were then selected by simple random sampling from complete lists provided by RMS, giving every eligible buyer within each stratum an equal chance of inclusion. The stratification ensured that all 30 districts are represented and that the distribution of the sample reflects the structure of the buyer network. Purposive selection was applied only for the qualitative component, in order to reach respondents with specialised knowledge of the ordering and receiving process.

For suppliers, simple random sampling was applied within the national and international supplier strata from lists provided by RMS, with the one-year experience criterion applied as a prerequisite so that respondents have sufficient exposure to the procurement cycle to give an informed assessment. The two supplier strata were maintained separately because local and international suppliers experience RMS procurement differently, particularly in respect of importation, customs coordination and payment in foreign currency.

The approach is appropriate because it ensures representative coverage of every stakeholder category and every district, eliminates sampling error within the census category, minimises selection bias within the randomly sampled strata, and supports disaggregated analysis at province and district level on the client side and by origin and supply category on the supplier side, which are specific requirements of the assignment.

2.2.3. Sample size and response rate

Sample size was determined at inception using Yamane's formula at a 5% level of precision, applied separately within each stakeholder category so that categories of very different size each retain adequate representation. For the buyer categories this produced a target of 57 hospitals through census, 192 health centres and 80 health posts through sampling, giving a buyer target of 329 respondents. For the supplier categories it produced a target of 46 national medical suppliers, 88 international medical suppliers and 7 non-medical suppliers through census, giving a supplier target of 141 respondents. The Inception Report further established a minimum acceptable response threshold of 70% of the approved sample.

A total of 553 valid and complete responses were obtained, comprising 491 buyers and 62 suppliers. On the buyer side the achieved sample exceeds the approved target by 49% and is comfortably above the minimum acceptable threshold; the surplus arises principally in the health post category, where a larger number of buyers than targeted were successfully reached during fieldwork, and the additional

responses were retained because they strengthen the precision of last-mile findings without displacing any other category. All 30 districts are represented, with district sample sizes ranging from 3 to 42 buyers.

On the supplier side the achieved sample of 62 is below the approved target of 141. The reason being that their pace of responding was too slow and given that the mode of administration was online self-administered due to the fact that most of them are international firms. The achieved supplier sample nonetheless covers every supply category and both origin groups, and at 62 respondents it exceeds the 60 suppliers surveyed in the previous round. Supplier results are therefore reported with their sample sizes throughout, subgroup figures based on fewer than ten respondents are treated as indicative, and the supplier findings are presented as a robust description of the active supplier base rather than as a precise population estimate. Table 3.1 presents the achieved distribution against the approved target.

Table 2.1. Approved sample, achieved sample and response performance by facility level

Respondent category	Population	Selection method	Approved sample	Achieved sample	Achievement rate
Hospitals	57	Census	57	53	93.0%
Health centres	526	Yamane formula	192	280	145.8%
Health posts	1,280	Yamane formula	80	158	197.5%
Subtotal, buyers	**1,863**		**329**	**491**	**149.2%**
National medical suppliers	70	Yamane formula	46	33	71.7%
International medical suppliers	135	Yamane formula	88	27	30.7%
Non-medical suppliers	7	Census	7	2	28.6%
Subtotal, suppliers	**212**		**141**	**62**	**44.0%**
Total	**2,075**		**470**	**553**	**117.7%**

Population figures and approved sample as set out in the Inception Report. The achievement rate is the achieved sample as a percentage of the approved sample.

2.3. Dimensions of service quality assessed

The literature confirms that satisfaction is multi-dimensional, encompassing product quality, service quality, value for money, expectations, customer support, convenience and the quality of the relationship. Building on the SERVQUAL framework and on the dimensions used in the previous survey round, two parallel instruments were constructed. The buyer instrument assessed eleven dimensions through sixty-eight attributes, following the client experience from ordering through delivery to after-sales support. The supplier instrument assessed thirteen dimensions through eighty-four attributes, following the procurement cycle from registration and tendering through contracting, forecasting and

order management to delivery, inspection, payment and partnership. Every attribute in both instruments was rated on the same five-point scale from Very Dissatisfied (1) to Very Satisfied (5), so that the two groups can be compared on a common measurement basis. Tables 3 and 4 set out the dimensions, their SERVQUAL correspondence and the attributes covered.

Table 2.2. Dimensions of service quality assessed in the buyer instrument

Dimension	SERVQUAL correspondence	Attributes covered	No.
Availability and range of commodities	Reliability	Availability of essential medicines, programme commodities, laboratory supplies and consumables; adequacy of the product range for the level of care; match between stock availability and buyer demand; contribution to reducing stock-outs; availability for emergency needs	7
Ordering process and digital systems	Tangibles	Access to catalogues and ordering information; clarity of product descriptions and codes; simplicity of order preparation and submission; functionality of the eLMIS interface; timeliness of order confirmation; support during system downtime	6
Order accuracy, completeness and documentation	Reliability	Accuracy of order records; completeness of delivered quantities; accuracy of products supplied; accuracy of delivery notes and proof of delivery; consistency between deliveries and invoices; management of backorders and substitutions	6
Timeliness and reliability of delivery	Reliability	Speed of order processing; delivery within agreed lead time; reliability of schedules and routes; frequency of deliveries; speed of emergency deliveries; advance notice of delay; overall predictability	7
Product quality, packaging and cold chain	Tangibles	Quality and fitness for use; remaining shelf life at delivery; packaging integrity; clarity of labels, batch numbers and expiry dates; cold-chain maintenance; care during transport and handling; response to quality defects	7
Communication and information sharing	Assurance	Clarity and usefulness of communication; timeliness of stock and backorder information; advance notice of changes; order status and tracking information; ease of reaching the right contact; consistency of information across channels	6

Dimension	SERVQUAL correspondence	Attributes covered	No.
Customer care, complaints and issue resolution	Responsiveness	Professionalism and courtesy of staff; speed of response to enquiries; effectiveness in resolving shortages and errors; clarity of the complaints process; fairness and transparency of handling; follow-up after resolution	6
Pricing, billing and value for money	Assurance	Transparency of prices and fees; timeliness of updated price lists; accuracy of invoices and statements; clarity of payment terms and reconciliation; overall value for money	5
Returns, recalls and reverse logistics	Responsiveness	Ease of reporting damaged, expired or incorrectly supplied products; clarity of return procedures; communication during recalls and safety alerts; timeliness of replacement or credit; guidance on quarantine and disposal	5
Partnership, coordination and supply chain support	Empathy	Consultation of the buyer and consideration of its needs; support for quantification and forecasting; technical guidance on inventory management; usefulness of orientation and training; coordination with district authorities and Ministry of Health programmes	5
Overall satisfaction and future relationship	Overall	Overall satisfaction with availability, reliability, product quality, communication and customer care, and with ordering, documentation and billing; overall trust in RMS; likelihood of continuing to use RMS; overall satisfaction with products and services	8

In addition to the sixty-eight rated attributes, the buyer instrument included four summary questions covering the perceived change in RMS services over the past two years, the issue experienced most frequently, an overall performance rating on a scale of one to ten, and the single area RMS should improve first, together with five open-ended questions on strengths, challenges, specific incidents, requested actions and additional recommendations.

Table 2.3. Dimensions of service quality assessed in the supplier instrument

Dimension	SERVQUAL correspondence	Attributes covered	No.
Supplier registration, prequalification and onboarding	Assurance	Clarity of registration requirements; ease of access to forms and guidance; reasonableness of documents requested; timeliness of review and feedback; transparency of eligibility and approval decisions; usefulness of orientation on procedures	6
Tendering, bidding and supplier selection	Assurance	Access to tender notices and solicitation documents; clarity of specifications and evaluation requirements; adequacy of bidding time; functionality of bid submission; timeliness of clarification responses; transparency of bid opening and evaluation; feedback to unsuccessful bidders	7
Contract award, negotiation and administration	Reliability	Timeliness of award notification; clarity of contractual scope and terms; fairness of negotiations; reasonableness of risk allocation, securities and penalties; timeliness of signature and start date; consistency in applying agreed terms	6
Forecasting, demand visibility and supply planning	Reliability	Advance information on demand forecasts and volumes; reliability of forecast quantities for production planning; timeliness of information on changes; opportunity to clarify lead times and minimum order quantities; coordination on seasonal and emergency planning; overall predictability of procurement plans	6
Purchase orders, call-offs and order amendments	Reliability	Clarity and completeness of purchase orders; accuracy of descriptions, codes, quantities and delivery locations; timeliness of order issuance after award; ease of acknowledgement and clarification; management of order changes and substitutions; consistency between orders, contracts and payment documents	6

Dimension	SERVQUAL correspondence	Attributes covered	No.
Importation, regulatory and customs coordination	Responsiveness	Clarity of import permit and registration requirements; timeliness of documents for shipment and clearance; coordination with regulatory and customs authorities; support when approvals delay supply; clarity of responsibility for freight, duties and demurrage; management of exceptional disruptions	6
Delivery scheduling, receiving and warehouse interface	Tangibles	Clarity of schedules, warehouse locations and receiving hours; ease of booking delivery appointments; readiness of receiving teams; professionalism during unloading and handover; timeliness of goods-received notes; management of partial and rescheduled deliveries; overall efficiency of receiving	7
Product inspection, quality assurance and acceptance	Assurance	Clarity of quality standards and inspection criteria; reasonableness of shelf life, packaging and labelling requirements; timeliness of inspection and acceptance decisions; competence of inspection personnel; transparency of rejection reasons; fairness of replacement and appeal procedures; handling of quality complaints and recalls	7
Invoicing, payment and financial administration	Reliability	Clarity of invoice submission requirements; ease of confirming invoice receipt and validation; accuracy of invoice verification; timeliness of payment against contractual terms; transparency of deductions and disputed amounts; resolution of rejected invoices and reconciliation differences; availability of invoice status information	7
Communication, responsiveness and information sharing	Responsiveness	Ease of contacting the correct officer; professionalism and courtesy of staff; speed of response to enquiries; clarity and consistency of information across channels; timeliness of notice about changes; effectiveness of coordination among RMS teams	6

Dimension	SERVQUAL correspondence	Attributes covered	No.
Performance monitoring, complaints and dispute resolution	Empathy	Clarity of supplier performance indicators and review criteria; objectivity of performance evaluations; usefulness and timeliness of feedback; accessibility of complaint and appeal channels; fairness and timeliness of dispute resolution; follow-up after corrective action	6
Ethics, fairness, compliance and confidentiality	Assurance	Fair and equal treatment of suppliers; transparency of rules on conflicts of interest and anti-corruption; protection of confidential commercial and pricing information; consistency of decisions with published procedures; ability to raise concerns without fear of retaliation; overall confidence in integrity and accountability	6
Partnership, innovation, sustainability and overall relationship	Empathy	Treatment of suppliers as partners; opportunity to propose innovations and alternatives; support for environmentally responsible practice; consideration of local supplier development; willingness to jointly address disruptions; overall trust in RMS as a customer; likelihood of future participation; overall satisfaction with the relationship	8

The supplier instrument likewise included five summary questions covering the perceived change in RMS supplier management over the past two years, the challenge experienced most frequently, an overall performance rating on a scale of one to ten, the single area RMS should improve first and willingness to participate in future RMS procurement, together with six open-ended questions on strengths, challenges, specific incidents, requested actions, innovation and partnership opportunities, and additional recommendations.

2.4. Data collection tools and methods

Four instruments and methods were used, consistent with the Inception Report.

Desk review. An extensive review of documentation was conducted at inception, covering the previous client satisfaction survey report, the RMS strategic plan, the private sector engagement plan, the Health Sector Strategic Plan, Vision 2050, the National Strategy for Transformation and RMS operational documentation on the ordering, distribution and information-sharing processes. The review served both to understand the operating framework and to inform the construction of the survey instrument.

Structured questionnaires. Two structured questionnaires were used, one for buyers and one for suppliers, each comprising closed-ended questions, five-point Likert items and open-ended questions. Both were developed in English, submitted to RMS for review and approval, and piloted before deployment. Buyer data were captured electronically on tablets and smartphones by trained enumerators, which enabled validation checks at the point of entry, real-time monitoring of progress and daily quality review. The supplier instrument was administered mainly online, reflecting the geographic dispersion of the supplier base.

Key informant interviews. Interviews were conducted with facility staff holding specialised knowledge of ordering, receiving and stock management, in order to explain the quantitative results and to identify institutional and operational factors shaping satisfaction. The interview guide was prepared in English, with respondents free to choose the language in which they were most comfortable.

Open-ended and consultative responses. Five open-ended questions were administered to every buyer respondent and six to every supplier respondent, generating between 421 and 483 substantive written responses per question on the buyer side and between 30 and 54 on the supplier side.

2.5. Data analysis

Raw data were exported from the collection server and processed for analysis. The dataset was cleaned to address missing values, inconsistent categories and outliers before any analysis was performed; a cleaning log records every transformation applied, and no records were deleted or duplicated. Four records carried a province that did not correspond to the district recorded, and province was realigned to district using the official administrative mapping; all provincial figures in this report use the corrected variable.

Likert responses were coded from 1 to 5, where 1 is very dissatisfied, 3 is neutral and 5 is very satisfied, and were analysed in three complementary ways. In every attribute table that follows, the satisfied column reports the combined share of satisfied and very satisfied responses, the very satisfied column is a subset of it shown separately to indicate the strength of the positive verdict, and the satisfied, neutral and dissatisfied columns sum to 100% of valid responses. Percentages are calculated on valid responses, so items marked not applicable are excluded from the base rather than scored. First, for each attribute the percentage of respondents who were satisfied or very satisfied, neutral, and dissatisfied or very dissatisfied is reported alongside the mean score. Second, a dimension index was computed for each respondent as the mean of that respondent's valid attribute scores within the dimension; the internal consistency of every dimension was very high, with Cronbach's alpha between 0.96 and 0.99, which supports the use of these indices for comparison across groups. Third, the Client Satisfaction Score (CSAT) was computed as the proportion of respondents whose composite score across all assessed attributes reaches the satisfied level, that is a mean of 4 or above. Two satisfaction measures are therefore reported throughout this report and it is important to distinguish them. The attribute-level measure, being the proportion of all individual attribute responses that are positive, is the headline satisfaction figure. It is also the basis on which the overall results of the previous rounds were reported, so it is the measure used for trend comparison. The composite Client Satisfaction Score is reported alongside it as a stricter test of consistency: because it requires a respondent to reach a satisfactory average across every attribute assessed, it places below the threshold any respondent who rates a single dimension low, even where that respondent answered positively on the

rest of the instrument. The two measures therefore answer different questions, the first about the proportion of service experiences that are positive and the second about the proportion of respondents for whom every part of the service is satisfactory, and the difference between them is quantified in Section 4.5. Both are applied identically to buyers and suppliers, so that the two groups remain directly comparable with each other within this round, and both are shown in the trend tables.

Loyalty was measured using the Net Promoter Score, derived from the overall performance rating given by each respondent. Respondents rating RMS at 9 or 10 are classified as promoters, those rating 7 or 8 as passives and those rating 6 or below as detractors; the Net Promoter Score is the percentage of promoters less the percentage of detractors. The score is reported for each respondent group and for both groups combined.

Comparative analysis used cross-tabulations of every summary item against facility level, ownership and province on the client side, and against supplier origin, supply category, procurement arrangement and length of relationship on the supplier side. Inferential testing was applied throughout: the chi-square test of association for categorical variables and the Kruskal-Wallis test for dimension indices and the ten-point rating, with p-values below 0.05 treated as statistically significant. The association between each dimension and the overall client verdict was examined using Spearman rank correlation in order to identify the drivers of satisfaction. Qualitative responses were coded thematically using a multilingual keyword framework covering English, Kinyarwanda and French and verified by reading; because a response may carry more than one theme, theme percentages do not sum to 100. Quantitative and qualitative findings were triangulated throughout, and the previous survey round was used as the comparative benchmark wherever the two instruments measure the same construct.

2.6. Ethical considerations

Ethical integrity was treated as a core requirement throughout. Participation was voluntary and informed consent was obtained from every respondent before the interview began. Respondents were assured that their answers would be treated in confidence, used only for the purposes of this survey, and reported in aggregate form. No individual respondent or buyer is identified in this report. Data were stored securely and access restricted to the analysis team. The survey team adhered to the principle that research should make a positive contribution to the welfare of those who participate in it, and that the rights and dignity of participants are to be respected at all times.

3. PRESENTATION OF THE FINDINGS

3.1. Introduction

This section presents the findings of the survey in four parts. It opens with the profile of the respondents in both groups. It then reports the buyer findings across each of the eleven service quality dimensions, in the sequence of the client experience, from communication and ordering through availability, delivery, product quality, pricing and customer support to partnership. It next reports the supplier findings across the thirteen dimensions of the procurement cycle. It then brings the two together, presenting the overall satisfaction score and its disaggregation, the Net Promoter Score, the perceived trajectory of RMS services, an analysis of what drives the overall verdict in each group, and the connections between the client and supplier findings. It closes with the qualitative findings from the open-ended responses of both groups.

3.2. Findings from buyers

Section 3.2 presents the buyer results dimension by dimension. Supplier results follow in Section 3.3 and the two are brought together from Section 3.4 onward.

3.2.1. Profile of the respondents

3.2.1.1 Geographical distribution of respondents by facility level

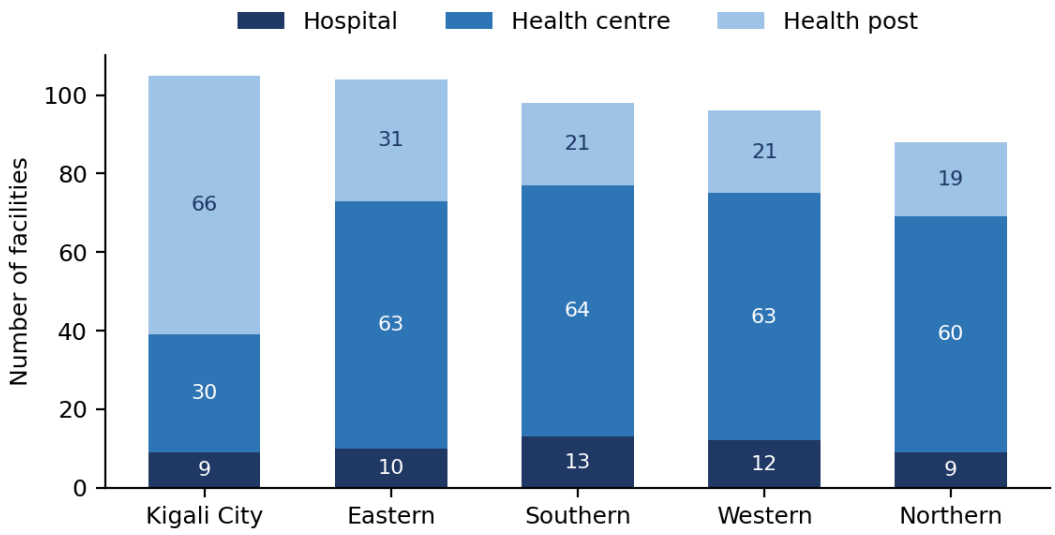
The survey covered all 30 districts of Rwanda. Health centres account for 57.0% of responses (280 buyers), health posts for 32.2% (158) and hospitals for 10.8% (53). The five provinces are evenly represented, each contributing between 88 and 105 buyers. Public buyers make up 63.1% of the sample, private buyers 21.6% and faith-based buyers 15.1%. Ownership is closely linked to facility level: 79.2% of hospitals and 77.4% of health centres are public, whereas 62.0% of health posts are privately owned, reflecting the ownership model of the health post network. Kigali City has a distinct composition, with health posts forming 62.9% of its sample and private buyers 38.1%, against 21% to 30% health posts and 14% to 19% private buyers elsewhere; this must be borne in mind when provincial results are compared.

Table 3.1. Buyers surveyed distributed across the country

Province	Health centres	%	Health posts	%	Hospitals	%	Total	%
Kigali City	30	10.7%	66	41.8%	9	17.0%	105	21.4%
Eastern	63	22.5%	31	19.6%	10	18.9%	104	21.2%
Southern	64	22.9%	21	13.3%	13	24.5%	98	20.0%
Western	63	22.5%	21	13.3%	12	22.6%	96	19.6%
Northern	60	21.4%	19	12.0%	9	17.0%	88	17.9%
Total	**280**	**100%**	**158**	**100%**	**53**	**100%**	**491**	**100%**

Column percentages within facility level. Chi-square test of association between facility level and province: $p < 0.001$.

Figure 3.1. Number of responding buyers by province and facility level



3.2.1.2 *Respondents' profile*

Table 3.2. Respondent role, experience with RMS and recent interaction, by facility level

Characteristic	Hospital (n=53)	Health centre (n=280)	Health post (n=158)	All
Main Role				
Clinical/nursing	0.0% (0)	1.1% (3)	6.3% (10)	2.6%
Data/eLMIS	0.0% (0)	1.4% (4)	0.6% (1)	1.0%
Facility head or manager	1.9% (1)	39.6% (111)	70.9% (112)	45.6%
Finance or administration	1.9% (1)	1.8% (5)	1.9% (3)	1.8%
Pharmacy/store	83.0% (44)	55.4% (155)	17.1% (27)	46.0%
Procurement officer	13.2% (7)	0.7% (2)	1.9% (3)	2.4%
Interaction with RMS in last 12 months				
Interacted with RMS in last 12 months	90.6% (48)	87.1% (244)	75.3% (119)	83.7%
Not interacted with RMS in last 12 months	7.5% (4)	8.6% (24)	15.8% (25)	10.8%
Not sure if interacted with RMS in last 12 months	1.9% (1)	4.3% (12)	8.9% (14)	5.5%
Years working with RMS				
Below 1 year				11.4% (56)
1-3 years				34.8% (171)
4-6 years				26.1% (128)
7-10 years				13.0% (64)
Above 10 years				14.7% (72)

Source: Primary data, Client satisfaction survey, 2026

The role profile of the respondents follows the staffing establishment of the facility level at which they work, and this shapes how the findings that follow should be read. At hospital level, 83.0% of respondents manage a pharmacy or store and a further 13.2% hold a formal procurement position, so 96.2% of hospital responses come from staff whose full-time function is commodity management, with only one hospital respondent answering as a facility head. At health post level the position is

reversed: 70.9% of respondents are the head of the post and only 17.1% describe a pharmacy or store function, which reflects the reality that a health post is staffed by one or two people who carry every function at once. Health centres sit between the two, with 55.4% in a pharmacy or store role and 39.6% answering as the head of the centre. Procurement exists as a distinct function almost only at hospital level, where 7 of the 12 procurement officers in the sample are found, confirming that ordering from RMS is handled as a stores responsibility rather than a procurement responsibility in the great majority of buyers.

This distribution means that satisfaction differences between facility levels are partly differences in who answered. Hospital ratings are given by specialists assessing the technical performance of a supplier they deal with continuously, including order accuracy, documentation, packaging and cold chain. Health post ratings are given by generalists assessing the consequence of a supply shortfall at the point of care, where the practical question is whether the commodity was on the shelf when the patient arrived. Both are valid measures of service quality, but they are not measures of the same thing, and the facility level breakdown should be read alongside the role composition rather than independently of it.

Recent contact with RMS is high overall but declines steadily as facilities get smaller. In the twelve months preceding the survey, 90.6% of hospital respondents, 87.1% of health centre respondents and 75.3% of health post respondents had interacted with RMS, giving an overall 83.7%. The residual is concentrated at health post level, where 15.8% had not interacted and a further 8.9% were not sure whether they had. Taken together, almost a quarter of health post respondents, 24.7%, could not confirm a recent direct interaction. Part of this is order frequency, since a health post orders a narrow product range at long intervals, and part of it is the supply route, since posts are commonly resupplied through their parent health centre and therefore do not always recognise a consignment as an RMS delivery. The 8.9% who were not sure is itself a finding about RMS visibility at the lowest tier of the health pyramid, and it means that health post satisfaction ratings rest on a thinner base of recent, first-hand experience than the ratings given at the other two levels.

Length of the relationship gives most respondents a sound basis for judgement but limits the number who can assess change over time. A majority of 60.9% have worked with RMS for between one and six years, 34.8% for one to three years and 26.1% for four to six years. A further 27.7% have seven years or more of dealing with the institution and hold the institutional memory needed to compare current performance against earlier periods. At the other end, 11.4% have been in post for less than a year and cannot reasonably assess whether service has improved or deteriorated. This matters directly for the items asking respondents to rate change over the past two years, where the responses of that 11.4% reflect a first impression rather than an observed trend, and it supports reading the trend items primarily from the responses of the 27.7% with the longest exposure.

One point of caution on the table itself. The six role categories account for 489 of the 491 respondents, so two entries fall outside the classification and the role column sums to 99.4% rather than 100%. This should be footnoted in the report rather than left to the reader to discover.

3.2.2. Communication and information sharing about RMS products and services

Effective communication underpins every other aspect of the client relationship, since a buyer that knows what is available and when it will arrive can plan around a shortfall, whereas one that does not cannot. Overall performance on this dimension is good: 67.2% of buyers are satisfied on the dimension index and 77.4% of individual responses are positive. The strengths lie in the consistency of information provided across telephone, email, digital platforms and RMS staff (82.6% of responses satisfied) and in the ease of identifying and reaching the appropriate RMS contact person (80.8%), which together indicate that the client-facing structure is functioning.

The main scope for improvement lies in proactive communication. Advance notice of changes in prices, catalogues, ordering procedures or distribution arrangements is the lowest-rated attribute in the dimension (69.7% satisfied, 18.0% dissatisfied), followed by the timeliness of information on stock availability, backorders and expected replenishment (75.4%). Buyers can reach RMS when they need to, but they would like RMS to reach them first when something changes. The open-ended responses put the same point plainly, one buyer observing that there is "less communication whether there are drugs or not when you make an order" and another asking to be told "when the system is updated, because sometimes we find the system has changed without being informed, which delays service delivery".

Table 3.3. Communication and information sharing: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Clarity and usefulness of communication received from RMS.	483	79.1	38.5	8.3	12.6	4.0
Timeliness of information on stock availability, backorders and expected replenishment.	483	75.4	35.6	9.9	14.7	3.9
Advance notice of changes in prices, catalogues, ordering procedures or distribution arrangements.	482	69.7	34.0	12.2	18.0	3.8
Availability of order-status and delivery-tracking information.	483	76.6	35.8	9.1	14.3	3.9
Ease of identifying and reaching the appropriate RMS contact person or service point.	484	80.8	40.3	7.4	11.8	4.0
Consistency of information provided through telephone, email, digital platforms and RMS staff.	482	82.6	40.2	6.2	11.2	4.1

Source: Primary data, Client satisfaction survey, 2026

3.2.3. Ordering process and digital systems

Ordering behaviour is highly standardised and almost entirely digital. Monthly ordering is the norm for 84.1% of buyers, and 83.7% submit their orders through eLMIS or another electronic platform, with a further 6.7% using eBuzima, almost entirely health centres. Telephone-supported ordering persists mainly at health posts (10.8%) and paper-based ordering has effectively disappeared (0.8%). Buyers

also order at different rhythms by level: health posts order weekly or as needed far more often than other levels (24.7% combined, against 6.8% at health centres), reflecting their smaller storage capacity.

Table 3.4. Ordering frequency, ordering channel and recency of last delivery, by facility level

Characteristic	Hospital	Health centre	Health post	All
Ordering frequency: Weekly	5.7% (3)	1.8% (5)	10.8% (17)	5.1%
Ordering frequency: Monthly	79.2% (42)	91.8% (257)	72.2% (114)	84.1%
Ordering frequency: Quarterly	5.7% (3)	1.1% (3)	1.9% (3)	1.8%
Ordering frequency: As needed	9.4% (5)	5.0% (14)	13.9% (22)	8.4%
Ordering frequency: Less often	0.0% (0)	0.4% (1)	1.3% (2)	0.6%
Main channel: Email	1.9% (1)	1.8% (5)	3.2% (5)	2.2%
Main channel: Other electronic/manual	7.5% (4)	0.0% (0)	0.0% (0)	0.8%
Main channel: Paper/manual	1.9% (1)	0.7% (2)	0.6% (1)	0.8%
Main channel: Telephone-supported	1.9% (1)	3.6% (10)	10.8% (17)	5.7%
Main channel: eBuzima	3.8% (2)	11.1% (31)	0.0% (0)	6.7%
Main channel: eLMIS/electronic platform	83.0% (44)	82.9% (232)	85.4% (135)	83.7%
Last delivery: Within 1 month	86.8% (46)	87.1% (244)	81.0% (128)	85.1%
Last delivery: 1-3 months ago	11.3% (6)	10.7% (30)	16.5% (26)	12.6%
Last delivery: 4-6 months ago	1.9% (1)	1.1% (3)	0.0% (0)	0.8%
Last delivery: More than 6 months ago	0.0% (0)	1.1% (3)	2.5% (4)	1.4%

Source: Primary data, Client satisfaction survey, 2026

Column percentages within facility level. Chi-square: ordering frequency $p < 0.001$; ordering channel $p < 0.001$; recency of last delivery $p = 0.253$ (not significant).

Satisfaction with the ordering process is high: 67.8% of buyers are satisfied on the dimension index, the second highest of the eleven dimensions. Simplicity of preparing and submitting routine orders is the strongest attribute (81.2% of responses satisfied), and 77.3% are satisfied with the functionality and user-friendliness of the eLMIS interface. This confirms the finding of the previous survey that buyers are familiar with and confident in the electronic ordering system, and it indicates that the transition of logistics information systems has not damaged the client experience of ordering.

One attribute has greater scope for improvement: the support provided when ordering systems are unavailable or when users experience technical problems (72.9% satisfied, 18.0% dissatisfied). Because more than eight buyers in ten depend on an electronic channel, helpdesk support during downtime is a service continuity issue rather than a marginal one. Buyers also raised network availability and gaps in system knowledge among their own staff, and several requested training on the ordering system.

Table 3.5. Ordering process and digital systems: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Ease of accessing current RMS catalogues, product lists and ordering information.	484	77.3	34.3	8.1	14.7	3.9
Clarity of product descriptions, catalogue codes, units of issue and ordering requirements.	482	76.1	34.4	9.8	14.1	3.9
Simplicity of preparing and submitting routine orders to RMS.	479	81.2	39.0	7.3	11.5	4.0
Functionality and user-friendliness of the electronic ordering platform or eLMIS interface used with RMS.	471	77.3	35.2	8.5	14.2	3.9
Timeliness of confirmation that RMS has received and accepted an order.	481	78.0	36.4	8.5	13.5	3.9
Support provided by RMS when ordering systems are unavailable or when users experience technical problems.	479	72.9	35.7	9.2	18.0	3.8

Source: Primary data, Client satisfaction survey, 2026

3.2.4. Availability and range of commodities

Availability is the lowest-rated dimension of the survey and the issue on which the rest of the findings turn. 51.5% of buyers are satisfied on the dimension index, and at attribute level 17.4% of responses are negative, the highest of any dimension. The two lowest-rated attributes in the entire survey both sit here: the availability of laboratory supplies, medical consumables and other health products (61.1% satisfied, 19.2% dissatisfied) and the availability of programme commodities such as vaccines, family planning, HIV, TB and malaria products (62.7% satisfied). Nearly one buyer in five is dissatisfied with the availability of commodities for emergency or urgent needs (19.9%), the highest dissatisfaction figure recorded for any single attribute.

The pattern is important for interpretation. Availability of essential medicines (72.4% satisfied) and adequacy of the product range for the facility's level of care (71.6%) are the strongest attributes in the dimension. The availability challenge is therefore not general: it is concentrated in laboratory reagents and test kits and in programme commodities. The open-ended responses confirm this precisely, naming creatinine and other laboratory reagents, RPR syphilis tests, HIV test kits, haemoglobin and glucose strips, microcuvettes, pregnancy tests and hepatitis tests, alongside family planning products, malaria commodities and antiretrovirals.

Table 3.6. Availability and range of commodities: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Availability of essential medicines when your buyer needs them.	486	72.4	25.1	12.6	15.0	3.8
Availability of programme commodities relevant to your buyer (for example vaccines, family-planning products, HIV, TB or malaria commodities).	485	62.7	23.9	19.4	17.9	3.6
Availability of laboratory supplies, medical consumables and other health products required by your buyer.	468	61.1	23.1	19.7	19.2	3.6
Adequacy of the range of products offered by RMS for your facility's level of care.	483	71.6	28.8	12.2	16.1	3.8
Extent to which RMS stock availability matches your facility's actual demand.	480	66.0	21.7	18.1	15.8	3.6
Contribution of RMS supply services to reducing stock-outs at your buyer.	480	67.7	25.4	14.4	17.9	3.7
Availability of commodities for emergency or urgent service-delivery needs.	478	68.2	31.0	11.9	19.9	3.7

Source: Primary data, Client satisfaction survey, 2026

Availability is also the dominant issue in the summary questions. Stock-outs or unavailability of products is the issue experienced most frequently by 41.1% of buyers, and commodity availability is the first improvement priority for 54.2%. Stock-outs dominate at hospitals (62.3%), which order the widest range of products, and decline to 43.9% at health centres and 29.1% at health posts (p = 0.004). Across provinces, stock-outs are the most frequent issue for more than half of buyers in the Southern (53.1%) and Western (53.1%) provinces and 43.2% in the Northern Province, but for only 26.7% in Kigali City and 31.7% in the Eastern Province.

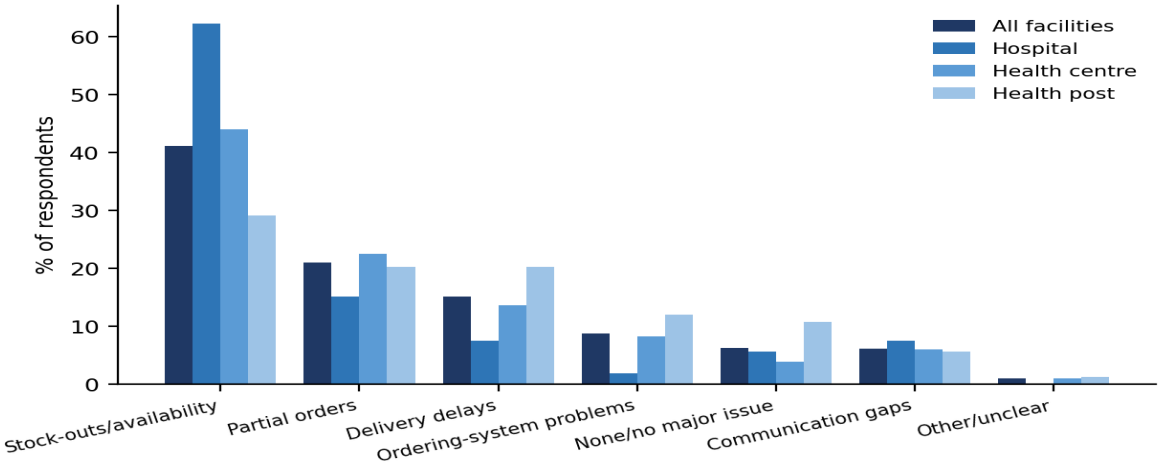
Table 3.7. Most frequent issue experienced by facility level and province

Most frequent issue	Hospital (n=53)	Health centers (n=280)	Health posts (n=158)	Kigali (n=105)	Eastern (n=104)	Southern (n=98)	Western (n=96)	Northern (n=88)	All
Communication gaps	7.5%	6.1%	5.7%	5.7%	6.7%	7.1%	7.3%	3.4%	6.1% (30)
Delivery delays	7.5%	13.6%	20.3%	28.6%	7.7%	14.3%	6.2%	18.2%	15.1% (74)
None/no major issue	5.7%	3.9%	10.8%	2.9%	14.4%	4.1%	5.2%	4.5%	6.3% (31)
Ordering-system problems	1.9%	8.2%	12.0%	13.3%	3.8%	6.1%	10.4%	10.2%	8.8% (43)
Other/unclear	0.0%	1.1%	1.3%	0.0%	3.8%	1.0%	0.0%	0.0%	1.0% (5)
Partial orders	15.1%	22.5%	20.3%	22.9%	31.7%	13.3%	15.6%	20.5%	21.0% (103)
Payment/billing	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.4% (2)
Product quality/shelf life	0.0%	0.0%	0.6%	0.0%	0.0%	1.0%	0.0%	0.0%	0.2% (1)
Stock-outs/availability	62.3%	43.9%	29.1%	26.7%	31.7%	53.1%	53.1%	43.2%	41.1% (202)

Source: Primary data, Client satisfaction survey, 2026

Column percentages. Provinces in the order Kigali City, Eastern, Southern, Western, Northern. Chi-square: by facility level p = 0.004; by province p < 0.001.

Figure 3.2. Most frequent issue experienced with RMS, by facility level



Source: Primary data, Client satisfaction survey, 2026

3.2.5. Order accuracy, completeness and delivery

Order accuracy, completeness and documentation.

The documentary and transactional side of the order is a clear strength, with 66.8% of buyers satisfied on the dimension index. Accuracy and clarity of delivery notes, packing lists and proof-of-delivery documents (83.0% of responses satisfied), accuracy of products supplied (81.4%) and consistency between products delivered and the related invoice (81.4%) are all among the ten highest-rated attributes of the survey. This represents a marked change from the previous round, in which order discrepancies were the most frequently cited complaint reported by 49.68% of buyers during the system transition period.

Satisfaction falls on the two attributes that concern incomplete fulfilment: completeness of delivered quantities against approved quantities (72.0% satisfied) and management and communication of backorders, partial fulfilment and substituted products (75.6%). Partial orders are the second most frequent issue overall, reported by 21.0% of buyers and rising to 22.5% at health centres and 31.7% in the Eastern Province. Buyers trust what the paperwork says; the difficulty is that the paperwork sometimes records less than was ordered.

Table 3.3. Order accuracy, completeness and documentation: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Accuracy of RMS order records compared with the order submitted by your buyer.	483	75.2	28.0	10.6	14.3	3.8
Completeness of delivered quantities compared with the quantities confirmed or approved.	485	72.0	28.5	13.8	14.2	3.8
Accuracy of products supplied, including product name, strength, dosage form, pack size and unit of issue.	484	81.4	34.9	5.2	13.4	4.0

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Accuracy and clarity of delivery notes, packing lists and proof-of-delivery documents.	481	83.0	39.7	4.8	12.3	4.0
Consistency between products delivered and the related invoice or billing documents.	483	81.4	37.5	5.8	12.8	4.0
Management and communication of backorders, partial fulfilment and substituted products.	480	75.6	36.7	9.0	15.4	3.9

Source: Primary data, Client satisfaction survey, 2026

Timeliness and reliability of delivery

Timeliness is the second lowest-rated dimension, with 60.1% of buyers satisfied on the dimension index and 16.1% of attribute responses negative. Routine performance is acceptable: 74.8% of responses are satisfied with the frequency of deliveries and 72.5% with the reliability of schedules and distribution routes, and 85.1% of buyers had received a delivery within the month preceding the interview. Two attributes fall below 70% and both carry disproportionate operational consequences: the speed of processing and delivering emergency or urgent orders (69.0% satisfied, 18.8% dissatisfied) and the advance notice provided when an order or delivery is likely to be delayed (67.3% satisfied, 18.2% dissatisfied). A delay that is communicated allows a buyer to borrow from a neighbour or to inform patients; a delay that is not communicated does neither.

Table 3.4. Timeliness and reliability of delivery: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Speed with which RMS processes routine buyer orders.	487	71.0	28.1	12.1	16.8	3.8
Delivery of routine orders within the agreed or expected lead time.	487	71.5	28.1	11.5	17.0	3.8
Reliability of RMS delivery schedules and distribution routes.	483	72.5	30.6	12.8	14.7	3.8
Appropriateness of the frequency of deliveries to your buyer.	485	74.8	31.3	11.5	13.6	3.9
Speed of processing and delivering emergency or urgent orders.	480	69.0	31.2	12.3	18.8	3.7
Advance notice provided when an order or delivery is likely to be delayed.	483	67.3	30.0	14.5	18.2	3.7
Overall predictability and consistency of RMS deliveries over time.	484	71.3	29.1	14.9	13.8	3.8

Source: Primary data, Client satisfaction survey, 2026

Delivery performance is the clearest geographical differentiator in the survey. The timeliness index is 3.44 in Kigali City against a national 3.78 and 4.02 in the Eastern Province ($p < 0.001$), and 28.6% of Kigali City buyers name delivery delay as their most frequent issue, almost four times the Eastern Province figure of 7.7%. Delivery timeliness is also the improvement priority most strongly associated with a

lower overall rating: buyers whose main concern is delivery delay gave RMS a mean rating of 7.08 out of ten, against 7.95 among buyers whose main concern is stock-outs. Buyers appear to treat a national stock-out as a constraint RMS shares with the wider system, but a late delivery of stock RMS holds as a shortfall attributable to RMS. This distinction should shape how RMS communicates about the two situations.

3.2.6. Product quality, packaging and cold-chain management

Product quality is the best-performing dimension of the survey, with 75.8% of buyers satisfied on the dimension index and 82.1% of attribute responses positive. Quality and fitness for use of the products supplied (85.0% satisfied), integrity of packaging on arrival (84.9%), care taken during transport and handling (83.9%) and maintenance of cold-chain conditions for temperature-sensitive products (83.4%) are the four highest-rated attributes of the entire instrument. For an institution distributing to 30 districts including remote areas, this is a substantial achievement and should be recognised as such.

The lowest-rated attribute in the dimension is the adequacy of remaining shelf life at the time of delivery (77.1% satisfied, 14.0% dissatisfied). Although still above the survey average, it echoes a specific concern raised repeatedly in the open-ended responses, where buyers described receiving products close to expiry and the losses that follow when those products cannot be used in time. One buyer noted that delivering medicines near their expiry date "causes losses for the contractor", and another asked for products to be supplied "on time and with a good expiry date".

Table 3.5. Product quality, packaging and cold-chain management: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Quality and fitness for use of medical products supplied by RMS.	487	85.0	43.1	3.5	11.5	4.1
Adequacy of the remaining shelf life of products at the time of delivery.	484	77.1	35.7	8.9	14.0	3.9
Condition and integrity of packaging when products arrive at your buyer.	484	84.9	45.2	3.7	11.4	4.1
Clarity and accuracy of labels, batch numbers, expiry dates and storage instructions.	482	81.5	45.0	5.4	13.1	4.1
Maintenance of appropriate temperature and cold-chain conditions for temperature-sensitive products.	475	83.4	44.4	4.6	12.0	4.1
Care taken during transport and handling to prevent contamination, breakage, leakage or other damage.	485	83.9	45.6	4.5	11.5	4.1
Promptness of RMS action when your buyer reports a suspected quality defect or product-safety concern.	479	78.5	38.8	8.1	13.4	4.0

Source: Primary data, Client satisfaction survey, 2026

3.2.7. Pricing, billing and value for money

Pricing and billing performs well overall, with 67.4% of buyers satisfied on the dimension index. The transactional attributes are strong: accuracy and completeness of invoices and statements (80.9% of responses satisfied), clarity of payment terms, credit arrangements and account reconciliation procedures (80.2%) and overall value for money provided by RMS products and services (81.0%). This

is a notable improvement on the previous round, in which 16.06% of buyers considered RMS prices much higher than the market and payment-related concerns featured among the reasons buyers contacted customer support.

The two lower-rated attributes both concern the communication of price information rather than price itself: transparency of prices, service charges and applicable fees (73.8% satisfied) and timeliness and accessibility of updated price lists (70.6% satisfied, 17.8% dissatisfied). The finding mirrors the pattern in the communication dimension, and it also echoes the recommendation of the previous survey that prices be harmonised and kept current across systems. Buyers in the open-ended responses asked for prices to be published consistently and for advance notice of price changes, and a small number of health posts raised transport charges levied when part of an order is not supplied.

Table 3.8. Pricing, billing and value for money: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Transparency of RMS product prices, service charges and any applicable fees.	480	73.8	32.9	9.6	16.7	3.8
Timeliness and accessibility of updated price lists.	483	70.6	33.1	11.6	17.8	3.8
Accuracy and completeness of invoices, statements and related financial documents.	482	80.9	37.8	7.7	11.4	4.0
Clarity of payment terms, credit arrangements and account-reconciliation procedures.	484	80.2	34.9	8.5	11.4	4.0
Overall value for money provided by RMS products and services.	485	81.0	35.9	7.6	11.3	4.0

Source: Primary data, Client satisfaction survey, 2026

3.2.8. Customer care, complaints and issue resolution

Customer care is rated well on the interpersonal dimension and less well on the closing of the loop. 68.4% of buyers are satisfied on the dimension index. RMS staff are perceived as professional, courteous and respectful by 80.1% of responses, and complaints are seen as handled fairly and transparently by 78.1%. The two lowest-rated attributes are the effectiveness of RMS in actually resolving missing items, shortages, delivery errors and service problems (72.2% satisfied, 15.3% dissatisfied) and the follow-up provided after a complaint has been addressed (74.5%).

This distinction matters. The previous survey found that 50% of buyers had contacted RMS customer support in the preceding twelve months and that the leading requests for improvement were greater availability of support channels (54.61%) and shorter waiting times (28.37%). The present round indicates that the quality of the interaction, once contact is made, is not in question; what remains unresolved is whether the issue raised is closed and the buyer told. In the open-ended responses buyers asked for a functioning call centre, for confirmation when stock is received and when payments are made, and for feedback after a problem has been reported.

Table 3.9. Customer care, complaints and issue resolution: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Professionalism, courtesy and respect demonstrated by RMS staff.	483	80.1	40.4	8.1	11.8	4.0
Speed of response to inquiries and requests for clarification.	481	75.9	35.3	10.8	13.3	3.9
Effectiveness of RMS in resolving missing items, shortages, delivery errors or service problems.	485	72.2	33.6	12.6	15.3	3.8
Clarity and accessibility of the process for submitting complaints or service requests.	480	75.8	33.1	10.4	13.8	3.9
Fairness and transparency with which complaints and disputes are handled.	480	78.1	37.3	9.8	12.1	4.0
Follow-up provided by RMS after a complaint or service issue has been addressed.	479	74.5	34.4	11.1	14.4	3.9

Source: Primary data, Client satisfaction survey, 2026

3.2.9. Returns, recalls and reverse logistics

Returns and reverse logistics is the third lowest-rated dimension, with 60.3% of buyers satisfied on the dimension index and the second highest neutral share in the survey at 13.6%, which indicates that many buyers have limited direct experience of the process. The ease of reporting damaged, expired, short-dated, excess or incorrectly supplied products (66.8% satisfied) and the clarity and practicality of return and replacement procedures (67.2%) are both among the ten lowest-rated attributes of the survey. Communication during a recall or safety alert (72.2%) and guidance on quarantine, safe storage, collection and disposal (72.4%) perform somewhat better. The dimension is a candidate for procedural clarification and communication rather than for operational overhaul, and it is closely connected to the short shelf-life concern reported in Section 4.3.5.

Table 3.10. Returns, recalls and reverse logistics: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Ease of reporting damaged, expired, short-dated, excess or incorrectly supplied products.	479	66.8	30.7	15.2	18.0	3.7
Clarity and practicality of RMS procedures for returning or replacing products.	479	67.2	25.7	14.2	18.6	3.7
Speed and effectiveness of communication when a product recall or safety alert occurs.	482	72.2	32.2	12.7	15.1	3.8
Timeliness of product replacement, account adjustment or credit-note processing where applicable.	477	69.2	26.4	13.6	17.2	3.7
Guidance provided on quarantine, safe storage, collection or disposal of unusable products.	475	72.4	30.3	12.4	15.2	3.8

Source: Primary data, Client satisfaction survey, 2026

3.2.10. Partnership, coordination and supply chain support

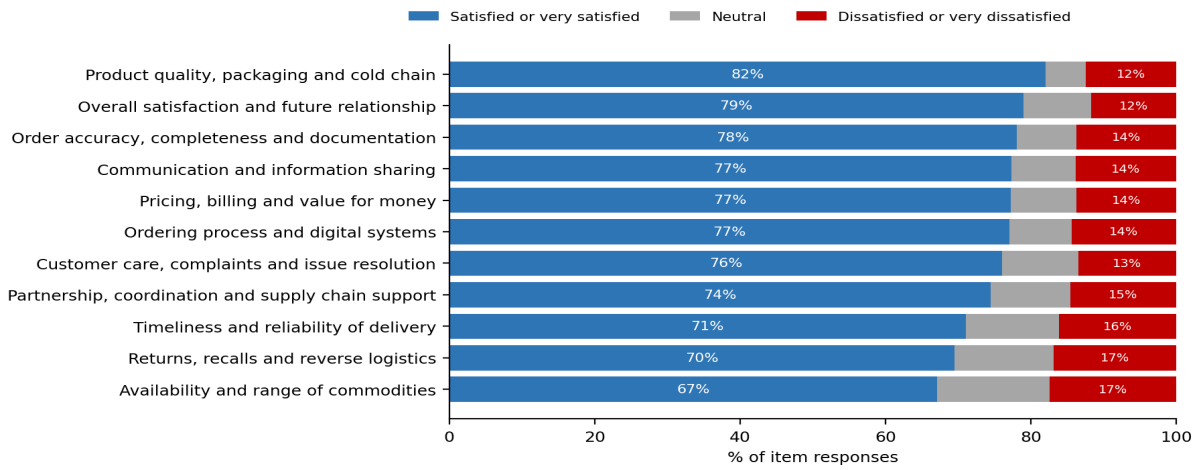
Partnership and supply chain support is rated at 66.4% of buyers satisfied. Coordination between RMS, the buyer, district authorities and Ministry of Health programmes is the strongest attribute (78.1% of responses satisfied), followed by technical guidance on inventory management, stock reporting and the prevention of stock-outs and expiries (74.9%). The lower-rated attributes are the extent to which RMS consults the buyer and considers its service-delivery needs (73.4%) and the usefulness of orientation, training and updates provided to facility staff (72.4%, 15.9% dissatisfied). Training is one of the most frequent specific requests in the open-ended responses, particularly from health posts and from buyers whose stock management staff have changed, and it is a low-cost intervention with a direct effect on ordering accuracy.

Table 3.11. Partnership, coordination and supply chain support: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Extent to which RMS consults your buyer and considers its service-delivery needs.	481	73.4	31.4	10.8	15.8	3.8
Support and feedback provided by RMS for quantification, forecasting and demand planning.	481	73.6	30.8	11.9	14.6	3.8
Technical guidance provided on inventory management, stock reporting and prevention of stock-outs or expiries.	483	74.9	32.3	11.6	13.5	3.9
Usefulness of orientation, training or updates provided by RMS to relevant facility staff.	485	72.4	34.6	11.8	15.9	3.8
Coordination between RMS, your buyer, district authorities and relevant Ministry of Health programmes.	483	78.1	36.2	9.1	12.8	4.0

Source: Primary data, Client satisfaction survey, 2026

Figure 3.6. Satisfaction by service dimension, all buyers (attribute-level responses)

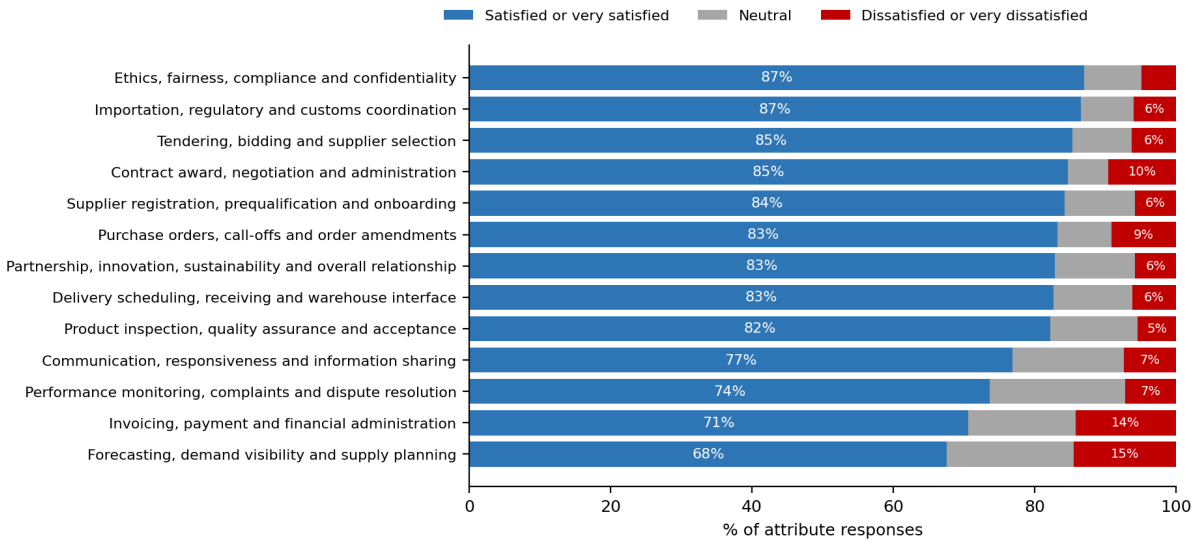


Source: Primary data, Client satisfaction survey, 2026

3.3. Findings from suppliers

This section presents the results of the supplier instrument across the thirteen dimensions of the procurement cycle. Across all attribute responses, 80.6% were satisfied or very satisfied, 11.5% neutral and 7.9% dissatisfied. On the composite measure, 51.6% of suppliers are satisfied. Eleven of the thirteen-dimension indices sit at or above 4.00 on the five-point scale, and the two that do not are the source of almost all supplier dissatisfaction.

Figure 3.7. Supplier satisfaction by dimension of the procurement cycle (attribute-level responses)



Source: Primary data, Client satisfaction survey, 2026

Table 3.12. Supplier satisfaction by dimension of the procurement cycle

Dimension	% of suppliers satisfied	Dimension index (1 to 5)	% of attribute responses satisfied	Interpretation
Supplier registration, prequalification and onboarding	72.6%	4.11	84.2%	High
Tendering, bidding and supplier selection	72.6%	4.13	85.3%	High
Contract award, negotiation and administration	72.6%	4.09	84.7%	High
Forecasting, demand visibility and supply planning	50.0%	3.71	67.6%	Moderate
Purchase orders, call-offs and order amendments	66.1%	4.02	83.2%	High
Importation, regulatory and customs coordination	67.7%	4.06	86.5%	High
Delivery scheduling, receiving and warehouse interface	67.7%	4.05	82.7%	High
Product inspection, quality assurance and acceptance	69.3%	4.06	82.2%	High
Invoicing, payment and financial administration	54.8%	3.82	70.6%	Moderate

Dimension	% of suppliers satisfied	Dimension index (1 to 5)	% of attribute responses satisfied	Interpretation
Communication, responsiveness and information sharing	64.5%	4.04	76.8%	High
Performance monitoring, complaints and dispute resolution	59.7%	3.83	73.6%	Moderate
Ethics, fairness, compliance and confidentiality	80.7%	4.15	87.0%	Very high
Partnership, innovation, sustainability and overall relationship	72.6%	4.13	82.9%	High

Source: Primary data, Client satisfaction survey, 2026

3.3.1. Suppliers

The 62 responding suppliers are split between locally established and international organisations. 34 suppliers (54.8%) are based in Rwanda and 28 (45.2%) are international. This is a broadly similar balance to the previous round, in which 53.3% of suppliers surveyed were local and 46.7% international.

Medicines are the most common supply category (17 suppliers), followed by consumables and packaging, medical devices and equipment, laboratory products and logistics or other services, each with ten to twelve suppliers. The category profile is not independent of origin: all ten suppliers of logistics and other services are Rwanda-based, whereas international suppliers are concentrated in medicines and in medical devices and equipment. Framework agreements are the most common procurement arrangement (40.3%), followed by open tender (30.6%) and direct procurement or requests for quotation (17.7%). Most relationships are recent, with 45.1% of suppliers having supplied RMS for three years or less and 22.6% for more than six years, and most respondents draw on repeated rather than single-transaction experience, 79.0% having handled two or more RMS contracts in the previous 24 months. Dealings are predominantly conducted online (62.9%), and 80.6% of respondents had personally interacted with RMS during the previous 24 months, with invoicing or payment the most recent point of contact for 25.8% and contracting for 22.6%.

Table 3.13. Profile of responding suppliers (n=62)

Characteristic	Number of suppliers	% of respondents
Supplier origin: Rwanda-based	34	54.8%
Supplier origin: International	28	45.2%
Main supply category: Medicines	17	27.4%
Main supply category: Consumables and packaging	12	19.4%
Main supply category: Medical devices and equipment	12	19.4%
Main supply category: Laboratory products	11	17.7%
Main supply category: Logistics and other services	10	16.1%
Length of relationship with RMS: Less than 1 year	3	4.8%
Length of relationship with RMS: 1-3 years	25	40.3%
Length of relationship with RMS: 4-6 years	20	32.3%

Characteristic	Number of suppliers	% of respondents
Length of relationship with RMS: 7-10 years	9	14.5%
Length of relationship with RMS: More than 10 years	5	8.1%
Main procurement arrangement: Framework agreement	25	40.3%
Main procurement arrangement: Open tender	19	30.6%
Main procurement arrangement : Direct procurement or RFQ	11	17.7%
Main procurement arrangement: Restricted tender	4	6.5%
Main procurement arrangement: Other or mixed	3	4.8%
Contracts handled in last 24 months: 1	13	21.0%
Contracts handled in last 24 months: 2-3	35	56.5%
Contracts handled in last 24 months: 4-6	12	19.4%
Contracts handled in last 24 months: 7 or more	2	3.2%
Most recent interaction stage: Bidding	13	21.0%
Most recent interaction stage: Contracting	14	22.6%
Most recent interaction stage: Order fulfilment	11	17.7%
Most recent interaction stage: Delivery/inspection	3	4.8%
Most recent interaction stage: Invoicing/payment	16	25.8%
Most recent interaction stage: Contract closed	5	8.1%
Mode of dealing with RMS: Online	39	62.9%
Mode of dealing with RMS: In person	13	21.0%
Mode of dealing with RMS: Telephone	8	12.9%

Source: Primary data, Client satisfaction survey, 2026

3.3.2. Registration, tendering and contract award

The front end of the procurement cycle is a clear strength. Registration and prequalification (72.6% of suppliers satisfied), tendering and supplier selection (72.6%) and contract award and administration (72.6%) all sit among the strongest dimensions. At attribute level, transparency of supplier eligibility, categorisation and approval decisions reaches 89.7% satisfied, transparency and fairness of bid opening and evaluation 88.3%, and clarity of contractual scope and fairness of contract negotiations both 90.2%, the joint highest attributes of the supplier instrument. Timeliness and consistency of responses to clarification requests during tendering is the only attribute in either instrument with no dissatisfied responses at all.

Three attributes are rated lower and each was raised independently in the written responses. The quality and usefulness of feedback or debriefing provided to unsuccessful bidders (82.8% satisfied, 12.1% dissatisfied) is the lowest-rated tendering attribute, and suppliers asked directly for tender results to be communicated within a stated period and for feedback on allocation criteria. The reasonableness of contractual risk allocation, warranties, securities, penalties and performance obligations (77.0% satisfied, 14.8% dissatisfied) is the lowest-rated attribute of the contracting dimension, and the written responses locate the concern specifically in liquidated damages applied

where the delay originated with RMS, with a manufacturer, with shipping or with a pre-import permit. The timeliness of RMS review and feedback on registration applications (82.1%) is the lowest-rated onboarding attribute.

Table 3.14. Registration, tendering and contract award: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Clarity of information provided about RMS supplier-registration requirements.	59	83.1	35.6	11.9	5.1	4.1
Ease of accessing supplier-registration and prequalification forms, guidance and submission channels.	55	81.8	30.9	14.5	3.6	4.1
Reasonableness and relevance of the documents and evidence requested during registration or prequalification.	56	83.9	30.4	12.5	3.6	4.1
Timeliness of RMS review and feedback on supplier-registration or prequalification applications.	56	82.1	37.5	10.7	7.1	4.1
Transparency of supplier eligibility, categorisation and approval decisions.	58	89.7	41.4	3.4	6.9	4.2
Usefulness of orientation provided on RMS procurement procedures, contacts, systems and compliance expectations.	58	84.5	37.9	6.9	8.6	4.1
Ease of accessing RMS tender notices, solicitation documents and procurement opportunities.	60	83.3	38.3	6.7	10.0	4.1
Clarity and completeness of tender specifications, quantities, delivery schedules and evaluation requirements.	60	85.0	38.3	5.0	10.0	4.1
Adequacy of the time allowed to prepare and submit responsive bids.	60	83.3	33.3	13.3	3.3	4.1
Functionality and user-friendliness of the electronic or manual bid-submission process.	57	87.7	35.1	10.5	1.8	4.2
Timeliness and consistency of responses to requests for clarification during tendering.	60	86.7	40.0	13.3	0.0	4.3
Transparency and fairness of bid opening, evaluation and supplier-selection procedures.	60	88.3	35.0	5.0	6.7	4.1
Quality and usefulness of feedback or debriefing provided to unsuccessful bidders.	58	82.8	29.3	5.2	12.1	4.0
Timeliness of notification of tender results and contract-award decisions.	60	85.0	36.7	3.3	11.7	4.0
Clarity of contractual scope, specifications, quantities, prices, delivery terms and responsibilities.	61	90.2	39.3	1.6	8.2	4.2
Fairness and professionalism of contract negotiations with RMS.	61	90.2	44.3	3.3	6.6	4.2

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Reasonableness of contractual risk allocation, warranties, securities, penalties and performance obligations.	61	77.0	29.5	8.2	14.8	3.9
Timeliness of contract signature, purchase authorisation and communication of the effective start date.	61	83.6	42.6	11.5	4.9	4.2
Consistency with which RMS applies agreed contract terms and approved amendments.	61	82.0	34.4	6.6	11.5	4.0

Source: Primary data, Client satisfaction survey, 2026

3.3.3. Forecasting, demand visibility and supply planning

Forecasting is the lowest-rated dimension of the supplier instrument, with 50.0% of suppliers satisfied and 14.5% of attribute responses negative. Adequacy of advance information on demand forecasts and expected volumes (63.2% satisfied, 19.3% dissatisfied), reliability of forecast quantities for planning production, sourcing and inventory (62.3%, with the highest neutral share in either instrument at 24.5%) and timeliness of information on changes in demand, funding or product priorities (66.0%) are the three lowest-rated attributes. Overall predictability of procurement plans and call-off requirements reaches 69.8%.

The operational consequence is direct and was described in detail by respondents. For manufacturers and importers whose production and shipping cycles run to months, the absence of a reliable forward view lengthens lead times and raises costs. Suppliers reported tender quantities that differed from the quantities finally ordered after freight had been costed, minimum order quantities not accounted for at tendering stage, and, most frequently, a long interval between contract signature and issuance of the purchase order which "prevents the supplier from also planning their purchases". Sharing indicative annual or rolling forecasts was the single most frequent partnership proposal made by suppliers.

Table 3.15. Forecasting, purchase orders and importation: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Adequacy of advance information provided on RMS demand forecasts and expected procurement volumes.	57	63.2	28.1	17.5	19.3	3.7
Reliability of forecast quantities for planning production, sourcing and inventory.	53	62.3	26.4	24.5	13.2	3.7
Timeliness of information on changes in demand, funding, product priorities or procurement schedules.	53	66.0	26.4	18.9	15.1	3.7
Opportunities provided for suppliers to clarify lead times, production constraints and minimum order quantities.	55	74.5	23.6	18.2	7.3	3.9

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Coordination with RMS on supply planning for seasonal, programme-specific or emergency requirements.	53	69.8	28.3	13.2	17.0	3.8
Overall predictability of RMS procurement plans and call-off requirements.	53	69.8	24.5	15.1	15.1	3.7
Clarity and completeness of purchase orders, call-off orders and delivery instructions.	59	84.7	30.5	5.1	10.2	4.0
Accuracy of product descriptions, catalogue codes, units, quantities, prices and delivery locations in RMS orders.	58	86.2	34.5	6.9	6.9	4.1
Timeliness of issuing purchase orders or call-offs after contract award or requisition approval.	59	83.1	30.5	8.5	8.5	4.0
Ease of acknowledging orders and obtaining clarification before fulfilment.	59	84.7	33.9	10.2	5.1	4.1
Effectiveness of RMS in managing order changes, cancellations, substitutions or quantity adjustments.	56	78.6	28.6	10.7	10.7	3.9
Consistency between purchase orders, contracts, approved quotations and subsequent payment documents.	60	81.7	28.3	5.0	13.3	3.9
Clarity of RMS requirements for import permits, product registration, licences and regulatory documentation.	50	90.0	34.0	6.0	4.0	4.2
Timeliness of RMS provision of documents or confirmations needed for international shipment and customs clearance.	48	89.6	31.2	4.2	6.2	4.1
Coordination between RMS and relevant regulatory or customs authorities when clarification is required.	46	87.0	34.8	8.7	4.3	4.1
Support provided when regulatory approvals, customs procedures or port-of-entry requirements delay supply.	47	85.1	31.9	10.6	4.3	4.1
Clarity of responsibilities for freight, insurance, taxes, duties, demurrage and other import-related costs.	46	84.8	37.0	8.7	6.5	4.1
Management of exceptional disruptions affecting international supply, including transport constraints, fuel-price changes or global shortages.	45	82.2	28.9	6.7	11.1	3.9

Source: Primary data, Client satisfaction survey, 2026

3.3.4. Purchase orders, importation and delivery

Purchase orders are handled accurately but not always promptly or flexibly (66.1% of suppliers satisfied). Accuracy of product descriptions, codes, quantities and delivery locations (86.2% of responses satisfied) is strong, while the effectiveness of RMS in managing order changes, cancellations, substitutions and quantity adjustments (78.6%) and the consistency between purchase

orders, contracts, approved quotations and subsequent payment documents (81.7%, 13.3% dissatisfied) are rated lower. The second of these is the documentary root of many payment delays: an inconsistency between the order, the delivery record and the invoice is what stalls a payment.

Importation, regulatory and customs coordination is one of the strongest dimensions (67.7% of suppliers satisfied, 86.5% of attribute responses positive), which is a notable result given how much of the RMS supply base is international. Clarity of import permit and registration requirements (90.0%) and timeliness of the documents needed for shipment and customs clearance (89.6%) are among the highest-rated attributes of the instrument. The lowest-rated attribute is the management of exceptional disruptions affecting international supply, such as transport constraints, fuel price changes or global shortages (82.2%), which connects to supplier requests for flexibility on price revision and delivery timelines under force majeure conditions.

The delivery and warehouse interface (67.7% satisfied) is rated well on the human and access dimensions, with professionalism and cooperation of RMS staff during unloading and handover at 89.3% and ease of booking delivery appointments at 87.3%. Two attributes fall sharply below the dimension average and both concern documentation and exceptions: the timeliness of issuing goods-received notes and proof-of-receipt documents (73.7% satisfied, 14.0% dissatisfied) and the management of partial, urgent, rescheduled and delayed deliveries (75.9%). Because a goods-received note is the trigger for invoicing, a delay at this step propagates directly into the payment cycle, and several suppliers described penalties applied because receipt had not been confirmed in time for them to invoice.

3.3.5. Inspection, quality assurance and acceptance

Inspection and quality assurance is rated highly on competence and standards (69.3% of suppliers satisfied): competence and professionalism of RMS inspection personnel reaches 88.7% and clarity and consistency of quality standards and inspection criteria 86.0%. The lower-rated attributes are the timeliness of inspection, sampling, testing and acceptance decisions after delivery (75.9%) and the transparency of reasons provided when products are rejected, quarantined or conditionally accepted (76.5%). One supplier described a consignment rejected because expiry dates had been agreed by telephone rather than confirmed in writing, with the stock subsequently expiring in its own warehouse. The gap here is the documentation of acceptance decisions rather than the competence of the inspection function, and it connects directly to the short shelf life concern reported by buyers in Section 4.3.5.

Table 3.16. Delivery, inspection and invoicing: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Clarity of delivery schedules, warehouse locations, receiving hours and contact arrangements.	55	87.3	34.5	3.6	9.1	4.1
Ease of booking delivery appointments and obtaining gate or warehouse access.	55	87.3	32.7	5.5	7.3	4.1

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Readiness of RMS receiving teams and buyers when goods arrive at the agreed time.	54	83.3	27.8	11.1	5.6	4.0
Professionalism and cooperation of RMS staff during unloading, verification and handover.	56	89.3	30.4	7.1	3.6	4.1
Timeliness of issuing goods-received notes and delivery acknowledgements or proof-of-receipt documents.	57	73.7	28.1	12.3	14.0	3.9
Management of partial deliveries, urgent deliveries, rescheduled deliveries and delivery delays.	54	75.9	29.6	22.2	1.9	4.0
Overall efficiency of the delivery and warehouse-receiving process.	56	82.1	32.1	16.1	1.8	4.1
Clarity and consistency of RMS product-quality standards and inspection criteria.	57	86.0	33.3	8.8	5.3	4.1
Reasonableness of requirements concerning shelf life, packaging, labelling, batch information and storage conditions.	56	82.1	30.4	12.5	5.4	4.1
Timeliness of inspection, sampling, testing and acceptance decisions after delivery.	54	75.9	29.6	18.5	5.6	4.0
Competence, professionalism and consistency of RMS inspection and quality-assurance personnel.	53	88.7	32.1	7.5	3.8	4.2
Transparency of reasons provided when products are rejected, quarantined or conditionally accepted.	51	76.5	31.4	15.7	7.8	4.0
Fairness and practicality of procedures for replacement, corrective action, reinspection or appeal.	50	82.0	32.0	14.0	4.0	4.1
Handling of quality complaints, product recalls, safety alerts and warranty claims after acceptance.	49	83.7	28.6	10.2	6.1	4.0
Clarity of invoice-submission requirements and supporting documentation.	59	86.4	39.0	10.2	3.4	4.2
Ease of confirming whether RMS has received and validated an invoice.	59	72.9	32.2	18.6	8.5	3.9
Accuracy and consistency of invoice verification against contracts, orders, deliveries and acceptance records.	59	79.7	33.9	16.9	3.4	4.1
Timeliness of payment in accordance with contractual payment terms.	60	53.3	18.3	16.7	30.0	3.3
Transparency of deductions, withholding taxes, penalties, credit notes or disputed amounts.	57	70.2	26.3	21.1	8.8	3.9
Speed and effectiveness of resolving rejected invoices, payment delays and account-reconciliation differences.	54	64.8	27.8	14.8	20.4	3.7
Availability of reliable information on invoice status and expected payment dates.	60	66.7	30.0	8.3	25.0	3.6

Source: Primary data, Client satisfaction survey, 2026

3.3.6. Invoicing, payment and financial administration

Invoicing and payment contains the single most negative result of the entire survey. 54.8% of suppliers are satisfied on the dimension index. Timeliness of payment in accordance with contractual payment terms is rated satisfactory by 53.3% of suppliers, with 30.0% dissatisfied, by a wide margin the lowest-scoring attribute in either instrument. Availability of reliable information on invoice status and expected payment dates (66.7% satisfied, 25.0% dissatisfied) and the speed of resolving rejected invoices and reconciliation differences (64.8%, 20.4% dissatisfied) are the next lowest-rated. By contrast the front end of the process is sound, with clarity of invoice submission requirements at 86.4%.

The issue is therefore not what suppliers must submit but what happens after they submit it, and above all the limited visibility while they wait. The written responses are specific and consistent: an invoice ninety days past due after an accepted extension request, "one payment took over a year", "in two consecutive years we had significant payment delays", and a documented case of a purchase order outstanding for 264 days which the supplier linked to foreign exchange regulations in its home country restricting how long an export receivable may remain unsettled. Suppliers repeatedly connected the delay to the absence of information rather than to the delay alone, describing payments "delayed with no communication from the finance team" and asking RMS to "communicate exact timelines for payments to enable proper planning". This finding indicates that the position reported in the previous round has not yet been fully resolved, when 25% of suppliers consistently received payment on the promised date and payment-related issues had risen to 55% of supplier contacts with customer support.

3.3.7. Communication, performance monitoring, ethics and partnership

Communication with suppliers (64.5% satisfied) is rated well on tone and less well on speed and internal coordination. Professionalism, courtesy and respect shown by RMS staff reaches 84.7%, but ease of identifying and contacting the correct officer or department falls to 74.6%, speed of response to enquiries and urgent operational issues to 72.1% and the effectiveness of coordination among the RMS procurement, warehouse, quality, finance and programme teams to 70.9%, the lowest-rated attribute of the dimension. Suppliers described the consequence concretely: enquiries passing between departments, approvals stalling when one officer is absent, and difficulty obtaining a contact point in the finance function.

Performance monitoring and dispute resolution (59.7% satisfied) is the dimension with the least engagement, carrying the highest neutral shares in the instrument, between 17.6% and 20.8% per attribute, and the lowest valid response counts. Follow-up after a complaint or agreed corrective action is the lowest-rated attribute (67.9% satisfied). The reading is that a formal supplier performance management system is not visible to most suppliers rather than that it is judged to work badly, and suppliers themselves proposed filling the gap through joint performance reviews using measures such as on-time in-full delivery.

Ethics, fairness, compliance and confidentiality is the highest-rated dimension of the supplier instrument (80.7% of suppliers satisfied, 87.0% of attribute responses positive). Ability to raise ethical or compliance concerns without fear of retaliation (89.5%), fair and equal treatment of suppliers

(88.1%) and transparency of rules on conflicts of interest, gifts and anti-corruption (87.5%) all score strongly, and overall confidence in the integrity and accountability of RMS supplier management reaches 86.2%. This is a significant institutional asset and it echoes the finding of the previous round that suppliers considered the tendering process competitive and transparent.

The partnership and overall relationship dimension (72.6% satisfied) confirms a positive verdict with one reservation. Likelihood of participating in future RMS procurement opportunities is the highest-rated attribute of the instrument (94.9% satisfied), overall trust in RMS as a reliable and professional customer reaches 85.0% and overall satisfaction with the supplier relationship 83.3%. The lowest-rated attribute is consideration of local supplier development, capacity building and inclusive procurement (74.5% satisfied, 14.5% dissatisfied), and this is the point on which Rwanda-based suppliers diverge most sharply from international ones.

Table 3.17. Communication, performance monitoring, ethics and partnership: attribute-level satisfaction

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Ease of identifying and contacting the correct RMS officer or department.	59	74.6	32.2	15.3	10.2	3.9
Professionalism, courtesy and respect demonstrated by RMS staff in dealings with suppliers.	59	84.7	42.4	10.2	5.1	4.2
Speed of response to supplier inquiries, requests and urgent operational issues.	61	72.1	32.8	14.8	13.1	3.9
Clarity, accuracy and consistency of information provided through email, telephone, meetings and digital systems.	61	78.7	36.1	16.4	4.9	4.1
Timeliness of notice about procedural, specification, scheduling, contractual or organisational changes.	59	79.7	39.0	18.6	1.7	4.2
Effectiveness of coordination among RMS procurement, warehouse, quality, finance and programme teams.	55	70.9	32.7	20.0	9.1	3.9
Clarity of supplier performance indicators, reporting expectations and review criteria.	51	74.5	23.5	17.6	7.8	3.9
Objectivity and consistency of supplier performance evaluations conducted by RMS.	50	76.0	26.0	20.0	4.0	3.9
Usefulness and timeliness of performance feedback provided to suppliers.	50	76.0	28.0	18.0	6.0	3.9
Accessibility of channels for submitting complaints, appeals or contract-administration concerns.	52	73.1	26.9	19.2	7.7	3.9
Fairness and timeliness of investigation, corrective action and dispute-resolution processes.	51	74.5	23.5	19.6	5.9	3.9
Follow-up by RMS after a complaint, dispute or agreed corrective action has been addressed.	53	67.9	24.5	20.8	11.3	3.8

Attribute	n	% satisfied (4 or 5)	of which very satisfied (5)	% neutral (3)	% dissatisfied (1 or 2)	Mean
Fair and equal treatment of suppliers throughout RMS procurement and contract-management processes.	59	88.1	32.2	5.1	6.8	4.1
Transparency of rules concerning conflicts of interest, gifts, anti-corruption and ethical conduct.	56	87.5	41.1	8.9	3.6	4.2
Protection of confidential commercial, technical and pricing information submitted by suppliers.	59	84.7	40.7	8.5	6.8	4.2
Consistency of RMS decisions with published procedures, tender conditions and contractual provisions.	58	86.2	41.4	8.6	5.2	4.2
Ability to raise ethical or compliance concerns without fear of unfair treatment or retaliation.	57	89.5	36.8	7.0	3.5	4.2
Overall confidence in the integrity and accountability of RMS supplier-management practices.	58	86.2	34.5	10.3	3.4	4.1
Extent to which RMS treats suppliers as partners in strengthening the health supply chain.	59	81.4	35.6	13.6	5.1	4.1
Opportunities for suppliers to propose innovations, efficiencies, alternative products or service improvements.	56	80.4	35.7	10.7	8.9	4.0
Support for environmentally responsible packaging, transport, waste reduction and reverse logistics.	49	81.6	36.7	18.4	0.0	4.2
Consideration of local supplier development, capacity building and inclusive procurement where applicable.	55	74.5	34.5	10.9	14.5	3.9
Willingness of RMS to jointly address major disruptions, shortages, regulatory changes and supply risks.	52	80.8	36.5	13.5	5.8	4.1
Overall trust in RMS as a reliable and professional customer.	60	85.0	41.7	8.3	6.7	4.2
Likelihood that your organisation would participate in future RMS procurement opportunities.	59	94.9	59.3	3.4	1.7	4.5
Overall satisfaction with your organisation's supplier relationship with RMS.	60	83.3	43.3	13.3	3.3	4.2

Source: Primary data, Client satisfaction survey, 2026

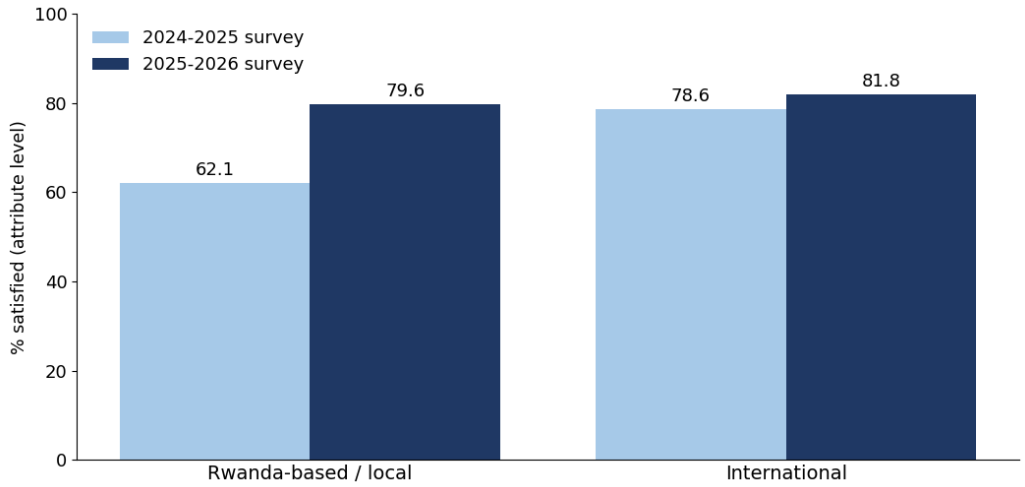
3.3.8. Supplier satisfaction by origin, category and arrangement

Supplier origin is the most consequential distinction in the supplier data and it repeats, in the same direction, the finding of the previous survey round. International suppliers record 81.8% satisfaction on the attribute-level measure against 79.6% for Rwanda-based suppliers, a gap of 2.2 percentage points against 16.5 points in the previous round. On the composite measure the difference is wider, at 60.7% against 44.1%, which reflects the concentration of Rwanda-based supplier dissatisfaction in payment

and forecasting rather than a broad difference in experience. On the overall ten-point rating the difference is statistically significant, at 8.29 for international suppliers with 82.1% rating RMS 8 or above, against 7.03 and 47.1% for Rwanda-based suppliers (p = 0.013). One Rwanda-based supplier in five rated RMS at 5 or below, against 3.6% of international suppliers.

The dimension analysis shows where the gap does and does not lie. International suppliers rate RMS higher on partnership and overall relationship, communication, ethics and fairness and the whole front end of the cycle from registration through contract award. The two dimensions where Rwanda-based suppliers rate RMS marginally higher are importation and customs coordination and the delivery and warehouse interface, both areas of frequent direct dealing. Invoicing and payment is the one dimension where the two groups agree almost exactly, at 3.86 for local and 3.80 for international suppliers, which confirms that payment delay is a system-wide issue rather than a concern specific to local suppliers. The gap therefore lies not in the transactional handling of orders and deliveries but in how the commercial relationship as a whole is experienced, and the written responses locate it precisely: the strongest concerns about tender access and about the move toward contracting manufacturers directly come from Rwanda-based distributors, who see their intermediary role being displaced.

Figure 3.8. Supplier satisfaction by origin, 2024-2025 and 2025-2026 surveys compared



Source: Primary data, Client satisfaction survey, 2026

Table 3.18. Supplier satisfaction by origin, supply category and procurement arrangement

Category	Suppliers surveyed	% satisfied
Origin: Rwanda-based	34	44.1%
Origin: International	28	60.7%
Supply category: Medicines	17	52.9%
Supply category: Consumables and packaging	12	41.7%
Supply category: Medical devices and equipment	12	50.0%
Supply category: Laboratory products	11	36.4%

Category	Suppliers surveyed	% satisfied
Supply category: Logistics and other services	10	80.0%
Arrangement: Framework agreement	25	56.0%
Arrangement: Open tender	19	42.1%
Arrangement : Direct procurement or RFQ	11	63.6%
Arrangement: Restricted tender	4	25.0%
All suppliers	**62**	**51.6%**

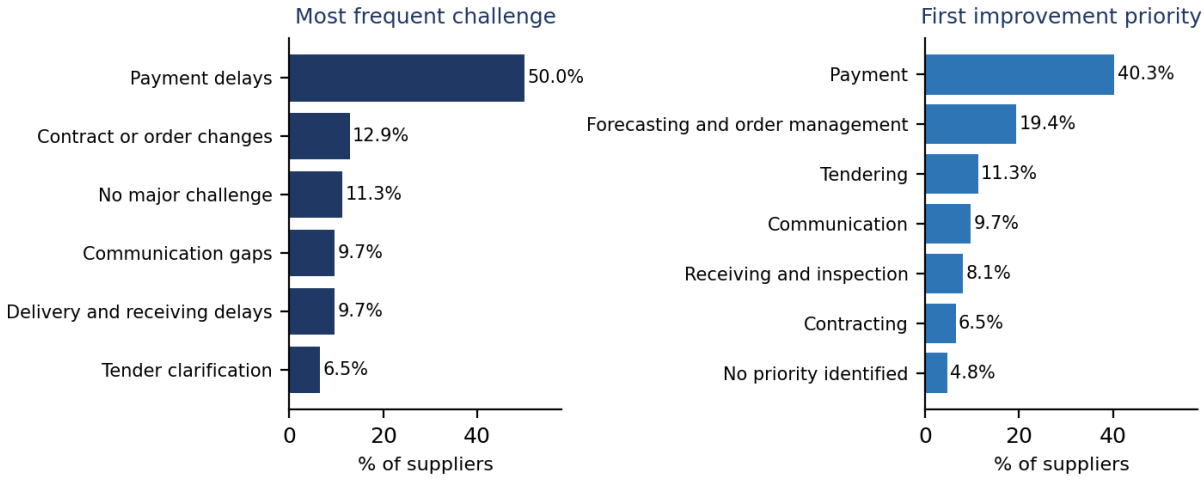
Source: Primary data, Client satisfaction survey, 2026

Supply category shows a consistent pattern that falls just short of conventional significance. Suppliers of laboratory products are the least satisfied group in the survey (36.4% satisfied, mean rating 6.36 out of ten, with 36.4% rating RMS at 5 or below), followed by consumables and packaging. Suppliers of logistics and other services (80.0%) and of medicines (52.9%) are the most satisfied. The laboratory result converges with the client-side finding in Section 4.3.3: laboratory reagents and test kits are the products buyers most often report as unavailable, and the suppliers of those same products are the least satisfied with how RMS manages them, with payment delay named as the most frequent challenge by 81.8% of laboratory suppliers against 52.9% of medicines suppliers. Suppliers of seven years or more give the lowest mean rating by relationship length (6.79) and are the most likely to name payment delay as their main challenge (78.6%), having carried the cumulative cost of delayed settlement for longer.

3.3.9. Supplier challenges and improvement priorities

Payment dominates both supplier summary questions. Asked to name the challenge experienced most frequently, 50.0% of suppliers chose payment delays, more than four times the next most common answer. Contract or order changes (12.9%), delivery and receiving delays (9.7%), communication gaps (9.7%) and tender clarification (6.5%) follow, and 11.3% report no major challenge. Asked which area RMS should improve first, 40.3% chose payment, 19.4% forecasting and order management, 11.3% tendering and 9.7% communication. The two questions align closely: three quarters of suppliers whose most frequent challenge is payment delay name payment as the first priority, every supplier whose main challenge is tender clarification names tendering, and suppliers experiencing contract or order changes divide between forecasting and contracting.

Figure 3.9. Most frequent challenge and first improvement priority reported by suppliers



Source: Primary data, Client satisfaction survey, 2026

Table 3.19. Most frequent challenge and first improvement priority reported by suppliers

Response	Suppliers	% of suppliers
Most frequent challenge: Payment delays	31	50.0%
Most frequent challenge: Contract or order changes	8	12.9%
Most frequent challenge: Delivery and receiving delays	6	9.7%
Most frequent challenge: Communication gaps	6	9.7%
Most frequent challenge: Tender clarification	4	6.5%
Most frequent challenge: No major challenge	7	11.3%
First improvement priority: Payment	25	40.3%
First improvement priority: Forecasting and order management	12	19.4%
First improvement priority: Tendering	7	11.3%
First improvement priority: Communication	6	9.7%
First improvement priority: Receiving and inspection	5	8.1%
First improvement priority: Contracting	4	6.5%
First improvement priority: No priority identified	3	4.8%

Source: Primary data, Client satisfaction survey, 2026, n = 62.

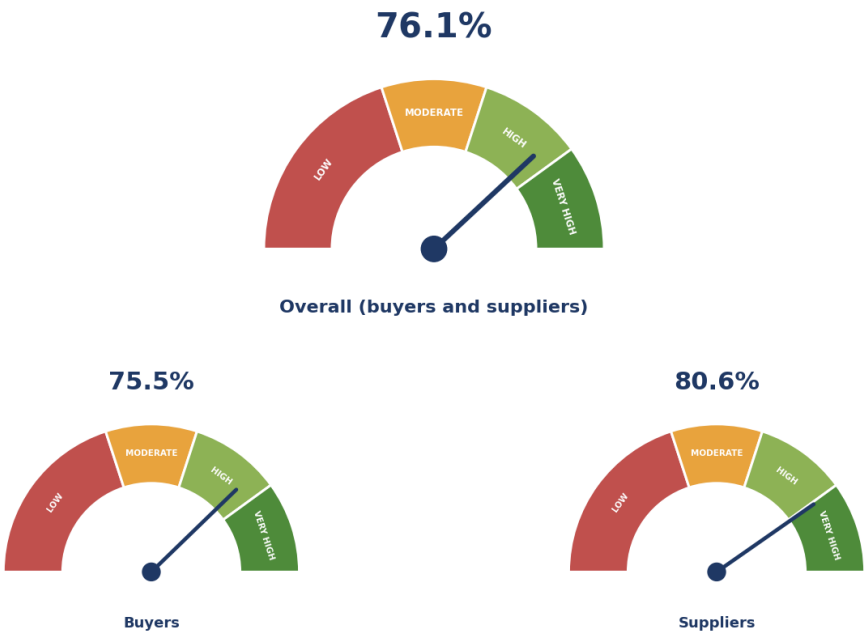
3.4. Customer satisfaction level

3.4.1. Overall satisfaction across both respondent groups

Overall satisfaction across both respondent groups stands at 76.1%, being the proportion of the individual attribute responses of all 553 respondents that are positive. On the stricter composite measure, which requires a respondent to reach a satisfactory average across every attribute assessed, 55.7% of respondents are satisfied. On the interpretation thresholds set out in Table 5 the headline figure is in the high satisfaction band and the composite figure is a moderate level approaching the high band. The gap between the two, 20.4 percentage points, is not a contradiction but a property of the composite measure, and it is quantified and explained in the conclusion.

The overall satisfaction level across all dimensions of service quality shows a continued improvement compared with the two previous surveys. The total satisfaction rate stands at 76.1% on the attribute-level measure used for trend comparison, against 59.03% reported in 2024-2025 and 35.5% in 2022-2023, a gain of 17.1 percentage points since the previous round. When analysed by customer type, satisfaction among buyers increased from 35.1% in 2022-2023 and 45.5% in 2024-2025 to 56.2% in the present round on the composite basis applied consistently to the buyer series, while satisfaction among suppliers, measured on the attribute-level basis that is comparable across rounds, increased from 42.4% in 2022-2023 and 72.6% in 2024-2025 to 80.6% in 2025-2026 (see the figure below and the comparison presented in the following sub-section).

Figure 3.10. The overall satisfaction level of the respondents



Attribute-level satisfaction: the proportion of individual attribute responses that are positive.

Source: Primary data, Client satisfaction survey, 2026.

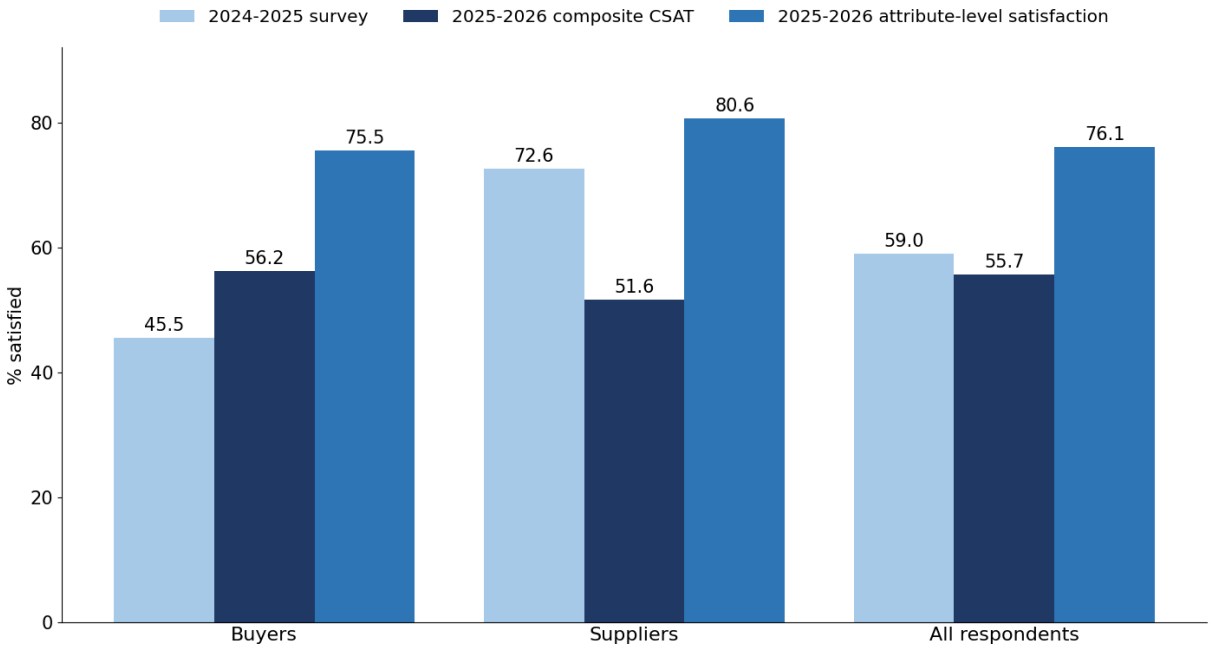
Attribute-level satisfaction, being the proportion of individual attribute responses that are positive. On the stricter composite measure, being the proportion of respondents whose mean score across all assessed

attributes reaches 4 or above, the figures are 55.7% overall, 56.2% for buyers and 51.6% for suppliers. Interpretation bands: low below 40%, moderate 40 to 59%, high 60 to 79%, very high 80% and above.

Disaggregated by respondent group, buyers record 75.5% satisfaction at attribute level and 56.2% on the composite measure, while suppliers record 80.6% and 51.6% respectively. Suppliers are therefore more positive than clients when the measure is taken across individual attributes, and less positive when the measure requires a satisfactory average across the whole instrument; this reflects the concentration of supplier dissatisfaction in two dimensions, forecasting and payment, which is pronounced enough to pull a supplier's composite below the threshold even where the rest of the relationship is rated well. Both measures are therefore reported throughout this section.

On the eight overall relationship attributes of the buyer instrument taken together, 70.7% of buyers are satisfied, and on the eight overall relationship attributes of the supplier instrument, 72.6% of suppliers are satisfied. Both figures sit in the high satisfaction band, which indicates that the relationship as a whole is stronger than the composite service score alone suggests.

Figure 3.11. Overall satisfaction by respondent group, 2024-2025 and 2025-2026 surveys compared



Source: Primary data, Client satisfaction survey, 2026

Comparison with the previous survey round requires care and is set out in Table 20. The earlier rounds reported satisfaction as the share of positive responses, so the attribute-level measure is the basis on which the comparison is made. On the client side satisfaction has risen by 30.0 percentage points, from 45.5% to 75.5%, continuing the improvement from 35.1% recorded two rounds ago. The composite measure is introduced in this round and has no comparator in the earlier reports. On the supplier side the instrument changed substantially between rounds, expanding from a small number of questions to eighty-four attributes across thirteen dimensions, and the composite measure applied here is correspondingly stricter. The attribute-level figure of 80.6% is the closer analogue to the 72.6% reported in 2024-2025 and indicates that supplier satisfaction has been maintained and marginally improved, while the composite figure of 51.6% shows how many suppliers fall below a satisfactory average once the payment and forecasting dimensions are included in the calculation. The combined

figure for all respondents should be read in the same light, since it inherits the change in the supplier instrument.

Table 3.20. Overall satisfaction compared with the previous survey round

Measure	2024-2025 survey	2025-2026 survey	Change
Buyers, attribute-level satisfaction	45.5%	75.5%	+30.0 pp
Hospitals	34.0%	76.2%	+42.2 pp
Health centres	51.3%	76.1%	+24.8 pp
Health posts	39.0%	74.2%	+35.2 pp
Suppliers, attribute-level satisfaction	72.6%	80.6%	+8.0 pp
Suppliers, composite CSAT (new measure)	not measured	51.6%	not comparable
Rwanda-based suppliers, attribute-level satisfaction	62.1%	79.6%	+17.5 pp
International suppliers, attribute-level satisfaction	78.6%	81.8%	+3.2 pp
All respondents, attribute-level satisfaction	59.0%	76.1%	+17.1 pp
Net Promoter Score, all respondents	11.3	21.5	+10.3
Promoters, all respondents	44.6%	36.7%	-7.9 pp
Detractors, all respondents	33.3%	15.2%	-18.2 pp
Respondents surveyed	330 clients, 60 suppliers	491 clients, 62 suppliers	+163

Source: Primary data, Client satisfaction survey, 2026

The 2024-2025 figures are those reported in the RMS Customer Satisfaction Survey, June 2025, which measured satisfaction as the share of positive responses. All trend rows in this table are therefore stated on the attribute-level measure. The composite Client Satisfaction Score, which is introduced in this round, stands at 56.2% for buyers, 51.6% for suppliers and 55.7% overall, and has no comparator in the earlier rounds. The 2024-2025 overall figure covered buyers, suppliers and 160 employees, whereas this round covers buyers and suppliers only, since staff satisfaction is reported separately. The 2025-2026 supplier instrument assesses 84 attributes against a much smaller set in 2024-2025, so the composite measure is marked as not comparable and the attribute-level measure is used for every trend row. pp denotes percentage points.

3.4.2. Comparison with the two previous survey rounds

RMS has now commissioned three client satisfaction surveys, in 2022-2023, in 2024-2025 and in the present round. Comparing the three establishes whether the improvement recorded in 2024-2025 has been sustained. On the buyer side the construct measured is the same in all three rounds and the comparison is direct. On the supplier side the instrument expanded substantially in 2025-2026, from a small number of questions to eighty-four attributes across thirteen dimensions, so the attribute-level

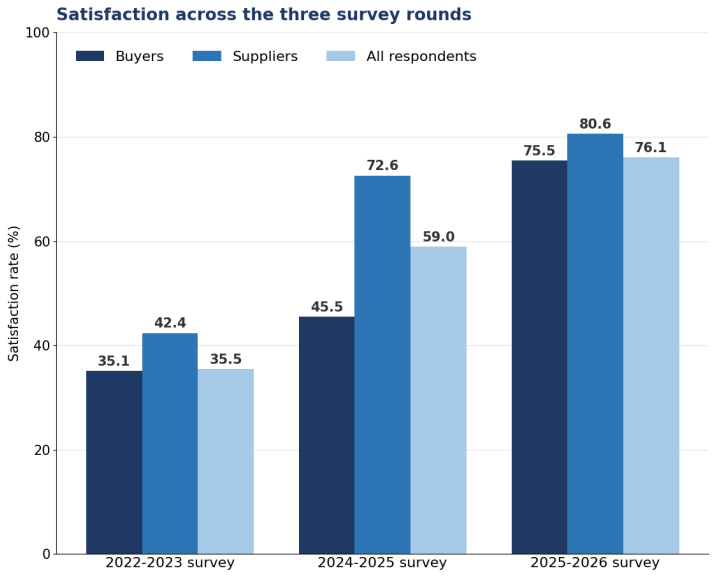
measure is used for the supplier trend and the composite measure introduced this round is reported separately in the preceding sub-section.

Buyer satisfaction has risen in each round, from 35.1% in 2022-2023 to 45.5% in 2024-2025 and 75.5% in 2025-2026 on the attribute-level measure, a gain of 40.4 percentage points over the three rounds and of 30.0 points since the previous survey. The gain is broadest at hospital level, which was the least satisfied buyer category in both previous rounds, at 25.9% in 2022-2023 and 34.0% in 2024-2025, and now stands at 76.2%, an increase of 50.3 points across the three rounds. Health centres have risen from 39.6% to 51.3% and now 76.1%, while health posts have moved from 33.3% to 39.0% and now 74.2%. The spread between the most and least satisfied buyer category has narrowed from 13.7 percentage points in 2022-2023 and 17.3 points in 2024-2025 to 2.0 points in 2025-2026, which indicates that RMS is delivering a materially more uniform service across the health pyramid than in either previous round. Part of this movement reflects the expansion of the buyer instrument to sixty-eight attributes in eleven dimensions, which covers more of the service relationship than the earlier questionnaires, and the figures should be read with that in mind.

Supplier satisfaction has risen in each round as well, from 42.4% in 2022-2023 to 72.6% in 2024-2025 and 80.6% in 2025-2026 on the comparable attribute-level measure, a gain of 38.2 percentage points over the three rounds. The 2024-2025 round recorded the larger part of that movement, and the present round confirms that the position then reached has been consolidated rather than eroded. The relative position of the two supplier groups is unchanged across all three rounds, with international suppliers ahead of Rwanda-based suppliers throughout, at 46.2% against 38.1% in 2022-2023, 78.6% against 62.1% in 2024-2025 and 81.8% against 79.6% in 2025-2026, a gap that has narrowed from 16.5 percentage points to 2.2 points. The composite measure introduced in this round shows, however, that the aggregate supplier position conceals a concentration of dissatisfaction in payment and forecasting that the earlier instruments did not capture.

Loyalty has improved in every round. The Net Promoter Score has moved from +5.6 in 2022-2023 to +11.3 in 2024-2025 and +21.5 in the present round. The composition of that movement has changed direction between the last two rounds. Between 2022-2023 and 2024-2025 the promoter share was flat, at 44.5% and 44.6%, and the improvement came from detractors falling from 38.9% to 33.3%. Between 2024-2025 and 2025-2026 the detractor share fell much more sharply, from 33.3% to 15.2%, a reduction of 18.1 percentage points, but the promoter share also fell, from 44.6% to 36.7%, and the passive group more than doubled from 22.1% to 48.1%. RMS has therefore been markedly successful at removing the causes of active dissatisfaction, and correspondingly less successful at converting satisfied respondents into advocates. The recommendation of the 2024-2025 survey, to reduce detractors and convert passives into promoters, has been half achieved, and the passive group is now the principal opportunity for further gains.

Figure 3.12. Satisfaction and loyalty across the three survey rounds, 2022-2023, 2024-2025 and 2025-2026



Source: RMS Customer Satisfaction Survey 2023; RMS Customer Satisfaction Survey 2025; Primary data, Client satisfaction survey, 2026.

Table 3.21. Satisfaction and loyalty compared across the 2022-2023, 2024-2025 and 2025-2026 survey rounds

Indicator	2022-2023 survey	2024-2025 survey	2025-2026 survey	Change since 2024-2025	Change since 2022-2023
Buyers, satisfaction rate	35.1%	45.5%	75.5%	+30.0 pp	+40.4 pp
Hospitals	25.9%	34.0%	76.2%	+42.2 pp	+50.3 pp
Health centres	39.6%	51.3%	76.1%	+24.8 pp	+36.5 pp
Health posts	33.3%	39.0%	74.2%	+35.2 pp	+40.9 pp
Suppliers, attribute-level satisfaction	42.4%	72.6%	80.6%	+8.0 pp	+38.2 pp
Rwanda-based suppliers, attribute-level	38.1%	62.1%	79.6%	+17.5 pp	+41.5 pp
International suppliers, attribute-level	46.2%	78.6%	81.8%	+3.2 pp	+35.6 pp
All respondents	35.5%	59.0%	76.1%	+17.1 pp	+40.6 pp
Promoters	44.5%	44.6%	36.7%	-7.9 pp	-7.8 pp
Passives	16.6%	22.1%	48.1%	+26.0 pp	+31.5 pp
Detractors	38.9%	33.3%	15.2%	-18.1 pp	-23.7 pp
Net Promoter Score	+5.6	+11.3	+21.5	+10.2	+15.9
Respondents surveyed	351	390	553	+163	+202

Sources: RMS Customer Satisfaction Survey 2023, page 13 and page 15; RMS Customer Satisfaction Survey 2025, page 22 and page 23; Primary data, Client satisfaction survey, 2026. The 2022-2023 buyer categories were health centres and prisons, health posts and private clinics, and hospitals. All satisfaction rows use the attribute-level measure throughout for comparability, being the basis on which the earlier rounds reported. The composite Client Satisfaction Score introduced in this round is reported separately in Section 3.4.1. The 2024-2025 all-respondent figure included 160 employees, who are covered by a separate staff satisfaction report in this round. pp denotes percentage points.

3.4.3. What RMS has changed to improve its service quality

The improvement recorded between rounds is not a statistical artefact of a larger sample. It is visible in the specific attributes on which the previous survey recorded the greatest concern, and it is independently confirmed by the buyers themselves. Eight areas in which the position has demonstrably changed are set out below, each with the evidence from the present round and the corresponding position recorded in the previous round.

Table 3.22. Areas in which RMS service quality has demonstrably changed since the previous survey round

Area of service	Position in the 2025-2026 survey	Position recorded in the 2024-2025 survey
Order accuracy and documentation	Delivery notes, packing lists and proof of delivery 83.0% satisfied; accuracy of products supplied 81.4%; consistency between goods delivered and invoice 81.4%; dimension at 66.8%	Order discrepancies were the single most frequent complaint, reported by 49.68% of buyers during the system transition
Pricing, billing and value for money	Accuracy and completeness of invoices 80.9% satisfied; clarity of payment terms 80.2%; overall value for money 81.0%; dimension at 67.4%	16.06% of buyers considered RMS prices much higher than the market and payment concerns were a leading reason for contacting support
Consistency of service across the health pyramid	Spread between the most and least satisfied buyer category down to 8.0 pp; hospitals up 17.0 pp to 50.9%	Spread of 17.3 pp, with hospitals the least satisfied category at 34.0%
Geographic coverage of the improvement	Western Province up 28.3 pp to 63.5% and Eastern up 17.2 pp to 65.4%	Western Province was the least satisfied at 35.3% and Eastern at 48.2%
Supplier relationship	Attribute-level supplier satisfaction 80.6%; 88.7% of suppliers would definitely bid again	Attribute-level supplier satisfaction 72.6%
Reduction of active dissatisfaction	Detractors down to 15.2% and Net Promoter Score up to +21.5	Detractors at 33.3% and Net Promoter Score at +11.3
Buyer perception of the direction of travel	82.7% of buyers report that RMS services have improved over the past two years, 51.3% of them significantly; only 2.2% perceive any decline	Not measured in this form
Supplier perception of the direction of travel	66.1% of suppliers report that RMS supplier management has improved over the past two years; 8.1% report a decline	Not measured in this form

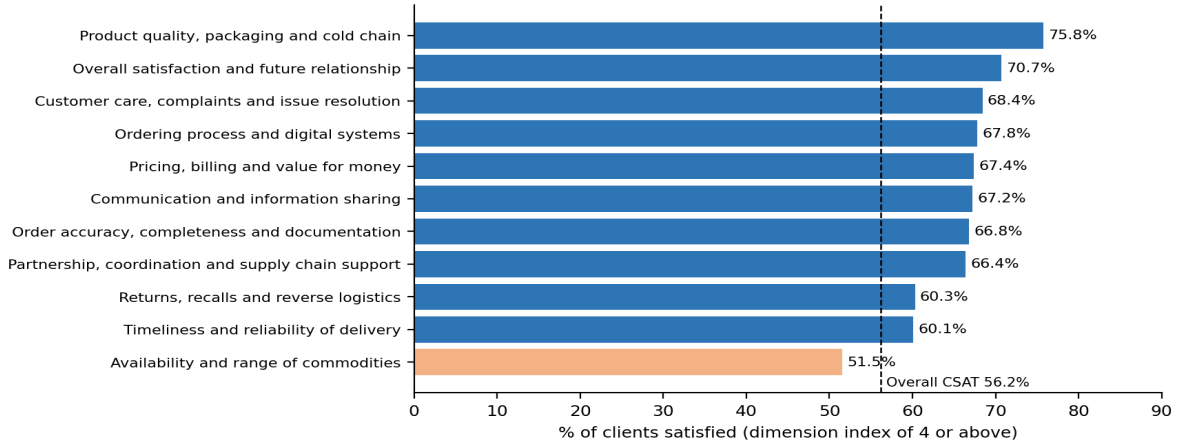
Sources: Primary data, Client satisfaction survey, 2026; RMS Customer Satisfaction Survey 2025. pp denotes percentage points.

Three observations follow from the table. First, the areas that have moved are the transactional ones, namely the accuracy of what is delivered, the documentation that accompanies it and the invoicing that follows it. These are the areas in which the 2024-2025 round recorded the effects of the transition between logistics information systems, and the present round indicates that the transition has been absorbed. Second, the improvement is widest where the previous position was lowest, at hospital level and in the Western Province, which is the signature of a deliberate corrective effort rather than of general drift. Third, the change is corroborated by an independent question: 82.7% of buyers state that services have improved over the past two years, and buyers who report significant improvement give RMS a mean overall rating of 8.44 out of ten against 6.84 among those who see no change, a difference that is statistically significant at $p < 0.001$.

The areas that have not moved are equally clear from the evidence. Availability of commodities remains the lowest-rated dimension at 51.5% of buyers satisfied and a dimension index of 3.69, and it is the first improvement priority for 54.2% of buyers, a position substantially unchanged from the previous round. Proactive communication, in the form of advance notice of changes in prices, catalogues or

distribution arrangements, records 69.7% satisfaction with 18.0% dissatisfied, the lowest-rated attribute of its dimension. On the supplier side, payment timeliness and demand forecasting remain the two dimensions that pull the supplier composite down to 51.6%, and Rwanda-based suppliers return a Net Promoter Score of -14.7. These are the areas in which the next round will measure whether comparable corrective effort has been applied.

Figure 3.13. Client satisfaction by service dimension



Source: Primary data, Client satisfaction survey, 2026

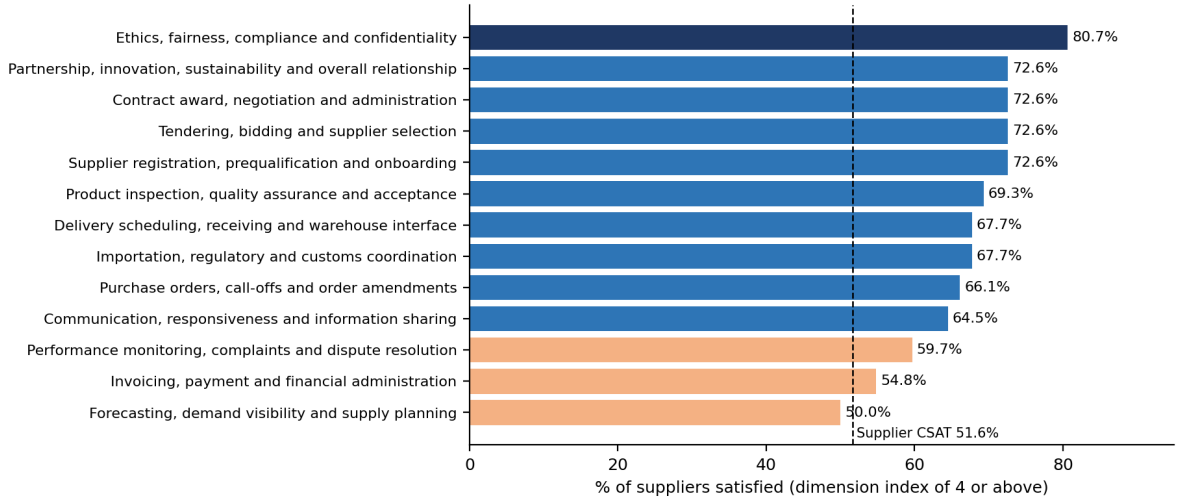
Table 3.23. Client satisfaction by service dimension

Service dimension	% of buyers satisfied	Dimension index (1 to 5)	Interpretation
Availability and range of commodities	51.5%	3.69	Moderate
Ordering process and digital systems	67.8%	3.92	High
Order accuracy, completeness and documentation	66.8%	3.92	High
Timeliness and reliability of delivery	60.1%	3.78	High
Product quality, packaging and cold chain	75.8%	4.06	High
Communication and information sharing	67.2%	3.95	High
Customer care, complaints and issue resolution	68.4%	3.92	High
Pricing, billing and value for money	67.4%	3.92	High
Returns, recalls and reverse logistics	60.3%	3.76	High
Partnership, coordination and supply chain support	66.4%	3.87	High
Overall satisfaction and future relationship	70.7%	3.97	High

Source: Primary data, Client satisfaction survey, 2026

A buyer is counted as satisfied on a dimension where its mean score across the attributes of that dimension is 4 or above.

Figure 3.14. Supplier satisfaction by dimension of the procurement cycle



Source: Primary data, Client satisfaction survey, 2026

3.4.4. Client satisfaction by facility level and ownership

On the composite measure health centres are the most satisfied facility level (58.9%), followed by health posts (53.2%) and hospitals (50.9%). The differences are not statistically significant (chi-square p = 0.362), and this is itself the finding of interest: in the previous round the gap between the most and least satisfied facility level was 17.3 percentage points, whereas on the attribute-level measure it is now 2.0 points. Hospitals, the least satisfied group in 2024-2025 at 34.0%, have improved most of any facility level, reaching 76.2% on the attribute-level basis used for comparison across rounds. RMS is now delivering a materially consistent client experience across the health pyramid, which means that improvement measures need to be differentiated by geography and by issue type rather than by level of care.

By ownership, faith-based buyers are the most satisfied group (67.6%), ahead of public (54.2%) and private buyers (53.8%), although the difference is not statistically significant (p = 0.143). The faith-based advantage is consistent across every dimension index and reaches statistical significance on availability, timeliness, order accuracy, product quality and customer care, which suggests that buyers with stronger internal stock management and greater financial autonomy experience the same RMS service more favourably.

Table 3.24. Client satisfaction by facility level and ownership

Category	Buyers surveyed	% satisfied
Facility level: Hospital	53	50.9%
Facility level: Health centre	280	58.9%
Facility level: Health post	158	53.2%
Ownership: Public	310	54.2%

Category	Buyers surveyed	% satisfied
Ownership: Faith-based	74	67.6%
Ownership: Private	106	53.8%
All buyers	**491**	**56.2%**

Source: Primary data, Client satisfaction survey, 2026

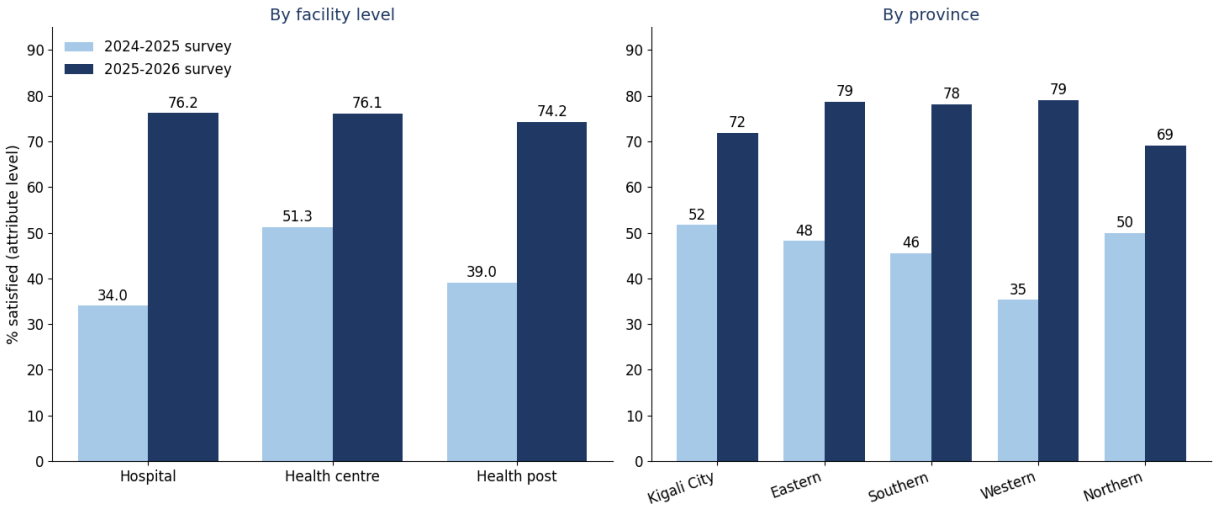
Chi-square test of association: by facility level p = 0.362; by ownership p = 0.143. Figures in this table are the composite Client Satisfaction Score. On the attribute-level measure the corresponding figures are 76.2% for hospitals, 76.1% for health centres and 74.2% for health posts, and 74.8% for public, 79.4% for faith-based and 74.8% for private buyers.

3.4.5. Client satisfaction by province

Geography is the strongest source of variation in the survey and the area of greatest change since the previous round (chi-square p = 0.011). On the composite measure the Eastern Province is the most satisfied (65.4%), followed by the Western Province (63.5%) and the Southern Province (58.2%), while Kigali City (46.7%) and the Northern Province (46.6%) are the lowest. Measured on the attribute-level basis that is comparable with the previous round, every province improved. The Western Province, the least satisfied province in 2024-2025 at 35.3%, records the largest improvement at 43.8 percentage points to 79.1%, followed by the Southern Province at 32.6 points to 78.1% and the Eastern Province at 30.5 points to 78.7%. Kigali City, at 71.8% from 51.7%, and the Northern Province, at 69.1% from 50.0%, record the smallest gains, at 20.1 and 19.1 points, and are the two provinces whose satisfaction now sits furthest below the national figure. The dimension analysis explains the difference between the two precisely.

The two low-scoring provinces have distinct profiles and require different responses. Kigali City records by far the lowest timeliness index in the country (3.44 against a national 3.78) and the lowest scores on returns (3.53) and pricing (3.74), while sitting close to the national average on communication, customer care and product quality. Its main challenge relates to delivery, consistent with the high share of its buyers naming delivery delays and with its facility composition, which is dominated by health posts and private units ordering in smaller, more frequent quantities. The Northern Province, by contrast, is lowest on availability (3.47), order accuracy (3.72), product quality (3.84), communication (3.81), customer care (3.78) and partnership (3.66), indicating broader scope for service improvement rather than a single area of concern.

Figure 3.15. Client satisfaction by facility level and province, 2024-2025 and 2025-2026 surveys compared



Source: Primary data, Client satisfaction survey, 2026

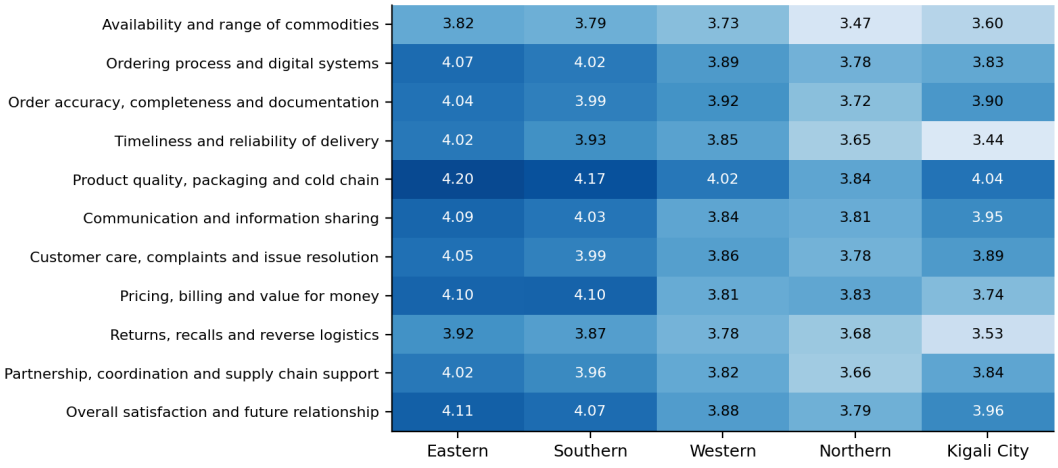
Table 30: Client satisfaction by province compared with the previous survey round

Province	Buyers surveyed 2026	2024-2025 survey	2025-2026 survey	Change
Kigali City	105	51.7%	71.8%	+20.1 pp
Eastern	104	48.2%	78.7%	+30.5 pp
Southern	98	45.5%	78.1%	+32.6 pp
Western	96	35.3%	79.1%	+43.8 pp
Northern	88	50.0%	69.1%	+19.1 pp
All provinces	**491**	**45.5%**	**75.5%**	**+30.0 pp**

Source: Primary data, Client satisfaction survey, 2026

Chi-square test of association between province and satisfaction: p = 0.011. Both survey columns report attribute-level satisfaction, the basis on which the previous round reported, so the comparison is like for like. On the composite measure introduced in this round the provincial figures are 46.7% for Kigali City, 65.4% for the Eastern Province, 58.2% for the Southern Province, 63.5% for the Western Province and 46.6% for the Northern Province. pp denotes percentage points.

Figure 3.16. Dimension indices by province (mean score, 1 to 5; darker shading indicates higher satisfaction)

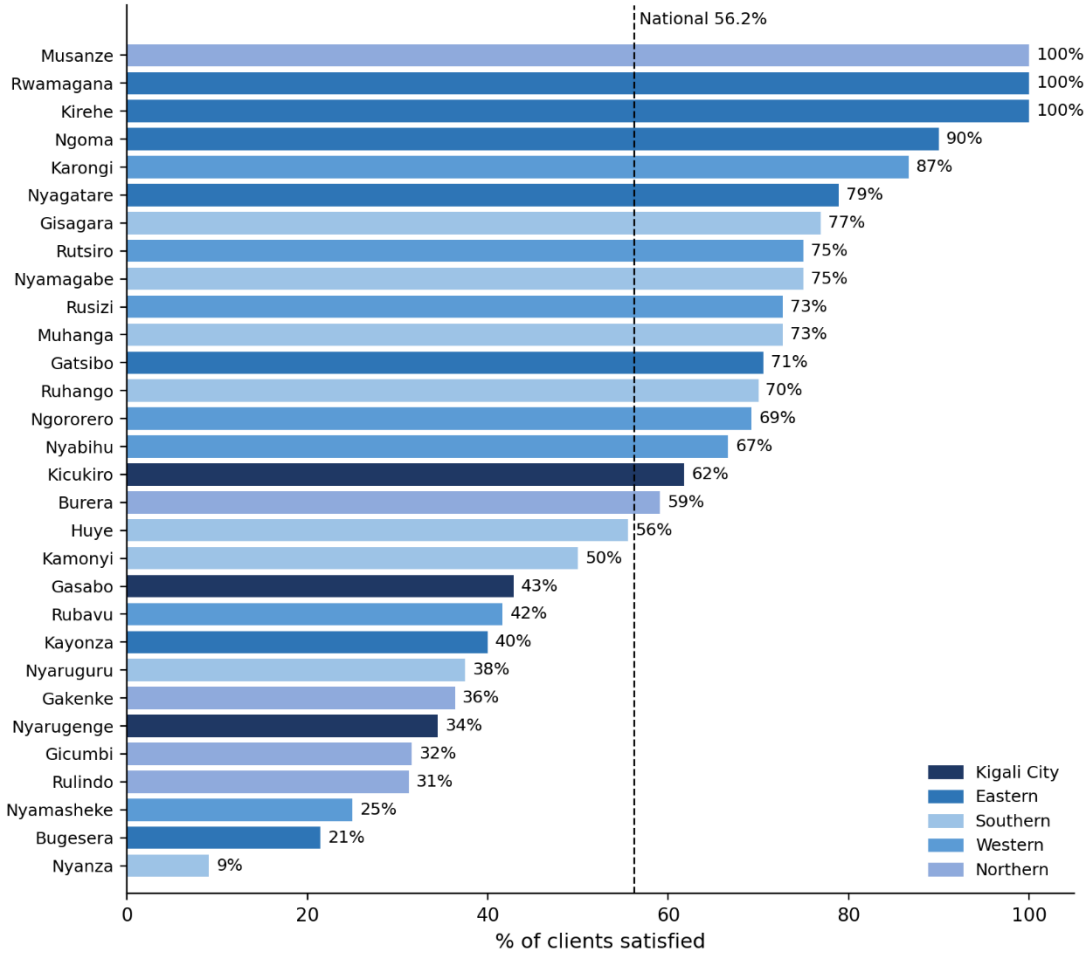


Source: Primary data, Client satisfaction survey, 2026

3.4.6. Client satisfaction by district

District-level analysis was a specific requirement of the assignment and is presented in full in Table 21 and Figure 12. The spread is wide, and the figures in this sub-section are composite Client Satisfaction Scores. Eight districts record satisfaction of 75% or above, led by Musanze, Rwamagana, Kirehe, Ngoma and Gatsibo, and all seven Eastern Province districts except Bugesera and Kayonza sit in the upper group. At the other end, ten districts fall below 45%, comprising Nyamasheke, Bugesera, Gicumbi, Gakenke, Kayonza, Rulindo, Rubavu and the three Kigali City districts of Gasabo, Kicukiro and Nyarugenge.

The low-scoring districts share a supply profile rather than a geographic one. In Nyamasheke, Rusizi, Rulindo, Ruhango, Gisagara and Nyamagabe, between 62% and 92% of buyers name stock-outs as their most frequent issue, and in Nyamasheke, Kayonza, Gasabo, Gicumbi and Gakenke the availability index falls to 3.4 or below. The three Kigali City districts combine moderate availability with the lowest timeliness scores in the country, between 3.38 and 3.48. This yields a defined and manageable list of priority districts for corrective engagement, with the agenda differing according to whether the dominant complaint is availability or delivery timing.



Source: Primary data, Client satisfaction survey, 2026

Table 3.25. District-level client satisfaction, overall rating and selected indicators

District	Province	% satisfied (CSAT)	Rating mean (1-10)	% rating 8+	Availability index	Timeliness index	% improved vs 2 yrs	% stock-outs most frequent
Bugesera	Eastern	21.4%	7.07	42.9%	3.56	3.35	85.7%	28.6%
Gatsibo	Eastern	70.6%	9.12	82.4%	3.87	4.15	94.1%	5.9%
Kayonza	Eastern	40.0%	7.40	60.0%	3.37	3.45	88.0%	44.0%
Kirehe	Eastern	100.0%	9.67	100.0%	4.51	4.62	100.0%	33.3%
Ngoma	Eastern	90.0%	9.00	100.0%	4.51	4.64	90.0%	50.0%
Nyagatare	Eastern	78.9%	8.68	84.2%	3.31	4.15	100.0%	47.4%
Rwamagana	Eastern	100.0%	9.56	100.0%	4.75	4.71	100.0%	12.5%
Gasabo	Kigali City	42.9%	7.19	45.2%	3.34	3.48	83.3%	31.0%
Kicukiro	Kigali City	61.8%	7.44	47.1%	3.96	3.45	73.5%	26.5%
Nyarugenge	Kigali City	34.5%	7.38	48.3%	3.54	3.38	75.9%	20.7%
Burera	Northern	59.1%	8.27	68.2%	3.48	3.65	72.7%	36.4%
Gakenke	Northern	36.4%	7.50	45.5%	3.26	3.33	63.6%	45.5%
Gicumbi	Northern	31.6%	7.16	42.1%	2.95	3.42	52.6%	36.8%
Musanze	Northern	100.0%	10.00	100.0%	4.86	4.95	100.0%	33.3%
Rulindo	Northern	31.2%	7.25	62.5%	3.57	3.62	87.5%	62.5%
Gisagara	Southern	76.9%	8.38	69.2%	3.76	4.04	61.5%	61.5%
Huye	Southern	55.6%	7.56	55.6%	3.65	3.67	77.8%	33.3%
Kamonyi	Southern	50.0%	7.57	64.3%	3.62	3.86	85.7%	35.7%
Muhanga	Southern	72.7%	8.55	100.0%	4.05	4.29	90.9%	36.4%
Nyamagabe	Southern	75.0%	8.33	83.3%	4.02	4.17	91.7%	91.7%
Nyanza	Southern	9.1%	7.73	81.8%	3.70	3.73	100.0%	54.5%
Nyaruguru	Southern	37.5%	7.12	37.5%	3.91	3.85	87.5%	25.0%
Ruhango	Southern	70.0%	8.30	80.0%	3.74	3.81	100.0%	65.0%
Karongi	Western	86.7%	8.60	93.3%	4.18	4.33	100.0%	46.7%
Ngororero	Western	69.2%	7.92	69.2%	3.75	3.73	84.6%	38.5%
Nyabihu	Western	66.7%	8.29	81.0%	3.66	3.91	71.4%	57.1%
Nyamasheke	Western	25.0%	6.83	41.7%	3.30	3.36	66.7%	75.0%
Rubavu	Western	41.7%	7.42	41.7%	3.40	3.45	83.3%	50.0%
Rusizi	Western	72.7%	7.82	72.7%	4.05	4.09	100.0%	72.7%
Rutsiro	Western	75.0%	8.17	75.0%	3.73	3.98	66.7%	33.3%

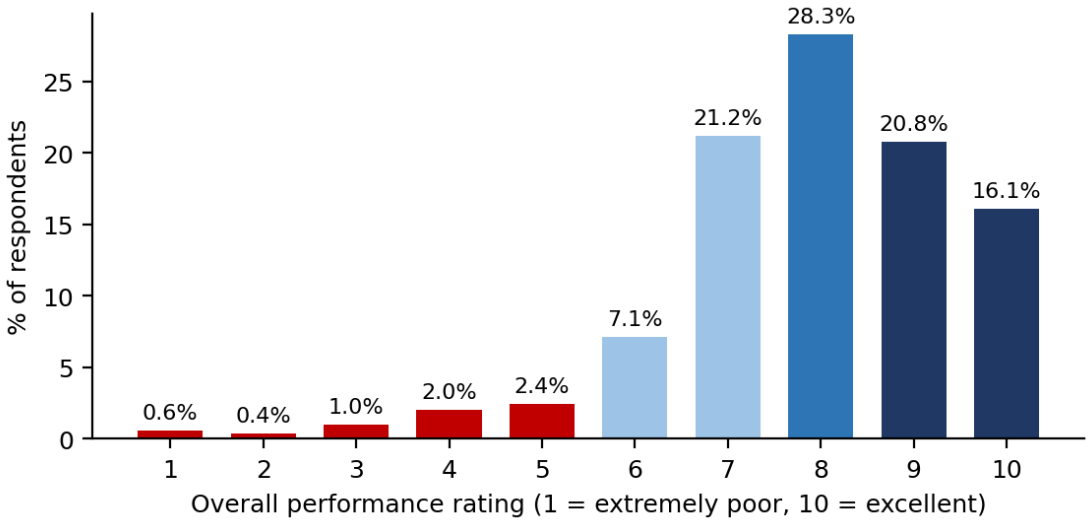
Source: Primary data, Client satisfaction survey, 2026

3.4.7. Overall performance rating

Asked to rate RMS overall on a scale of 1 to 10, buyers gave a mean of 7.90 and a median of 8. Two thirds (65.2%) rated RMS at 8 or above and 36.9% at 9 or 10, while 6.5% gave a rating of 5 or below. The

rating does not differ significantly by facility level (p = 0.252), ownership (p = 0.290) or ordering channel (p = 0.440), but differs strongly by province (p < 0.001), with Eastern Province buyers at 8.42 and 76.9% rating 8 or above, against 7.32 and 46.7% in Kigali City.

Figure 3.17. Distribution of the overall performance rating (1 to 10)

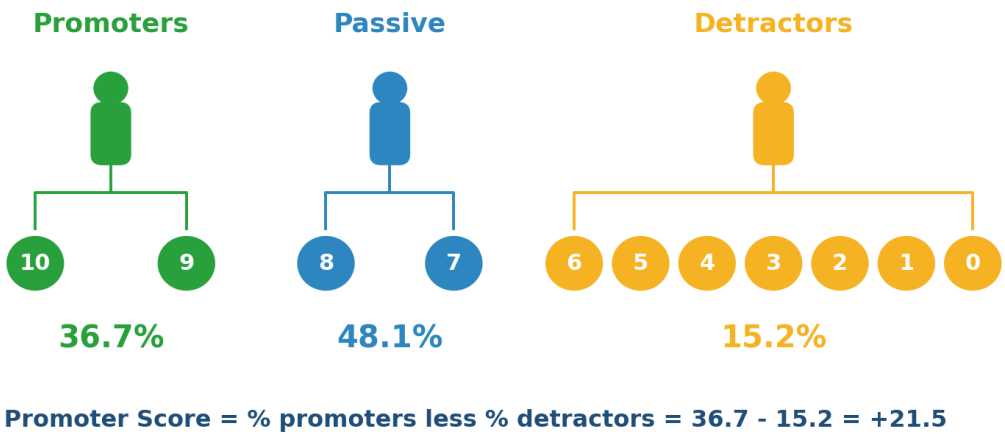


Source: Primary data, Client satisfaction survey, 2026

3.5. Net promoter score results

Loyalty was measured through the Net Promoter Score, derived from the overall performance rating on the standard classification of promoters, passives and detractors. Across both respondent groups the score stands at 21.5, against 11.3 in the previous survey. Promoters account for 36.7% of all respondents, passives for 48.1% and detractors for 15.2%. The most significant movement is in the detractor group, which has fallen from 33.3% to 15.2%, a reduction of 18.2 percentage points. The previous survey recommended converting passives into promoters and reducing detractors; the reduction in detractors has been achieved, while the passive group has grown and now represents the principal opportunity for further gains.

Figure 3.18. The Net Promoters Score (NPS) as reported by both Buyers and Suppliers

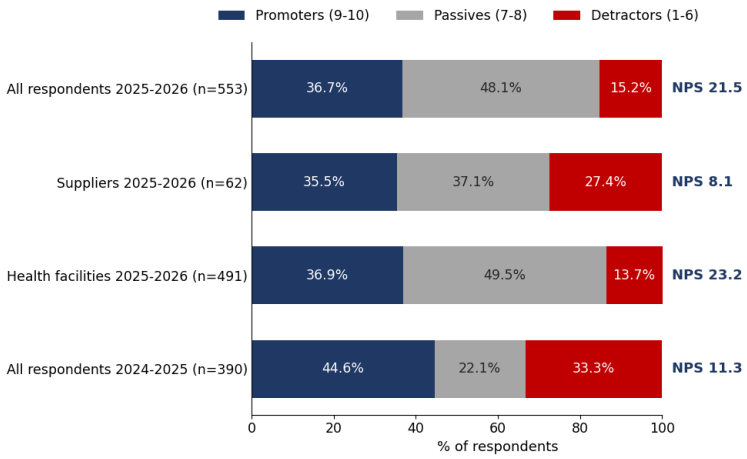


Source: Primary data, Client satisfaction survey, 2026. Promoters rate RMS 9 or 10, passives 7 or 8 and detractors 6 or below.

The survey revealed a substantial decline in the proportion of detractors, that is those who are dissatisfied and unlikely to recommend the service, from 33.34% in the previous survey to 15.2% in the current one. At the same time the percentage of passive customers, that is those who are neutral and less likely to actively promote the service, rose from 22.05% to 48.1%, while the proportion of highly loyal customers, those very likely to recommend RMS to their colleagues and friends, moved from 44.61% to 36.7%. Therefore NPS equal to 21.5 (% promoters - % detractors) and is positive and improving, which indicates that RMS is on track, the previous recommendation to reduce the number of detractors having been met, while the conversion of passives into promoters remains outstanding.

The two groups differ. Buyers return a Net Promoter Score of 23.2, with 36.9% promoters and only 13.7% detractors. Suppliers return 8.1, with a promoter share close to that of buyers (35.5%) but a detractor share twice as high (27.4%), which is consistent with the concentration of supplier dissatisfaction in payment. Within the supplier group the divide by origin is pronounced: international suppliers return a score of 35.7 while Rwanda-based suppliers return -14.7, the only negative score recorded anywhere in the survey, with 41.2% of Rwanda-based suppliers classified as detractors.

Figure 3.19. Net Promoter Score by respondent group, 2024-2025 and 2025-2026 surveys compared



Source: Primary data, Client satisfaction survey, 2026

Table 3.26. Net Promoter Score by respondent group and characteristics

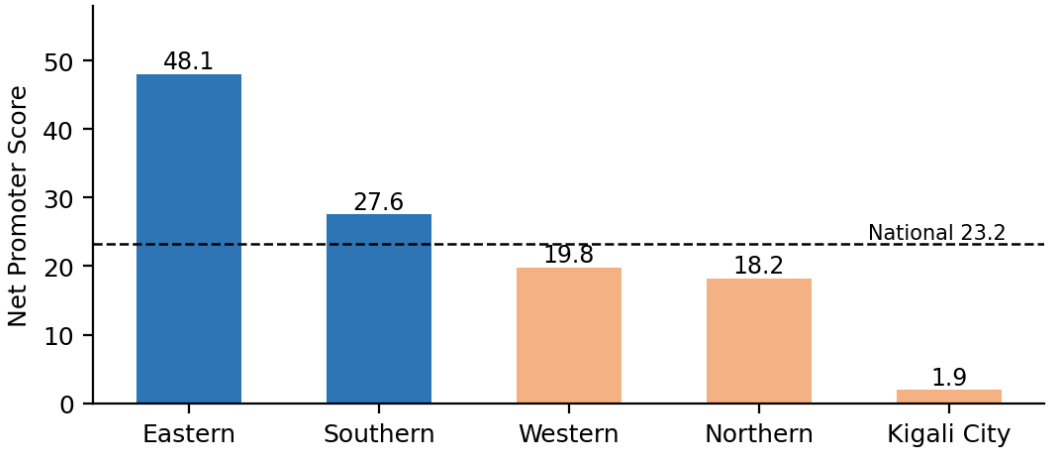
Group	n	% promoters	% passives	% detractors	NPS
All respondents	**553**	**36.7**	**48.1**	**15.2**	**21.5**
Buyers	**491**	**36.9**	**49.5**	**13.7**	**23.2**
Facility level: Hospital	53	28.3	54.7	17.0	11.3
Facility level: Health centre	280	36.4	52.9	10.7	25.7
Facility level: Health post	158	40.5	41.8	17.7	22.8

Group	n	% promoters	% passives	% detractors	NPS
Province: Eastern	104	59.6	28.9	11.5	48.1
Province: Southern	98	37.8	52.0	10.2	27.6
Province: Western	96	31.3	57.3	11.5	19.8
Province: Northern	88	34.1	50.0	15.9	18.2
Province: Kigali City	105	20.9	60.0	19.1	1.9
Suppliers	**62**	**35.5**	**37.1**	**27.4**	**8.1**
Rwanda-based	34	26.5	32.4	41.2	-14.7
International	28	46.4	42.9	10.7	35.7

Source: Primary data, Client satisfaction survey, 2026

Promoters rate RMS 9 or 10, passives 7 or 8 and detractors 6 or below. NPS is the percentage of promoters less the percentage of detractors.

Figure 3.20. Net Promoter Score by province, buyers



Source: Primary data, Client satisfaction survey, 2026

Among buyers, loyalty varies geographically in the same pattern as satisfaction. The Eastern Province records a score of 48.1, the Southern Province 27.6 and the Western Province 19.8, while Kigali City is barely positive at 1.9, with detractors (19.1%) almost equalling promoters (20.9%). Hospitals return the lowest score by facility level (11.3), reflecting their concentration of stock-out experience.

Alongside the Net Promoter Score, 81.9% of buyers state that they are likely to continue using RMS as their principal source of medical commodities and 80.7% express trust in RMS as a dependable health supply chain partner, while 88.7% of suppliers would definitely participate in future RMS procurement opportunities and a further 8.1% probably would. It should be noted that continued use is, for public buyers, largely a policy requirement rather than a free choice, so the client loyalty items are best read as indicators of willingness and confidence rather than of retention risk. On the supplier side the position is different, since participation is genuinely voluntary; the two suppliers who are unsure about bidding again and one third of those answering only "probably" supply laboratory products, the same category that records the lowest supplier satisfaction and the highest incidence of payment delay.

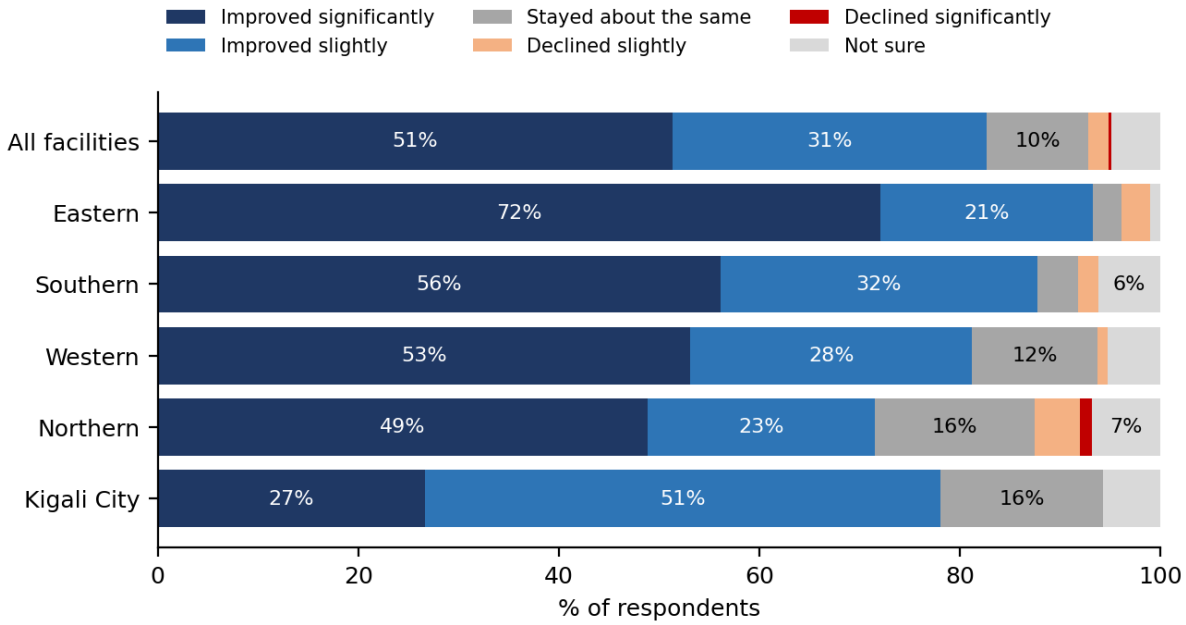
3.6. Trajectory of RMS services over the past two years

The trajectory question produces the most positive result in the survey. 51.3% of buyers consider that RMS services have improved significantly over the past two years and a further 31.4% that they have improved slightly, a combined 82.7%. Only 2.2% perceive any decline and 10.2% see no change. Perceived improvement is strongly associated with the overall rating ($p < 0.001$): buyers reporting significant improvement gave a mean rating of 8.44 with 82.5% at 8 or above, against 6.84 and 30.0% among those who saw no change. This corroborates the CSAT gain reported in Section 4.12 through an independent question, and confirms that the improvement recorded is perceived by clients themselves and not only visible in the comparison of survey rounds.

Perceived improvement is significantly stronger outside the capital ($p < 0.001$). Seventy-two percent of Eastern Province buyers report significant improvement, against 56.1% in the Southern, 53.1% in the Western and 48.9% in the Northern provinces, and only 26.7% in Kigali City, where the modal response is improvement of a slight degree (51.4%) and 16.2% see no change. By facility level ($p = 0.013$) hospitals are the most polarised, with 54.7% reporting significant improvement but 17.0% seeing no change.

Suppliers are also positive on this question but less so and with more uncertainty. 66.1% of suppliers consider that RMS supplier-management processes have improved over the past two years, 8.1% report a decline and a notable 16.1% answered "not sure", a much higher share than among buyers and a further indication that suppliers lack a structured view of how RMS is performing toward them. Several suppliers volunteered the improvement in their written comments, one observing that RMS "has significantly improved their ways of doing business and communicating over the last 3 years" and another that "you have improved quite a lot in the past 2-3 years". Taken across both groups, 80.8% of respondents perceive improvement over the past two years.

Figure 3.21. Perceived change in RMS services over the past two years, by province



Source: Primary data, Client satisfaction survey, 2026

Table 3.27. Perceived change in RMS services over two years, by province

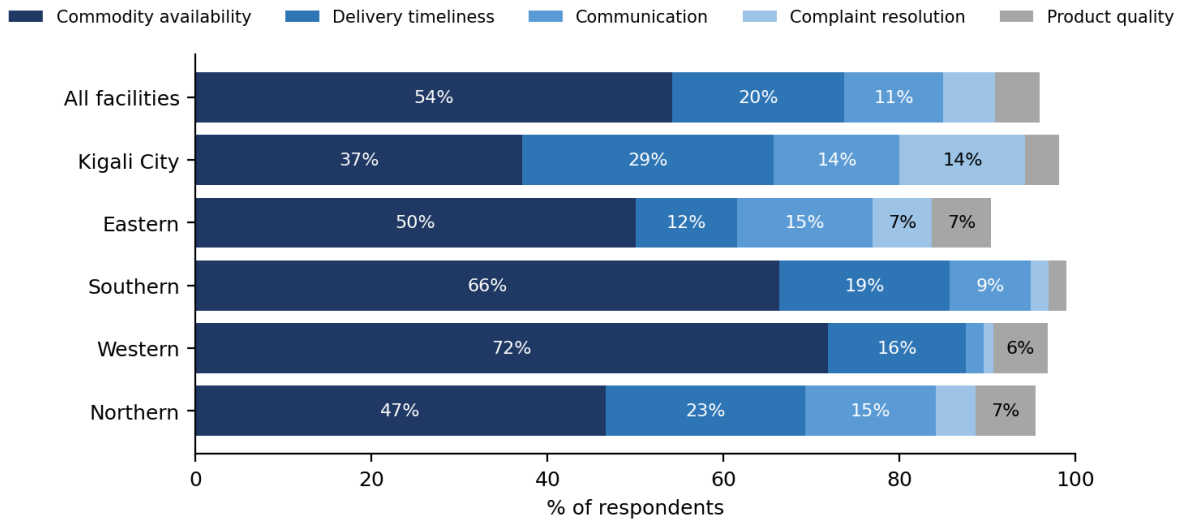
Change over two years	Kigali City (n=105)	Eastern (n=104)	Southern (n=98)	Western (n=96)	Northern (n=88)	All (n=491)
Improved significantly	26.7% (28)	72.1% (75)	56.1% (55)	53.1% (51)	48.9% (43)	51.3% (252)
Improved slightly	51.4% (54)	21.2% (22)	31.6% (31)	28.1% (27)	22.7% (20)	31.4% (154)
Stayed about the same	16.2% (17)	2.9% (3)	4.1% (4)	12.5% (12)	15.9% (14)	10.2% (50)
Declined slightly	0.0% (0)	2.9% (3)	2.0% (2)	1.0% (1)	4.5% (4)	2.0% (10)
Declined significantly	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	1.1% (1)	0.2% (1)
Not sure	5.7% (6)	1.0% (1)	6.1% (6)	5.2% (5)	6.8% (6)	4.9% (24)

Source: Primary data, Client satisfaction survey, 2026

3.7. Improvement priorities identified by clients

Asked which area RMS should improve first, buyers were unequivocal: 54.2% chose commodity availability, 19.6% delivery timeliness and 11.2% communication. Complaint resolution (5.9%) and product quality (5.1%) were chosen by small minorities, and pricing, training and ordering systems by fewer than 1% each. Priorities differ significantly by facility level ($p < 0.001$) and province ($p < 0.001$). Hospitals (66.0%) and health centres (62.5%) overwhelmingly prioritise availability, whereas health posts spread their priorities more widely, with 35.4% choosing availability, 28.5% delivery timeliness, 14.6% communication and 10.1% complaint resolution. Provincially, availability is the first priority for 71.9% of Western and 66.3% of Southern Province buyers but for only 37.1% in Kigali City, where delivery timeliness (28.6%), communication (14.3%) and complaint resolution (14.3%) together form the majority.

Figure 3.22. Priority area RMS should improve first, by province



Source: Primary data, Client satisfaction survey, 2026

Table 3.28. Priority area for improvement by facility level

Priority area	Hospital (n=53)	Health centre (n=280)	Health post (n=158)	All (n=491)
Commodity availability	66.0% (35)	62.5% (175)	35.4% (56)	54.2% (266)
Communication	7.5% (4)	10.0% (28)	14.6% (23)	11.2% (55)
Complaint resolution	3.8% (2)	3.9% (11)	10.1% (16)	5.9% (29)
Delivery timeliness	15.1% (8)	15.4% (43)	28.5% (45)	19.6% (96)
None/no priority	0.0% (0)	1.1% (3)	5.7% (9)	2.4% (12)
Ordering/documentation systems	0.0% (0)	0.7% (2)	0.0% (0)	0.4% (2)
Pricing/payment	0.0% (0)	0.0% (0)	1.3% (2)	0.4% (2)
Product quality	7.5% (4)	5.4% (15)	3.8% (6)	5.1% (25)
Training/staffing	0.0% (0)	0.7% (2)	0.0% (0)	0.4% (2)

Source: Primary data, Client satisfaction survey, 2026

Table 3.29. Improvement priority chosen, according to the issue experienced most frequently

Most frequent issue	Commodity availability first	Delivery timeliness first	Communication first	Complaint resolution first	Product quality first
Stock-outs/availability	67.8% (137)	13.9% (28)	9.4% (19)	4.0% (8)	3.5% (7)
Partial orders	66.0% (68)	17.5% (18)	9.7% (10)	3.9% (4)	2.9% (3)
Delivery delays	29.7% (22)	48.6% (36)	8.1% (6)	8.1% (6)	5.4% (4)
Ordering-system problems	44.2% (19)	14.0% (6)	7.0% (3)	14.0% (6)	16.3% (7)
Communication gaps	20.0% (6)	16.7% (5)	50.0% (15)	3.3% (1)	6.7% (2)
None/no major issue	35.5% (11)	6.5% (2)	3.2% (1)	9.7% (3)	3.2% (1)

Source: Primary data, Client satisfaction survey, 2026

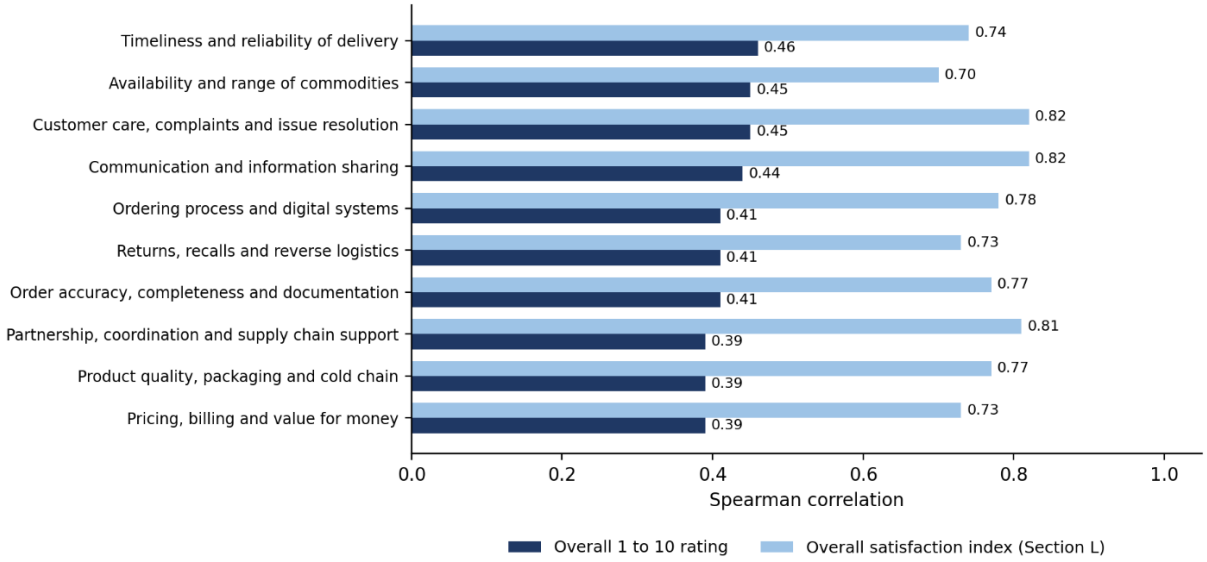
3.8. Drivers of satisfaction

In order to identify where improvement effort will have the greatest effect, each dimension index was correlated with the overall performance rating and with the overall satisfaction index. Because the dimensions are highly inter-correlated, the analysis is presented as bivariate rank correlations rather than as a multivariate model, whose coefficients would be unstable. The results in Figure 18 show a clear two-tier structure. Timeliness and reliability of delivery (rho = 0.46) and availability and range of commodities (0.45) are the dimensions most closely associated with the overall rating, followed by customer care and issue resolution (0.45) and communication (0.44). Product quality (0.39) and pricing (0.39), although the best-rated dimensions, are the least associated with the overall judgement, which indicates that clients treat them as preconditions and do not credit RMS for delivering them.

Against the overall satisfaction index the ordering changes: communication (0.82), customer care (0.82) and partnership (0.81) are the strongest correlates. Read together, the two analyses indicate that the operational basics of availability and timeliness set the level of the overall verdict, while the

relational dimensions of communication, customer care and partnership determine whether a buyer that experiences a supply issue nonetheless remains satisfied and trusting. This is the central analytical finding of the survey for management purposes: engagement quality is not a substitute for supply performance, but it is the strongest available moderator of how supply shortfalls are judged.

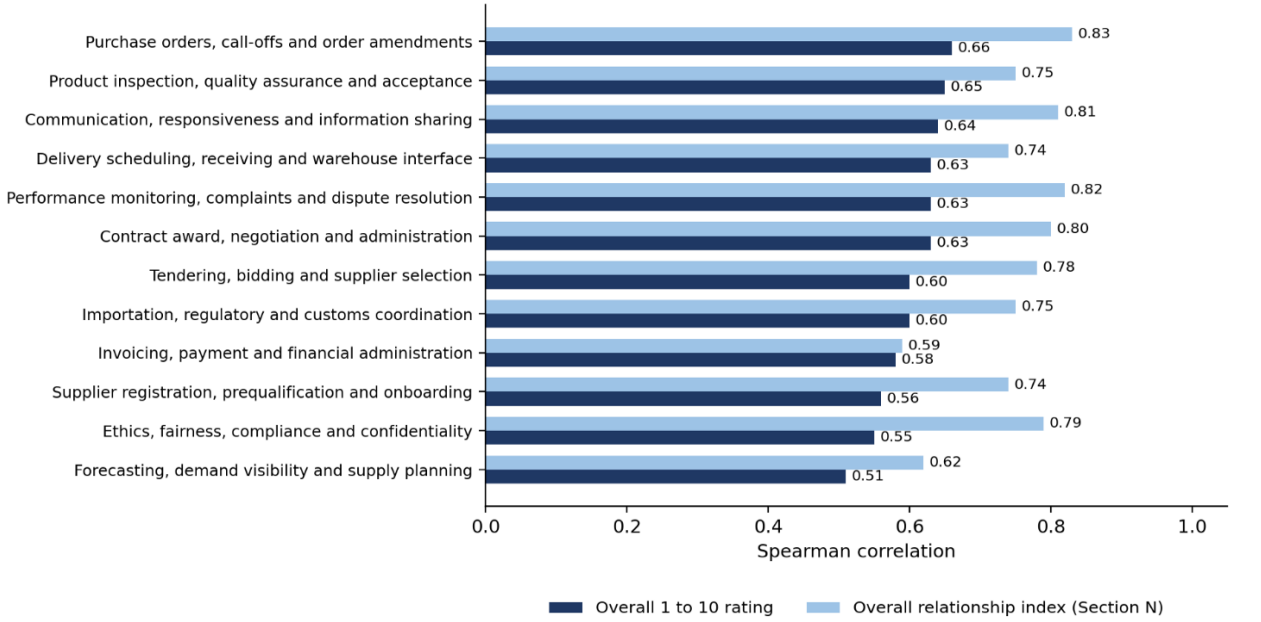
Figure 3.23. Correlation of client dimension indices with the overall rating and the overall satisfaction index



Source: Primary data, Client satisfaction survey, 2026

The same analysis was applied to the supplier data. Every supplier dimension correlates positively and substantially with the overall rating, with coefficients between 0.51 and 0.66, a tighter and higher band than on the client side. The strongest correlates are purchase orders and call-offs (0.66), inspection and quality assurance (0.65), partnership and overall relationship (0.65), communication (0.64) and delivery and receiving (0.63). Forecasting, although the lowest-rated dimension, has the lowest correlation with the overall rating (0.51), and ethics the second lowest (0.55). The structure mirrors the client side: ethics and fairness are a satisfied precondition that no longer differentiates, forecasting is a widely shared frustration that suppliers do not hold against RMS personally, and the day-to-day execution of orders, deliveries, inspections and communication is what determines the overall verdict.

Figure 3.24. Correlation of supplier dimension indices with the overall rating and the relationship index



Source: Primary data, Client satisfaction survey, 2026

3.8.1. Connections between the client and supplier findings

Read together, the two instruments describe one system rather than two. Four connections are visible in the data and should be carried into the recommendations.

Predictability matters more than the level of performance. Buyers rate availability and delivery timeliness lowest; suppliers rate forecasting and payment timeliness lowest. In each case the complaint is less about the absolute level of service than about not knowing what to expect. Buyers asked to be told in advance what is unavailable and when a delayed delivery will arrive; suppliers asked for a forward view of demand and a reliable date for payment. Both groups proposed the same remedy in their own words, which is proactive information rather than additional resources.

Communication moderates how service shortfalls are judged in both groups. On the client side, communication, customer care and partnership are the dimensions most strongly associated with overall satisfaction even though availability and timeliness set its level. On the supplier side, communication and day-to-day order execution rank ahead of forecasting as determinants of the overall verdict, and suppliers described the payment challenge principally as an information gap. A structured communication protocol is therefore the single highest-leverage measure available to RMS on both sides of the supply chain.

Laboratory commodities are a shared area for improvement. Laboratory reagents, test kits and consumables are the products buyers most often report as unavailable, cited in 86 buyer incident descriptions and forming the second most frequent challenge theme. At the other end of the chain, suppliers of laboratory products are the least satisfied supplier category, the most likely to report payment delay (81.8%) and the only category containing suppliers unsure about bidding again. This convergence, visible from opposite ends of the chain, identifies the laboratory commodity line as a distinct workstream rather than a general availability issue.

The financial cycle links the two groups. Delayed payment to suppliers lengthens lead times, discourages competitive bidding and, in the accounts suppliers gave, has already caused at least one supplier to hold stock it could not deliver and others to reconsider participation. The commodity availability that buyers identify as their first priority for improvement is therefore, at least in part, downstream of the payment performance that suppliers identify as theirs. Strengthening the invoice-to-payment cycle is consequently not only a supplier relations measure but a commodity availability measure, and it should be presented and resourced as such.

3.9. Qualitative findings from buyers

Response rates to the five open-ended questions were high, between 86% and 98% of buyers, and many respondents wrote at length in English, Kinyarwanda or French. Responses were coded thematically; the tables below report the share of substantive responses, excluding answers of "none" or "no comment", and a response may carry more than one theme.

3.9.1. Strengths of RMS

Buyers describe RMS strengths in terms that mirror the quantitative ranking. Availability of commodities was cited by 41.1% of the 472 substantive responses, timely and reliable delivery by 33.9% and communication and customer care by 26.7%, followed by the ordering system and eLMIS (12.3%), product quality and packaging (8.7%) and transport and distribution to the buyer (7.8%). Typical statements included "reliable availability and distribution of essential medicines and medical supplies", "respect the time of delivery, quality products and communication" and "RMS staff respond when we have a problem or need clarification about what we ordered". A number of respondents compared present with past performance, one noting that "RMS communication and customer care is very good compared to before", which is consistent with the trajectory finding. Thirteen buyers singled out the credit buyer that allows them to receive commodities when funds are not immediately available.

Table 3.30. Main strengths of RMS cited by buyers

Theme	Responses	% of substantive responses
Availability of commodities	194	41.1
Timely and reliable delivery	160	33.9
Communication and customer care	126	26.7
Ordering system / eLMIS	58	12.3
Product quality and packaging	41	8.7
Transport and distribution	37	7.8
Emergency orders	13	2.8
Credit / payment flexibility	13	2.8
Training and technical support	6	1.3

Source: Primary data, Client satisfaction survey, 2026

481 buyers answered; 9 gave no substantive comment.

3.9.2. Challenges and service gaps

Stock-outs and unavailable products dominate the challenges, cited by 51.4% of substantive responses, and the products named are specific: laboratory reagents and consumables (16.0%), programme commodities (6.3%) and a limited range of specialised items in the catalogue (12.9%). Delivery delays (15.5%), communication gaps (9.9%) and partial orders (8.2%) follow. Several threads recur that do not appear in the closed questions: buyers not being told whether ordered items are available, ordering deadlines that leave no room to adjust, the distance to RMS branches for urgent needs and for resolving document mismatches, transport charges levied even when part of an order is missing, and short-dated products causing losses. Only 46 of 472 responding buyers reported no challenge at all.

Table 3.31. Most important challenges and service gaps cited by buyers

Theme	Responses	% of substantive responses
Stock-outs / unavailable products	219	51.4
Laboratory reagents and consumables	68	16.0
Delivery delays	66	15.5
Limited product range / specialised items	55	12.9
Communication gaps	42	9.9
Partial or incomplete orders	35	8.2
Programme commodities	27	6.3
Distance, transport cost and access	22	5.2
Ordering system / network problems	20	4.7
Payment, pricing and billing	14	3.3
Short shelf life / expiry	10	2.3
Staffing and capacity at RMS	7	1.6

Source: Primary data, Client satisfaction survey, 2026

472 buyers answered; 46 reported no challenge.

3.9.3. Specific incidents in the last twelve months

Asked to describe a significant stock-out, delayed delivery, incomplete order or quality issue experienced in the previous twelve months, 455 buyers responded and 407 described at least one incident. Stock-outs were described by 44.0% of these, delayed deliveries by 16.0% and incomplete orders by 10.8%; quality problems (3.4%) and short-dated products (2.0%) were comparatively rare. The products named most often are laboratory items and test kits, cited in 86 incident descriptions, followed by programme commodities in 59 and named essential medicines in 67. The recurrence of the same laboratory and programme items across unrelated districts indicates supply gaps upstream of RMS distribution, in procurement or in programme allocation, rather than isolated warehouse or delivery shortfalls.

Table 3.32. Products most frequently named in buyer incident descriptions

Product or product group	Number of incident descriptions
Creatinine / lab reagents	45
Family planning products	22
Salbutamol spray	19
HIV test kits (Determine/Stat-Pak/combo)	18
RPR (syphilis) test	16
Zinc / ORS	16
Malaria RDT / antimalarials	13
Lidocaine	7
Pregnancy tests	7
Hepatitis B/C tests	6
Amoxicillin	5
NCD medicines	5
Insulin / syringes	4
Vitamin K / antenatal	4
Oxytocin/misoprostol	4
Glucose / Hgb test strips	3
ARVs	3
Paracetamol	1
Dexamethasone/steroids	1

Source: Primary data, Client satisfaction survey, 2026

3.9.4. Actions buyers want RMS to take

The actions requested are consistent with the closed-question priorities but more specific. Ensuring commodity availability, including adequate buffer stocks of essential medicines and laboratory supplies, was mentioned by 58.0% of the 471 substantive responses; improving delivery timeliness by 29.1%; strengthening communication and feedback, in particular early notice of unavailable products and of system changes, by 20.6%; and delivering orders in full by 14.6%. Beyond these, buyers asked for improved forecasting and quantification support, regular coordination meetings between RMS and buyers including store managers, training and mentorship for buyer stock managers, a call centre that answers, more vehicles and staff at RMS branches, faster handling of emergency orders with several buyers suggesting expanded drone delivery for items such as intravenous fluids, anaesthetics and blood glucose tests, services brought closer to buyers, and fairer transport charges when orders are incomplete.

Table 3.33. Actions buyers want RMS to take

Theme	Responses	% of substantive responses
Ensure commodity availability and buffer stocks	273	58.0
Improve delivery timeliness	137	29.1
Strengthen communication and feedback	97	20.6
Complete orders / avoid partial deliveries	69	14.6
Reduce stock-outs	64	13.6
Increase RMS staffing and customer care	30	6.4
Pricing, payment terms and credit	26	5.5

Theme	Responses	% of substantive responses
Improve forecasting and quantification	22	4.7
Improve ordering system / eLMIS	22	4.7
Training, mentorship and technical support	21	4.5
Product quality and shelf life	20	4.2
Decentralise and bring services closer / transport	19	4.0
Emergency order handling	16	3.4
Product range / new products	3	0.6

Source: Primary data, Client satisfaction survey, 2026

3.9.5. Additional comments and recommendations

The additional comments confirm the overall tone of the survey. One third of substantive comments (32.4%) were expressions of appreciation and encouragement to continue, while 39.4% returned to availability and 24.7% to timeliness. Requests for regular meetings and supervisory visits, for a more responsive call centre, for advance communication of prices and delivery dates, for training of buyer stock staff and for a review of transport charges on incomplete orders were repeated across provinces. These comments supply the client-side content for the engagement measures recommended in Section 5.2.

Table 3.34. Additional comments and recommendations from buyers

Theme	Responses	% of substantive responses
Ensure commodity availability / avoid stock-outs	147	39.4
Appreciation and encouragement to continue	121	32.4
Improve delivery timeliness	92	24.7
Strengthen communication and feedback	62	16.6
Pricing, transport charges and payment terms	31	8.3
Product quality and shelf life	26	7.0
Training and capacity building	21	5.6
Ordering system / eLMIS	18	4.8
Emergency and closer services	17	4.6
Complete orders / partial deliveries	12	3.2

Source: Primary data, Client satisfaction survey, 2026

3.10. Qualitative findings from suppliers

Between 30 and 54 suppliers answered each of the six open-ended questions and many wrote at length. Responses were coded thematically; percentages refer to substantive responses, excluding answers of "none" or "no comment", and a response may carry several themes.

3.10.1. Strengths of RMS supplier management

Communication is the strength suppliers name most often, cited in 49.0% of the 49 substantive responses, followed by supplier relationship management and partnership (32.7%), clear procurement procedures and requirements (30.6%), transparency, fairness and integrity (20.4%) and the professionalism of RMS staff and leadership (20.4%). Suppliers wrote of "clear requirements, clear products, simple communication", "professional, transparent partnership", "great communication from the RMS team and openness to face to face meetings" and "integrity, confidentiality, honesty". One international manufacturer observed that RMS is "the only government agency we work with in the region" that had presented no significant issues, and another supplier praised recent improvement in obtaining shelf-life approvals and delivery clearances.

Table 3.35. Main strengths of RMS supplier management cited by suppliers

Theme	Responses	% of substantive responses
Communication and responsiveness	24	49.0
Supplier relationship management and partnership	16	32.7
Clear procurement procedures and requirements	15	30.6
Transparency, fairness and integrity	10	20.4
Professionalism of RMS staff and leadership	10	20.4
Timeliness of information and follow-up	9	18.4
Tendering process and tender advertising	6	12.2
Contracting and contract preparation	4	8.2
Complaint handling and supplier feedback	3	6.1

Source: Primary data, Client satisfaction survey, 2026

3.10.2. Challenges and significant incidents

Payment delay dominates both the general challenge question and the request for a description of a significant incident, cited in 42.2% of substantive challenge responses and 64.9% of incident descriptions. Four further clusters recur. The first is the interval between contract signature and issuance of the purchase order, described as "very long" and as an obstacle to production planning. The second is penalties and liquidated damages applied where the delay originated with RMS, with manufacturers, with shipping or with a pre-import permit, together with penalties triggered by late confirmation of receipt. The third is receiving, inspection and acceptance, including a slow receiving process and the rejection of stock over expiry dates agreed verbally but not confirmed in writing. The fourth is specification and volume mismatch, including tender quantities that differed from quantities finally ordered after freight had been costed and minimum order quantities not accounted for at tendering stage.

Tender access and fairness, cited in 32.4% of incident descriptions, is a distinct theme raised principally by Rwanda-based distributors. The concern is not the conduct of evaluation but the policy direction toward contracting manufacturers directly, one supplier writing that "all companies should be equally invited, not only manufacturers" and warning of consequences for Rwandan companies, employment and tax revenue. A separate procedural concern was raised by international suppliers about eligibility conditions, in particular completion certificates with monetary thresholds that "may restrict

participation of capable bidders who lack prior public sector references", and about tender notices sent to inactive email addresses because supplier contact records are not updated.

Table 3.36. Challenges and significant incidents reported by suppliers

Theme	Challenges: responses	Challenges: %	Incidents: responses	Incidents: %
Payment delays and payment terms	19	42.2	24	64.9
Receiving, inspection and acceptance problems	8	17.8	7	18.9
Delayed purchase orders and contracting	7	15.6	9	24.3
Unclear specifications and volume changes	7	15.6	6	16.2
Communication gaps and slow responses	7	15.6	5	13.5
Tender access, fairness and eligibility	6	13.3	12	32.4
Penalties and liquidated damages	5	11.1	3	8.1
Import, logistics and customs constraints	5	11.1	4	10.8
Internal coordination and approval bottlenecks	4	8.9	3	8.1
Flexibility and price revision	3	6.7	1	2.7

Source: Primary data, Client satisfaction survey, 2026

3.10.3. Actions and partnership opportunities proposed by suppliers

The actions requested follow directly from the challenges: improving communication, feedback and responsiveness (50.0% of 46 substantive responses), speeding up the procurement, contract and order cycle (37.0%), paying on time and communicating payment timelines (32.6%), fair and transparent tender evaluation and access (30.4%) and regular supplier meetings, reviews and performance indicators (21.7%). The specific proposals were unusually concrete and are recorded here as candidate measures: assign account managers who can be followed up from contract signing through to payment; introduce automated notifications within the procurement platform for tender updates, order status and receiving confirmation; hold joint supplier performance reviews using measures such as on-time in-full delivery and disseminate tender results with feedback on allocation criteria; set and respect a standard period for each procedural step, with the 45-day payment term specified in most contracts named explicitly; consult end users to validate item specifications before issuing a request; communicate changes in required delivery and invoicing documents in advance rather than at the counter; assess the actual cause of a delay before applying liquidated damages; and reduce paperwork by completing the shift to digital submissions and signatures.

On innovation and partnership, digital procurement, order tracking and paperless processes was the most frequent theme (34.9% of 43 substantive responses), followed by better information sharing and tender publication (32.6%), joint demand forecasting and supply planning (23.3%), regular supplier meetings and company visits (20.9%) and long-term framework agreements and strategic partnership (18.6%). Concrete suggestions included sharing annual or rolling procurement forecasts so that manufacturers can plan production; longer-term framework agreements to improve supply continuity and cost efficiency; vendor-managed inventory, proposed independently by two suppliers; a supplier

portal for tracking purchase orders, deliveries and payment status; publishing all tenders on the RMS website rather than distributing them by email alone; early supplier involvement in product selection and specification; permitting suppliers to offer improved alternatives where a specification has been carried forward from previous years; and value-based selection weighing quality, after-sales service and total cost of ownership rather than price alone.

Table 3.37. Actions and partnership opportunities proposed by suppliers

Theme	Responses	% of substantive responses
Action: Improve communication, feedback and responsiveness	23	50.0
Action: Speed up procurement, contract and order cycle	17	37.0
Action: Pay on time and communicate payment timelines	15	32.6
Action: Fair and transparent tender evaluation and access	14	30.4
Action: Regular supplier meetings, reviews and KPIs	10	21.7
Action: Share forecasts and involve suppliers in planning	7	15.2
Action: Dedicated account management and contacts	4	8.7
Action: Flexibility on delivery timelines and documents	4	8.7
Action: Digital systems, automation and reduced paperwork	2	4.3
Action: Fair application of penalties	2	4.3
Opportunity: Digital procurement, tracking and paperless processes	15	34.9
Opportunity: Better information sharing and tender publication	14	32.6
Opportunity: Joint demand forecasting and supply planning	10	23.3
Opportunity: Regular supplier meetings, engagement and visits	9	20.9
Opportunity: Long-term framework agreements and strategic partnership	8	18.6
Opportunity: Product and technology innovation	7	16.3
Opportunity: Training and technical capacity building	4	9.3
Opportunity: Value-based and quality-focused selection	4	9.3
Opportunity: Local supplier development and sourcing	1	2.3

Source: Primary data, Client satisfaction survey, 2026

3.10.4. Additional comments from suppliers

Thirty suppliers offered additional comments and the tone was predominantly appreciative: 60.0% of substantive comments expressed appreciation or encouragement, including "overall a great partnership" and "it is our privilege to be your supplier", with two independent observations that RMS has improved markedly over the past two to three years. The recurring recommendations were to pay on time, to strengthen communication and feedback, to build longer-term partnerships based on transparency and accountability, and to revisit specific processes, including the rejection of consignments where written confirmation of expiry dates is missing and the continued requirement for physical copies of formal correspondence.

Table 3.38. Additional comments and recommendations from suppliers

Theme	Responses	% of substantive responses
Appreciation and positive relationship	15	60.0
Process and documentation improvements	9	36.0
Stronger, longer-term partnership and accountability	9	36.0
Strengthen communication and feedback	8	32.0
Pay suppliers on time	7	28.0
Fair treatment of local suppliers and tender access	3	12.0

Source: Primary data, Client satisfaction survey, 2026

3.11. Key Informant Interview Findings

Alongside the structured client and supplier surveys, the assessment included key informant interviews with institutions that hold a system level view of the medical supply chain in Rwanda. These interviews were designed to reach judgements that a standardised questionnaire cannot capture: how RMS performs as an institutional partner, where strain in the supply chain is felt most acutely, and which corrective actions these institutions would place first. The findings are presented here as a self contained qualitative account.

3.11.1. Scope and method

Four institutions were visited on 9 and 10 September 2026 under a single mission order: Rwanda Biomedical Centre (RBC), Rwanda Social Security Board (RSSB), the Clinton Health Access Initiative (CHAI) and the Ministry of Health (MoH). Each interview followed a common three question guide covering aspects of RMS performance the institution appreciates, challenges and areas for improvement observed, and priority areas for improvement. Responses were recorded in handwriting during the sessions and transcribed afterwards, with the original wording retained and a cleaned wording prepared for analysis.

3.11.2. Aspects of RMS performance that are appreciated

Positive assessments from both institutions concentrate on the upstream functions of the supply chain, namely planning, procurement and the information systems that support them. They identified four areas of strength, all of them upstream of physical delivery like quantification, stock monitoring, supply plan monitoring and procurement. Taken together these point to an institution that RBC considers competent in forecasting demand, tracking what it holds and translating supply plans into purchases.

They also emphasised equity and reliability in allocation, reporting that the allocation of medicines to buyers is timely and consistent, and that rural areas are served on comparable terms to urban areas. RSSB also credited RMS with improved data availability and with efficient use of electronic systems, citing SAP and eLMS by name.

The common thread is that RMS is credited with getting the planning and acquisition side of its mandate right, and with having invested in digital systems that make its operations more visible than they previously were.

3.11.3. Challenges and areas for improvement reported

Concerns cluster downstream of procurement and around the transparency of price information.

- They raised issues like distribution, and limited data visibility on stock, pipeline and warehousing. These are related concerns rather than separate ones, since limited visibility of what is held and what is in transit directly constrains the ability to manage distribution.
- They also raised issues like the lack of traceability of historical medicine prices, the absence of price benchmarking, and operational changes that affect product availability. The first two reflect RSSB's position as a payer, for which the ability to verify that prices are reasonable over time is a core requirement rather than a secondary interest.

It is worth noting that data and information questions appear on both sides of the ledger. RSSB credits RMS with improved data availability while RBC reports limited visibility on stock, pipeline and warehousing. The two positions are not contradictory. They suggest that the systems now in place have improved the quality of data held within RMS without yet delivering the operational visibility that partner institutions need for their own planning.

3.11.4. Priority areas for improvement

When asked what should be addressed first, both institutions named visibility, and each added priorities specific to its mandate.

- Improve data visibility, and improve distribution together with distribution reporting.
- Provide partners with continuous visibility of product availability, minimise price variation, and avoid the use of multiple software systems.

Table 3.39. Thematic summary of key informant responses

Theme	RBC	RSSB
Quantification and supply planning	Appreciated	Not raised
Procurement	Appreciated	Not raised
Allocation timeliness and rural equity	Not raised	Appreciated
Distribution and distribution reporting	Area for improvement and priority	Not raised
Data and information visibility	Area for improvement and priority	Appreciated internally, priority for partner facing visibility
Price traceability and benchmarking	Not raised	Area for improvement and priority
Fragmentation across software systems	Not raised	Priority

Source: Key informant interviews, 2026

3.11.5. Emerging observations

Three observations follow from the interviews held.

- **First.** Visibility is the single theme shared by both institutions, appearing as an area for improvement and again as a stated priority in each case. The framing differs: RBC describes an internal operational need covering stock, pipeline and warehousing, while RSSB describes a partner facing need for continuous sight of product availability. Any response to this finding would have to serve both.

- **Second.** Appreciation concentrates upstream and concern concentrates downstream. Quantification, supply planning, procurement and allocation attract positive assessments, while distribution, distribution reporting and price transparency attract concern. This pattern suggests that the immediate gains are more likely to come from the delivery and reporting end of the chain than from further investment in planning.

- **Third.** Pricing is a distinct institutional concern rather than a general one. It was raised only by RSSB, across all three questions in the form of historical price traceability, benchmarking and price variation, which is consistent with its role as a payer rather than a recipient of commodities.

4. CONCLUSION AND RECOMMENDATIONS

4.1. Conclusion

This Client Satisfaction Survey assessed the perceptions and experiences of 553 respondents on both sides of the RMS supply chain, comprising 491 buyers across all 30 districts of Rwanda and 62 suppliers, and measured satisfaction through sixty-eight attributes in eleven dimensions on the client side and eighty-four attributes in thirteen dimensions on the supplier side, together with summary and open-ended questions. It was implemented in accordance with the approved Inception Report and exceeded both the approved buyer sample and the minimum acceptable response threshold overall, although the supplier sample did not reach its own target for the reasons set out in the methodology.

The survey finds that RMS has consolidated a substantially improved position with the buyers it serves. Client satisfaction stands at 75.5% of all attribute responses positive, up 30.0 percentage points on the 45.5% recorded for buyers in the previous round on the same basis, and at 56.2% on the composite measure introduced in this round. The improvement is independently corroborated by the clients themselves, 82.7% of whom consider that RMS services have improved over the past two years while only 2.2% perceive any decline. It is also more evenly distributed than before: hospitals, the least satisfied facility level in the previous round, record the largest gain of any level and the difference between facility levels is no longer statistically significant, while the Western Province, previously the least satisfied province, records the largest provincial gain.

Among suppliers the position is broadly positive but more qualified. 80.6% of supplier attribute responses are positive, a marginal improvement on the 72.6% reported in 2024-2025, and 88.7% of suppliers would definitely participate in future RMS procurement. At the same time, 51.6% reach a satisfactory average once the payment and forecasting dimensions are included, and the historic gap between local and international suppliers persists, with Rwanda-based suppliers at 44.1% against 60.7% for international suppliers on the composite measure, although the two groups are close on the attribute-level measure at 79.6% and 81.8%, and Rwanda-based suppliers return the only negative Net Promoter Score recorded anywhere in the survey.

Loyalty across both groups has strengthened. The combined Net Promoter Score rose from 11.3 to 21.5 and the detractor group fell from 33.3% to 15.2%. Trust in RMS as a dependable supply chain partner stands at 80.7% among buyers, and confidence in the integrity and accountability of RMS supplier management at 86.2% among suppliers.

The strengths on which this rests are clear and should be recognised and protected. With clients, RMS performs best on the quality, packaging, labelling and cold-chain integrity of what it supplies, which is the highest-rated client dimension and includes the four highest-rated client attributes; on the accuracy of orders and the clarity of documentation, an area that was a leading source of concern in the previous round and is now a strength; on the simplicity and reliability of the electronic ordering process; and on the professionalism and accessibility of its staff. With suppliers, it performs best on ethics, fairness and confidentiality, on tendering and supplier selection, on contract award and administration, and on regulatory and customs coordination, which together mean that suppliers do not question the integrity of how RMS awards and manages its business.

The areas for improvement are equally clear and, importantly, they connect across the two groups. On the client side, commodity availability is the lowest-rated dimension, the most frequently reported issue and the first improvement priority, and it is concentrated in laboratory reagents and test kits and in programme commodities rather than in the essential medicines list. Delivery timeliness is the second area for improvement, is the factor most strongly associated with a lower overall rating, and is concentrated in Kigali City. Proactive communication is the third and, as the driver analysis shows, the dimension that most strongly moderates how clients judge supply shortfalls. On the supplier side, forecasting and demand visibility is the lowest-rated dimension and invoicing and payment the second, with timeliness of payment against contractual terms the lowest-rated attribute in the entire survey at 53.3% satisfied, payment delay the most frequent challenge for half of suppliers and the first improvement priority for 40.3%.

The difference between the two measures, and the level at which the composite measure has settled, is explained by a small number of measurable causes rather than by general sentiment, and those causes can be stated in figures. The first is arithmetic. The composite measure requires a respondent to average 4 or above across every assessed attribute, so a single lower-rated dimension is sufficient to place an otherwise satisfied respondent below the threshold. Across the survey 76.1% of individual attribute responses are positive, which is the headline satisfaction figure, while 55.7% of respondents clear the stricter composite threshold, a gap of 20.4 percentage points. On the buyer side that gap is carried almost entirely by one dimension. Availability of commodities records 51.5% of buyers satisfied and an index of 3.69, against a range of 60.1% to 75.8% and 3.76 to 4.06 for every other buyer dimension. Stock-outs are the issue experienced most frequently by 41.1% of buyers and the first improvement priority for 54.2% of them, and the challenge is concentrated rather than general: availability of essential medicines scores 72.4% and adequacy of the product range 71.6%, while the shortage is reported in laboratory reagents and test kits and in programme commodities. The exposure rises with the breadth of the order book, from 29.1% of health posts naming stock-outs as their main issue to 43.9% of health centres and 62.3% of hospitals.

The second cause is geographic and is specific to two provinces. Kigali City, at 46.7% on the composite measure and 71.8% on the attribute-level measure, records the smallest provincial gain since the previous round and returns a Net Promoter Score of 1.9, and the cause is delivery rather than supply: its timeliness index is 3.44 against a national 3.78 and an Eastern Province 4.02, and 28.6% of its buyers name delivery delay as their most frequent issue against 7.7% in the Eastern Province. The distinction matters because buyers assess the two situations differently. Buyers whose principal concern is delivery delay give RMS a mean overall rating of 7.08 out of ten, against 7.95 among buyers whose principal concern is a stock-out, which indicates that a national shortage is treated as a constraint RMS shares with the wider system whereas a late delivery of stock RMS holds is attributed to RMS. The Northern Province, at 46.6% and 69.1% on the two measures and the second smallest provincial gain, presents the opposite profile: it is the lowest province on availability at 3.47, order accuracy at 3.72, product quality at 3.84, communication at 3.81, customer care at 3.78 and partnership at 3.66, which indicates broad scope for service improvement rather than a single area of concern. Ten districts fall below 45% satisfaction, and they divide on the same lines, with stock-outs naming between 62% and 92% of buyers in Nyamasheke, Rusizi, Rulindo, Ruhango, Gisagara and Nyamagabe, and timeliness scores between 3.38 and 3.48 in the three Kigali City districts.

The third cause sits on the supplier side and has the same structure. Supplier attribute responses are 80.6% positive while 51.6% of suppliers clear the composite threshold, a gap of 29.0 percentage points created by two dimensions. Timeliness of payment against contractual terms is the lowest-rated attribute in the entire survey at 53.3% satisfied, payment delay is the most frequent challenge for half of the suppliers and the first improvement priority for 40.3% of them, and forecasting is the lowest-rated supplier dimension. The consequence is measurable in loyalty: Rwanda-based suppliers return a Net Promoter Score of -14.7 with 41.2% classified as detractors, against +35.7 and 10.7% for international suppliers, the only negative score recorded anywhere in the survey. Since Rwanda-based suppliers are also the group most exposed to working capital pressure, the payment cycle is the single operational variable with the clearest measured effect on supplier sentiment.

The fourth cause explains the shape of the loyalty result rather than its level. The detractor share has fallen by 18.1 percentage points to 15.2%, which is the largest single movement recorded in this survey and the clearest evidence that the corrective measures taken since the previous round have worked. The promoter share, however, has fallen from 44.6% to 36.7% and the passive band, comprising ratings of 7 and 8, now holds 48.1% of all respondents. The most common verdict on RMS is therefore no longer dissatisfaction but qualified approval, and the reason is visible in the same data: buyers who report significant improvement over the past two years give a mean rating of 8.44 with 82.5% rating RMS at 8 or above, while those who see no change give 6.84 with 30.0% at 8 or above. Movement from 8 to 9 requires the removal of the residual concern, which for most buyers is the availability of a specific product line and for most suppliers is the settlement of an invoice.

The connection between the two sets of findings is the central analytical result of this survey. Limited forward demand visibility and delayed settlement lengthen supplier lead times and discourage competitive participation, which constrains the commodity availability that buyers identify as their principal concern; and in both groups the complaint is less about the level of service than about its predictability, with each group asking for the same remedy of proactive information rather than additional resources. Laboratory commodities are the clearest shared area for improvement, being simultaneously the products buyers most often report as unavailable and the category whose suppliers are least satisfied and most affected by payment delay. Client dissatisfaction is geographically concentrated in a defined set of districts, comprising the three Kigali City districts together with Nyamasheke, Bugesera, Kayonza, Gicumbi, Gakenke, Rulindo and Rubavu, while supplier dissatisfaction is concentrated by category and by origin.

In conclusion, RMS has built a strong and improving relationship with the buyers it serves and retains a willing supplier base, and the residual dissatisfaction in both groups is specific enough to be addressed through targeted rather than systemic measures. Converting the large passive group into promoters, closing the availability and predictability gaps in the identified districts and product lines, and strengthening the invoice-to-payment cycle represent the principal opportunities for the next period.

4.2. Recommendations

Based on the findings from both respondent groups, the following ten recommendations are proposed. Each is linked to the evidence that supports it, and each identifies the responsible function and an indicative timeframe.

1. **Strengthen commodity availability through improved forecasting and buffer stocks, with a dedicated focus on laboratory and programme commodities.** Availability is the lowest-rated client dimension (51.5% of buyers satisfied), the most frequent issue (41.1%) and the first priority for 54.2% of buyers, and the challenge is concentrated in laboratory reagents and test kits and in programme commodities which recur by name across unrelated districts. The same convergence appears on the supplier side, where laboratory suppliers are the least satisfied category. RMS should strengthen quantification and forecasting for these specific lines, establish buffer stock levels for a defined list of tracer laboratory and programme items, and convene a joint problem-solving mechanism with the Ministry of Health programmes, the Rwanda Biomedical Centre and development partners for the items whose shortage originates upstream of RMS distribution. Responsible: Procurement and Supply Planning. Timeframe: immediate and continuing.
2. **Strengthen the invoice-to-payment cycle and give suppliers visibility of payment status.** Timeliness of payment is the lowest-rated attribute of the entire survey (53.3% satisfied, 30.0% dissatisfied), payment delay is the most frequent challenge for 50.0% of suppliers and the first priority for 40.3%, and availability of information on invoice status is rated satisfactory by 66.7%. Because delayed settlement lengthens supplier lead times, this is a commodity availability measure as well as a supplier relations measure. RMS should establish and publish a target payment cycle consistent with the 45-day term specified in most contracts, report performance against it, introduce an invoice status buyer through which suppliers can confirm receipt, validation and expected payment date without contacting the finance team, and clear the ageing backlog identified by respondents. Responsible: Finance, with Procurement. Timeframe: within six months, with the status buyer within twelve.
3. **Share indicative demand forecasts with suppliers and shorten the interval between award and purchase order.** Forecasting is the lowest-rated supplier dimension (50.0% satisfied) and suppliers proposed forecast sharing more often than any other partnership measure. RMS should share annual or rolling indicative procurement forecasts with contracted suppliers under appropriate confidentiality terms, set and respect a standard maximum interval between contract signature and issuance of the purchase order, and provide a structured opportunity for suppliers to confirm lead times and minimum order quantities before a tender closes. Responsible: Procurement and Supply Planning. Timeframe: within nine months.
4. **Institute a proactive stock and delivery communication protocol for buyers.** Advance notice of delay (67.3% satisfied) and timeliness of stock and backorder information (75.4%) are the lowest-rated client communication attributes, and the driver analysis identifies communication as the dimension that most strongly moderates how clients judge supply shortfalls. RMS should establish a standing protocol under which buyers are notified, before the expected delivery date, of any item that will not be supplied, the reason and the expected replenishment date, and are informed of any change to the delivery schedule. Where a shortage originates upstream, buyers should be told so. Responsible: Customer Service and Distribution. Timeframe: within three months.

5. **Improve delivery predictability, with a differentiated intervention in Kigali City.** Timeliness is the dimension most strongly associated with a lower overall client rating, and Kigali City records the lowest timeliness index in the country (3.44), the highest incidence of delivery delay as the most frequent issue (28.6%) and the lowest client Net Promoter Score (1.9). RMS should review distribution routing, delivery frequency and vehicle and staffing capacity for the Kigali City districts specifically, taking account of the high concentration of health posts ordering in smaller and more frequent quantities, and should review emergency order handling nationally, including the scope for expanded drone delivery of emergency items as requested by buyers. Responsible: Distribution and Logistics. Timeframe: within six months.

6. **Establish a district-differentiated client engagement programme for the priority districts.** Client satisfaction varies more by district than by any other characteristic. RMS should institute structured quarterly engagement with the buyers and district health management teams of the ten priority districts identified in Section 4.5.4, with an availability and service quality agenda in Nyamasheke, Bugesera, Kayonza, Gicumbi, Gakenke, Rulindo and Rubavu, and a delivery timing agenda in Gasabo, Kicukiro and Nyarugenge. Responsible: Branch Operations and Customer Service. Timeframe: within three months, quarterly thereafter.

7. **Establish a visible supplier performance management framework and address the local supplier relationship explicitly.** Performance monitoring is the supplier dimension with the least engagement, carrying the highest neutral shares in the survey, and suppliers themselves proposed joint reviews using measures such as on-time in-full delivery. Separately, Rwanda-based suppliers rate RMS significantly lower than international suppliers do and return the only negative Net Promoter Score in the survey, with the concern located in tender access and the move toward contracting manufacturers directly. RMS should publish supplier performance indicators and review criteria, hold periodic joint performance reviews, provide feedback to unsuccessful bidders within a stated period, keep supplier contact records current so that tender notices reach active addresses, and set out its position on local supplier participation clearly to the supplier base rather than leaving it to inference. Responsible: Procurement, with Executive Management on the policy question. Timeframe: within nine months.

8. **Clarify and communicate the returns, recall, inspection and system-downtime procedures.** Returns and reverse logistics is the third lowest-rated client dimension (60.3% satisfied) with a high neutral share indicating limited familiarity rather than operational difficulty, and support during ordering system downtime is the lowest-rated attribute of the otherwise strong ordering dimension (72.9%). On the supplier side, transparency of rejection reasons (76.5%) and timeliness of goods-received notes (73.7%) are the corresponding gaps, and a supplier lost stock to expiry after an acceptance agreed verbally was not confirmed in writing. RMS should issue a concise procedural guide covering reporting and replacement of damaged, expired, short-dated and incorrectly supplied products, require written confirmation of acceptance and shelf-life decisions, set a target for issuing goods-received notes, publish the helpdesk arrangements applicable when electronic ordering is unavailable, and clarify the policy on transport charges where an order is only partly supplied. Responsible: Quality Assurance, Warehouse, Finance and ICT. Timeframe: within six months.

9. **Strengthen closure of the customer service loop for both groups and extend capacity building for facility staff.** Effectiveness in resolving missing items, shortages and delivery errors (72.2% satisfied) and follow-up after a complaint (74.5%) are the lowest-rated client customer care

attributes, while coordination among RMS departments (70.9%) is the lowest-rated supplier communication attribute. Usefulness of orientation and training is among the lowest-rated client partnership attributes (72.4%) and training is one of the most frequent specific requests in the open-ended responses. RMS should introduce case tracking with defined resolution timeframes and a mandatory closing communication for both buyers and suppliers, strengthen call centre capacity and accessibility, deliver periodic refresher orientation on ordering, quantification and inventory management prioritising health posts and buyers with recent staff turnover, and include buyer leadership in coordination engagements, since facility managers hold a significantly less favourable view of RMS than the store staff who deal with RMS daily. Responsible: Customer Service and Capacity Building. Timeframe: within twelve months.

10. **Institutionalise measurement and act on the passive group.** The reduction in detractors from 33.3% to 15.2% shows that targeted action changes sentiment, and the passive group, now 48.1% of all respondents, is the principal remaining opportunity. RMS should maintain the annual satisfaction assessment covering both clients and suppliers, retain the district-level and dimension-level disaggregation established in this round so that trends remain comparable, stabilise the supplier instrument so that future rounds are comparable to this one, strengthen supplier list management and fieldwork lead time so that the approved supplier sample is achieved, add a respondent sex variable to the buyer instrument to permit gender-disaggregated reporting, and track the attributes identified here as lowest-rated through routine service monitoring between survey rounds. Responsible: Planning, Monitoring and Evaluation. Timeframe: continuing, with the next round in twelve months.

ANNEXES

The annexes supplement the main report. Annex 1 lists the documents and methodological sources consulted. Annex 2 sets out the structure and full content of the two survey instruments. Annex 3 presents the detailed statistical tables underlying the analysis, including results that are summarised rather than reproduced in full in Section 4. Annex 4 documents data quality, cleaning and reliability. Annex 5 sets out the qualitative coding framework. Annex 6 records the fieldwork coverage achieved. Annex tables are numbered separately from the tables in the main report.

Annex 1: References and documents consulted

A1.1 RMS and Government of Rwanda documents

Annex Table 1: Institutional and policy documents consulted during the desk review

Institution	Document	Use in this report
Rwanda Medical Supply Ltd	Customer Satisfaction Survey, Final Report, June 2025	Benchmark for trend comparison in Sections 4.5 and 4.6
Rwanda Medical Supply Ltd	Customer Satisfaction Survey for FY 2022-2023	Baseline for the Customer Satisfaction 35.5%
Rwanda Medical Supply Ltd	Strategic Plan 2024-2026	Institutional objectives and service commitments
Rwanda Medical Supply Ltd	Private Sector Engagement Plan 2022-2027	Framework for supplier and private sector engagement
Rwanda Medical Supply Ltd	Service Delivery Point Supply Chain KPI Report, 2024	Operational performance indicators cited for context
Ministry of Health, Rwanda	Health Sector Strategic Plan V: July 2024 to June 2029	Supply chain constraints and national service delivery targets
Ministry of Health, Rwanda	Health Service Packages for Public Buyers, 2017	Definition of service levels and associated commodity requirements
Government of Rwanda	National Strategy for Transformation (NST2) 2024-2030	National policy framework for the health supply chain
Government of Rwanda	Vision 2050	Long-term ambition for health services and supply chain management
GHSC-PSM	Rwanda National Supply Chain Assessment Report, July 2022	Independent assessment of national supply chain performance

Annex 2: Survey instruments

A2.1 Structure of the instruments

Two instruments were administered. Both used a common five-point satisfaction scale, from Very Dissatisfied (1) through Dissatisfied (2), Neither Satisfied nor Dissatisfied (3) and Satisfied (4) to Very Satisfied (5), with a not-applicable option treated as missing and excluded from the calculation of percentages. Annex Table 2 sets out the structure of each instrument.

Annex Table 2: Structure of the two survey instruments

Element	Buyer instrument	Supplier instrument
Respondent profile	Section A, 11 questions covering location, facility level, ownership, respondent role, tenure, ordering frequency, ordering channel, recency of last delivery and recent interaction with RMS	Section A, 14 questions covering supplier name, country, respondent position and department, tenure, contract or purchase order reference, RMS contact unit, supply category, relationship length, procurement arrangement, number of contracts handled, most recent interaction stage and recent interaction with RMS
Rated satisfaction attributes	Sections B to L, 68 attributes in 11 dimensions	Sections B to N, 84 attributes in 13 dimensions
Summary questions	Section M, 4 questions: change over two years, most frequent issue, overall performance rating out of ten, first improvement priority	Section O, 5 questions: change over two years, most frequent challenge, overall performance rating out of ten, first improvement priority, willingness to participate in future procurement
Open-ended questions	Section N, 5 questions: strengths, challenges and service gaps, significant incidents in the last twelve months, actions RMS should take, additional comments	Section P, 6 questions: strengths, challenges, significant incidents, actions RMS should take, innovation and partnership opportunities, additional comments
Languages	English and Kinyarwanda, with responses accepted in English, Kinyarwanda or French	English
Mode of administration	Face to face by trained enumerators using tablets and smartphones	Predominantly online
Total questions	88	109

A2.2 Buyer instrument: full list of rated attributes

The 68 rated attributes of the buyer instrument are listed below in the order administered, grouped by dimension.

Annex Table 3: Buyer instrument: rated attributes by dimension

No.	Section	Dimension	Attribute
1	B	Availability and range of commodities	Availability of essential medicines when your buyer needs them.
2	B	Availability and range of commodities	Availability of programme commodities relevant to your buyer (for example vaccines, family-planning products, HIV, TB or malaria commodities).

No.	Section	Dimension	Attribute
3	B	Availability and range of commodities	Availability of laboratory supplies, medical consumables and other health products required by your buyer.
4	B	Availability and range of commodities	Adequacy of the range of products offered by RMS for your facility's level of care.
5	B	Availability and range of commodities	Extent to which RMS stock availability matches your facility's actual demand.
6	B	Availability and range of commodities	Contribution of RMS supply services to reducing stock-outs at your buyer.
7	B	Availability and range of commodities	Availability of commodities for emergency or urgent service-delivery needs.
8	C	Ordering process and digital systems	Ease of accessing current RMS catalogues, product lists and ordering information.
9	C	Ordering process and digital systems	Clarity of product descriptions, catalogue codes, units of issue and ordering requirements.
10	C	Ordering process and digital systems	Simplicity of preparing and submitting routine orders to RMS.
11	C	Ordering process and digital systems	Functionality and user-friendliness of the electronic ordering platform or eLMIS interface used with RMS.
12	C	Ordering process and digital systems	Timeliness of confirmation that RMS has received and accepted an order.
13	C	Ordering process and digital systems	Support provided by RMS when ordering systems are unavailable or when users experience technical problems.
14	D	Order accuracy, completeness and documentation	Accuracy of RMS order records compared with the order submitted by your buyer.
15	D	Order accuracy, completeness and documentation	Completeness of delivered quantities compared with the quantities confirmed or approved.
16	D	Order accuracy, completeness and documentation	Accuracy of products supplied, including product name, strength, dosage form, pack size and unit of issue.
17	D	Order accuracy, completeness and documentation	Accuracy and clarity of delivery notes, packing lists and proof-of-delivery documents.
18	D	Order accuracy, completeness and documentation	Consistency between products delivered and the related invoice or billing documents.
19	D	Order accuracy, completeness and documentation	Management and communication of backorders, partial fulfilment and substituted products.
20	E	Timeliness and reliability of delivery	Speed with which RMS processes routine buyer orders.
21	E	Timeliness and reliability of delivery	Delivery of routine orders within the agreed or expected lead time.
22	E	Timeliness and reliability of delivery	Reliability of RMS delivery schedules and distribution routes.
23	E	Timeliness and reliability of delivery	Appropriateness of the frequency of deliveries to your buyer.
24	E	Timeliness and reliability of delivery	Speed of processing and delivering emergency or urgent orders.
25	E	Timeliness and reliability of delivery	Advance notice provided when an order or delivery is likely to be delayed.
26	E	Timeliness and reliability of delivery	Overall predictability and consistency of RMS deliveries over time.
27	F	Product quality, packaging and cold chain	Quality and fitness for use of medical products supplied by RMS.
28	F	Product quality, packaging and cold chain	Adequacy of the remaining shelf life of products at the time of delivery.
29	F	Product quality, packaging and cold chain	Condition and integrity of packaging when products arrive at your buyer.
30	F	Product quality, packaging and cold chain	Clarity and accuracy of labels, batch numbers, expiry dates and storage instructions.

No.	Section	Dimension	Attribute
31	F	Product quality, packaging and cold chain	Maintenance of appropriate temperature and cold-chain conditions for temperature-sensitive products.
32	F	Product quality, packaging and cold chain	Care taken during transport and handling to prevent contamination, breakage, leakage or other damage.
33	F	Product quality, packaging and cold chain	Promptness of RMS action when your buyer reports a suspected quality defect or product-safety concern.
34	G	Communication and information sharing	Clarity and usefulness of communication received from RMS.
35	G	Communication and information sharing	Timeliness of information on stock availability, backorders and expected replenishment.
36	G	Communication and information sharing	Advance notice of changes in prices, catalogues, ordering procedures or distribution arrangements.
37	G	Communication and information sharing	Availability of order-status and delivery-tracking information.
38	G	Communication and information sharing	Ease of identifying and reaching the appropriate RMS contact person or service point.
39	G	Communication and information sharing	Consistency of information provided through telephone, email, digital platforms and RMS staff.
40	H	Customer care, complaints and issue resolution	Professionalism, courtesy and respect demonstrated by RMS staff.
41	H	Customer care, complaints and issue resolution	Speed of response to inquiries and requests for clarification.
42	H	Customer care, complaints and issue resolution	Effectiveness of RMS in resolving missing items, shortages, delivery errors or service problems.
43	H	Customer care, complaints and issue resolution	Clarity and accessibility of the process for submitting complaints or service requests.
44	H	Customer care, complaints and issue resolution	Fairness and transparency with which complaints and disputes are handled.
45	H	Customer care, complaints and issue resolution	Follow-up provided by RMS after a complaint or service issue has been addressed.
46	I	Pricing, billing and value for money	Transparency of RMS product prices, service charges and any applicable fees.
47	I	Pricing, billing and value for money	Timeliness and accessibility of updated price lists.
48	I	Pricing, billing and value for money	Accuracy and completeness of invoices, statements and related financial documents.
49	I	Pricing, billing and value for money	Clarity of payment terms, credit arrangements and account-reconciliation procedures.
50	I	Pricing, billing and value for money	Overall value for money provided by RMS products and services.
51	J	Returns, recalls and reverse logistics	Ease of reporting damaged, expired, short-dated, excess or incorrectly supplied products.
52	J	Returns, recalls and reverse logistics	Clarity and practicality of RMS procedures for returning or replacing products.
53	J	Returns, recalls and reverse logistics	Speed and effectiveness of communication when a product recall or safety alert occurs.
54	J	Returns, recalls and reverse logistics	Timeliness of product replacement, account adjustment or credit-note processing where applicable.
55	J	Returns, recalls and reverse logistics	Guidance provided on quarantine, safe storage, collection or disposal of unusable products.
56	K	Partnership, coordination and supply chain support	Extent to which RMS consults your buyer and considers its service-delivery needs.

No.	Section	Dimension	Attribute
57	K	Partnership, coordination and supply chain support	Support and feedback provided by RMS for quantification, forecasting and demand planning.
58	K	Partnership, coordination and supply chain support	Technical guidance provided on inventory management, stock reporting and prevention of stock-outs or expiries.
59	K	Partnership, coordination and supply chain support	Usefulness of orientation, training or updates provided by RMS to relevant facility staff.
60	K	Partnership, coordination and supply chain support	Coordination between RMS, your buyer, district authorities and relevant Ministry of Health programmes.
61	L	Overall satisfaction and future relationship	Overall satisfaction with the availability of commodities supplied by RMS.
62	L	Overall satisfaction and future relationship	Overall satisfaction with the reliability and timeliness of RMS services.
63	L	Overall satisfaction and future relationship	Overall satisfaction with the quality and condition of products received.
64	L	Overall satisfaction and future relationship	Overall satisfaction with RMS communication and customer care.
65	L	Overall satisfaction and future relationship	Overall satisfaction with RMS ordering, documentation and billing processes.
66	L	Overall satisfaction and future relationship	Overall trust in RMS as a dependable health supply-chain partner.
67	L	Overall satisfaction and future relationship	Likelihood that your buyer will continue using RMS as its principal source of medical commodities.
68	L	Overall satisfaction and future relationship	Overall satisfaction with RMS products and services.

A2.3 Supplier instrument: full list of rated attributes

The 84 rated attributes of the supplier instrument are listed below in the order administered, grouped by dimension.

Annex Table 4: Supplier instrument: rated attributes by dimension

No.	Section	Dimension	Attribute
1	B	Supplier registration, prequalification and onboarding	Clarity of information provided about RMS supplier-registration requirements.
2	B	Supplier registration, prequalification and onboarding	Ease of accessing supplier-registration and prequalification forms, guidance and submission channels.
3	B	Supplier registration, prequalification and onboarding	Reasonableness and relevance of the documents and evidence requested during registration or prequalification.
4	B	Supplier registration, prequalification and onboarding	Timeliness of RMS review and feedback on supplier-registration or prequalification applications.
5	B	Supplier registration, prequalification and onboarding	Transparency of supplier eligibility, categorisation and approval decisions.
6	B	Supplier registration, prequalification and onboarding	Usefulness of orientation provided on RMS procurement procedures, contacts, systems and compliance expectations.
7	C	Tendering, bidding and supplier selection	Ease of accessing RMS tender notices, solicitation documents and procurement opportunities.

No.	Section	Dimension	Attribute
8	C	Tendering, bidding and supplier selection	Clarity and completeness of tender specifications, quantities, delivery schedules and evaluation requirements.
9	C	Tendering, bidding and supplier selection	Adequacy of the time allowed to prepare and submit responsive bids.
10	C	Tendering, bidding and supplier selection	Functionality and user-friendliness of the electronic or manual bid-submission process.
11	C	Tendering, bidding and supplier selection	Timeliness and consistency of responses to requests for clarification during tendering.
12	C	Tendering, bidding and supplier selection	Transparency and fairness of bid opening, evaluation and supplier-selection procedures.
13	C	Tendering, bidding and supplier selection	Quality and usefulness of feedback or debriefing provided to unsuccessful bidders.
14	D	Contract award, negotiation and administration	Timeliness of notification of tender results and contract-award decisions.
15	D	Contract award, negotiation and administration	Clarity of contractual scope, specifications, quantities, prices, delivery terms and responsibilities.
16	D	Contract award, negotiation and administration	Fairness and professionalism of contract negotiations with RMS.
17	D	Contract award, negotiation and administration	Reasonableness of contractual risk allocation, warranties, securities, penalties and performance obligations.
18	D	Contract award, negotiation and administration	Timeliness of contract signature, purchase authorisation and communication of the effective start date.
19	D	Contract award, negotiation and administration	Consistency with which RMS applies agreed contract terms and approved amendments.
20	E	Forecasting, demand visibility and supply planning	Adequacy of advance information provided on RMS demand forecasts and expected procurement volumes.
21	E	Forecasting, demand visibility and supply planning	Reliability of forecast quantities for planning production, sourcing and inventory.
22	E	Forecasting, demand visibility and supply planning	Timeliness of information on changes in demand, funding, product priorities or procurement schedules.
23	E	Forecasting, demand visibility and supply planning	Opportunities provided for suppliers to clarify lead times, production constraints and minimum order quantities.
24	E	Forecasting, demand visibility and supply planning	Coordination with RMS on supply planning for seasonal, programme-specific or emergency requirements.
25	E	Forecasting, demand visibility and supply planning	Overall predictability of RMS procurement plans and call-off requirements.
26	F	Purchase orders, call-offs and order amendments	Clarity and completeness of purchase orders, call-off orders and delivery instructions.
27	F	Purchase orders, call-offs and order amendments	Accuracy of product descriptions, catalogue codes, units, quantities, prices and delivery locations in RMS orders.
28	F	Purchase orders, call-offs and order amendments	Timeliness of issuing purchase orders or call-offs after contract award or requisition approval.
29	F	Purchase orders, call-offs and order amendments	Ease of acknowledging orders and obtaining clarification before fulfilment.
30	F	Purchase orders, call-offs and order amendments	Effectiveness of RMS in managing order changes, cancellations, substitutions or quantity adjustments.
31	F	Purchase orders, call-offs and order amendments	Consistency between purchase orders, contracts, approved quotations and subsequent payment documents.
32	G	Importation, regulatory and customs coordination	Clarity of RMS requirements for import permits, product registration, licences and regulatory documentation.
33	G	Importation, regulatory and customs coordination	Timeliness of RMS provision of documents or confirmations needed for international shipment and customs clearance.
34	G	Importation, regulatory and customs coordination	Coordination between RMS and relevant regulatory or customs authorities when clarification is required.
35	G	Importation, regulatory and customs coordination	Support provided when regulatory approvals, customs procedures or port-of-entry requirements delay supply.

No.	Section	Dimension	Attribute
36	G	Importation, regulatory and customs coordination	Clarity of responsibilities for freight, insurance, taxes, duties, demurrage and other import-related costs.
37	G	Importation, regulatory and customs coordination	Management of exceptional disruptions affecting international supply, including transport constraints, fuel-price changes or global shortages.
38	H	Delivery scheduling, receiving and warehouse interface	Clarity of delivery schedules, warehouse locations, receiving hours and contact arrangements.
39	H	Delivery scheduling, receiving and warehouse interface	Ease of booking delivery appointments and obtaining gate or warehouse access.
40	H	Delivery scheduling, receiving and warehouse interface	Readiness of RMS receiving teams and buyers when goods arrive at the agreed time.
41	H	Delivery scheduling, receiving and warehouse interface	Professionalism and cooperation of RMS staff during unloading, verification and handover.
42	H	Delivery scheduling, receiving and warehouse interface	Timeliness of issuing goods-received notes and delivery acknowledgements or proof-of-receipt documents.
43	H	Delivery scheduling, receiving and warehouse interface	Management of partial deliveries, urgent deliveries, rescheduled deliveries and delivery delays.
44	H	Delivery scheduling, receiving and warehouse interface	Overall efficiency of the delivery and warehouse-receiving process.
45	I	Product inspection, quality assurance and acceptance	Clarity and consistency of RMS product-quality standards and inspection criteria.
46	I	Product inspection, quality assurance and acceptance	Reasonableness of requirements concerning shelf life, packaging, labelling, batch information and storage conditions.
47	I	Product inspection, quality assurance and acceptance	Timeliness of inspection, sampling, testing and acceptance decisions after delivery.
48	I	Product inspection, quality assurance and acceptance	Competence, professionalism and consistency of RMS inspection and quality-assurance personnel.
49	I	Product inspection, quality assurance and acceptance	Transparency of reasons provided when products are rejected, quarantined or conditionally accepted.
50	I	Product inspection, quality assurance and acceptance	Fairness and practicality of procedures for replacement, corrective action, reinspection or appeal.
51	I	Product inspection, quality assurance and acceptance	Handling of quality complaints, product recalls, safety alerts and warranty claims after acceptance.
52	J	Invoicing, payment and financial administration	Clarity of invoice-submission requirements and supporting documentation.
53	J	Invoicing, payment and financial administration	Ease of confirming whether RMS has received and validated an invoice.
54	J	Invoicing, payment and financial administration	Accuracy and consistency of invoice verification against contracts, orders, deliveries and acceptance records.
55	J	Invoicing, payment and financial administration	Timeliness of payment in accordance with contractual payment terms.
56	J	Invoicing, payment and financial administration	Transparency of deductions, withholding taxes, penalties, credit notes or disputed amounts.
57	J	Invoicing, payment and financial administration	Speed and effectiveness of resolving rejected invoices, payment delays and account-reconciliation differences.
58	J	Invoicing, payment and financial administration	Availability of reliable information on invoice status and expected payment dates.
59	K	Communication, responsiveness and information sharing	Ease of identifying and contacting the correct RMS officer or department.
60	K	Communication, responsiveness and information sharing	Professionalism, courtesy and respect demonstrated by RMS staff in dealings with suppliers.
61	K	Communication, responsiveness and information sharing	Speed of response to supplier inquiries, requests and urgent operational issues.
62	K	Communication, responsiveness and information sharing	Clarity, accuracy and consistency of information provided through email, telephone, meetings and digital systems.
63	K	Communication, responsiveness and information sharing	Timeliness of notice about procedural, specification, scheduling, contractual or organisational changes.

No.	Section	Dimension	Attribute
64	K	Communication, responsiveness and information sharing	Effectiveness of coordination among RMS procurement, warehouse, quality, finance and programme teams.
65	L	Performance monitoring, complaints and dispute resolution	Clarity of supplier performance indicators, reporting expectations and review criteria.
66	L	Performance monitoring, complaints and dispute resolution	Objectivity and consistency of supplier performance evaluations conducted by RMS.
67	L	Performance monitoring, complaints and dispute resolution	Usefulness and timeliness of performance feedback provided to suppliers.
68	L	Performance monitoring, complaints and dispute resolution	Accessibility of channels for submitting complaints, appeals or contract-administration concerns.
69	L	Performance monitoring, complaints and dispute resolution	Fairness and timeliness of investigation, corrective action and dispute-resolution processes.
70	L	Performance monitoring, complaints and dispute resolution	Follow-up by RMS after a complaint, dispute or agreed corrective action has been addressed.
71	M	Ethics, fairness, compliance and confidentiality	Fair and equal treatment of suppliers throughout RMS procurement and contract-management processes.
72	M	Ethics, fairness, compliance and confidentiality	Transparency of rules concerning conflicts of interest, gifts, anti-corruption and ethical conduct.
73	M	Ethics, fairness, compliance and confidentiality	Protection of confidential commercial, technical and pricing information submitted by suppliers.
74	M	Ethics, fairness, compliance and confidentiality	Consistency of RMS decisions with published procedures, tender conditions and contractual provisions.
75	M	Ethics, fairness, compliance and confidentiality	Ability to raise ethical or compliance concerns without fear of unfair treatment or retaliation.
76	M	Ethics, fairness, compliance and confidentiality	Overall confidence in the integrity and accountability of RMS supplier-management practices.
77	N	Partnership, innovation, sustainability and overall relationship	Extent to which RMS treats suppliers as partners in strengthening the health supply chain.
78	N	Partnership, innovation, sustainability and overall relationship	Opportunities for suppliers to propose innovations, efficiencies, alternative products or service improvements.
79	N	Partnership, innovation, sustainability and overall relationship	Support for environmentally responsible packaging, transport, waste reduction and reverse logistics.
80	N	Partnership, innovation, sustainability and overall relationship	Consideration of local supplier development, capacity building and inclusive procurement where applicable.
81	N	Partnership, innovation, sustainability and overall relationship	Willingness of RMS to jointly address major disruptions, shortages, regulatory changes and supply risks.
82	N	Partnership, innovation, sustainability and overall relationship	Overall trust in RMS as a reliable and professional customer.
83	N	Partnership, innovation, sustainability and overall relationship	Likelihood that your organisation would participate in future RMS procurement opportunities.
84	N	Partnership, innovation, sustainability and overall relationship	Overall satisfaction with your organisation's supplier relationship with RMS.

Annex 3: Detailed statistical tables

This annex presents the detailed results underlying the analysis in Section 4. Percentages are calculated on valid responses; counts are shown in parentheses where space permits. Statistical tests are the chi-square test of association for categorical variables and the Kruskal-Wallis test for dimension indices and the ten-point ratings.

A3.1 Buyer dimension indices by respondent characteristics

Annex Table 6: Buyer dimension indices by facility level, ownership and province

Dimension	Hospital (53)	centre (280)	post (158)	p	Public (310)	Faith (74)	Private (106)	p	Kigali (105)	Eastern (104)	Southern (98)	Western (96)	Northern (88)	p
Availability and range of commodities	3.65	3.67	3.73	0.795	3.61	3.93	3.74	0.009	3.60	3.82	3.79	3.73	3.47	0.061
Ordering process and digital systems	3.93	3.95	3.87	0.255	3.88	4.11	3.89	0.089	3.83	4.07	4.02	3.89	3.78	0.050
Order accuracy, completeness and documentation	3.94	3.91	3.93	0.834	3.87	4.13	3.93	0.019	3.90	4.04	3.99	3.92	3.72	0.116
Timeliness and reliability of delivery	3.78	3.84	3.68	0.329	3.73	4.13	3.69	0.002	3.44	4.02	3.93	3.85	3.65	<0.001
Product quality, packaging and cold chain	4.03	4.07	4.05	0.506	4.01	4.29	4.05	0.012	4.04	4.20	4.17	4.02	3.84	0.048
Communication and information sharing	3.95	3.96	3.92	0.708	3.92	4.13	3.91	0.184	3.95	4.09	4.03	3.84	3.81	0.106
Customer care, complaints and issue resolution	3.86	3.94	3.90	0.787	3.88	4.18	3.85	0.022	3.89	4.05	3.99	3.86	3.78	0.190
Pricing, billing and value for money	3.93	3.97	3.82	0.078	3.90	4.12	3.82	0.098	3.74	4.10	4.10	3.81	3.83	0.001
Returns, recalls and reverse logistics	3.93	3.75	3.70	0.395	3.74	3.87	3.72	0.445	3.53	3.92	3.87	3.78	3.68	0.004
Partnership, coordination and supply chain support	3.86	3.90	3.81	0.669	3.85	4.01	3.82	0.180	3.84	4.02	3.96	3.82	3.66	0.088
Overall satisfaction and future relationship	3.95	3.96	3.99	0.815	3.94	4.10	3.95	0.289	3.96	4.11	4.07	3.88	3.79	0.076

Facility levels in the order Hospital, Health centre, Health post. Ownership in the order Public, Faith-based, Private. Provinces in the order Kigali City, Eastern, Southern, Western, Northern. Mean scores on the 1 to 5 scale.

Annex Table 7: Buyer dimension indices by respondent role, years working with RMS and ordering channel

Dimension	Pharm/ store (226)	Buyer mgmt (224)	p	<1 yr (56)	1-3 (171)	4-6 (128)	7-10 (64)	>10 (72)	p	eLMIS (411)	eBuzima (33)	Phone (28)	p
Availability and range of commodities	3.83	3.55	0.096	3.79	3.64	3.53	3.71	3.97	0.015	3.75	3.53	3.23	0.016
Ordering process and digital systems	4.14	3.71	<0.001	3.98	3.95	3.76	3.97	4.07	0.356	3.98	3.89	3.42	0.007
Order accuracy, completeness and documentation	4.11	3.73	0.019	4.06	3.96	3.72	3.98	4.03	0.114	3.97	3.89	3.57	0.265
Timeliness and reliability of delivery	4.01	3.56	0.003	3.85	3.82	3.56	3.82	3.99	0.246	3.82	3.92	3.34	0.178
Product quality, packaging and cold chain	4.23	3.90	0.154	4.15	4.05	3.94	4.06	4.24	0.486	4.11	4.07	3.74	0.058
Communication and information sharing	4.15	3.76	0.012	4.00	3.95	3.73	4.01	4.24	0.033	4.01	3.96	3.39	0.018
Customer care, complaints and issue resolution	4.12	3.73	0.027	4.07	3.88	3.73	3.99	4.17	0.062	3.98	3.93	3.38	0.027

Dimension	Pharm/ store (226)	Buyer mgmt (224)	p	<1 yr (56)	1-3 (171)	4-6 (128)	7-10 (64)	>10 (72)	p	eLMIS (411)	eBuzima (33)	Phone (28)	p
Pricing, billing and value for money	4.13	3.71	0.005	3.96	3.92	3.73	3.94	4.20	0.078	3.95	4.11	3.62	0.078
Returns, recalls and reverse logistics	3.99	3.52	0.002	3.94	3.76	3.52	3.88	3.91	0.036	3.78	3.86	3.40	0.232
Partnership, coordination and supply chain support	4.10	3.66	0.002	3.98	3.91	3.66	3.87	4.04	0.206	3.90	4.10	3.43	0.039
Overall satisfaction and future relationship	4.16	3.78	0.003	4.09	3.98	3.80	3.92	4.18	0.109	4.01	4.02	3.53	0.026

Mean scores on the 1 to 5 scale. Role p-values are computed across all role categories; only the two largest are displayed.

A3.2 Buyer overall rating by respondent characteristics

Annex Table 8: Overall performance rating (1 to 10) by buyer characteristics

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
All buyers	**491**	**7.90**	**8**	**65.2**	**6.5**	
Facility level: Hospital	53	7.75	8	58.5	1.9	p = 0.252
Facility level: Health centre	280	8.00	8	70.7	5.7	
Facility level: Health post	158	7.78	8	57.6	9.5	
Ownership: Public	310	7.87	8	62.9	6.1	p = 0.290
Ownership: Faith-based	74	8.14	8	78.4	1.4	
Ownership: Private	106	7.84	8	62.3	11.3	
Province: Kigali City	105	7.32	7	46.7	8.6	p = <0.001
Province: Eastern	104	8.42	9	76.9	8.7	
Province: Southern	98	8.01	8	73.5	3.1	
Province: Western	96	7.93	8	69.8	5.2	
Province: Northern	88	7.83	8	59.1	6.8	
Years with RMS: Below 1 year	56	8.27	8.5	67.9	3.6	p = 0.021
Years with RMS: 1-3 years	171	7.86	8	67.8	7.0	
Years with RMS: 4-6 years	128	7.63	8	56.2	7.0	
Years with RMS: 7-10 years	64	8.05	8	64.1	4.7	
Years with RMS: Above 10 years	72	8.07	8	73.6	8.3	
Ordering channel: eLMIS/electronic platform	411	7.95	8	66.2	5.4	p = 0.440
Ordering channel: eBuzima	33	7.64	8	69.7	15.2	

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
Ordering channel: Telephone-supported	28	7.64	7.5	50.0	7.1	
Ordering channel: Email	11	7.91	8	54.5	9.1	
Respondent role: Pharmacy/store	226	8.15	8	71.7	4.0	p = 0.087
Respondent role: Buyer management	224	7.67	8	58.5	9.4	
Respondent role: Procurement/supply chain	12	7.92	8	75.0	0.0	
Respondent role: Clinical/nursing	13	7.69	8	61.5	7.7	
Respondent role: Finance	9	8.00	9	66.7	11.1	
Respondent role: Data/eLMIS	5	8.20	8	80.0	0.0	
Change over two years: Improved significantly	252	8.44	9	82.5	5.2	p = <0.001
Change over two years: Improved slightly	154	7.52	8	53.9	5.2	
Change over two years: Stayed about the same	50	6.84	7	30.0	12.0	
Change over two years: Declined slightly	10	7.00	7	20.0	10.0	
Change over two years: Declined significantly	1	7.00	7	0.0	0.0	
Change over two years: Not sure	24	7.38	7.5	50.0	16.7	
Most frequent issue: Communication gaps	30	7.63	8	66.7	6.7	p = <0.001
Most frequent issue: Delivery delays	74	7.08	7	37.8	10.8	
Most frequent issue: None/no major issue	31	9.26	10	93.5	3.2	
Most frequent issue: Ordering-system problems	43	7.72	8	55.8	11.6	
Most frequent issue: Other/unclear	5	7.40	9	60.0	20.0	
Most frequent issue: Partial orders	103	8.17	8	70.9	5.8	
Most frequent issue: Payment/billing	2	9.00	9	100.0	0.0	
Most frequent issue: Product quality/shelf life	1	7.00	7	0.0	0.0	
Most frequent issue: Stock-outs/availability	202	7.95	8	69.8	4.5	
First improvement priority: Commodity availability	266	7.88	8	67.3	6.0	p = 0.016
First improvement priority: Delivery timeliness	96	7.70	8	53.1	6.2	
First improvement priority: Communication	55	7.96	8	63.6	5.5	
First improvement priority: Complaint resolution	29	7.83	8	65.5	13.8	

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
First improvement priority: Product quality	25	8.04	8	72.0	4.0	
First improvement priority: None/no priority	12	9.17	10	91.7	8.3	

A3.3 Buyer summary questions: full cross-tabulations

Annex Table 9: Perceived change in RMS services over two years, by facility level

Change over two years	Hospital (n=53)	Health centre (n=280)	Health post (n=158)	All (n=491)
Improved significantly	54.7% (29)	52.9% (148)	47.5% (75)	51.3% (252)
Improved slightly	20.8% (11)	33.2% (93)	31.6% (50)	31.4% (154)
Stayed about the same	17.0% (9)	8.9% (25)	10.1% (16)	10.2% (50)
Declined slightly	3.8% (2)	2.5% (7)	0.6% (1)	2.0% (10)
Declined significantly	0.0% (0)	0.4% (1)	0.0% (0)	0.2% (1)
Not sure	3.8% (2)	2.1% (6)	10.1% (16)	4.9% (24)

Annex Table 10: Perceived change in RMS services over two years, by ownership

Change over two years	Public (n=310)	Faith-based (n=74)	Private (n=106)	All (n=490)
Improved significantly	50.3% (156)	62.2% (46)	47.2% (50)	51.4% (252)
Improved slightly	32.9% (102)	27.0% (20)	29.2% (31)	31.2% (153)
Stayed about the same	10.0% (31)	6.8% (5)	13.2% (14)	10.2% (50)
Declined slightly	2.6% (8)	2.7% (2)	0.0% (0)	2.0% (10)
Declined significantly	0.3% (1)	0.0% (0)	0.0% (0)	0.2% (1)
Not sure	3.9% (12)	1.4% (1)	10.4% (11)	4.9% (24)

Annex Table 11: Most frequent issue experienced, by ownership

Most frequent issue	Public (n=310)	Faith-based (n=74)	Private (n=106)	All (n=490)
Communication gaps	5.8% (18)	4.1% (3)	8.5% (9)	6.1% (30)
Delivery delays	17.1% (53)	6.8% (5)	15.1% (16)	15.1% (74)
None/no major issue	5.5% (17)	5.4% (4)	9.4% (10)	6.3% (31)
Ordering-system problems	7.1% (22)	9.5% (7)	13.2% (14)	8.8% (43)
Other/unclear	0.3% (1)	2.7% (2)	1.9% (2)	1.0% (5)

Most frequent issue	Public (n=310)	Faith-based (n=74)	Private (n=106)	All (n=490)
Partial orders	24.5% (76)	12.2% (9)	17.0% (18)	21.0% (103)
Payment/billing	0.3% (1)	1.4% (1)	0.0% (0)	0.4% (2)
Product quality/shelf life	0.0% (0)	0.0% (0)	0.9% (1)	0.2% (1)
Stock-outs/availability	39.4% (122)	58.1% (43)	34.0% (36)	41.0% (201)

Annex Table 12: First improvement priority, by ownership

Priority area	Public (n=310)	Faith-based (n=74)	Private (n=106)	All (n=490)
Commodity availability	57.1% (177)	63.5% (47)	38.7% (41)	54.1% (265)
Communication	11.3% (35)	9.5% (7)	12.3% (13)	11.2% (55)
Complaint resolution	4.2% (13)	2.7% (2)	13.2% (14)	5.9% (29)
Delivery timeliness	20.3% (63)	10.8% (8)	23.6% (25)	19.6% (96)
None/no priority	1.6% (5)	1.4% (1)	5.7% (6)	2.4% (12)
Ordering/documentation systems	0.6% (2)	0.0% (0)	0.0% (0)	0.4% (2)
Pricing/payment	0.0% (0)	0.0% (0)	1.9% (2)	0.4% (2)
Product quality	4.2% (13)	10.8% (8)	3.8% (4)	5.1% (25)
Training/staffing	0.6% (2)	0.0% (0)	0.0% (0)	0.4% (2)

A3.4 Buyer profile cross-tabulations

Annex Table 13: Buyer ownership by facility level

Ownership	Hospital (n=53)	Health centre (n=279)	Health post (n=158)	All (n=490)
Public	79.2% (42)	77.4% (216)	32.9% (52)	63.3% (310)
Faith-based	17.0% (9)	20.4% (57)	5.1% (8)	15.1% (74)
Private	3.8% (2)	2.2% (6)	62.0% (98)	21.6% (106)

Annex Table 14: Buyer ownership by province

Ownership	Kigali City (n=105)	Eastern (n=104)	Southern (n=98)	Western (n=95)	Northern (n=88)	All (n=490)
Public	58.1% (61)	64.4% (67)	65.3% (64)	55.8% (53)	73.9% (65)	63.3% (310)
Faith-based	3.8% (4)	16.3% (17)	18.4% (18)	25.3% (24)	12.5% (11)	15.1% (74)
Private	38.1% (40)	19.2% (20)	16.3% (16)	18.9% (18)	13.6% (12)	21.6% (106)

Annex Table 15: Main ordering channel by facility level

Ordering channel	Hospital (n=53)	Health centre (n=280)	Health post (n=158)	All (n=491)
Email	1.9% (1)	1.8% (5)	3.2% (5)	2.2% (11)
Other electronic/manual	7.5% (4)	0.0% (0)	0.0% (0)	0.8% (4)
Paper/manual	1.9% (1)	0.7% (2)	0.6% (1)	0.8% (4)
Telephone-supported	1.9% (1)	3.6% (10)	10.8% (17)	5.7% (28)
eBuzima	3.8% (2)	11.1% (31)	0.0% (0)	6.7% (33)
eLMIS/electronic platform	83.0% (44)	82.9% (232)	85.4% (135)	83.7% (411)

Annex Table 16: Recency of last RMS delivery by facility level

Last delivery received	Hospital (n=53)	Health centre (n=280)	Health post (n=158)	All (n=491)
Within 1 month	86.8% (46)	87.1% (244)	81.0% (128)	85.1% (418)
1-3 months ago	11.3% (6)	10.7% (30)	16.5% (26)	12.6% (62)
4-6 months ago	1.9% (1)	1.1% (3)	0.0% (0)	0.8% (4)
More than 6 months ago	0.0% (0)	1.1% (3)	2.5% (4)	1.4% (7)

A3.5 Buyer attribute results, all 68 attributes

Annex Table 17: Buyer instrument: satisfaction on all rated attributes

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
B	Availability of essential medicines when your buyer needs them.	486	72.4	25.1	12.6	15.0	3.8
B	Availability of programme commodities relevant to your buyer (for example vaccines, family-planning products, HIV, TB or malaria commodities).	485	62.7	23.9	19.4	17.9	3.6
B	Availability of laboratory supplies, medical consumables and other health products required by your buyer.	468	61.1	23.1	19.7	19.2	3.6
B	Adequacy of the range of products offered by RMS for your facility's level of care.	483	71.6	28.8	12.2	16.1	3.8
B	Extent to which RMS stock availability matches your facility's actual demand.	480	66.0	21.7	18.1	15.8	3.6
B	Contribution of RMS supply services to reducing stock-outs at your buyer.	480	67.7	25.4	14.4	17.9	3.7
B	Availability of commodities for emergency or urgent service-delivery needs.	478	68.2	31.0	11.9	19.9	3.7
C	Ease of accessing current RMS catalogues, product lists and ordering information.	484	77.3	34.3	8.1	14.7	3.9
C	Clarity of product descriptions, catalogue codes, units of issue and ordering requirements.	482	76.1	34.4	9.8	14.1	3.9
C	Simplicity of preparing and submitting routine orders to RMS.	479	81.2	39.0	7.3	11.5	4.0
C	Functionality and user-friendliness of the electronic ordering platform or eLMIS interface used with RMS.	471	77.3	35.2	8.5	14.2	3.9

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
C	Timeliness of confirmation that RMS has received and accepted an order.	481	78.0	36.4	8.5	13.5	3.9
C	Support provided by RMS when ordering systems are unavailable or when users experience technical problems.	479	72.9	35.7	9.2	18.0	3.8
D	Accuracy of RMS order records compared with the order submitted by your buyer.	483	75.2	28.0	10.6	14.3	3.8
D	Completeness of delivered quantities compared with the quantities confirmed or approved.	485	72.0	28.5	13.8	14.2	3.8
D	Accuracy of products supplied, including product name, strength, dosage form, pack size and unit of issue.	484	81.4	34.9	5.2	13.4	4.0
D	Accuracy and clarity of delivery notes, packing lists and proof-of-delivery documents.	481	83.0	39.7	4.8	12.3	4.0
D	Consistency between products delivered and the related invoice or billing documents.	483	81.4	37.5	5.8	12.8	4.0
D	Management and communication of backorders, partial fulfilment and substituted products.	480	75.6	36.7	9.0	15.4	3.9
E	Speed with which RMS processes routine buyer orders.	487	71.0	28.1	12.1	16.8	3.8
E	Delivery of routine orders within the agreed or expected lead time.	487	71.5	28.1	11.5	17.0	3.8
E	Reliability of RMS delivery schedules and distribution routes.	483	72.5	30.6	12.8	14.7	3.8
E	Appropriateness of the frequency of deliveries to your buyer.	485	74.8	31.3	11.5	13.6	3.9
E	Speed of processing and delivering emergency or urgent orders.	480	69.0	31.2	12.3	18.8	3.7
E	Advance notice provided when an order or delivery is likely to be delayed.	483	67.3	30.0	14.5	18.2	3.7
E	Overall predictability and consistency of RMS deliveries over time.	484	71.3	29.1	14.9	13.8	3.8
F	Quality and fitness for use of medical products supplied by RMS.	487	85.0	43.1	3.5	11.5	4.1
F	Adequacy of the remaining shelf life of products at the time of delivery.	484	77.1	35.7	8.9	14.0	3.9
F	Condition and integrity of packaging when products arrive at your buyer.	484	84.9	45.2	3.7	11.4	4.1
F	Clarity and accuracy of labels, batch numbers, expiry dates and storage instructions.	482	81.5	45.0	5.4	13.1	4.1
F	Maintenance of appropriate temperature and cold-chain conditions for temperature-sensitive products.	475	83.4	44.4	4.6	12.0	4.1
F	Care taken during transport and handling to prevent contamination, breakage, leakage or other damage.	485	83.9	45.6	4.5	11.5	4.1
F	Promptness of RMS action when your buyer reports a suspected quality defect or product-safety concern.	479	78.5	38.8	8.1	13.4	4.0
G	Clarity and usefulness of communication received from RMS.	483	79.1	38.5	8.3	12.6	4.0
G	Timeliness of information on stock availability, backorders and expected replenishment.	483	75.4	35.6	9.9	14.7	3.9
G	Advance notice of changes in prices, catalogues, ordering procedures or distribution arrangements.	482	69.7	34.0	12.2	18.0	3.8
G	Availability of order-status and delivery-tracking information.	483	76.6	35.8	9.1	14.3	3.9
G	Ease of identifying and reaching the appropriate RMS contact person or service point.	484	80.8	40.3	7.4	11.8	4.0
G	Consistency of information provided through telephone, email, digital platforms and RMS staff.	482	82.6	40.2	6.2	11.2	4.1
H	Professionalism, courtesy and respect demonstrated by RMS staff.	483	80.1	40.4	8.1	11.8	4.0
H	Speed of response to inquiries and requests for clarification.	481	75.9	35.3	10.8	13.3	3.9

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
H	Effectiveness of RMS in resolving missing items, shortages, delivery errors or service problems.	485	72.2	33.6	12.6	15.3	3.8
H	Clarity and accessibility of the process for submitting complaints or service requests.	480	75.8	33.1	10.4	13.8	3.9
H	Fairness and transparency with which complaints and disputes are handled.	480	78.1	37.3	9.8	12.1	4.0
H	Follow-up provided by RMS after a complaint or service issue has been addressed.	479	74.5	34.4	11.1	14.4	3.9
I	Transparency of RMS product prices, service charges and any applicable fees.	480	73.8	32.9	9.6	16.7	3.8
I	Timeliness and accessibility of updated price lists.	483	70.6	33.1	11.6	17.8	3.8
I	Accuracy and completeness of invoices, statements and related financial documents.	482	80.9	37.8	7.7	11.4	4.0
I	Clarity of payment terms, credit arrangements and account-reconciliation procedures.	484	80.2	34.9	8.5	11.4	4.0
I	Overall value for money provided by RMS products and services.	485	81.0	35.9	7.6	11.3	4.0
J	Ease of reporting damaged, expired, short-dated, excess or incorrectly supplied products.	479	66.8	30.7	15.2	18.0	3.7
J	Clarity and practicality of RMS procedures for returning or replacing products.	479	67.2	25.7	14.2	18.6	3.7
J	Speed and effectiveness of communication when a product recall or safety alert occurs.	482	72.2	32.2	12.7	15.1	3.8
J	Timeliness of product replacement, account adjustment or credit-note processing where applicable.	477	69.2	26.4	13.6	17.2	3.7
J	Guidance provided on quarantine, safe storage, collection or disposal of unusable products.	475	72.4	30.3	12.4	15.2	3.8
K	Extent to which RMS consults your buyer and considers its service-delivery needs.	481	73.4	31.4	10.8	15.8	3.8
K	Support and feedback provided by RMS for quantification, forecasting and demand planning.	481	73.6	30.8	11.9	14.6	3.8
K	Technical guidance provided on inventory management, stock reporting and prevention of stock-outs or expiries.	483	74.9	32.3	11.6	13.5	3.9
K	Usefulness of orientation, training or updates provided by RMS to relevant facility staff.	485	72.4	34.6	11.8	15.9	3.8
K	Coordination between RMS, your buyer, district authorities and relevant Ministry of Health programmes.	483	78.1	36.2	9.1	12.8	4.0
L	Overall satisfaction with the availability of commodities supplied by RMS.	486	76.5	31.7	10.7	12.8	3.9
L	Overall satisfaction with the reliability and timeliness of RMS services.	486	73.9	29.6	13.0	13.2	3.8
L	Overall satisfaction with the quality and condition of products received.	486	81.7	36.2	7.8	10.5	4.0
L	Overall satisfaction with RMS communication and customer care.	488	77.7	37.1	10.5	11.9	4.0
L	Overall satisfaction with RMS ordering, documentation and billing processes.	486	80.5	35.2	8.4	11.1	4.0
L	Overall trust in RMS as a dependable health supply-chain partner.	487	80.7	34.9	8.8	10.5	4.0
L	Likelihood that your buyer will continue using RMS as its principal source of medical commodities.	486	81.9	39.9	6.4	11.7	4.0
L	Overall satisfaction with RMS products and services.	486	79.2	35.8	9.3	11.5	4.0

A3.6 Supplier dimension indices and overall rating by respondent characteristics

Annex Table 18: Supplier dimension indices by origin, supply category and procurement arrangement

Dimension	Rwa (34)	Int (28)	p	Medic (17)	Consu (12)	Medic (12)	Labor (11)	Logis (10)	p	Frame (25)	Open (19)	Direc (11)	Restr (4)	p
Supplier registration, prequalification and onboarding	4.00	4.24	0.231	4.10	4.02	4.10	3.94	4.39	0.669	4.09	4.07	4.29	3.71	0.741
Tendering, bidding and supplier selection	4.02	4.25	0.114	4.15	3.92	4.23	3.90	4.46	0.294	4.20	3.97	4.23	3.86	0.675
Contract award, negotiation and administration	3.95	4.24	0.162	4.06	3.81	4.04	4.03	4.58	0.168	4.19	3.94	4.29	3.46	0.445
Forecasting, demand visibility and supply planning	3.59	3.85	0.398	3.55	3.25	3.67	3.89	4.38	0.073	3.72	3.50	4.08	3.42	0.471
Purchase orders, call-offs and order amendments	3.91	4.14	0.332	3.98	3.76	4.10	3.90	4.42	0.242	4.07	3.89	4.20	3.44	0.475
Importation, regulatory and customs coordination	4.08	4.05	0.728	4.09	3.92	3.89	3.98	4.50	0.318	4.19	3.81	4.34	3.33	0.270
Delivery scheduling, receiving and warehouse interface	4.06	4.03	0.961	4.05	3.90	3.98	3.94	4.44	0.434	4.16	3.86	4.21	3.57	0.260
Product inspection, quality assurance and acceptance	4.03	4.10	0.801	4.12	3.84	4.12	3.80	4.50	0.281	4.11	4.03	4.04	3.62	0.825
Invoicing, payment and financial administration	3.85	3.80	0.898	3.96	3.72	3.67	3.59	4.16	0.625	3.91	3.61	3.93	3.62	0.464
Communication, responsiveness and information sharing	3.92	4.19	0.082	4.21	3.96	3.75	3.99	4.25	0.666	4.20	3.78	4.29	3.45	0.186
Performance monitoring, complaints and dispute resolution	3.77	3.91	0.618	3.95	3.87	3.33	3.66	4.27	0.345	4.07	3.50	3.84	3.78	0.266
Ethics, fairness, compliance and confidentiality	4.03	4.27	0.276	4.06	4.02	4.11	4.18	4.45	0.694	4.24	4.04	4.29	3.33	0.505
Partnership, innovation, sustainability and overall relationship	3.97	4.32	0.078	4.14	4.01	4.13	4.00	4.40	0.685	4.26	3.88	4.34	3.84	0.420

Annex Table 19: Supplier overall rating (1 to 10) by supplier characteristics

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
All suppliers	**62**	**7.60**	**8**	**62.9**	**12.9**	
Origin: Rwanda-based	34	7.03	7	47.1	20.6	p = 0.013
Origin: International	28	8.29	8	82.1	3.6	
Region: Rwanda	34	7.03	7	47.1	20.6	p = 0.057
Region: Other Africa	8	8.00	8	75.0	12.5	
Region: Asia	13	8.62	9	92.3	0.0	
Region: Europe and other	7	8.00	8	71.4	0.0	
Supply category: Medicines	17	7.53	8	64.7	17.6	p = 0.089

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
Supply category: Consumables and packaging	12	7.58	8	66.7	8.3	
Supply category: Medical devices and equipment	12	8.08	8	75.0	0.0	
Supply category: Laboratory products	11	6.36	6	36.4	36.4	
Supply category: Logistics and other services	10	8.50	8.5	70.0	0.0	
Arrangement: Framework agreement	25	7.64	8	64.0	16.0	p = 0.468
Arrangement: Open tender	19	7.00	7	47.4	15.8	
Arrangement : Direct procurement or RFQ	11	8.18	8	81.8	0.0	
Arrangement: Restricted tender	4	7.75	8	75.0	25.0	
Length of relationship: 1-3 years or less	28	7.79	8	64.3	10.7	p = 0.318
Length of relationship: 4-6 years	20	7.90	8	75.0	10.0	
Length of relationship: 7 years or more	14	6.79	7	42.9	21.4	
Contracts in 24 months: 1 contract	13	7.31	8	53.8	15.4	p = 0.643
Contracts in 24 months: 2-3 contracts	35	7.57	8	62.9	14.3	
Contracts in 24 months: 4 or more	14	7.93	8	71.4	7.1	
Mode of dealing: Online	39	7.41	8	56.4	15.4	p = 0.339
Mode of dealing: In person	13	8.23	9	76.9	7.7	
Mode of dealing: Telephone	8	7.75	8	75.0	0.0	
Most recent stage: Bidding	13	7.38	8	53.8	15.4	p = 0.443
Most recent stage: Contracting	14	7.57	8	64.3	14.3	
Most recent stage: Order fulfilment	11	8.36	9	81.8	9.1	
Most recent stage: Delivery/inspection	3	7.00	6	33.3	0.0	
Most recent stage: Invoicing/payment	16	7.69	8	62.5	12.5	
Most recent stage: Contract closed	5	6.60	8	60.0	20.0	
Change over two years: Improved significantly	23	8.65	9	91.3	0.0	p = 0.030
Change over two years: Improved slightly	18	7.22	8	55.6	11.1	
Change over two years: Stayed about the same	6	7.50	8	50.0	16.7	
Change over two years: Declined slightly	3	6.33	6	0.0	0.0	

Group	n	Mean	Median	% rating 8 to 10	% rating 1 to 5	Kruskal-Wallis
Change over two years: Declined significantly	2	4.00	4	0.0	100.0	
Change over two years: Not sure	10	7.00	7	50.0	30.0	
Most frequent challenge: Payment delays	31	7.29	8	51.6	12.9	p = 0.188
Most frequent challenge: Contract or order changes	8	7.38	8	75.0	25.0	
Most frequent challenge: Delivery and receiving delays	6	7.83	8	83.3	0.0	
Most frequent challenge: Communication gaps	6	7.50	8.5	83.3	16.7	
Most frequent challenge: Tender clarification	4	7.50	8	50.0	25.0	
Most frequent challenge: No major challenge	7	9.14	10	71.4	0.0	
Future participation: Definitely yes	55	7.93	8	70.9	9.1	p = 0.002
Future participation: Probably yes	5	5.20	6	0.0	40.0	
Future participation: Not sure	2	4.50	4.5	0.0	50.0	

A3.7 Supplier summary questions: cross-tabulations

Annex Table 20: Perceived change in supplier-management processes over two years, by supplier origin

Change over two years	Rwanda-based (n=34)	International (n=28)	All (n=62)
Improved significantly	29.4% (10)	46.4% (13)	37.1% (23)
Improved slightly	29.4% (10)	28.6% (8)	29.0% (18)
Stayed about the same	8.8% (3)	10.7% (3)	9.7% (6)
Declined slightly	5.9% (2)	3.6% (1)	4.8% (3)
Declined significantly	5.9% (2)	0.0% (0)	3.2% (2)
Not sure	20.6% (7)	10.7% (3)	16.1% (10)

Annex Table 21: Most frequent challenge experienced, by supplier origin

Most frequent challenge	Rwanda-based (n=34)	International (n=28)	All (n=62)
Payment delays	47.1% (16)	53.6% (15)	50.0% (31)
Contract or order changes	14.7% (5)	10.7% (3)	12.9% (8)
Delivery and receiving delays	11.8% (4)	7.1% (2)	9.7% (6)
Communication gaps	8.8% (3)	10.7% (3)	9.7% (6)
Tender clarification	8.8% (3)	3.6% (1)	6.5% (4)
No major challenge	8.8% (3)	14.3% (4)	11.3% (7)

Annex Table 22: Most frequent challenge experienced, by supply category

Most frequent challenge	Medicines (n=17)	Consumables and packaging (n=12)	Medical devices and equipment (n=12)	Laboratory products (n=11)	Logistics and other services (n=10)	All (n=62)
Payment delays	52.9% (9)	25.0% (3)	58.3% (7)	81.8% (9)	30.0% (3)	50.0% (31)
Contract or order changes	17.6% (3)	16.7% (2)	8.3% (1)	0.0% (0)	20.0% (2)	12.9% (8)
Delivery and receiving delays	11.8% (2)	16.7% (2)	16.7% (2)	0.0% (0)	0.0% (0)	9.7% (6)
Communication gaps	5.9% (1)	16.7% (2)	0.0% (0)	9.1% (1)	20.0% (2)	9.7% (6)
Tender clarification	5.9% (1)	16.7% (2)	8.3% (1)	0.0% (0)	0.0% (0)	6.5% (4)
No major challenge	5.9% (1)	8.3% (1)	8.3% (1)	9.1% (1)	30.0% (3)	11.3% (7)

Annex Table 23: First improvement priority, by supply category

Priority area	Medicines (n=17)	Consumables and packaging (n=12)	Medical devices and equipment (n=12)	Laboratory products (n=11)	Logistics and other services (n=10)	All (n=62)
Payment	29.4% (5)	33.3% (4)	50.0% (6)	54.5% (6)	40.0% (4)	40.3% (25)
Forecasting and order management	29.4% (5)	25.0% (3)	8.3% (1)	18.2% (2)	10.0% (1)	19.4% (12)
Tendering	11.8% (2)	16.7% (2)	8.3% (1)	18.2% (2)	0.0% (0)	11.3% (7)
Communication	11.8% (2)	16.7% (2)	8.3% (1)	0.0% (0)	10.0% (1)	9.7% (6)
Receiving and inspection	5.9% (1)	0.0% (0)	8.3% (1)	9.1% (1)	20.0% (2)	8.1% (5)
Contracting	5.9% (1)	0.0% (0)	16.7% (2)	0.0% (0)	10.0% (1)	6.5% (4)
No priority identified	5.9% (1)	8.3% (1)	0.0% (0)	0.0% (0)	10.0% (1)	4.8% (3)

Annex Table 24: Willingness to participate in future RMS procurement, by supply category

Would participate again	Medicines (n=17)	Consumables and packaging (n=12)	Medical devices and equipment (n=12)	Laboratory products (n=11)	Logistics and other services (n=10)	All (n=62)
Definitely yes	82.4% (14)	91.7% (11)	100.0% (12)	72.7% (8)	100.0% (10)	88.7% (55)
Probably yes	17.6% (3)	8.3% (1)	0.0% (0)	9.1% (1)	0.0% (0)	8.1% (5)
Not sure	0.0% (0)	0.0% (0)	0.0% (0)	18.2% (2)	0.0% (0)	3.2% (2)

Annex Table 25: Improvement priority chosen by suppliers, according to the challenge experienced most frequently

Most frequent challenge	Payment first	Forecasting and order management first	Tendering first	Communication first	Receiving and inspection first	Contracting first
Payment delays	74.2% (23)	12.9% (4)	3.2% (1)	9.7% (3)	0.0% (0)	0.0% (0)
Contract or order changes	0.0% (0)	62.5% (5)	0.0% (0)	0.0% (0)	0.0% (0)	37.5% (3)
Delivery and receiving delays	16.7% (1)	16.7% (1)	0.0% (0)	16.7% (1)	33.3% (2)	16.7% (1)
Communication gaps	0.0% (0)	16.7% (1)	33.3% (2)	16.7% (1)	33.3% (2)	0.0% (0)
Tender clarification	0.0% (0)	0.0% (0)	100.0% (4)	0.0% (0)	0.0% (0)	0.0% (0)
No major challenge	14.3% (1)	14.3% (1)	0.0% (0)	14.3% (1)	14.3% (1)	0.0% (0)

A3.8 Supplier attribute results, all 84 attributes

Annex Table 26: Supplier instrument: satisfaction on all rated attributes

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
B	Clarity of information provided about RMS supplier-registration requirements.	59	83.1	35.6	11.9	5.1	4.1
B	Ease of accessing supplier-registration and prequalification forms, guidance and submission channels.	55	81.8	30.9	14.5	3.6	4.1
B	Reasonableness and relevance of the documents and evidence requested during registration or prequalification.	56	83.9	30.4	12.5	3.6	4.1
B	Timeliness of RMS review and feedback on supplier-registration or prequalification applications.	56	82.1	37.5	10.7	7.1	4.1
B	Transparency of supplier eligibility, categorisation and approval decisions.	58	89.7	41.4	3.4	6.9	4.2
B	Usefulness of orientation provided on RMS procurement procedures, contacts, systems and compliance expectations.	58	84.5	37.9	6.9	8.6	4.1
C	Ease of accessing RMS tender notices, solicitation documents and procurement opportunities.	60	83.3	38.3	6.7	10.0	4.1
C	Clarity and completeness of tender specifications, quantities, delivery schedules and evaluation requirements.	60	85.0	38.3	5.0	10.0	4.1
C	Adequacy of the time allowed to prepare and submit responsive bids.	60	83.3	33.3	13.3	3.3	4.1
C	Functionality and user-friendliness of the electronic or manual bid-submission process.	57	87.7	35.1	10.5	1.8	4.2
C	Timeliness and consistency of responses to requests for clarification during tendering.	60	86.7	40.0	13.3	0.0	4.3
C	Transparency and fairness of bid opening, evaluation and supplier-selection procedures.	60	88.3	35.0	5.0	6.7	4.1
C	Quality and usefulness of feedback or debriefing provided to unsuccessful bidders.	58	82.8	29.3	5.2	12.1	4.0
D	Timeliness of notification of tender results and contract-award decisions.	60	85.0	36.7	3.3	11.7	4.0
D	Clarity of contractual scope, specifications, quantities, prices, delivery terms and responsibilities.	61	90.2	39.3	1.6	8.2	4.2
D	Fairness and professionalism of contract negotiations with RMS.	61	90.2	44.3	3.3	6.6	4.2
D	Reasonableness of contractual risk allocation, warranties, securities, penalties and performance obligations.	61	77.0	29.5	8.2	14.8	3.9
D	Timeliness of contract signature, purchase authorisation and communication of the effective start date.	61	83.6	42.6	11.5	4.9	4.2
D	Consistency with which RMS applies agreed contract terms and approved amendments.	61	82.0	34.4	6.6	11.5	4.0

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
E	Adequacy of advance information provided on RMS demand forecasts and expected procurement volumes.	57	63.2	28.1	17.5	19.3	3.7
E	Reliability of forecast quantities for planning production, sourcing and inventory.	53	62.3	26.4	24.5	13.2	3.7
E	Timeliness of information on changes in demand, funding, product priorities or procurement schedules.	53	66.0	26.4	18.9	15.1	3.7
E	Opportunities provided for suppliers to clarify lead times, production constraints and minimum order quantities.	55	74.5	23.6	18.2	7.3	3.9
E	Coordination with RMS on supply planning for seasonal, programme-specific or emergency requirements.	53	69.8	28.3	13.2	17.0	3.8
E	Overall predictability of RMS procurement plans and call-off requirements.	53	69.8	24.5	15.1	15.1	3.7
F	Clarity and completeness of purchase orders, call-off orders and delivery instructions.	59	84.7	30.5	5.1	10.2	4.0
F	Accuracy of product descriptions, catalogue codes, units, quantities, prices and delivery locations in RMS orders.	58	86.2	34.5	6.9	6.9	4.1
F	Timeliness of issuing purchase orders or call-offs after contract award or requisition approval.	59	83.1	30.5	8.5	8.5	4.0
F	Ease of acknowledging orders and obtaining clarification before fulfilment.	59	84.7	33.9	10.2	5.1	4.1
F	Effectiveness of RMS in managing order changes, cancellations, substitutions or quantity adjustments.	56	78.6	28.6	10.7	10.7	3.9
F	Consistency between purchase orders, contracts, approved quotations and subsequent payment documents.	60	81.7	28.3	5.0	13.3	3.9
G	Clarity of RMS requirements for import permits, product registration, licences and regulatory documentation.	50	90.0	34.0	6.0	4.0	4.2
G	Timeliness of RMS provision of documents or confirmations needed for international shipment and customs clearance.	48	89.6	31.2	4.2	6.2	4.1
G	Coordination between RMS and relevant regulatory or customs authorities when clarification is required.	46	87.0	34.8	8.7	4.3	4.1
G	Support provided when regulatory approvals, customs procedures or port-of-entry requirements delay supply.	47	85.1	31.9	10.6	4.3	4.1
G	Clarity of responsibilities for freight, insurance, taxes, duties, demurrage and other import-related costs.	46	84.8	37.0	8.7	6.5	4.1
G	Management of exceptional disruptions affecting international supply, including transport constraints, fuel-price changes or global shortages.	45	82.2	28.9	6.7	11.1	3.9
H	Clarity of delivery schedules, warehouse locations, receiving hours and contact arrangements.	55	87.3	34.5	3.6	9.1	4.1
H	Ease of booking delivery appointments and obtaining gate or warehouse access.	55	87.3	32.7	5.5	7.3	4.1
H	Readiness of RMS receiving teams and buyers when goods arrive at the agreed time.	54	83.3	27.8	11.1	5.6	4.0
H	Professionalism and cooperation of RMS staff during unloading, verification and handover.	56	89.3	30.4	7.1	3.6	4.1
H	Timeliness of issuing goods-received notes and delivery acknowledgements or proof-of-receipt documents.	57	73.7	28.1	12.3	14.0	3.9
H	Management of partial deliveries, urgent deliveries, rescheduled deliveries and delivery delays.	54	75.9	29.6	22.2	1.9	4.0
H	Overall efficiency of the delivery and warehouse-receiving process.	56	82.1	32.1	16.1	1.8	4.1
I	Clarity and consistency of RMS product-quality standards and inspection criteria.	57	86.0	33.3	8.8	5.3	4.1
I	Reasonableness of requirements concerning shelf life, packaging, labelling, batch information and storage conditions.	56	82.1	30.4	12.5	5.4	4.1
I	Timeliness of inspection, sampling, testing and acceptance decisions after delivery.	54	75.9	29.6	18.5	5.6	4.0
I	Competence, professionalism and consistency of RMS inspection and quality-assurance personnel.	53	88.7	32.1	7.5	3.8	4.2
I	Transparency of reasons provided when products are rejected, quarantined or conditionally accepted.	51	76.5	31.4	15.7	7.8	4.0
I	Fairness and practicality of procedures for replacement, corrective action, reinspection or appeal.	50	82.0	32.0	14.0	4.0	4.1

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
I	Handling of quality complaints, product recalls, safety alerts and warranty claims after acceptance.	49	83.7	28.6	10.2	6.1	4.0
J	Clarity of invoice-submission requirements and supporting documentation.	59	86.4	39.0	10.2	3.4	4.2
J	Ease of confirming whether RMS has received and validated an invoice.	59	72.9	32.2	18.6	8.5	3.9
J	Accuracy and consistency of invoice verification against contracts, orders, deliveries and acceptance records.	59	79.7	33.9	16.9	3.4	4.1
J	Timeliness of payment in accordance with contractual payment terms.	60	53.3	18.3	16.7	30.0	3.3
J	Transparency of deductions, withholding taxes, penalties, credit notes or disputed amounts.	57	70.2	26.3	21.1	8.8	3.9
J	Speed and effectiveness of resolving rejected invoices, payment delays and account-reconciliation differences.	54	64.8	27.8	14.8	20.4	3.7
J	Availability of reliable information on invoice status and expected payment dates.	60	66.7	30.0	8.3	25.0	3.6
K	Ease of identifying and contacting the correct RMS officer or department.	59	74.6	32.2	15.3	10.2	3.9
K	Professionalism, courtesy and respect demonstrated by RMS staff in dealings with suppliers.	59	84.7	42.4	10.2	5.1	4.2
K	Speed of response to supplier inquiries, requests and urgent operational issues.	61	72.1	32.8	14.8	13.1	3.9
K	Clarity, accuracy and consistency of information provided through email, telephone, meetings and digital systems.	61	78.7	36.1	16.4	4.9	4.1
K	Timeliness of notice about procedural, specification, scheduling, contractual or organisational changes.	59	79.7	39.0	18.6	1.7	4.2
K	Effectiveness of coordination among RMS procurement, warehouse, quality, finance and programme teams.	55	70.9	32.7	20.0	9.1	3.9
L	Clarity of supplier performance indicators, reporting expectations and review criteria.	51	74.5	23.5	17.6	7.8	3.9
L	Objectivity and consistency of supplier performance evaluations conducted by RMS.	50	76.0	26.0	20.0	4.0	3.9
L	Usefulness and timeliness of performance feedback provided to suppliers.	50	76.0	28.0	18.0	6.0	3.9
L	Accessibility of channels for submitting complaints, appeals or contract-administration concerns.	52	73.1	26.9	19.2	7.7	3.9
L	Fairness and timeliness of investigation, corrective action and dispute-resolution processes.	51	74.5	23.5	19.6	5.9	3.9
L	Follow-up by RMS after a complaint, dispute or agreed corrective action has been addressed.	53	67.9	24.5	20.8	11.3	3.8
M	Fair and equal treatment of suppliers throughout RMS procurement and contract-management processes.	59	88.1	32.2	5.1	6.8	4.1
M	Transparency of rules concerning conflicts of interest, gifts, anti-corruption and ethical conduct.	56	87.5	41.1	8.9	3.6	4.2
M	Protection of confidential commercial, technical and pricing information submitted by suppliers.	59	84.7	40.7	8.5	6.8	4.2
M	Consistency of RMS decisions with published procedures, tender conditions and contractual provisions.	58	86.2	41.4	8.6	5.2	4.2
M	Ability to raise ethical or compliance concerns without fear of unfair treatment or retaliation.	57	89.5	36.8	7.0	3.5	4.2
M	Overall confidence in the integrity and accountability of RMS supplier-management practices.	58	86.2	34.5	10.3	3.4	4.1
N	Extent to which RMS treats suppliers as partners in strengthening the health supply chain.	59	81.4	35.6	13.6	5.1	4.1
N	Opportunities for suppliers to propose innovations, efficiencies, alternative products or service improvements.	56	80.4	35.7	10.7	8.9	4.0
N	Support for environmentally responsible packaging, transport, waste reduction and reverse logistics.	49	81.6	36.7	18.4	0.0	4.2
N	Consideration of local supplier development, capacity building and inclusive procurement where applicable.	55	74.5	34.5	10.9	14.5	3.9
N	Willingness of RMS to jointly address major disruptions, shortages, regulatory changes and supply risks.	52	80.8	36.5	13.5	5.8	4.1
N	Overall trust in RMS as a reliable and professional customer.	60	85.0	41.7	8.3	6.7	4.2

Sec.	Attribute	n	% sat.	% very sat.	% neutral	% dissat.	Mean
N	Likelihood that your organisation would participate in future RMS procurement opportunities.	59	94.9	59.3	3.4	1.7	4.5
N	Overall satisfaction with your organisation's supplier relationship with RMS.	60	83.3	43.3	13.3	3.3	4.2

A3.9 Driver analysis: full correlation matrix

Annex Table 27: Correlation of dimension indices with the overall rating and the overall satisfaction index

Dimension	With overall 1 to 10 rating	With overall satisfaction index
Buyer: Timeliness and reliability of delivery	0.46	0.73
Buyer: Availability and range of commodities	0.45	0.70
Buyer: Customer care, complaints and issue resolution	0.45	0.82
Buyer: Communication and information sharing	0.44	0.82
Buyer: Ordering process and digital systems	0.41	0.78
Buyer: Returns, recalls and reverse logistics	0.41	0.73
Buyer: Order accuracy, completeness and documentation	0.41	0.77
Buyer: Partnership, coordination and supply chain support	0.40	0.81
Buyer: Product quality, packaging and cold chain	0.39	0.77
Buyer: Pricing, billing and value for money	0.39	0.73
Supplier: Purchase orders, call-offs and order amendments	0.66	0.83
Supplier: Product inspection, quality assurance and acceptance	0.65	0.75
Supplier: Communication, responsiveness and information sharing	0.64	0.81
Supplier: Delivery scheduling, receiving and warehouse interface	0.63	0.74
Supplier: Performance monitoring, complaints and dispute resolution	0.63	0.82
Supplier: Contract award, negotiation and administration	0.63	0.80
Supplier: Tendering, bidding and supplier selection	0.60	0.78
Supplier: Importation, regulatory and customs coordination	0.60	0.75
Supplier: Invoicing, payment and financial administration	0.58	0.59
Supplier: Supplier registration, prequalification and onboarding	0.56	0.74
Supplier: Ethics, fairness, compliance and confidentiality	0.55	0.79
Supplier: Forecasting, demand visibility and supply planning	0.51	0.62