

# BUSINESS CONSUMER SATISFACTION SURVEY WITH TELECOMMUNICATION SERVICES 2023

Report of Survey Findings

September 2024

# TABLE OF CONTENTS

<b>VERSION CONTROL.....</b>	<b>5</b>
<b>1. EXECUTIVE SUMMARY.....</b>	<b>6</b>
Industry Overview .....	6
Awareness of CRA .....	7
<b>2. BACKGROUND .....</b>	<b>17</b>
2.1. Research Methodology .....	18
2.1.1. Stakeholder Engagement .....	18
2.1.2. Regional and International Benchmark Study.....	18
2.1.3. Business Consumer Insight (Focus Group Discussions) .....	19
2.1.4. Business Consumer Satisfaction Survey .....	19
2.2. Report Outline .....	20
2.3. Qatar Business Environment .....	21
2.3.1. Economic Indicators.....	21
2.3.2. Business Environment .....	23
2.4. Key Stakeholders in Qatar's Telecommunication Market.....	24
2.4.1. Changes in Qatar's Telecommunication Market .....	24
2.4.2. About Telecommunication Service Providers: Ooredoo Qatar & Vodafone Qatar .....	25
2.4.3. Communications Regulatory Authority (CRA) .....	29
<b>3. BUSINESS CONSUMER PERCEPTION OF TELECOMMUNICATION SERVICES.....</b>	<b>32</b>
3.1. Usage of Telecommunication Services .....	32
3.2. Importance of Telecommunication Services .....	41
3.3. Overall Satisfaction with Telecommunication Services.....	45
3.4. Consumer Experience with Telecommunications Network.....	49
3.4.1. Network Coverage .....	49
3.4.2. Network Reliability.....	52
3.4.3. Availability of Services .....	55

3.4.4. Voice Quality and Clarity .....	58
3.4.5. Speed of Data .....	61
3.4.6. Variety of Plans .....	63
3.4.7. Quality of Customer Support .....	67
3.4.8. Ease of Understanding the Bills .....	69
3.4.9. Modes of Bill Payment.....	71
3.4.10. Accuracy of the Bill.....	74
3.4.11. Regularity of Bills Received.....	77
3.4.12. Ease of Purchasing Services .....	80
3.4.13. Transparency of Prices Offered.....	82
3.4.14. Quality of Video.....	85
3.4.15. Ease of Understanding Terms and Conditions .....	88
3.4.16. Time Taken for Service Activation .....	90
3.4.17. Choice of Contract Duration .....	94
3.5. Consumer Perception on Pricing.....	97
3.5.1. Value Perception of Telecommunication Services by Service Providers .....	97
3.5.2. Overall Value Perception of Telecommunication Services .....	100
3.6. Consumer Perception on Rate Plans/ Tariffs.....	101
3.6.1. Awareness regarding the Tariff Plans.....	101
3.6.2. Accessibility of Tariff Plans .....	102
3.6.3. Preference for Receiving Telecommunication Bills.....	103
3.6.4. Preference for Mode of Bill Payments.....	103
3.7. Consumer Perception on Complaint Resolution Mechanism .....	104
3.7.1. Complaint to Service Provider.....	104
3.7.2. Complaint to CRA .....	109
3.8. Consumer Rights Protection.....	110
3.9. Market Competitiveness .....	112
3.9.1. Awareness regarding Mobile Number Portability (MNP) and Fixed Number Portability (FNP).....	112
3.9.2. Need for a New Service Provider.....	113
3.10. Consumer Perception on Telecommunication Services during COVID 19 .....	117

3.10.1. Changes in Product Offerings .....	117
3.10.2. Changes in Purchase Behavior .....	118
3.11. Consumer Perception of Telecommunication Services during FIFA World Cup 2022 .....	122
3.11.1. Overall Satisfaction .....	122
<b>4. KEY TAKEAWAYS FOR CRA.....</b>	<b>126</b>
4.1. Importance-Satisfaction Matrix .....	126
4.2. Key Findings and Recommendations.....	127
<b>5. APPENDICES .....</b>	<b>136</b>
A. Research Methodology .....	136
B. List of Abbreviations .....	142
C. List of Figures .....	143
D. List of Tables.....	146
References .....	150

## VERSION CONTROL

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Draft 3 V1	06 August 2024	Prudent	Draft submitted for CRA's review
Draft 3 V1	07 August 2024	CRA	Feedback on Draft 3 V1
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Draft 3 V2	19 August 2024	CRA	Feedback on Draft 3 V2
Final Report	25 September 2024	CRA	Final Report submitted to CRA

## 1. Executive Summary

The 'Business Consumer Satisfaction Survey 2023' unveils a comprehensive analysis of business consumer satisfaction in Qatar concerning their telecommunications service providers, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C. This report draws insights from a nationally representative survey encompassing 2,100 businesses spanning various industry sectors, diverse business sizes, and geographic locations in Qatar. The survey captures perspectives from key decision-makers responsible for procuring or managing telecommunications services within their respective businesses. This marks the third wave of research conducted to measure satisfaction levels among business consumers in Qatar, covering all aspects of telecommunication services, including network availability & coverage, value perception on pricing, service availability, rate plans and tariffs, billing and payment, customer service, and complaint resolution.

Results from 2023 are compared against the benchmark set in 2019, providing a robust assessment of the evolution in satisfaction levels over the preceding four years. The summary of the survey findings is succinctly presented below.

### Industry Overview

The telecommunications sector is expected to contribute significantly to the country's economy and is expected to grow by 2.5% year on year to \$5.6bn in 2026 making telecommunications a major pillar in economic development in the country. Qatar remains one of the most competitive and powerful economies in the region fueled by energy and gas supplies to the world. Qatar's telecommunications sector is expected to grow substantially over the next decade owing to a rising adoption of new and emerging technology aspects including the Internet of Things (IoT) and data centers. Qatar has made tremendous strides in digital transformation by developing its ICT and strengthening its human resource capacity in the past few years mainly owing to the development of FIFA World Cup 2022 combined with robust government policies in the telecommunications sector. The country is prioritizing the development of its ICT as it aims to transform into a knowledge-based economy in line with Qatar National Vision 2030, the country's framework for economic diversification and growth. Human resource development is critical to the authorities' goal of becoming a regional leader in ICT, and local talent stands to benefit from partnerships between educational institutions and local tech firms aimed at bolstering innovation. Recent government initiatives and public-private partnerships in driving large-scale infrastructure projects such as the Lusail City project built with technologies such as the Internet of Things (IoT), 5G, and Artificial Intelligence (AI) among others have showcased the country's key interest in developing the ICT sector towards the Qatar National Vision 2030.

The expansion of the telecommunications industry will necessitate heightened efforts from the CRA to sustain an open and competitive communications sector. This involves delivering a diverse array of advanced, innovative, and dependable products and services to businesses in Qatar, all at competitive prices.

## Awareness of CRA

Awareness of the Communications Regulatory Authority (CRA) remains relatively low among business consumers in Qatar, with less than half of the respondents acknowledging the CRA when prompted. Notably, there has been a slight uptick in awareness since 2019, with the figure increasing from 46% to 48% in 2023. The highest levels of awareness are observed regarding the CRA's role in regulatory oversight of the telecommunications market and communications sector in Qatar (81%) followed by the CRA's role in engaging with stakeholders to gather feedback and input on regulatory matters and a dedicated process for addressing and resolving customer complaints related to telecommunication services in Qatar (72%) respectively. Additionally, there is awareness that CRA conducts regular audits, assessments, and consumer satisfaction surveys to monitor compliance with regulations and assess the overall performance of telecom operators (65%), and oversees licensing and spectrum allocation to ensure fair and equitable distribution among telecom operators (65%). Amongst business consumers aware of the activities of CRA, there is also an awareness of consumer protection from misleading and unfair practices happening in the telecommunications industry (65%).

## Usage of Telecommunication Services

The distribution of service provider selections among businesses shows that 88% of respondents use Ooredoo, while 49% use Vodafone. This information spans a range of services including mobile voice and mobile internet, fixed voice and fixed internet, and specialized offerings like cloud and hosting services. The survey included various services such as leased lines, IoT, and bulk SMS, providing a thorough assessment of business telecommunications needs. In the telecom sector, 89% of respondents utilize Ooredoo for both Fixed Voice and Fixed Internet services. The company also sees significant utilization in Leased Lines, IoT Solutions, and Security Services, with participation rates consistently over 80%. Conversely, Vodafone is chosen by 80% of respondents for Mobile Voice and 77% for Mobile Internet services.

Regarding Over-The-Top (OTT) services utilized by businesses, WhatsApp is leading significantly at 99% usage. This indicates WhatsApp's dominant position as the preferred communication tool for

corporate entities in Qatar, likely due to its ease of use and widespread adoption. IMO and Skype follow with 49% and 43% usage, respectively, showing that they also play substantial roles in business communication, perhaps favoured for their video conferencing capabilities. Viber, with 28% usage, and IPTV, at 6%, round out the list, suggesting more specialized or less widespread use in the business environment.

## Importance of Telecommunication Services

The core telecommunication services essential for the efficient functioning of businesses in Qatar, ranked in descending order of importance, are Mobile Voice, Fixed Voice, Mobile Internet, and Fixed Internet. An overwhelming majority of business consumers, constituting close to (93%) Mobile Voice, (92%) Fixed Voice, (90%) Mobile Internet, and (87%) Fixed Internet highly value these services, rating them between '7' and '9' on a 9-point scale. In contrast, services like Leased Lines (71% rate between '7 to 9'), Internet of Things (IoT) services (58%), Security Services (35%), and OTT services (33%) are perceived as moderately important contributors to business operations.

In the evolving landscape, businesses in Qatar are increasingly using emerging technologies such as the Internet of Things (IoT) and Cloud Services with giants like Microsoft opening its first cloud data center in the country bringing new opportunities for a cloud-first economy and giving organizations access to hundreds of scalable, highly available and resilient cloud services. The development advances Qatar's growing demand for continued investments in computing accelerates the digital transformation and advances intelligent cloud adoption of businesses, customers, and partners across Qatar.

## Overall Satisfaction of Telecommunication Services

Businesses in Qatar expressed notably moderate to high levels of satisfaction with telecommunication services at 78%, encompassing both mobile and fixed domains. Fixed services garnered moderate to high levels of satisfaction among business consumers with 75% of the users of Fixed Voice and 67% of the users of Fixed Internet expressing either 'extreme satisfaction' or 'satisfaction' with the services. Mobile Voice and Mobile Internet services exhibited a similar satisfaction level at 78% and 73%, respectively. The responses exhibit a digitally inclusive telecommunications environment among business enterprises in Qatar irrespective of size; highlighting the importance of overall delivery of various service provisions to cater to the demand of the increasing business landscape in the country. This positive trend underscores a continuous enhancement in the quality and delivery of telecommunication services over the years. However, the fluctuations also indicate a significant



reassessment among customers, suggesting a consideration of a broader spectrum of factors in their evaluation of telecommunication services during this period.

## Customer Experience with Telecommunication Services

When examining the customer experience with specific aspects of telecommunication services, businesses in Qatar report exceptionally high satisfaction levels with fixed services. Over 80% of users of fixed services expressed either 'extreme satisfaction' or 'satisfaction' with various aspects, including the availability of fixed services (Fixed Voice at 80%, Fixed Internet at 85%, Leased Lines at 83%), quality of video access and streaming provided by Fixed Internet at 88%, speed of data for Fixed Internet Services at 86%, quality and clarity of Fixed Voice at 85% and variety of plans for Fixed Voice services at 82%.

On the mobile services front, responses exhibit a lesser satisfaction level. Approximately three-quarters of business consumers expressed either 'extreme satisfaction' or 'satisfaction' with aspects such as network coverage of Mobile Internet at 74%, network reliability of Mobile Voice and Mobile Internet at 76% and 71% respectively, quality and clarity of Mobile Voice at 79%, speed of data of Mobile Internet at 75%, and quality of video access and streaming provided by Mobile Internet at 69%. These nuanced satisfaction levels reflect the diverse experiences and expectations of business consumers across fixed and mobile telecommunication services.

## Satisfaction among Industry Sectors

With regards to satisfaction among various industry sectors, the Real Estate Activities sector reports the highest satisfaction with Mobile Voice services at an impressive 96%, suggesting that the immediacy and accessibility of mobile communication are highly valued in this sector. Conversely, the same sector registers a starkly low satisfaction rate for Leased Lines at 13%, perhaps indicating a lesser reliance on or satisfaction with this form of connectivity.

On the other hand, the Transportation and Storage sector, likely to prioritize constant and on-the-go communication, shows the greatest satisfaction with Mobile Voice services at 85%, and the least with Leased Lines at 18%. This could reflect the dynamic nature of the sector where mobility and immediate access to communication networks are essential for efficient operations.

In the context of Fixed Voice and Internet services, the Administrative and Support Service Activities sector demonstrates the highest satisfaction for Fixed Voice at 81%, which might be attributed to the nature of administrative work that requires stable and reliable voice communication channels. However, their satisfaction with Mobile Internet services is comparatively lower at 72%, suggesting a potential

area for service enhancement.

The Education sector exhibits a strong preference for Fixed Internet services with a 78% satisfaction rate, underscoring the importance of stable internet connectivity in educational environments for research and learning purposes.

The overall satisfaction with Mobile Voice and Internet services appears to be relatively high across most sectors, reflecting the quality and reach of mobile networks in Qatar. However, satisfaction with Leased Lines is generally lower, indicating potential areas for improvement in providing dedicated, high-capacity telecommunications services.

### **Business Consumer's Value Perception**

Business consumers in Qatar exhibit moderate to good perception of value concerning various aspects of telecommunication services, with most aspects receiving a 'good value' rating from less than three-quarters of respondents. Notable exceptions include monthly rental charges associated with Fixed Voice and Fixed Internet, where a higher proportion of users deem the charges as 'good value' (79% and 76%, respectively). In contrast, approximately six in ten business users express a perception of 'good value' for installation prices for fixed services (Fixed Voice 67%, Fixed Internet 58%, and Leased Line 60%), as well as for Fixed Internet and Mobile Internet data charges (61% and 57%, respectively).

### **Business Customers' Perceptions on Rate Plans / Tariffs**

Business consumers in Qatar showcase higher satisfaction levels regarding rate plans and tariffs associated with Fixed Voice and Fixed Internet services compared to their counterparts in Mobile Voice and Fixed Internet. A significant majority, constituting at least eight out of ten business consumers, express satisfaction with the variety and transparency of rate plans, as well as the terms and conditions, for both Fixed Voice and Fixed Internet services. In contrast, satisfaction levels slightly dip for Mobile Voice and Mobile Internet services, with approximately three-quarters of business users expressing contentment with these specific aspects.

The satisfaction landscape is somewhat different for Leased Line services, where satisfaction levels are lower compared to other telecommunication services. Specifically, 58% of users express satisfaction with the variety of rate plans offered for Leased Lines, while 59% are satisfied with the clarity of the terms and conditions associated with this service. These nuanced variations in satisfaction levels highlight the distinct considerations and preferences of business consumers in Qatar concerning different aspects of rate plans and tariffs across various telecommunication services.

## Publishing of Tariffs

Awareness among business consumers in Qatar regarding the obligation for telecommunication service providers to publish their tariffs has improved slightly when benchmarked against the responses from 2019 at (64% for 2023 vs 55% for 2019). Amongst consumers aware of the tariff publication by the service providers, 37% prefer accessing the details regarding all the tariff plans via a link sent as SMS periodically closely followed by information through account managers (21%). Less than 5% of businesses prefer receiving the tariff details through a link embedded within the bill. These insights highlight the moderate to high awareness levels and preferred communication channels related to tariff information among business consumers in Qatar.

## Business Customers' Perceptions of Provisioning

The combined analysis of customer satisfaction with the ease of purchasing and the time taken for service activation offers a holistic view of the customer experience in the telecommunications sector. For the ease of purchasing, customers report high levels of satisfaction with Mobile Voice (74% satisfied) and Fixed Voice services (84% satisfied). The satisfaction levels for Mobile Internet stand at 66%, and for Fixed Internet, it is slightly higher at 75%. Leased Lines show a 69% satisfaction rate, indicating that most customers experience little difficulty in purchasing these services.

When it comes to service activation times, Fixed Voice and Fixed Internet services again top the satisfaction charts, with 86% and 88% of customers respectively satisfied with the speed of activation. Mobile Voice services follow closely with 66% satisfaction, and Mobile Internet is just behind at 64%. Leased Lines have a 72% satisfaction rate, suggesting that while they may not activate as swiftly as fixed services, the majority of customers are still satisfied with the time frames.

Unsatisfaction rates for purchasing services are low across the board, with Mobile Voice at 19% (extremely unsatisfied and unsatisfied combined), Mobile Internet at 29%, and even lower rates for Fixed Voice and Fixed Internet at 10% and 9% respectively. Leased Lines have a 16% dissatisfaction rate. Regarding activation times, a minority of customers express dissatisfaction, with Mobile Voice at 27%, Mobile Internet at 26%, Fixed Voice at 10%, Fixed Internet at 9%, and Leased Lines at 17%.

These metrics reflect a telecommunications landscape that is largely efficient and customer-centric, with room for improvements in specific areas such as the purchasing and activation process for Mobile Internet and Leased Lines. The overall high satisfaction rates are promising, yet the presence of a dissatisfied minority underscores the continuous need for service optimization to cater to all customer segments.

## Business Customers' Perceptions of Billing and Payment

Satisfaction levels are notably high for Fixed Voice and Fixed Internet services, with 80% and 82% of customers respectively content with the payment methods available to them. Mobile Voice and Mobile Internet services also report positive feedback, with 70% and 72% of customers expressing satisfaction. Leased Lines see a slightly lower satisfaction rate at 70%, yet still indicate that most customers are comfortable with the payment modes offered.

Regarding the preferred mode of receiving telecommunication bills, a majority of business consumers favour electronic methods, with 36% of respondents preferring the bills via email. Traditional methods are still preferred in the country with 26% of businesses preferring bills sent via post followed by the service provider's website at 14% and the service provider's mobile application at 13%. Interestingly, 32% of respondents prefer to pay their bills via online bank transfers followed by payment at retail stores using cash, debit/ credit card, or cheques 28%. A smaller proportion prefers online payment through the service provider's mobile application at 13%, cash/cheque to account manager at 10%, or via payment machines at 9%.

With regards to satisfaction with the regularity of receiving bills for telecommunication services, a significant majority of customers are satisfied with the billing regularity of Fixed Voice and Fixed Internet services, both at 78%. Mobile Voice and Mobile Internet services have an average score of 66% and 70% with business customers reporting satisfaction with the frequency and consistency of their bill receipt. Satisfaction with Leased Lines is also at the lower end, with 67% of customers satisfied, but it still indicates that the majority do not have issues with bill regularity. It is observed that a smaller portion of customers across all services feel neutral, and a minority report dissatisfaction.

Customers report high levels of understanding for Fixed Voice and Fixed Internet services, with both enjoying an 88% satisfaction rate for Ease of Understanding the Bills, indicating that the majority find the bills clear and comprehensible. Mobile Voice and Mobile Internet services also demonstrate favorable outcomes, with 66% and 71% of customers respectively satisfied with the ease of understanding their bills. Leased Lines show a modestly lower satisfaction level at 69%, yet still suggest that most customers find the billing statements to be clear.

## Complaint Resolution Mechanism

### Complaint to Service Provider

Approximately three in ten business consumers have complained to their telecommunication service provider in the past twelve months. The majority of these complaints are predominantly associated with mobile services, with 49% about Mobile Voice and 44% about Mobile Internet. In contrast, complaints

related to fixed services are less frequent, with 14% for Fixed Internet, 12% for Fixed Voice, and only 4% for Leased Line services.

Comparing 2023 results to the 2019 baseline study, there has been an evident increase in complaints related to mobile services, while complaints related to fixed services have seen a decline. The primary reasons for business consumers registering complaints with their telecommunication service provider include issues related to disconnection (42%), network coverage (37%), network outage (36%), billing problems (33%), installation issue challenges (25%) and issues with customer service (22%) challenges.

Meanwhile, business consumers express moderate satisfaction with the complaint resolution process overall with improvements seen in a few parameters when benchmarked against the results from 2019 such as Moderate satisfaction observed for the ease of contacting the service provider (63% for 2023 vs 61% for 2019), friendliness of the staff (56% for 2023 vs 51% for 2019) and the time taken to resolve the issues (63% for 2023 vs 41% 2019). In contrast, satisfaction levels are notably low for the knowledge and skills of the agent in resolving the issue (39%) and the number of channels for raising the complaint or queries (37%). These nuanced insights highlight the varying satisfaction levels among business consumers in Qatar regarding the complaint resolution process, signalling potential areas for improvement in the service delivery of telecommunication providers.

## Complaint to CRA

The awareness of the complaint resolution mechanism at CRA appears to be low, with only 28% indicating familiarity. This suggests limited visibility of CRA as a potential avenue for complaint resolution in the overall telecommunications services landscape.

Furthermore, the data reveals that merely 2% of respondents who were aware of the complaint resolution mechanism at CRA had previously raised a complaint with the regulatory body. This low percentage underscores the underutilization of CRA's services for complaint resolution within the business community.

The findings emphasize the importance of initiatives aimed at increasing general awareness among businesses regarding CRA's role as a potential regulatory body for complaint resolution in the telecommunications spectrum. Enhancing visibility and understanding of the complaint resolution mechanism offered by CRA could contribute to more effective utilization of this avenue by businesses seeking resolution for telecommunication-related issues.

## Consumer Rights Protection

In general, six of every ten business consumers in Qatar do not perceive telecommunication service providers as misleading in their advertising and promotions. However, satisfaction with telecommunication advertising is only moderate. Approximately two in ten respondents (18%) assert that Ooredoo and Vodafone Qatar have misleading advertisements regarding their telecommunication services. Meanwhile, 82% of the respondents expressed satisfaction with the reduced occurrence of spamming and unwanted promotions. Almost eight of every ten respondents (78%) express moderate to high satisfaction with the clarity of advertising and communication. Additionally, 76% of respondents report moderate satisfaction with the ability to opt out of promotional messages from service providers. These nuanced insights shed light on the overall sentiment of business consumers in Qatar towards telecommunication advertising, emphasizing the importance of clarity, transparency, and the ability to control promotional communication. While the majority expresses satisfaction, addressing concerns related to misleading advertisements can further enhance the overall satisfaction levels with telecommunication advertising in the market.

## Market Competitiveness

Approximately two-thirds of business consumers 60% express the belief that there is a diverse range of products and/or services available to their organizations in the telecommunications sector. This suggests a generally positive perception of the variety of offerings within the industry.

However, despite this perceived diversity, respondents exhibit lower satisfaction levels with certain aspects of the telecom service providers in Qatar. Specifically, only 46% express satisfaction with the service providers offering innovative and up-to-date technology solutions, while 47% are satisfied with the level of customer support provided to meet organizational demands. These findings indicate potential areas for improvement in service offerings and customer support within the telecommunications sector.

Notably, micro-businesses stand out with only 50% agreeing to the statement that there is enough competition for telecommunication products and services in Qatar. This suggests that smaller enterprises may perceive limitations in the competitive landscape, pointing to a potential area for market development and increased competition.

Additionally, a relatively low percentage of respondents 45% agree with the statement that there are innovative and up-to-date technology solutions available in Qatar. This underscores the need to address underlying concerns and enhance the industry's offerings to foster a more inclusive, competitive, and effective telecommunication landscape in Qatar. Strategic measures to address these areas of concern

could contribute to an improved overall experience for businesses in the sector.

### Market Scenario during COVID-19

Findings reveal limited awareness of changes, as 70% reported no noticeable shifts. About 24% acknowledged some alterations, while 6% were unaware. Regarding purchase behaviour, 16% noted an increase in telecom service purchases due to heightened demand, while only 3% experienced a decrease, with over 80% observing no change. Trust levels varied, with 39% expressing increased trust in their service provider during the pandemic, 48% maintaining consistent trust, 11% losing trust, and 2% switching service providers. Satisfaction metrics during COVID-19 indicate 45% overall experience satisfaction, 43% reliability satisfaction, and 31% and 30% satisfaction with regular updates and customer service response time, respectively. Industry-wise, transportation and storage lead in recommendations at 54%, followed by education and mining/quarrying at 50%, while wholesale/retail trade and accommodation/food service activities are recommended at 35% and 31%. In terms of business recommendations, 35% would recommend their service provider, with less than 20% choosing not to recommend their provider at all. Overall, the data provides a comprehensive snapshot of consumer perceptions in the telecommunications sector amid the COVID-19 pandemic.

### Market Scenario during FIFA World Cup 2022

In assessing the impact of the FIFA World Cup 2022 on the telecommunications industry in Qatar, a mere 13% of respondents reported facing issues within the stadium. Satisfaction ratings during the event revealed high levels for attributes such as localization and multilingual support at 58% and network connectivity and data speed/performance at 53%, while flexible and affordable packages garnered the lowest satisfaction at 46%. Industry-specific recommendations during the World Cup varied, with notable endorsements from wholesale and retail trade at 27%, accommodation, and food service activities at 26%, construction at 35%, transportation and storage at 32%, and agriculture, forestry, and fishing at 31%. The human health and social work activities industry led with the highest recommendation at 46%, followed closely by arts, entertainment, and recreation at 43%. Micro, small, medium, and large businesses demonstrated varying recommendation rates, with micro businesses at 28%, small businesses at 24%, medium-sized businesses at 29%, and large businesses at 27%. Overall, a significant portion of respondents 28% expressed a strong inclination to highly recommend their service provider post-FIFA World Cup, while 55% indicated a moderate level of recommendation. This nuanced perspective underscores the diverse levels of satisfaction and endorsement within the surveyed community, providing valuable insights into the telecommunications industry in Qatar.



## Key Considerations of CRA

Based on the business consumer feedback the key considerations for CRA are outlined below:

### CONSIDERATION 1: Raise awareness about CRA

- 1. Public Awareness Programs:** Launch public awareness programs to educate businesses about the role of CRA in regulating the telecommunications sector and its complaint resolution services.
- 2. Collaborative Initiatives:** Collaborate with service providers to disseminate information about CRA's role, fostering a deeper understanding among businesses.

### CONSIDERATION 2: Customer Support Team for Service Providers

- 1. Quality Enhancement:** Collaborate with service providers to enhance the quality of customer support services, ensuring prompt issue resolution and satisfactory user experiences.
- 2. Training Initiatives:** Implement training programs for customer service representatives to improve communication and problem-solving skills.

### CONSIDERATION 3: Complaint Resolution Procedure with CRA

- 1. Streamline Resolution Mechanism:** Enhance the efficiency of the complaint resolution process by streamlining procedures and ensuring timely responses.
- 2. Increase Awareness:** Implement initiatives to boost awareness about the CRA's complaint resolution mechanism, ensuring businesses are informed about available avenues for issue resolution.

### CONSIDERATION 4: Products and Services Offered

- 1. Diversification and Customization:** Encourage telecommunication providers to diversify and customize their product offerings, addressing the specific needs of businesses of varying sizes and preferences.
- 2. Innovative Solutions:** Advocate for the adoption of innovative technologies to stay ahead of user expectations, fostering a more dynamic and competitive industry landscape.

### CONSIDERATION 5: Market Competitiveness

- 1. Encourage Competition:** Promote policies that encourage healthy competition among service providers.



2. **Benchmarking:** Regularly benchmark service standards and performance against international best practices.
3. **Support for New Entrants:** Provide support and incentives for new entrants in the telecommunications market to enhance competition.

#### CONSIDERATION 6: Data Privacy and Security

1. **Enhance Regulations:** Strengthen regulations related to data privacy and security to protect business consumers.
2. **Awareness Campaigns:** Conduct more awareness campaigns to educate businesses about data privacy and security best practices.
3. **Partnerships:** Foster partnerships with cybersecurity firms to offer advanced security solutions.
4. **Incident Response:** Develop a robust incident response framework to handle data breaches and cyber threats.

#### CONSIDERATION 7: Sustainability Initiatives

1. **Green Technologies:** Promote the adoption of environmentally friendly technologies and practices within the telecommunications sector.
2. **Resource Efficiency:** Encourage service providers to implement resource-efficient processes.
3. **Sustainability Reporting:** Require regular sustainability reporting from service providers to track progress and impact.
4. **Incentives for Compliance:** Provide incentives for service providers that meet or exceed sustainability targets.

## 2. Background

The Communications Regulatory Authority (CRA) was established by the Emiri Decree No. 42 of 2014 to regulate communications and information technology and the postal sectors, as well as access to digital media, to provide advanced and reliable telecommunication services across the state. CRA uses its full range of regulatory powers to ensure that competition in the communications sector thrives and that consumer rights are protected.

The Consumer Affairs Department of the CRA carries out regular monitoring of consumer satisfaction with the two licensed Service Providers, Ooredoo and Vodafone Qatar. The CRA conducted its inaugural Business Consumer Satisfaction Survey in 2015 baseline measure for the level of satisfaction

among business consumers with their telecom service providers. A second wave of the survey was conducted in 2019 to measure shifts in satisfaction with telecommunication service providers. In 2023, the CRA has conducted its 3rd Business Consumer Survey, using 2019 as the baseline measure for the level of satisfaction among business consumers with their telecom service providers.

The research methodology encompassed qualitative and quantitative approaches, including executive in-depth interviews with key stakeholders and decision-makers, focus group discussions with business consumers, and a nationally representative satisfaction survey for business consumers in Qatar. Supplementary secondary research was conducted for regional and international benchmarking, providing comparative data and indicators on the performance of telecommunication carriers and service providers.

## 2.1 Research Methodology

To address the desired information outputs, the research approach involved four key components:

- Stakeholder Engagement;
- Regional & International Benchmark Study;
- Business Consumer Insight and,
- Business Consumer Satisfaction Survey

### 2.1.1 Stakeholder Engagement

The Stakeholder Engagement study involves conducting comprehensive interviews with key departments within the CRA, along with the licensed service providers, Ooredoo Qatar and Vodafone Qatar. The primary aim is to gain insights into their perspectives on the preceding study, recognizing the obstacles encountered in 2019, and soliciting their recommendations for the ongoing Prudent Qatar-led research initiative.

A total of five comprehensive interviews were undertaken across these three organizations, comprising three key units within the CRA, one with representatives from Ooredoo Qatar, and another with representatives from Vodafone Qatar. The core units of the CRA that participated in this research include the Consumer Affairs Department, Technical Affairs Department, and Regulatory Affairs & Competition Department. taking place from July 16th to July 24th, 2023.

### 2.1.2 Regional and International Benchmark Study

The 'Regional & International Benchmark Study' entailed thorough secondary research aimed at furnishing the Communications Regulatory Authority (CRA) with regional and international benchmarking, along with comparative data and indicators pertaining to the performance of

telecommunication carriers and service providers. This report offers a comprehensive overview of the telecommunications landscape in Qatar and discerns potential service delivery gaps that could influence business customer satisfaction with the service providers.

The benchmark report places Qatar in a strategic comparison against eleven economies with similar characteristics, including its neighbouring nations like the Kingdom of Saudi Arabia (KSA), the United Arab Emirates (UAE), and Oman from the Arab region, along with Australia, New Zealand, Singapore, and India from the Asia-Pacific region, and the United Kingdom (UK), Spain, the Netherlands, and Sweden from the European region. The benchmarking exercise sheds light on key performance indicators and industry standards, facilitating a nuanced understanding of Qatar's telecommunications landscape in a global context.

### **2.1.3 Business Consumer Insight (Focus Group Discussions)**

The component labeled 'Business Consumer Insight' comprised qualitative research, featuring ten mini focus group discussions conducted among business consumers. The primary objective was to extract valuable insights into their attitudes towards telecommunication service providers and delve deeply into the customer service experience. Participants for these focused group discussions were meticulously chosen based on their familiarity with telecommunication services within their respective organizations, along with the extent of their involvement in decision-making processes regarding telecommunication products and services utilized within the business. This qualitative research methodology aimed to capture nuanced perspectives and firsthand experiences of business consumers in the telecommunications sector.

### **2.1.4 Business Consumer Satisfaction Survey**

The 'Business Consumer Satisfaction Survey' encompassed a comprehensive nationally representative survey involving 2,100 business consumers in Qatar. The research meticulously gauged satisfaction levels across a spectrum of service and product delivery aspects within the telecommunications sector. Key areas of focus included:

- Awareness Regarding Communication Regulatory Authority (CRA).
- Importance of Telecommunication Services within Businesses.
- Customer Experience with Communication Network.
- Business Consumer Perception of Pricing.
- Business Customer Perceptions on Rate Plans/ Tariff and Bill Payments.
- Complaint Resolution Mechanism with CRA and Service Providers.
- Consumer Rights Protection.

- Market Competitiveness - Mobile Number Portability (MNP) and Fixed Number Portability (FNP).
- Market Scenario during COVID-19.
- Market Scenario during FIFA World Cup 2022.

Employing the computer-assisted personal interview (CAPI) method, the survey utilized a meticulously crafted questionnaire with an average duration of 45 minutes. The questionnaire, developed, translated, scripted, and tested in both English and Arabic, underwent thorough scrutiny by the Consumer Affairs Department of CRA and the Prudent Qatar research team before fieldwork initiation. To ensure a nationally representative study of business consumers in Qatar, sampling quotas were strategically applied based on industry sector, business sector, size of business (number of employees), and geographic region. The survey aimed to capture nuanced insights into business consumers' satisfaction across various categories of fixed and mobile services.

## 2.2 Report Outline

This report comprehensively unveils the intricate findings derived from the third segment of the study - the 'Business Consumer Satisfaction Survey 2023'. Drawing comparisons with the insights published in the 2019 edition, the results are derived into multiple sections as described below:

**Usage and Importance of Telecommunication Services:** This section of the report will delve into the critical role and significance of telecommunication services within the State of Qatar. It outlines the fundamental aspects of telecommunication services, including various modes such as Mobile Voice and Mobile Internet, Fixed Voice and Fixed Internet, and Leased Lines's pivotal role in enabling instant, global communication.

**Business Customers' Satisfaction with Telecommunication Services:** This section of the report will present an in-depth analysis of business customers' satisfaction with telecommunication services in Qatar, focusing on key service areas such as Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Lines. It would assess the performance of these services against various parameters crucial to business operations, including Network Availability, Network Coverage, Availability of Services, Speed of Data, Bill Payment mechanisms, and more.

**Business Customers' Perceptions of Telecommunication Services:** This section focuses on the perceptions of business customers regarding telecommunication services in Qatar, with an emphasis on Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Lines. The analysis centres around several critical aspects that influence customer perceptions and satisfaction, including Pricing, Rate/Plans and Tariffs, and Complaint Resolution Mechanism. This also included business customers'

perceptions during COVID-19 and FIFA World Cup 2022. This examination provides a comprehensive overview of how business customers view the value, affordability, and responsiveness of telecommunication services, which are integral to their daily operations and long-term strategic goals.

**Key Take-Outs for CRA:** The concluding section synthesizes key observations gleaned from the survey findings. It includes the strengths and areas for improvement within the telecommunications market in Qatar, providing valuable insights for the Communications Regulatory Authority (CRA).

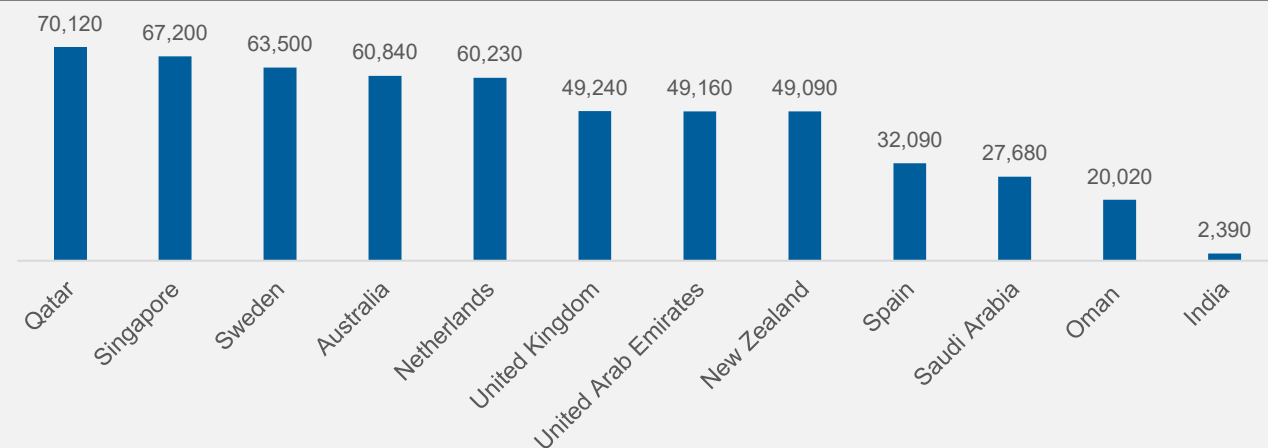
## 2.3 Qatar Business Environment

### 2.3.1 Economic Indicators

Figure 1 presents a comparison of Gross National Income (GNI) per capita among selected countries as in the benchmark report, measured in current US dollars, based on World Bank data from 2022. Qatar leads the chart with a GNI per capita of \$70,120, reflecting its robust economy, largely driven by its significant oil and natural gas revenues. Singapore follows with \$67,200, indicative of its highly developed and successful free-market economy. Sweden and Australia are also notable for their high GNI per capita, standing at \$63,500 and \$60,840, respectively, signifying their strong social welfare systems and diversified economies. European countries like the Netherlands, United Kingdom, and Spain show moderate figures, ranging from around \$49,000 to the lower \$30,000s, illustrating the variance within developed economies. The Gulf Cooperation Council (GCC) countries, including the United Arab Emirates and Saudi Arabia, also feature respectable figures, owing to their oil wealth. In contrast, India's GNI per capita is markedly lower at \$2,390, highlighting the economic disparity that exists when comparing developing economies with their developed counterparts. The spread across the graph underscores the varying levels of economic development and wealth distribution globally<sup>1</sup>.

<sup>1</sup> World Bank - <https://data.worldbank.org/indicator/NY.GNP.PCAP.PP.CD?locations=QA>

Figure 1: GNI per Capita (Current US\$)



Source: The World Bank, 2022 Data

Regarding other socioeconomic performance of Qatar in comparison to other benchmarked countries, Qatar has a population of 2.7 million and a population density of 234.56 per sq. km, which is significantly higher than Oman but lower than Singapore. This reflects Qatar's urbanized nature without the extreme density seen in city-states<sup>2</sup>.

The net migration rate of 0.78 migrants per 1,000 population indicates a healthy influx of people, contrary to the negative rate seen in the UAE<sup>3</sup>. This suggests that Qatar is seen as a favorable destination for work and residence, likely due to its economic opportunities and quality of life.

In terms of economic wealth, Qatar's GDP per capita at \$83.46 thousand is one of the highest globally, far surpassing the likes of some of the developed nations such as the UK and Spain. This is indicative of the nation's affluent economy, largely fuelled by its substantial natural gas reserves. Qatar's Gross Domestic Product at Purchasing Power Parity (PPP) is impressive at \$307.26 billion, representing significant economic might relative to its population size<sup>4</sup>.

Qatar's GDP growth rate in 2022 was a robust 3.4%, showcasing a thriving economy, particularly in contrast to advanced economies such as Sweden, which posted a lower growth rate. In 2023, the growth rate has moderated to approximately 1.6%, following the economic surge associated with the World Cup 2022. This adjustment represents a return to more sustainable growth levels after the exceptional event-driven boom. Nevertheless, the sustained growth is a testament to Qatar's strategic investments in infrastructure and its ongoing efforts to diversify its economy beyond the hydrocarbon sector. These

<sup>2</sup> World Bank - <https://data.worldbank.org/indicator/EN.POP.DNST?locations=QA>

<sup>3</sup> <https://www.migrationpolicy.org/country-resource/qatar>

<sup>4</sup> <https://www.focus-economics.com/country-indicator/qatar/gdp-per-capita-usd/>

initiatives are key drivers of the nation's economic vitality, signalling a commitment to long-term economic stability and resilience<sup>5</sup>.

Notably, Qatar's gross national savings rate, at 57% of GDP, is exceptionally high, dwarfing rates seen in countries like Australia and the Netherlands<sup>6</sup>. This high savings rate not only illustrates the country's fiscal prudence but also indicates the potential for substantial investment in future growth sectors.

Overall, Qatar's strong economic indicators, underscored by a high GDP per capita and national savings rate, are indicative of economic affluence and stability. The positive net migration rate further emphasizes its attractiveness as a destination for international talent, contributing to a dynamic and diverse workforce. Despite its smaller population size, Qatar's economy demonstrates vigor and a high level of wealth concentration, positioning it as a significant player in the global economic landscape.

### 2.3.2. Business Environment

Despite the challenges posed by the global pandemic in 2020, Qatar's economy demonstrated robust recovery, underpinned by a swift and effective response to health and economic impacts. This period saw an acceleration in Qatar's diversification efforts, moving beyond its traditional reliance on the oil and gas sector towards a more varied economic base. Investments in technology, renewable energy, and the knowledge economy have been pivotal in this shift, aligning with the Qatar National Vision 2030's objectives.

In the overall comparative business environment of Qatar, it is observed that Qatar exhibits a diverse spectrum of efficiencies and challenges. Commencing operations in Qatar takes approximately 8.7 days, which is comparatively efficient against India's 17.5 days but less so when juxtaposed with Oman's expedited 4.3 days. With an overall ease of doing business rank of 77, Qatar finds itself in a moderate position, suggesting potential areas for regulatory enhancement to match the facilitative environments of New Zealand and Singapore. In particular, the country's ranking of 108 in 'Starting a Business' and 157 in 'Protecting Minority Investors' indicates a notable need for procedural refinement and stronger legal frameworks to boost investor confidence<sup>7</sup>.

However, Qatar demonstrates commendable efficiency in 'Dealing with Construction Permits' and 'Registering Property', with the latter achieving a top ranking of 1, showcasing a highly streamlined property registration process. The domain of 'Paying Taxes' is another area where Qatar shines, ranking at an impressive third place, indicative of a tax system that favors business efficiency. Nonetheless, areas such as 'Getting Credit', 'Trading Across Borders', 'Enforcing Contracts', and 'Resolving

<sup>5</sup> <https://www.worldeconomics.com/GrossDomesticProduct/GDP-Annual-Growth-Rate/Qatar.aspx>

<sup>6</sup> <https://data.worldbank.org/indicator/NY.GNS.ICTR.ZS?locations=QA>

<sup>7</sup> <https://www.doingbusiness.org/content/dam/doingBusiness/country/q/qatar/QAT.pdf>



Insolvency' reflect rankings of 119, 101, 115, and 123, respectively, which highlight critical opportunities for Qatar to refine its economic landscape and enhance its global competitiveness. These insights collectively underscore the strategic imperatives for Qatar to further simplify business processes and strengthen investor protection to ascend in the global ease of doing business rankings<sup>8</sup>.

Qatar also aims to accelerate with an average of 4% per year to 2030, driven by its expanded gas production and economic diversification. As part of the country's recent diversification agenda in NDS3, Qatar aims to build a top-10 destination for investors and businesses, develop specialized economic clusters, and foster a vibrant business-led innovation ecosystem. Qatar will also focus on boosting labor productivity, with a 2% average yearly target, to drive economic growth, create high-skilled jobs that can support higher wages, and maintain a sustainable rate of population growth that does not add pressure to social fabric and infrastructure requirements<sup>9</sup>.

The government has also implemented reforms to enhance the business climate, such as the introduction of new laws to better protect investment and encourage foreign direct investment (FDI). Notably, the relaxation of foreign ownership restrictions in various sectors and improvements in the legal framework have boosted investor confidence. These changes have led to a more dynamic, diversified, and accessible business environment. Qatar's GDP growth, which rebounded strongly post-2020, reflects the success of these policies. The nation's commitment to sustainable development, innovation, and a more inclusive economy promises continued growth and opportunities for businesses operating within its borders.

## 2.4 Key Stakeholders in Qatar's Telecommunication Market

### 2.4.1 Changes in Qatar's Telecommunication Market

This section of the report highlights noteworthy changes in the telecommunications market in Qatar over the past four years, following the baseline study conducted in 2019.

Qatar's telecommunication market has witnessed significant changes, marked by advancements in technology and influenced by major events such as the COVID-19 pandemic and the FIFA World Cup 2022.

One of the most significant developments in this period was the launch and expansion of 5G networks. The first launch of a commercially 5G network was in May 2018 in Qatar and by 2020, both Ooredoo and Vodafone had launched commercial 5G networks. These providers had a licensing obligation to cover 40% of densely populated areas, primary roads, and World Cup venues by 2020, demonstrating

<sup>8</sup> <https://www.doingbusiness.org/content/dam/doingBusiness/country/q/qatar/QAT.pdf>

<sup>9</sup> [https://www.psa.gov.qa/en/nds1/nds3/Documents/QNDS3\\_EN.pdf](https://www.psa.gov.qa/en/nds1/nds3/Documents/QNDS3_EN.pdf)



the government's commitment to leveraging the World Cup as a catalyst for technological advancement. The rollout of 5G was expected to support a range of smart initiatives and cutting-edge technologies, including artificial intelligence, which are aligned with the Qatar National Vision 2030 to diversify the economy and reduce hydrocarbon dependency.

During the COVID-19 pandemic, as with the rest of the world, there was an increased demand for digital connectivity due to remote working and the need for reliable communications. This period likely accelerated digital transformation and reliance on telecom services in Qatar. The pandemic also highlighted the need for robust cybersecurity measures as the reliance on digital infrastructure grew, which was a global trend observed in the telecommunications sector.

Furthermore, the telecom sector saw growth in the number of mobile subscriptions, with a significant increase in customers switching to post-paid services. The mobile cellular subscription (per/ 100 inhabitants) grew from 137.6 in 2020 to 144.2 in 2021. This shift indicated a maturation of the market and a move towards higher-value services. The number of mobile subscriptions was greater than the population, indicating multiple subscriptions per user, a common trend in many developed markets<sup>10</sup>.

Vodafone and Ooredoo made adjustments to their business models to adapt to the declining revenue from voice opportunities in 5G services, business solutions, and broader ICT services. Both companies were also key players in the provision of services for new smart city developments like Lusail City.

The FIFA World Cup in 2022 also provided a significant boost to the industry, with a surge in demand for connectivity and data services due to the influx of visitors and global attention to the event. This likely spurred further investment and upgrades in telecom infrastructure to ensure seamless service during the tournament.

#### 2.4.2. About Telecommunication Service Providers: Ooredoo Qatar & Vodafone Qatar

**Ooredoo Qatar:** Ooredoo Qatar, originally established as Qatar Telecom (Qtel) in 1987, rebranded to Ooredoo in 2013. Since then, Ooredoo has become a key player in Qatar's telecommunications sector and expanded its reach to nine additional countries across the Middle East, North Africa, and Southeast Asia. In Qatar, Ooredoo offers a wide range of services tailored for individuals, businesses, and government entities, including high-speed internet, dedicated leased lines, voice, unified communications, data services, and IoT solutions, all aimed at empowering businesses in a digitally connected world<sup>11</sup>.

**Vodafone Qatar:** Operational since 2009, Vodafone Qatar serves 2.15 million mobile customers as of December 31, 2023. It leads in 5G services, having rolled out its network since August 2018. Beyond

<sup>10</sup> <https://www.statista.com/statistics/501067/number-of-mobile-cellular-subscriptions-in-qatar/>

<sup>11</sup> <https://www.ooredoo.com/2020-annual-report/files/Annual%20Report%202020%20-%20English.pdf>

telecommunications, Vodafone Qatar is committed to enhance Qatar's digital infrastructure and social progress. With a 90% Qatari ownership, including shares held by Vodafone and the Qatar Foundation LLC, it emphasizes socioeconomic development, inclusivity, and environmental sustainability, reflecting its broader purpose beyond just providing services.

### Major achievements: Ooredoo Qatar, 2019 to 2023

**In July 2020**, Ooredoo Qatar, in collaboration with Ericsson, successfully tested the 200MHz spectrum, achieving a record system throughput of 4.2Gbps. This milestone was part of the broader shift towards full 5G delivery<sup>12</sup>.

**In September 2020**, Ooredoo introduced Business Edge, aimed at providing unprecedented connectivity levels for small- and medium-sized enterprises through Fibre Broadband. This launch responded to the connectivity needs expressed by small office and home office (SOHO) and small- and medium-sized enterprise (SME) customers<sup>13</sup>.

**By November 2020**, Ooredoo had made the Nokia FastMile 5G Gateway available to all its customers. This customer-premises equipment (CPE) was designed to deliver superior Wi-Fi signal quality throughout the home. Sold with a unique visual installation aid, the Gateway facilitated easy setup and optimal 5G coverage within residences, offering a straightforward plug-and-play solution<sup>14</sup>.

**In September 2021**, Ooredoo announced a new trade-in service for customers looking to purchase new devices, in partnership with Starlink. This service enabled customers to bring their old devices to selected Ooredoo shops or Starlink outlets and receive credit towards a new device purchase, with the credit amount varying based on the traded-in device's specifics<sup>15</sup>.

**In November 2021**, Ooredoo Group announced a groundbreaking strategic partnership with Snap Inc., paving the way for the integration of advanced Augmented Reality (AR) technology to enrich its customer experience. This three-year collaboration, a first in the region, aimed to develop sophisticated AR experiences, including those enabled by 5G technology, for Ooredoo customers across its 10 operating companies<sup>16</sup>.

<sup>12</sup> [https://www.ooredoo.com/en/media/news\\_view/latest-ooredoo-milestone-demonstrates-network-leadership/](https://www.ooredoo.com/en/media/news_view/latest-ooredoo-milestone-demonstrates-network-leadership/)

<sup>13</sup> <https://www.ooredoo.qa/web/en/press-release/business-ooredoo-launches-business-edge-for-fibre-broadband/>

<sup>14</sup> <https://www.ooredoo.qa/web/en/press-release/personal-ooredoo-announces-new-nokia-device-to-ensure-optimal-home-wifi-delivery/>

<sup>15</sup> <https://thepeninsulaqatar.com/article/15/09/2021/Ooredoo-partners-with-Starlink-to-provide-new-trade-in-option-for-customers>

<sup>16</sup> [https://www.ooredoo.com/en/media/news\\_view/ooredoo-group-partners-with-snap-inc-to-unlock-potential-of-ar-across-global-footprint/](https://www.ooredoo.com/en/media/news_view/ooredoo-group-partners-with-snap-inc-to-unlock-potential-of-ar-across-global-footprint/)

**By July 2022**, Ooredoo had announced the availability of the Microsoft Intune solution for its business customers, enhancing device security and app management for employees whether working in the office or remotely<sup>17</sup>.

**In December 2022**, during the FIFA World Cup Qatar 2022™, for which Ooredoo was the Official Middle East & Africa Telecommunications Operator, the company released data confirming the high demand for its network and services. With 48 matches completed, approximately 2.46 million spectators attended the games across eight stadiums, using 533TB of mobile data and 136TB of Wi-Fi in and around the stadiums. Data usage included 39.9% through Ooredoo's 5G network at speeds up to 240Mbps, and 58.6% on the 4G network at speeds up to 20Mbps, with 434,000 fans utilizing roaming services during the event<sup>18</sup>.

**In May 2023**, Ooredoo revealed the signing of a Memorandum of Understanding (MoU) with Lenovo, marking a collaborative effort to develop innovative solutions for the B2B sector. This partnership focused on exploring opportunities in data sovereignty, private 5G solutions, advanced AI solutions, and High-Performance Computing (HPC) as a service<sup>19</sup>.

**In November 2023**, Ooredoo distinguished itself at the Middle East Investor Relations Association (MEIRA) Annual Conference in Bahrain, securing two prestigious awards. Additionally, Ooredoo clinched the "Best Investor Relations Professional" award in Qatar for the fourth year in a row<sup>20</sup>.

### **Major achievements: Vodafone Qatar, 2019 to 2023**

**In November 2019**, Vodafone Qatar announced the launch of GigaTV, a premium new entertainment service offering a broad range of regional and international content for family entertainment. GigaTV featured a sophisticated set-top box providing live TV channels, catch-up features, and on-demand content, including movies from major studios, Vodafone exclusive TV series, and children's content<sup>21</sup>.

**In December 2019**, Vodafone Qatar solidified its status as the nation's leading roaming provider with significant enhancements to its roaming products and services. The company expanded its Vodafone Passport Pack to include new countries such as Georgia, Bosnia & Herzegovina, Finland, Iceland,

<sup>17</sup> <https://www.ooredoo.qa/web/en/press-release/ooredoo-launches-microsoft-intune-a-cloud-based-mobile-device-and-application-management-service/>

<sup>18</sup> [https://www.ooredoo.com/en/media/news\\_view/ooredoo-registers-record-breaking-data-traffic-hundreds-of-thousands-of-voice-calls-in-first-48-matches-of-fifa-world-cup-qatar-2022/](https://www.ooredoo.com/en/media/news_view/ooredoo-registers-record-breaking-data-traffic-hundreds-of-thousands-of-voice-calls-in-first-48-matches-of-fifa-world-cup-qatar-2022/)

<sup>19</sup> <https://www.ooredoo.qa/web/en/press-release/ooredoo-partners-with-lenovo-to-investigate-upgrading-business-offerings-with-new-innovative-5g-and-ai-solutions/>

<sup>20</sup> [https://www.ooredoo.com/en/media/news\\_view/ooredoo-wins-two-prestigious-investor-relations-awards/](https://www.ooredoo.com/en/media/news_view/ooredoo-wins-two-prestigious-investor-relations-awards/)

<sup>21</sup> <https://www.vodafone.qa/en/about-us/media/press-release/vodafone-qatar-launches-gigatv>

Montenegro, and Nepal, extending its coverage to more than 130 countries<sup>22</sup>.

**Simultaneously, in December 2019**, Vodafone Qatar enhanced its offerings to the business sector by introducing the Ready Network, a cutting-edge software-defined network (SDN) product portfolio. This initiative was designed to propel Qatar's business landscape into the future by providing an increased level of agility, control, and efficiency. Ready Network, leveraging the principles of SDN, tackled the complexities and high costs of traditional networking environments by allowing for centralized network configuration<sup>23</sup>.

**In February 2020**, Vodafone Qatar was awarded "Best Investor Relations" for a Mid-Cap Company for the third consecutive year at the Qatar Stock Exchange's 5th Annual Investor Relations Excellence Program Awards Ceremony<sup>24</sup>.

**In October 2020**, Vodafone Qatar launched Sharek, an innovative concept designed to assist small and medium-sized enterprises (SMEs) in managing their operations more efficiently. Sharek enabled SMEs to custom-design their mobile plans and distribute benefits to their employees easily via the My Vodafone App<sup>25</sup>.

**In April 2021**, Vodafone Qatar introduced Labeeb, an AI chatbot available on the Vodafone App, as part of its digital transformation agenda, aiming to enhance customer experience and encourage the use of digital channels<sup>26</sup>.

**In January 2022**, Vodafone Qatar and Microsoft announced an expansion of their partnership to offer more digital solutions to businesses across the country, primarily integrating Microsoft Azure into Vodafone's range of IoT products and services<sup>27</sup>.

**In October 2022**, Vodafone Qatar's Infinity Payment Solutions (IPS), a wholly-owned subsidiary of Vodafone, launched iPay, Qatar's first licensed e-wallet<sup>28</sup>.

<sup>22</sup> <https://www.gulf-times.com/story/650802/vodafone-passport-now-covers-over-130-countries>

<sup>23</sup> <https://www.vodafone.qa/en/about-us/media/press-release/vodafone-launches-ready-network-sdn>

<sup>24</sup> <https://www.vodafone.qa/en/investor-relations/news/vodafone-wins-ir-excellence-award>

<sup>25</sup> <https://www.vodafone.qa/en/about-us/media/press-release/the-new-vodafone-sharek-launches-allowing-business-owners-to-design-their-own-plans-for-ultimate-flexibility-and-efficiency>

<sup>26</sup> <https://www.vodafone.qa/en/about-us/media/press-release/vodafone-introduces-labeeb-one-of-the-first-ai-powered-chatbots-in-qatar>

<sup>27</sup> <https://news.microsoft.com/en-xm/2022/01/13/vodafone-microsoft-boost-strategic-partnership-to-offer-digital-solutions-to-businesses-in-qatar/>

<sup>28</sup> <https://www.vodafone.qa/en/about-us/media/press-release/vodafone-qatar-introduces-ipay-the-first-licensed-wallet-by-qatar-central%20bank>

**In November 2022**, iPay announced its first strategic partnership with Mowasalat (Karwa), the official transportation company in Qatar, allowing customers to make instant digital payments for their trips via the iPay application<sup>29</sup>.

**In November 2023**, Vodafone Qatar introduced its new Auto-Bill Payment service, offering a more convenient method for managing monthly bills. Customers could set up automatic monthly payments using their preferred credit card through the My Vodafone App<sup>30</sup>.

**Also, In November 2023**, Vodafone Qatar and the Qatar Financial Center (QFC), a premier onshore financial hub in the region, formalized a Memorandum of Understanding (MoU) aimed at facilitating the establishment of businesses in Qatar. Under this strategic partnership, Vodafone committed to providing a suite of advanced communication, digital, and technology services to both new and existing QFC-licensed firms<sup>31</sup>.

#### **2.4.3. Communications Regulatory Authority (CRA)**

The Communications Regulatory Authority (CRA) of Qatar stands as the authoritative body tasked with the vital responsibility of overseeing the telecommunications landscape within the nation. Charged with regulating the telecommunications market and services, the CRA plays a pivotal role in ensuring equitable access, fair competition, and consumer protection within Qatar's telecommunications sector. Through meticulous licensing procedures and spectrum allocation, the CRA upholds principles of fairness and equality among telecom service providers while maintaining a keen focus on compliance through regular audits and assessments. Moreover, the CRA fosters an inclusive environment by actively engaging with stakeholders to gather insights and feedback, ensuring that regulatory decisions align with the needs and interests of all involved parties. Additionally, the CRA boasts a dedicated mechanism for addressing and resolving customer complaints promptly, safeguarding consumers from any misleading or unfair practices prevalent within the telecommunications industry. In essence, the Communications Regulatory Authority of Qatar serves as a cornerstone in fostering a dynamic, transparent, and consumer-centric telecommunications ecosystem within the nation.

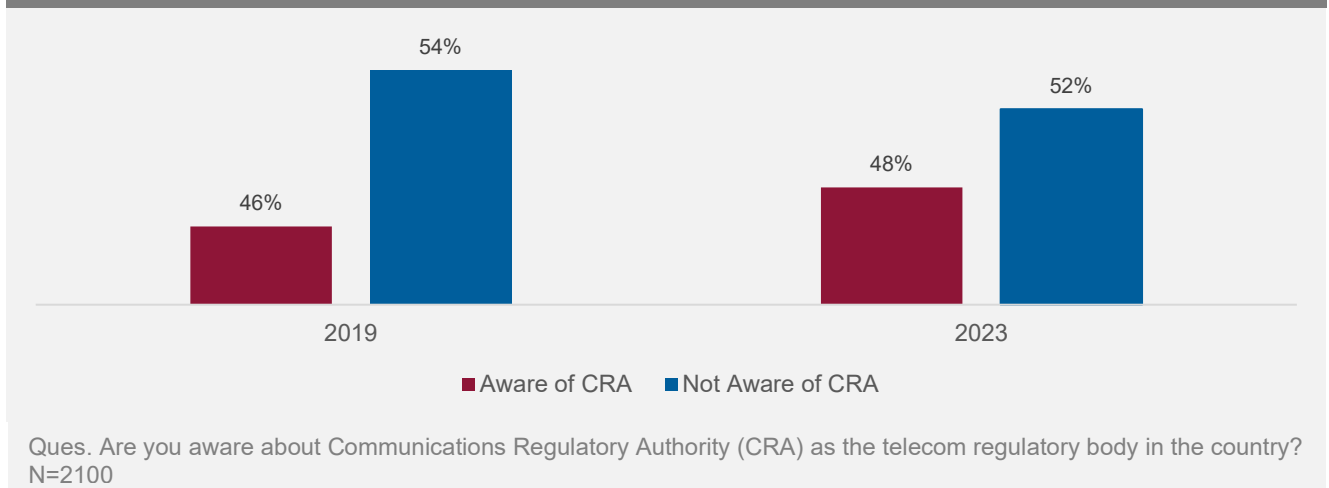
<sup>29</sup> <https://thepeninsulaqatar.com/article/23/11/2022/ipay-by-vodafone-qatar-partners-with-mowasalat-on-ipay-digital-payment>

<sup>30</sup> <https://www.vodafone.qa/en/about-us/vodafone-qatar-launches-auto-bill-payment-solution>

<sup>31</sup> <https://www.vodafone.qa/en/about-us/vodafone-qatar-signs-agreement-with-ofc>

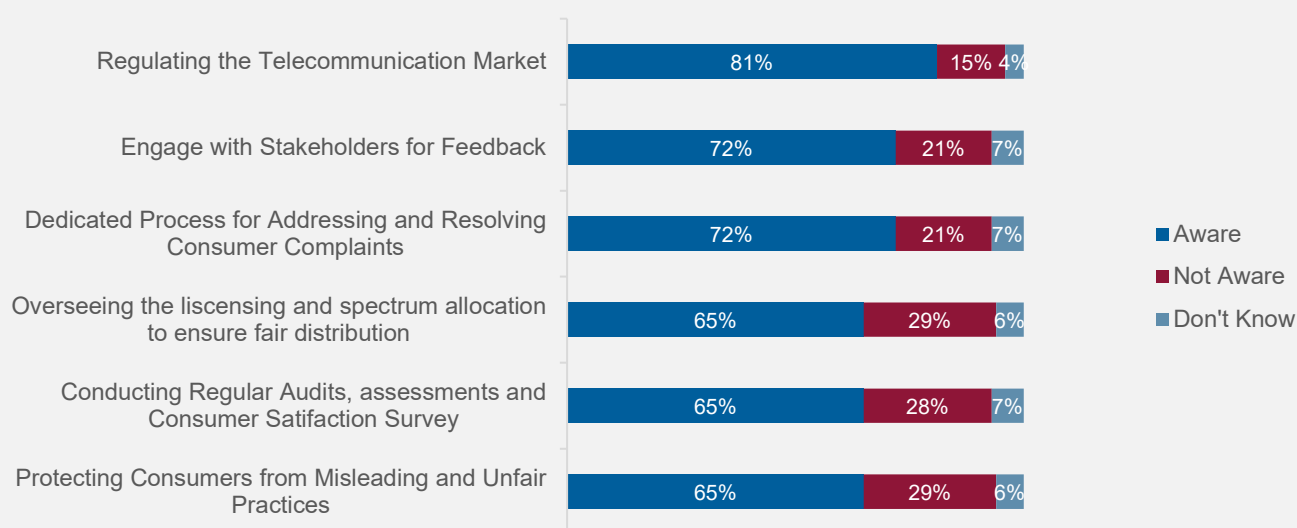
Business consumers were asked whether they were aware of the CRA. Awareness of the CRA among business consumers remained relatively low with less than half of the respondents reporting to be aware of the telecommunication regulatory authority. The awareness of CRA amongst the respondents has more or less remained the same with a slight increase of +2% from 2019. (see Figure 2).

**Figure 2: Awareness Regarding CRA**



Business respondents who reported to be aware of the CRA were asked whether they were aware of the various roles and responsibilities of the Authority. Among such respondents, there is high awareness that CRA is responsible for regulating the telecommunications market in Qatar (81%). This is followed by awareness that CRA actively engages with stakeholders to gather feedback and inputs on regulatory matters (72%), that CRA have a dedicated process for addressing and resolving customer complaints related to telecommunications services (72%). There is moderate awareness that CRA is responsible for overseeing the licensing and spectrum allocation to ensure fair and equitable distribution (65%), that CRA Qatar regularly conducts audits, assessments and surveys to monitor compliances (65%) and that CRA protects consumers from misleading and unfair practices happening in telecommunication industry (65%). (See Figure 3).

**Figure 3: Scope of CRA**



Ques. Are you aware of the following facts about activities of Communications Regulatory Authority (CRA)? N=1012

Table 1 compares the public's awareness of the roles and responsibilities of the Communications Regulatory Authority (CRA) in Qatar between 2019 and 2023. Awareness of the CRA's role in regulating the telecom market has increased from 76% to 81%. Conversely, there's been a decrease in awareness of its role in licensing and spectrum allocation, from 69% to 65%. Notably, in 2023, 65% are aware of the CRA's auditing and consumer satisfaction assessment activities, and 72% are aware of its engagement with stakeholders for regulatory feedback, for which data was not available (NA) in 2019. The understanding of the CRA's dedicated process for customer complaints resolution has significantly improved from 57% to 72%. However, there's a decrease in awareness of its consumer protection role from 81% to 65%. This table suggests an improvement in public knowledge of certain CRA functions, with room for increased awareness in others, highlighting the importance of ongoing public education about the CRA's activities.

Table 1: Awareness of Roles and Responsibilities of the CRA (2019 vs 2023)		
	2019	2023
Regulating the telecommunications market and services in Qatar	76%	81%
Oversees licensing and spectrum allocation to ensure fair and equitable distribution among telecom operators	69%	65%

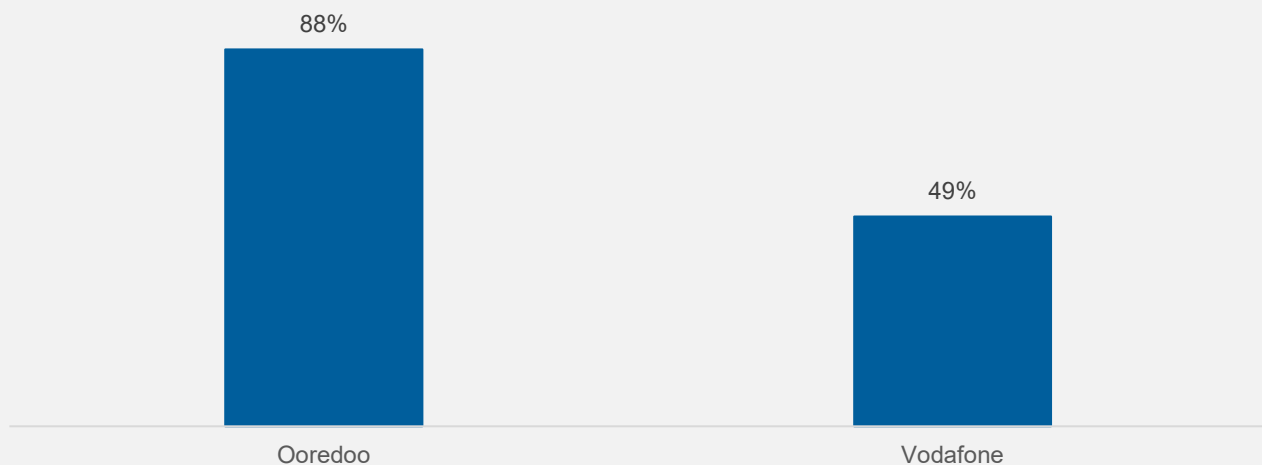
Conducts regular audits, assessments, and consumer satisfaction surveys to monitor compliance with regulations and assess the overall performance of telecom operators.	NA	65%
Engages with stakeholders to gather feedback and input on regulatory matters.	NA	72%
Dedicated process for addressing and resolving customer complaints related to telecommunications services in Qatar	57%	72%
Protects consumers from misleading and unfair practices happening in the telecommunication industry	81%	65%
<p><i>Ques. Are you aware of the following facts about activities of Communications Regulatory Authority (CRA)? Please answer in (Yes or No)</i></p> <p><i>Base: Respondents who are aware about the CRA N=1012</i></p>		

### 3. Business Consumer Perception of Telecommunication Services

#### 3.1. Usage of Telecommunication Services

The majority of business respondents report that their organization's telecommunication services are provided by Ooredoo Qatar at 88% while approximately half of the respondents mentioned that they utilized Vodafone Qatar's services at 49%. (See Figure 4).

**Figure 4: Telecommunication Service Providers Within Businesses**



Notes: Ques. For the list of the services, kindly mention the choice of Service Provider you have within your business?

N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Security Services=342, N OTT=338, N Leased Lines=256, N Cloud Services=123, N TV Services=77, N Bulk SMS=76, N IoT=71, N Hosting Services=71



Table 2 showcases Ooredoo with an average selection rate of 88%, across the majority of sectors surveyed. Vodafone is chosen by 49% of the industries, Remarkably, Ooredoo is the leading service provider for sectors such as Professional, Scientific, and Technical Activities, Education, Real Estate, Electricity, Gas, Steam and Air Conditioning Supply. This table effectively highlights the competitive landscape of telecommunication services in Qatar, reflecting sector-specific preferences and dependencies on these service providers.

Table 2: Main Telecommunication Service Providers by Industry Sectors		
	Ooredoo	Vodafone
Wholesale and Retail Trade; Repair of Motor Vehicles	86%	49%
Accommodation and Food Service Activities	85%	51%
Other Service Activities	84%	52%
Construction	87%	49%
Transportation and Storage	86%	52%
Manufacturing	88%	49%
Administrative and Support Service Activities	87%	50%
Agriculture, Forestry and Fishing	84%	54%
Professional, Scientific, and Technical Activities	89%	49%
Education	88%	49%
Financial and Insurance Activities	83%	51%
Real Estate Activities	87%	49%
Mining and Quarrying	86%	49%
Human Health and Social Work Activities	86%	50%
Information and Communication	81%	56%

Arts, Entertainment and Recreation	90%	42%
Water Supply, Sewerage, Waste Management and Remediation Activities	93%	33%
Electricity, Gas, Steam, and Air Conditioning Supply	73%	45%
<p><i>Ques. Kindly mention the choice of Service Provider you have within your business.</i>  <i>Base All Respondents N=2100, Those who use Ooredoo or Vodafone as a main service provider for all the services combined? N Wholesale &amp; Retail= 1038, N Accommodation and Food Services= 445, N Other Services= 113, N Transportation &amp; Storage=79, N Construction= 74</i></p>		

Table 3 illustrates the preference for telecommunication service providers, Ooredoo and Vodafone, among different business sizes in Qatar. For micro businesses (fewer than 10 employees), Ooredoo is chosen by 86% of respondents, while Vodafone is chosen by 51%. Among small businesses (10 to 49 employees), Ooredoo is selected by 87% and Vodafone by 49%. Medium businesses (50 to 249 employees) show a preference for Ooredoo at 88% and Vodafone at 50%. For large businesses (more than 250 employees), Ooredoo is favored by 82%, while Vodafone is favored by 56%. Overall, Ooredoo is the more frequently chosen service provider across all business sizes, with the highest preference among medium businesses. Vodafone, while less frequently chosen, shows a notable presence, particularly among large businesses.

<b>Table 3: Main Telecommunication Service Providers by Business Size</b>		
	<b>Ooredoo</b>	<b>Vodafone</b>
Micro Businesses	86%	51%
Small Businesses	87%	49%
Medium Businesses	88%	50%
Large Businesses	82%	56%
<p><i>Ques. Kindly mention the choice of Service Provider you have within your business.</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>		

In Table 4, the primary telecommunications service provider for each service utilized by businesses is depicted. Across all telecommunication services, Ooredoo Qatar emerges as the preferred choice among business consumers. However, Vodafone appears to be favored specifically for Mobile Voice and Mobile Internet services, capturing a share of 80% and 77%, respectively. Conversely, Vodafone falls short in Fixed Voice and Fixed Internet services, securing a mere 22% and 21% respectively.

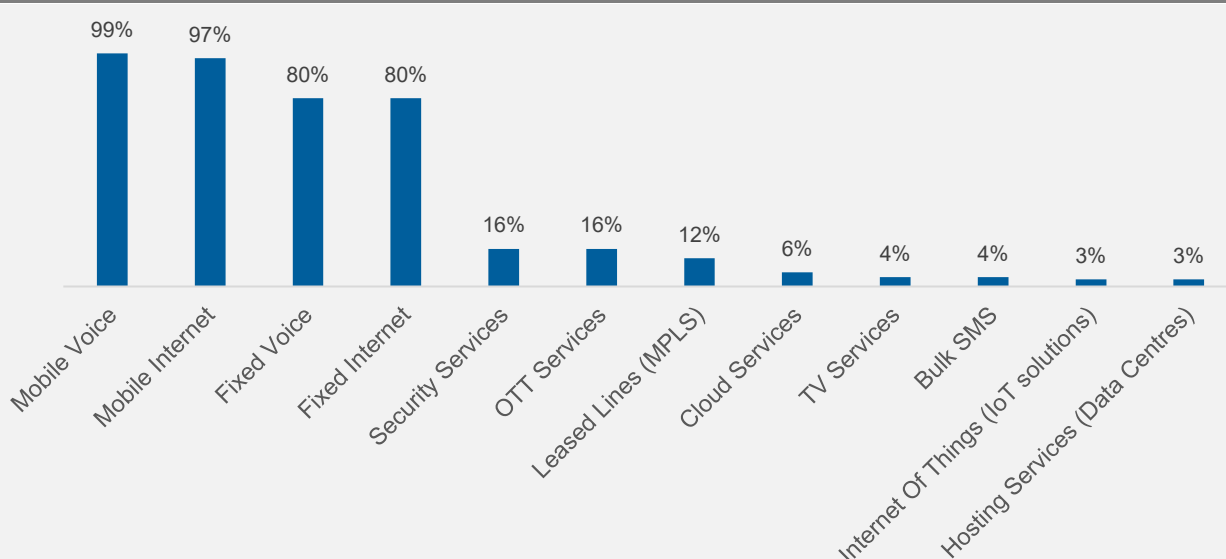
Table 4: Main Telecommunication Service Providers Within Each Service		
	Ooredoo	Vodafone
Mobile Voice	91%	80%
Mobile Internet	90%	77%
Fixed Voice	89%	22%
Fixed Internet	89%	21%
Leased Lines (MPLS)	86%	48%
Internet of Things (IoT Solutions)	80%	20%
Security Services	82%	18%
OTT Services	74%	26%
Hosting Services (Data Centers)	80%	20%
Cloud Services	80%	20%
Bulk SMS	75%	25%
TV Services	77%	23%
<p><i>Ques. For the list of the services, kindly mention the choice of Service Provider you have within your business.</i></p> <p><i>N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Security Services=342, N OTT=338, N Leased Lines=256, N Cloud Services=123, N TV Services=77, N Bulk SMS=76, N IoT=71, N Hosting Services=71</i></p>		

Almost all businesses use Mobile Voice and Mobile Internet services (99% and 97% respectively), an increase when compared with the corresponding numbers in 2019. The usage of Fixed Voice and Fixed Internet services has significantly risen, with both experiencing an increase to 80% in 2023 from 68%

for Fixed Voice and 55% for Fixed Internet in 2019. The utilization of Leased Line services (MPLS, TDM, etc.) has more than doubled, surging from 5% in 2019 to 12% in 2023.

With regards to the other services, respondents report that their company utilizes security services (16%), OTT services (16%), Cloud services (6%), TV services (4%), Bulk SMS (4%), IoT Services (3%) and Hosting services (3%) (see Figure 5).

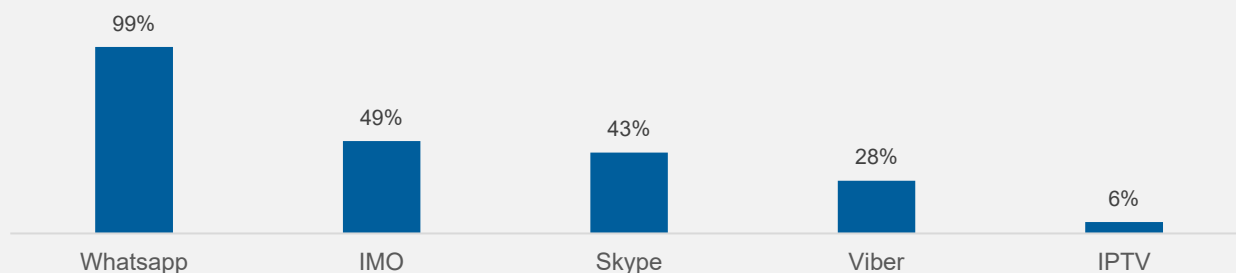
**Figure 5: Usage of Telecommunication Services**



Ques. I am now going to read out a list of telecommunication services. As I read them out, can you please tell me which services your organization currently uses? N=2100

Respondents were asked whether their companies use Over-The-Top (OTT) services. Within businesses, the most common OTT services that are being used by respondents in Qatar are WhatsApp (99%), IMO (49%), followed by Skype (43%), Viber (28%), and IPTV (6%). (See Figure 6).

**Figure 6: OTT services used by businesses**



Ques. Which Over-The-Top (OTT) services do you use? N=338

Businesses in Qatar utilize OTT (Over-the-Top) as such platforms offer cost-effective communication solutions with their free or low-cost options, appealing particularly to budget-conscious enterprises. Moreover, their global reach enables businesses to connect with international clients and partners effortlessly. With user-friendly interfaces and versatile features including text messaging, voice and video calls, and file sharing. Through OTT services, businesses can engage with customers, integrate with other tools, and enhance productivity, making them invaluable assets in the Qatari business landscape.

The majority of companies utilizing Fixed Internet services opt for Fiber as their means of accessing the Internet, with a rate of 93%, compared to 87% in 2019. Conversely, only 6% of companies access the Internet via Copper/Cable Wire, a decrease from 12% in 2019. (See Figure 7).

**Figure 7: Access to Fixed Internet**

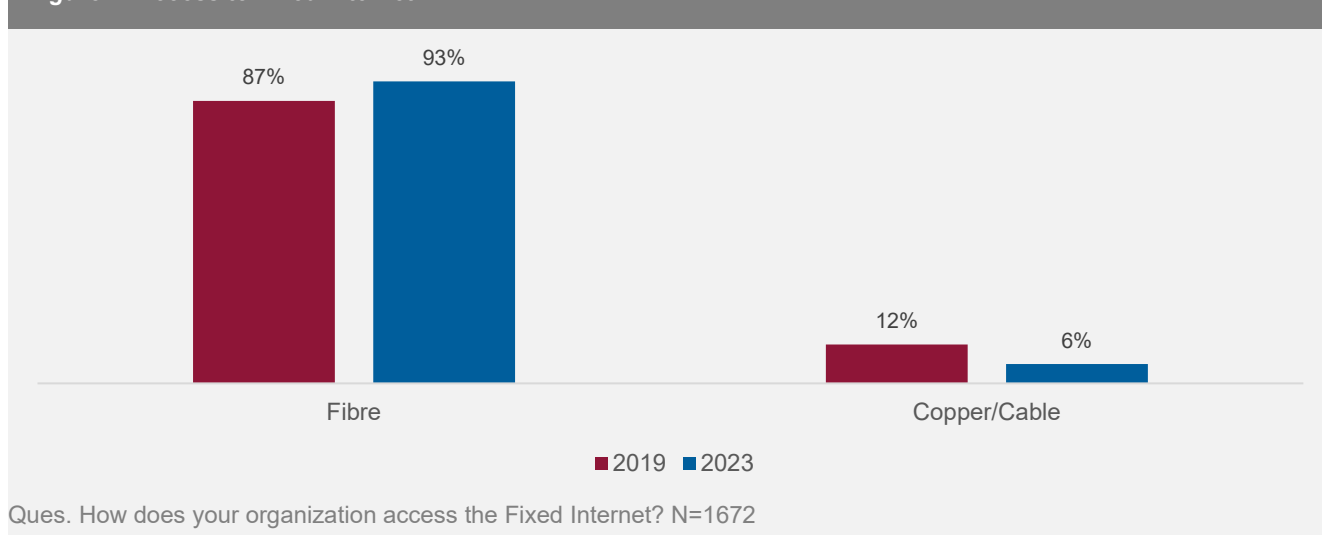


Table 5 shows the usage of Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Line by industry sector. It illustrates the penetration of various telecommunication services across different industry sectors. Mobile voice and mobile internet services exhibit the highest usage rates, with several sectors reporting full 100% adoption. Notably, the Transportation and Storage sector, Information and Communication sector, and Agriculture sector demonstrate complete reliance on these services. Conversely, leased lines show a relatively lower usage, with the highest adoption in the Real Estate Activities sector at 32%. Fixed voice and internet services show moderate to high usage, with the least dependence observed within the Information and Communication sector at 58%. Overall, the data reflects a trend towards mobile services, signalling a shift in telecommunication preferences within the business landscape in Qatar.

**Table 5: Usage of Telecommunication Services by Industry Sector**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Wholesale and Retail Trade; Repair of Motor Vehicles	99%	97%	80%	80%	12%
Accommodation and Food Service Activities	99%	97%	78%	80%	11%
Other Service Activities	97%	99%	76%	81%	12%
Construction	97%	97%	85%	84%	15%
Transportation and Storage	100%	99%	82%	73%	14%
Manufacturing	98%	97%	88%	77%	15%
Administrative and Support Service Activities	100%	100%	90%	79%	12%
Agriculture, Forestry and Fishing	100%	100%	69%	90%	8%
Professional, Scientific, and Technical Activities	96%	96%	83%	87%	22%
Education	95%	98%	88%	76%	15%
Financial and Insurance Activities	96%	96%	91%	78%	11%
Real Estate Activities	100%	100%	84%	72%	32%
Mining and Quarrying	100%	100%	83%	78%	17%
Human Health and Social Work Activities	100%	100%	85%	85%	8%
Information and Communication	100%	100%	58%	58%	0%
Arts, Entertainment and Recreation	100%	100%	86%	100%	0%
Water Supply, Sewerage, Waste Management and Remediation Activities	100%	100%	100%	67%	0%
Electricity, Gas, Steam, and Air Conditioning Supply	100%	100%	100%	100%	100%

Ques. I am now going to read out a list of telecommunication services. As I read them out, can you please tell me which services your organization currently uses?

Base All Respondents N=2100, N Wholesale & Retail= 1038, N Accommodation and Food Services= 445, N Other Services= 113, N Transportation & Storage=79, N Construction= 74

Table 6 presents a clear depiction of telecommunication service usage stratified by business size. Mobile voice services are near-universally adopted across all categories, with a slight peak in medium to large businesses, both at 100%. Mobile internet usage is similarly high, albeit with a marginal decline in large businesses to 95%. Fixed voice and internet services are consistently used by around 80% of micro to large businesses, with the least uptake by medium businesses at 76% for fixed internet. Leased lines have the least usage, although still significant, ranging from 12% in micro businesses to 17% in medium businesses. The data underscores a strong preference for mobile services, regardless of business size, indicating a prevailing trend toward mobile connectivity in Qatar's business sectors.

Table 6: Usage of Telecommunication Services by Business Size					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	99%	97%	81%	80%	12%
Small Businesses	98%	98%	81%	81%	16%
Medium Businesses	100%	99%	79%	76%	17%
Large Businesses	100%	95%	80%	91%	16%
<p>Ques. I am now going to read out a list of telecommunication services. As I read them out, can you please tell me which services your organization currently uses?</p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>					

Table 7 depicts the usage of telecommunications services across various geographic locations in Qatar, differentiated by service providers Ooredoo and Vodafone. In Doha, 91% favor Ooredoo for mobile voice services, while 90% prefer Ooredoo for mobile internet. The preference slightly shifts for fixed services, with 89% opting for Ooredoo for both voice and internet. Ooredoo is preferred in leased lines services at 84% and Vodafone at 46%. Al Rayyan and Al Wakra exhibit similar patterns. Umm Salal stands out with a notable 92% usage of Ooredoo for fixed voice services. Al Khor & Al Thakhira, and Al Shamal show the equitable distribution across services. Al Daayen has a 90% adoption of Ooredoo for fixed internet and leased lines, indicating a monopoly in those areas.

**Table 7: Usage of Telecommunication Services by Geographic Location**

Municipality	Mobile Voice			Mobile Internet			Fixed Voice			Fixed Internet			Leased Lines		
	O	V	B	O	V	B	O	V	B	O	V	B	O	V	B
Doha	21%	9%	70%	23%	10%	67%	79%	11%	10%	80%	11%	9%	54%	16%	30%
Al Rayyan	18%	10%	72%	24%	9%	67%	76%	10%	14%	78%	10%	12%	47%	15%	38%
Al Wakra	24%	7%	69%	27%	9%	64%	75%	10%	15%	75%	11%	14%	58%	0%	42%
Umm Salal	15%	9%	76%	18%	7%	75%	81%	8%	11%	81%	11%	8%	53%	12%	35%
Al Khor & Al Thakhira	20%	10%	70%	24%	14%	62%	75%	13%	12%	76%	15%	9%	59%	6%	35%
Al Shamal	12%	22%	66%	27%	10%	63%	73%	10%	17%	74%	12%	14%	45%	19%	36%
Al Daayen	45%	10%	45%	18%	0%	82%	78%	11%	11%	90%	10%	0%	100%	0%	0%
Al Sheehaniya	19%	4%	77%	24%	8%	68%	73%	11%	16%	72%	17%	11%	0%	33%	67%

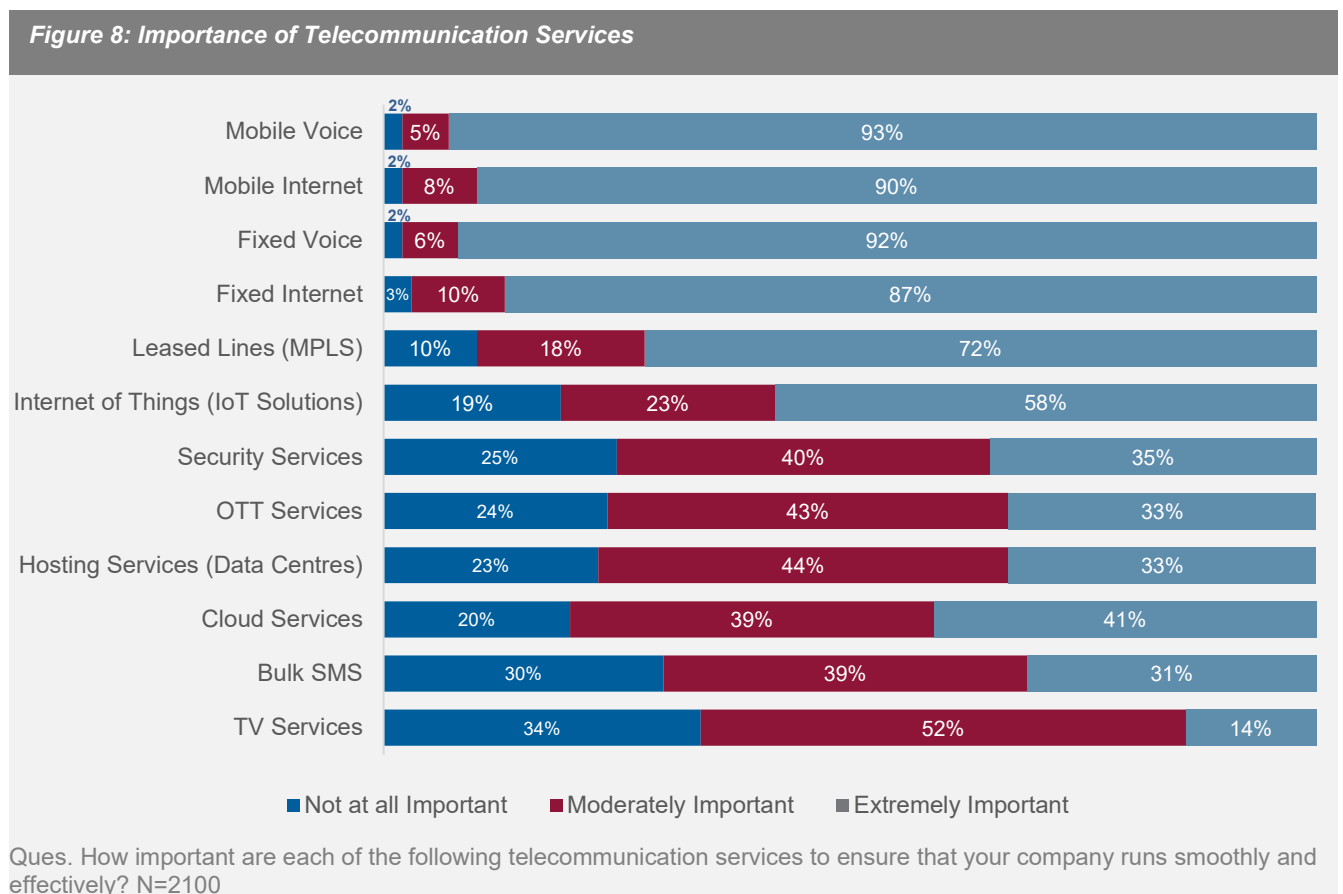
Base: All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11;).

O= Ooredoo Qatar; V= Vodafone Qatar



### 3.2. Importance of Telecommunication Services

All respondents were asked to indicate the level of importance of telecommunication services to ensure their business runs effectively using a scale of '1 to 9', where '1' means 'not at all important' and '9' means 'extremely important'. For the analysis, the research team considers the answers between '1 and 3' to be 'low importance', the answers between '4 and 6' to be 'moderate importance', and the answers between '7 and 9' to be 'high importance'. Figure 8 indicates that Mobile Voice, Mobile Internet, Fixed Voice, and Fixed Internet services are the most important services to businesses with high importance rates of 93%, 90%, 92%, and 87% respectively. The Leased Lines services are also highly important to businesses with a rating of 72%. Most of the business customers consider OTT services, Security services, Hosting Services, Cloud Services, and TV services as moderately important to ensure the company runs effectively. (See Figure 8)



The importance placed on mobile services to effectively run business operations has increased over the past four years (an increase of 4 percentage points for Mobile Voice and 4 for Mobile Internet from 2019 to 2023), whereas the level of importance placed on Fixed Voice and Internet services and Leased Lines has also increased (increase of 11 percentage points for Fixed Voice, 11 for Fixed Internet and 17 for Leased Lines from 2019 to 2023). In 2023, post COVID-19, the importance of Fixed Services has again increased showcasing a white space opportunity for the service providers (see Table 8).

<b>Table 8: Importance of Telecommunication Services (2019 vs 2023) (% of High Importance)</b>		
	<b>2019</b>	<b>2023</b>
Mobile Voice	89%	93%
Mobile Internet	86%	90%
Fixed Voice	81%	92%
Fixed Internet	76%	87%
Leased Lines (MPLS)	55%	72%
<p>Ques. How important are each of the following telecommunication services to ensure that your company runs smoothly and effectively? (Rating scale 1-9, where 1-3 is 'not at all important' and 7-9 is 'extremely important'. Even if you are not using a service directly, I would still ask you to rate its importance from a business perspective)</p> <p>Base: (2019 N=1635; 2023 N=2100)</p>		

Table 9 depicts the perceived importance of various telecommunication services across different industry sectors in Qatar, rating their significance as high. Mobile voice and internet services are deemed critically important, with the highest valuation in the Information and Communication sector and Mining Sector, at 100% for both. Fixed voice and internet services, while still considered highly important, generally receive lower importance ratings, particularly noticeable in sectors such as the Transportation, Manufacturing, and Healthcare sectors. Leased lines, although less prioritized compared to mobile services are viewed as highly important by 100% of respondents in the Water Supply, Sewerage, Waste Management, and Remediation Activities sector, emphasizing the necessity of reliable, dedicated connections for operational integrity. These insights highlight a reliance on mobile connectivity for day-to-day operations, whilst also acknowledging the critical role fixed services play in specific sectors.

**Table 9: Importance of Telecommunication Services by Industry Sector (% High Importance)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Wholesale and Retail Trade; Repair of Motor Vehicles	93%	90%	58%	55%	51%
Accommodation and Food Service Activities	94%	91%	56%	58%	50%
Other Service Activities	94%	91%	54%	52%	47%
Construction	92%	91%	57%	55%	47%
Transportation and Storage	90%	91%	46%	47%	47%
Manufacturing	91%	85%	49%	55%	42%
Administrative and Support Service Activities	86%	83%	62%	55%	57%
Agriculture, Forestry and Fishing	87%	85%	56%	59%	36%
Professional, Scientific, and Technical Activities	96%	78%	52%	61%	52%
Education	95%	93%	61%	51%	44%
Financial and Insurance Activities	98%	93%	64%	62%	58%
Real Estate Activities	92%	88%	52%	52%	32%
Mining and Quarrying	89%	100%	72%	67%	50%
Human Health and Social Work Activities	92%	92%	38%	46%	46%
Information and Communication	100%	92%	58%	67%	75%
Arts, Entertainment and Recreation	100%	86%	100%	100%	71%
Water Supply, Sewerage, Waste Management and Remediation Activities	100%	100%	67%	33%	33%
Electricity, Gas, Steam, and Air Conditioning Supply	100%	100%	50%	50%	100%
<p><i>Ques. How important are each of the following telecommunication services to ensure that your company runs smoothly and effectively? (Rating scale 1-9, where 1-3 is 'not at all important' and 7-9 is 'extremely important'. Even if you are not using a service directly, I would still ask you to rate its importance from a business perspective)</i></p>					

Base All Respondents N=2100, N Wholesale & Retail= 1038, N Accommodation and Food Services= 445, N Other Services= 113, N Transportation & Storage=79, N Construction= 74,

Table 10 depicts the levels of importance businesses of different sizes placed on various telecommunications services. Mobile voice and internet services are highly valued across all business sizes, with the largest companies ranking them as most important at 95% for mobile voice and 92% for mobile internet. Fixed voice and internet services are also considered important, especially by larger businesses, which show a notable need for these services. Leased lines have a lower importance rating, but still, half of the smallest and largest businesses see them as crucial. The data indicates a strong preference for mobile services, while still recognizing the importance of fixed services and dedicated lines for smooth business operations.

**Table 10: Importance of Telecommunication Services by Business Size (% High Importance)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	93%	90%	56%	55%	50%
Small Businesses	93%	93%	59%	57%	50%
Medium Businesses	94%	90%	56%	54%	45%
Large Businesses	95%	92%	63%	61%	50%

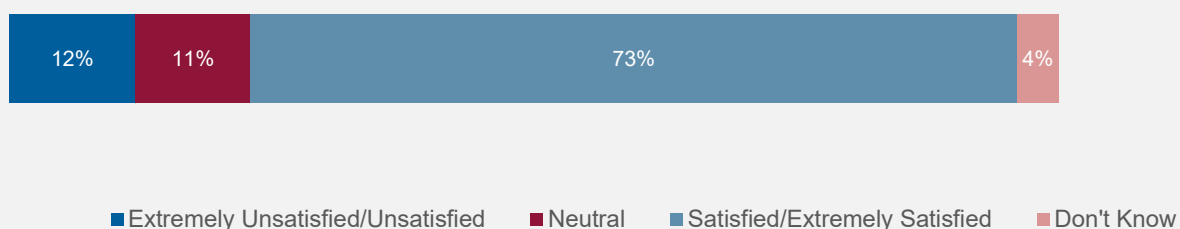
*Ques. How important are each of the following telecommunication services to ensure that your company runs smoothly and effectively? (Rating scale 1-9, where 1-3 is 'not at all important' and 7-9 is 'extremely important'. Even if you are not using a service directly, I would still ask you to rate its importance from a business perspective)*

Micro Enterprises: Fewer than 10 employees. N= 1684  
Small Enterprises: 10 to 49 employees. N= 200  
Medium Enterprises: 50 to 249 employees N=152  
Large Enterprises: More than 250 employees N=64

### 3.3. Overall Satisfaction with Telecommunication Services

Another indicator that is important to track for CRA is the level of satisfaction with telecommunication services among business consumers. Overall, there is a moderate level of satisfaction among business consumers with the overall quality of telecommunication services provided to their company (73% of respondents are either 'extremely satisfied' or 'satisfied' with the services). (see Figure 9).

**Figure 9: Overall Satisfaction with Telecommunication Services**

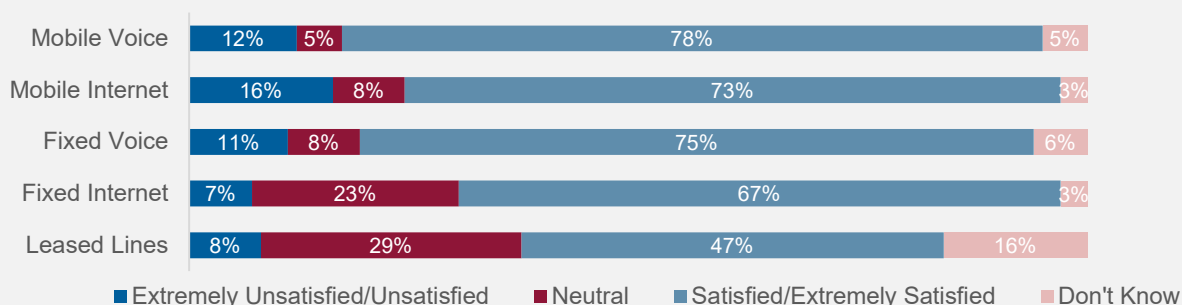


Score was calculated by taking weighted average for all services

Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

Satisfaction levels remain moderate to high across the various service offerings, with Mobile Voice and Fixed Voice recording the highest levels of satisfaction (78% and 75% respectively) (see Figure 10). When comparing the results from 2019, satisfaction levels have eased down a bit and now have a more neutral perspective for all telecommunication services. The highest neutral satisfaction is observed for Fixed Internet and Leased Lines with 23% and 29% respectively. Within Leased Lines, it is also observed that 16% of business customers responded 'Don't Know' to the question.

**Figure 10: Satisfaction with Telecommunication Services by Type of Service**



Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.

Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

Table 11 shows customer satisfaction levels with various telecommunication services, comparing data from 2019 and 2023. The overall satisfaction has adjusted from 90% to 73%, indicating a shift towards more neutral feedback rather than dissatisfaction. For mobile services, the satisfaction for voice has decreased slightly to 78%, and internet to 73%. Fixed services saw a similar movement towards neutral opinions, with fixed voice satisfaction at 75% and fixed internet at 67%. Leased lines (MPLS) satisfaction also moved to a more moderate stance at 47%. These changes suggest that customers are reassessing their satisfaction levels, possibly considering a wider range of factors in their evaluation of services such as network coverage, availability of services, network reliability, accuracy of the bill and value proposition.

<b>Table 11: Satisfaction with Telecommunication Services (2019 vs. 2023) (% Satisfied)</b>		
	<b>2019</b>	<b>2023</b>
Overall Satisfaction	90%	73%
Mobile Voice	84%	78%
Mobile Internet	83%	73%
Fixed Voice	98%	75%
Fixed Internet	94%	67%
Leased Lines (MPLS)	90%	47%
<p><i>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</i></p> <p><i>Base 2023: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</i></p> <p><i>Base 2019: N Mobile Voice=1548, N Mobile Internet=1530, N Fixed Voice=1107, N Fixed Internet=895, N Leased Lines=74</i></p> <p><i>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</i></p>		

Table 12 shows the proportion of business respondents that are either ‘extremely satisfied’ or ‘satisfied’ with each of the telecommunication services by industry sector. Mobile voice and internet services generally maintain a strong satisfaction rate, with a particularly high satisfaction rate in Human Health and Social Work Activities at 85% for both services. Satisfaction with fixed services is somewhat varied, with the highest satisfaction noted in the Food Services for fixed voice at 78%. With regards to fixed internet, the satisfaction remained moderate to high. Leased lines also showed diverse levels of satisfaction, standing out in the Construction sector at 73%. The data indicates a positive reception of telecommunication services tailored to industry-specific needs. Overall, while there are variations, the majority of sectors express a favorable view of their telecommunications services, highlighting their adequacy in meeting business requirements.

Table 12: Satisfaction with Telecommunication Services by Industry Sector (% Satisfied)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Wholesale and Retail Trade; Repair of Motor Vehicles	79%	75%	73%	67%	51%
Accommodation and Food Service Activities	79%	72%	78%	69%	48%
Other Service Activities	73%	73%	77%	66%	46%
Construction	69%	71%	62%	66%	73%
Transportation and Storage	85%	71%	74%	67%	18%
Manufacturing	75%	76%	79%	68%	40%
Administrative and Support Service Activities	79%	72%	81%	65%	57%
Agriculture, Forestry and Fishing	72%	72%	74%	66%	33%
Professional, Scientific, and Technical Activities	82%	68%	63%	60%	40%
Education	72%	75%	78%	65%	50%
Financial and Insurance Activities	84%	67%	78%	60%	60%
Real Estate Activities	96%	64%	67%	56%	13%



Mining and Quarrying	83%	61%	60%	64%	0%
Human Health and Social Work Activities	85%	85%	73%	73%	0%
Information and Communication	83%	50%	86%	71%	-
Arts, Entertainment and Recreation	86%	100%	100%	71%	-
Water Supply, Sewerage, Waste Management and Remediation Activities	67%	67%	100%	50%	-
Electricity, Gas, Steam, and Air Conditioning Supply	100%	100%	50%	100%	50%
<p><i>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</i></p> <p><i>Base All Respondents N=2100, N Wholesale &amp; Retail= 1038, N Accommodation and Food Services= 445, N Other Services= 113, N Transportation &amp; Storage=79, N Construction= 74</i></p>					

Table 13 provides a snapshot of how satisfied businesses of various sizes are with their telecommunication services. Micro businesses show a 78% satisfaction rate for mobile voice and 74% for mobile internet, indicating a favorable view of these services. Small businesses report slightly higher satisfaction, with 82% for mobile voice and 75% for mobile internet. Medium businesses have a good satisfaction level at 80% for mobile voice, though their mobile internet satisfaction drops to 65%. Large businesses express an 80% satisfaction rate for both mobile voice and fixed voice services. Fixed internet and leased lines have lower satisfaction rates across the board, with leased lines' satisfaction ranging from 46% to 53%. Overall, the table suggests businesses are generally satisfied with their telecommunication services, with mobile services notably receiving higher satisfaction scores.

<b>Table 13: Satisfaction with Telecommunication Services by Business Size (% Satisfied)</b>					
<b>Industry</b>	<b>Mobile Voice</b>	<b>Mobile Internet</b>	<b>Fixed Voice</b>	<b>Fixed Internet</b>	<b>Leased Lines</b>
Micro Businesses	78%	74%	74%	66%	46%
Small Businesses	82%	75%	76%	68%	50%
Medium Businesses	80%	65%	73%	68%	53%
Large Businesses	80%	75%	80%	66%	50%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684

Small Enterprises: 10 to 49 employees. N= 200

Medium Enterprises: 50 to 249 employees N=152

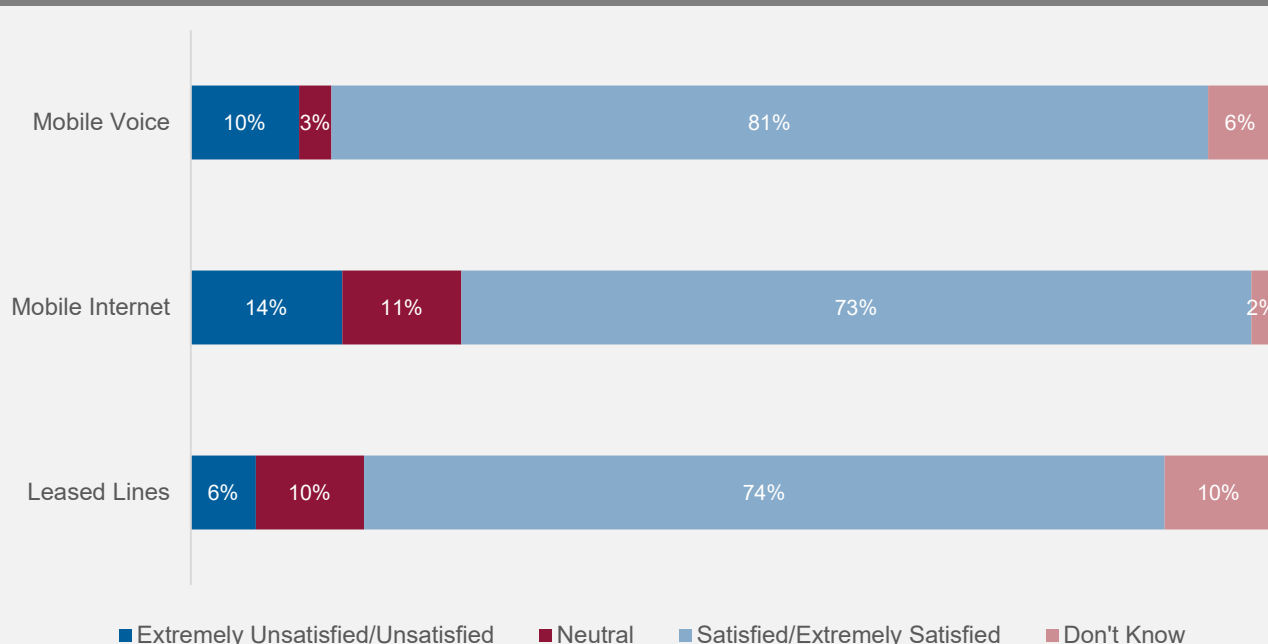
Large Enterprises: More than 250 employees N=64

### 3.4. Consumer Experience with Telecommunications Network

#### 3.4.1. Network Coverage

Overall satisfaction with network coverage for Mobile Voice and Mobile Internet is high among business consumers with 81% of respondents either 'extremely satisfied' or 'satisfied' with Mobile Voice and 73% with Mobile Internet. One out of ten and three out of twenty respondents report being either 'extremely dissatisfied' or 'dissatisfied' with the network coverage of Mobile Voice and Mobile Internet (10% and 14% respectively).

**Figure 11: Satisfaction with Network Coverage**



*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the network coverage?*

Base: N Mobile Voice=2074, N Mobile Internet=2047, N Leased Lines=256

Table 14 compares satisfaction with network coverage over four years, from 2019 to 2023. Satisfaction levels for mobile voice services have remained consistent at 81%, indicating steady approval from users. Mobile internet satisfaction has seen a slight decrease from 77% to 74%, suggesting a small change in user sentiment. Notably, leased lines were not included in the 2019 survey but had a satisfaction rate of 74% in 2023. This new data point could reflect the recent emphasis on leased lines for business operations. Overall, there is a stable satisfaction for mobile voice and a high level of satisfaction for leased lines, with a slight dip for mobile internet for network coverage over the period. The data indicates that network coverage continues to meet user needs effectively.

Table 14: Satisfaction with Network Coverage (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Voice	81%	81%
Mobile Internet	77%	74%
Leased Lines	NA	74%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the network coverage?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 15 reflects the satisfaction rates with network coverage across different areas in Qatar. In Doha, satisfaction with mobile voice stands at 80%, mobile internet at 74%, and leased lines at 76%. Al Rayyan showed similar satisfaction levels, while Al Wakrah reported higher satisfaction, particularly with leased lines at 84%. Satisfaction in Al Khor and Al Thakhira remains above 70% for all services, indicating positive reception. Al Sheehaniya showed an 87% satisfaction rate for mobile voice, although satisfaction with leased lines was observed to be 57%. Umm Salal has a notable 80% satisfaction for leased lines. Al Daayen stood out with exceptionally high satisfaction rates, 91% for both mobile voice and internet and a perfect 100% for leased lines. Al Shamal showed satisfaction rates in the lower seventies for mobile services. These figures suggest that, generally, customers are quite content with their network coverage, with some variations across regions.

Table 15: Satisfaction with Network Coverage by Area (% Satisfied)			
	Mobile Voice	Mobile Internet	Leased Lines
Doha	80%	74%	76%
Al Rayyan	79%	72%	73%
Al Wakrah	84%	81%	84%
Al Khor, Al Thakhira	81%	75%	71%
Al Shahaniya	87%	68%	57%
Umm Salal	76%	72%	80%
Al Daayen	91%	91%	100%
Al Shamal	73%	68%	-
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the network coverage?</p> <p>All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11)</p>			

Table 16 presents the satisfaction rates with network coverage as reported by customers of Ooredoo Qatar and Vodafone Qatar. For Ooredoo, 81% of users are satisfied with mobile voice coverage, while 74% are satisfied with mobile internet, and 73% with leased line services. Vodafone's users report a slightly lower satisfaction for mobile voice at 80%, but a comparable satisfaction for mobile internet at 73%. Notably, Vodafone has a higher satisfaction rate for leased lines at 80%. These figures suggest that both service providers are delivering network coverage that meets the expectations of the majority of their users.

Table 16: Satisfaction with Network Coverage by Service Provider (% Satisfied)			
	Mobile Voice	Mobile Internet	Leased Lines
Ooredoo Qatar	81%	74%	73%
Vodafone Qatar	80%	73%	80%

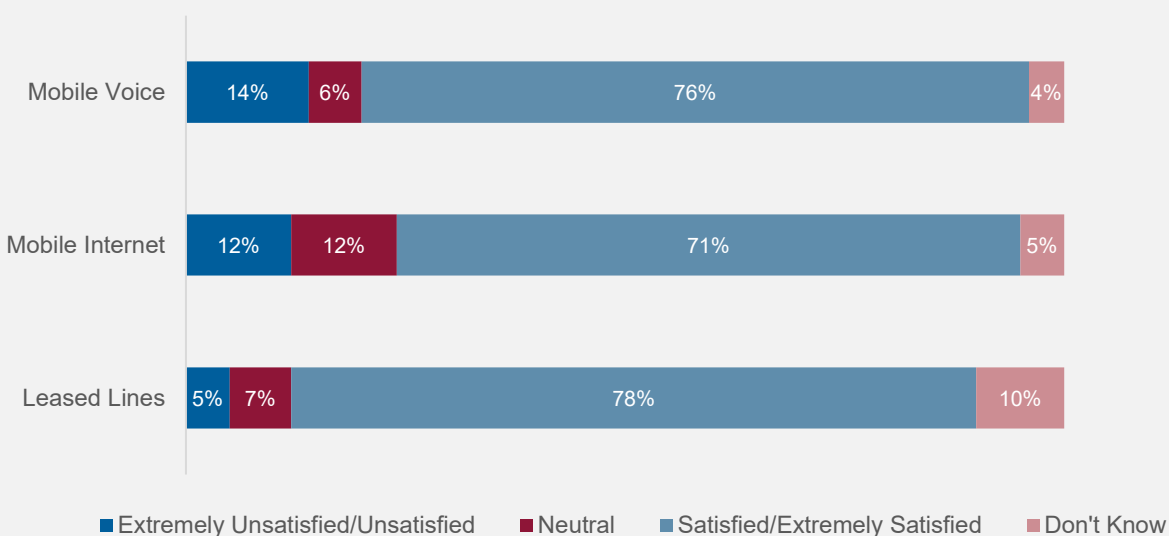
Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the network coverage?

Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

### 3.4.2. Network Reliability

Figure 12 illustrates customer satisfaction levels regarding the network reliability of Mobile Voice, Mobile Internet, and Leased Line services. Satisfaction varies by service, with overall high satisfaction reported across all categories. Leased Line services lead in satisfaction, with 78% of respondents expressing they are either 'extremely satisfied' or 'satisfied.' This is closely followed by Mobile Voice at 76% satisfaction, and Mobile Internet at 71%. Dissatisfaction levels are relatively low: 14% of respondents are dissatisfied with Mobile Voice, 12% are neutral towards Mobile Internet, and 5% are dissatisfied with Leased Line services.

Figure 12: Satisfaction with Network Reliability



Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the network reliability?

Table 17 provides a comparative analysis of user satisfaction with network reliability from 2019 to 2023. During this period, satisfaction levels have shown minor adjustments. For mobile voice services, satisfaction decreased marginally from 78% in 2019 to 76% in 2023. Similarly, mobile internet satisfaction slightly declined from 75% to 71%. Satisfaction with leased lines, while still high, fell from 90% in 2019 to 78% in 2023. Despite these modest shifts, the data underscores a continued confidence

in the reliability of these services, with the majority of users consistently reporting satisfaction.

Table 17: Satisfaction with Network Reliability (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Voice	78%	76%
Mobile Internet	75%	71%
Leased Lines	90%	78%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the network reliability?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 18 provides insight into how satisfied users are with the reliability of network services across various regions in Qatar. Satisfaction levels for mobile voice in Doha are at 76%, with mobile internet at 73%, and leased lines at 83%. Al Rayyan and Al Wakrah show similar patterns of satisfaction, with Al Wakrah slightly higher, particularly for leased lines at 74%. Al Khor and Al Thakhira have over 70% satisfaction across services, with leased lines at 88%. Al Sheehaniya records 74% satisfaction for mobile voice, but a lower 65% for mobile internet. In Umm Salal, satisfaction with mobile is notably high at 82%. Overall, these figures indicate a general satisfaction with network reliability, with some regional disparities.

Table 18: Satisfaction with Network Reliability by Area (% Satisfied)			
	Mobile Voice	Mobile Internet	Leased Lines
Doha	76%	73%	83%
Al Rayyan	75%	70%	70%
Al Wakrah	79%	68%	74%
Al Khor, Al Thakhira	74%	72%	88%
Al Shahaniya	74%	65%	71%

Umm Salal	82%	64%	80%
Al Daayen	82%	64%	50%
Al Shamal	77%	64%	-
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the network reliability?</p> <p>All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11)</p>			

Table 19 presents satisfaction levels with network reliability as reported by customers of the two major telecommunication service providers in Qatar: Ooredoo and Vodafone. For Ooredoo Qatar, 77% of users express satisfaction with mobile voice service reliability, while 70% feel the same about mobile internet reliability. Ooredoo's leased lines have a higher satisfaction rate, with 80% of users content with the service. Vodafone Qatar shows a slightly lower satisfaction for mobile voice at 73%, but a marginally higher satisfaction for mobile internet at 74%. Satisfaction with Vodafone's leased lines is at 70%. These figures highlight that both providers are perceived as reliable to a substantial proportion of their customer base, with Ooredoo having a slight edge in leased line satisfaction.

Table 19: Satisfaction with Network Reliability by Service Provider (% Satisfied)			
	Mobile Voice	Mobile Internet	Leased Lines
Ooredoo Qatar	77%	70%	80%
Vodafone Qatar	73%	74%	70%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the network reliability?</p> <p>Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p>			

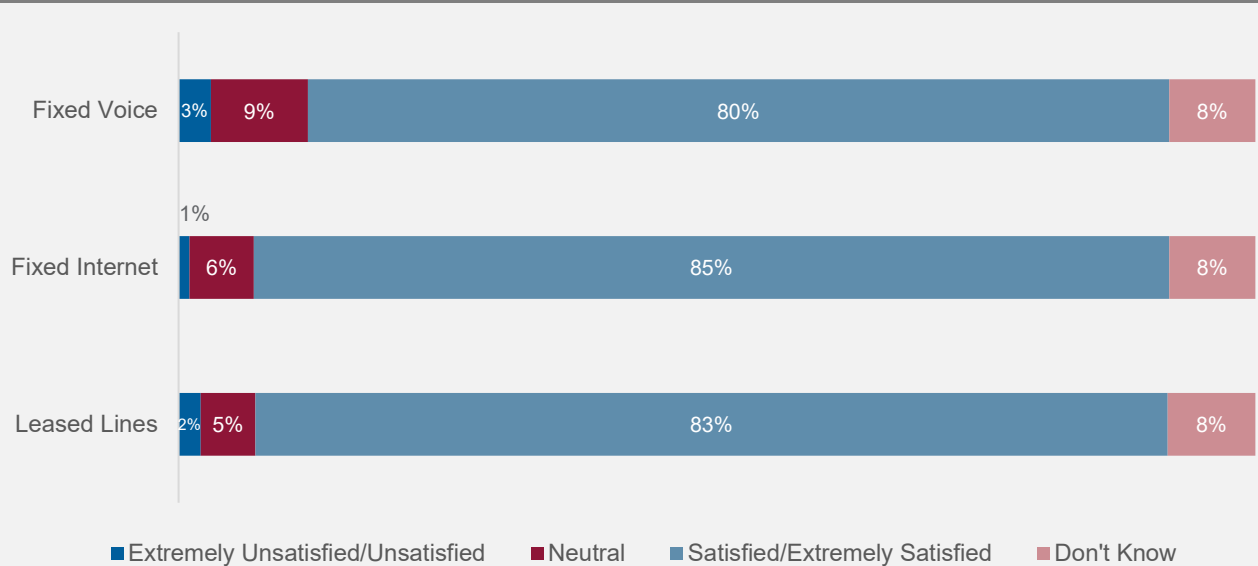


### 3.4.3. Availability of Services

Ensuring the availability of a wide range of communication services across Qatar is an important responsibility of the CRA. Figure 13 shows the level of satisfaction with the availability of Fixed Voice, Fixed Internet, and Leased Line services. Overall satisfaction with the availability of these services is high among business customers. Business consumers record the highest level of satisfaction with Fixed Internet services at 85%, followed by Leased Lines at 83% and Fixed Voice at 80%.

Business consumers expressed generally positive sentiment towards the availability of the three services, with dissatisfaction rates of only 3% for Fixed Voice and Leased Lines, and 1% for Fixed Internet.

**Figure 13: Satisfaction with Availability of Service**



*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the availability of services?*

Base: N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

Table 20 outlines customer satisfaction with the availability of telecommunication services from 2019 to 2023. It shows that satisfaction for fixed voice services has evolved from 95% to 80%, and for fixed internet services from 93% to 85%. These shifts indicate a trend towards neutrality. Similarly, satisfaction with leased lines has adjusted from 91% to 83%. Despite these changes, a significant number of customers remain content with the availability of their services, demonstrating a generally positive outlook that has become more balanced over time.

Table 20: Satisfaction with Availability of Services (2019 vs. 2023) (% Satisfied)		
	2019	2023
Fixed Voice	95%	80%
Fixed Internet	93%	85%
Leased Lines	91%	83%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of services?</p> <p>Base: N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 21 provides a detailed look at customer satisfaction with the availability of telecommunication services across different areas in Qatar. In Doha, there's a high satisfaction level with 79% for fixed voice and 85% for fixed internet, while 83% are satisfied with leased lines. Al Rayyan and Al Wakrah show similar high satisfaction rates, with Al Wakrah slightly ahead for leased lines at 84%. Satisfaction in Al Khor and Al Thakhira is strong for fixed voice at 84%, though slightly lower for leased lines. Al Sheehaniya reports remarkable satisfaction with leased lines at 90%. Umm Salal stands out with perfect satisfaction for leased lines at 100%. Al Daayen also shows complete satisfaction with leased lines. Overall, these figures indicate that service availability is generally well-received across the regions, with some areas exhibiting exceptionally high satisfaction.

**Table 21: Satisfaction with Availability of Services by Area (% Satisfied)**

	Fixed Voice	Fixed Internet	Leased Lines
Doha	79%	85%	83%
Al Rayyan	81%	87%	81%
Al Wakrah	79%	86%	84%
Al Khor, Al Thakhira	84%	82%	76%
Al Shahaniya	77%	89%	90%
Umm Salal	82%	82%	100%
Al Daayen	91%	86%	100%
Al Shamal	88%	89%	--
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of services?</p> <p>All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Daayen: 11)</p>			

Table 22 portrays the levels of customer satisfaction with the availability of various telecommunication services offered by Ooredoo Qatar and Vodafone Qatar. Ooredoo customers report an 80% satisfaction rate for fixed voice services, 85% for fixed internet, and 84% for leased lines. In comparison, Vodafone customers indicate a 76% satisfaction rate for fixed voice services, but a slightly higher satisfaction than Ooredoo for fixed internet at 86%. Satisfaction with Vodafone's leased lines is at 80%. The data suggests that both service providers are successfully meeting customer needs regarding the availability of their services, with Ooredoo having a slight edge in fixed voice and leased lines, while Vodafone leads marginally in fixed internet availability. These satisfaction levels reflect the effectiveness of the service providers in ensuring that their services are accessible to customers.

**Table 22: Satisfaction with Availability of Services by Service Provider (% Satisfied)**

	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	80%	85%	84%
Vodafone Qatar	76%	86%	80%
Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the availability of services?			
Base N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256			

### 3.4.4. Voice Quality and Clarity

Figure 14 presents the level of satisfaction with voice quality and clarity for Mobile Voice and Fixed Voice services among business consumers. Majority (85%) of respondents are either 'extremely satisfied' or 'satisfied' with the quality and clarity provided by Fixed Voice services, while satisfaction with Mobile Voice services stands at 75%. Only around 11% of businesses express dissatisfaction with the voice quality and clarity of Mobile Voice, while a notable portion of users reporting a 'neutral' stance on the quality and clarity of this service.

**Figure 14: Satisfaction with Voice Quality & Clarity**

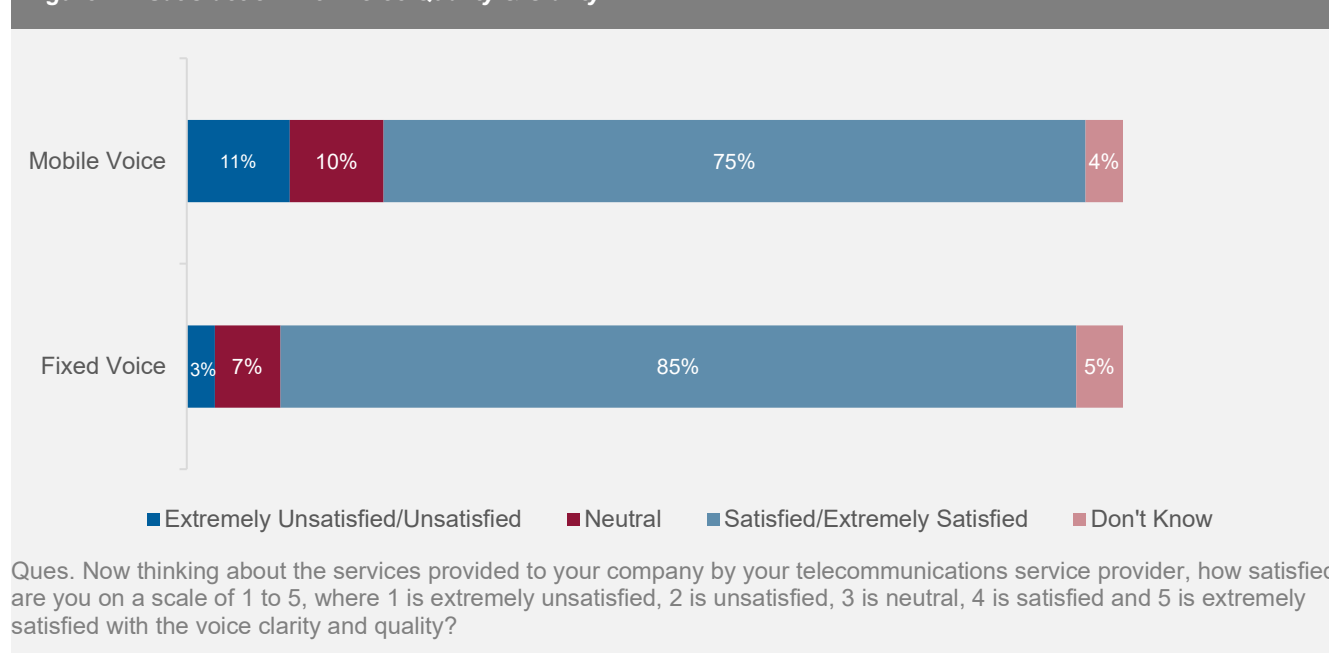


Table 23 outlines customer satisfaction with voice quality and clarity for mobile and fixed voice services, comparing the years 2019 and 2023. In 2019, satisfaction with mobile voice stood at 79%, which has seen a modest reduction to 75% by 2023. Fixed voice satisfaction has also seen a decrease from a high of 94% to 85% in the same period. Although there's a slight decline, the majority of users continue to be satisfied with the voice quality and clarity of their services. These figures suggest a continued commitment to service quality from telecommunication providers, with a generally positive reception from customers regarding the clarity and quality of voice communications.

Table 23: Satisfaction with Voice Quality and Clarity (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Voice	79%	75%
Fixed Voice	94%	85%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the Voice Quality and Clarity?</p> <p>Base: N Mobile Voice=2074, N Fixed Voice=1690</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 24 depicts customer satisfaction with voice quality and clarity for mobile voice and mobile internet services across various areas in Qatar. In Doha, satisfaction with mobile voice service stands at 74%, while satisfaction with mobile internet is at 71%, reflecting a positive reception in the nation's capital. Al Khor and Al Thakhira show the highest satisfaction for mobile voice at 84%. In contrast, Al Daayen has a unique profile with a lower satisfaction for mobile voice at 64% but a perfect satisfaction score for mobile internet at 100%. Al Shamal reports lower mobile internet satisfaction at 64%. These variations suggest that while the overall satisfaction is quite favorable, experiences can differ based on location, with Doha maintaining strong satisfaction levels indicative of the quality expected in a major urban center.

Table 24: Satisfaction with Voice Quality and Clarity by Area (% Satisfied)		
	Mobile Voice	Fixed Voice
Doha	74%	71%
Al Rayyan	75%	69%
Al Wakrah	73%	68%
Al Khor, Al Thakhira	84%	71%
Al Shahaniya	81%	68%
Umm Salal	75%	80%
Al Daayen	64%	100%
Al Shamal	81%	64%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of services?</p> <p>All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11)</p>		

Table 25 compares customer satisfaction with voice quality and clarity between two major service providers in Qatar: Ooredoo and Vodafone. For Ooredoo, 78% of users report being satisfied with the quality and clarity of mobile voice services, and 75% are satisfied with fixed voice services. Vodafone shows a similar satisfaction level for mobile voice at 79%, but a slightly lower satisfaction for fixed voice services at 68%. These statistics suggest that both providers are effectively delivering clear and reliable voice services, with Ooredoo having a slight advantage in fixed voice service satisfaction.

Table 25: Satisfaction with Voice Quality and Clarity by Service Provider (% Satisfied)		
	Mobile Voice	Fixed Voice
Ooredoo Qatar	78%	75%
Vodafone Qatar	79%	68%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the availability of services?</p>		

Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

### 3.4.5. Speed of Data

Figure 15 displays business customers' satisfaction levels with data speed for Mobile Internet and Fixed Internet services. A substantial 86% of respondents report high satisfaction with the data speed offered by Fixed Internet services. In comparison, satisfaction with Mobile Internet services is somewhat lower, with 70% of business customers expressing satisfaction. Additionally, approximately one in six respondents (16%) hold a 'neutral' view regarding the speed of Mobile Internet services.

**Figure 15: Satisfaction with Speed of Data**

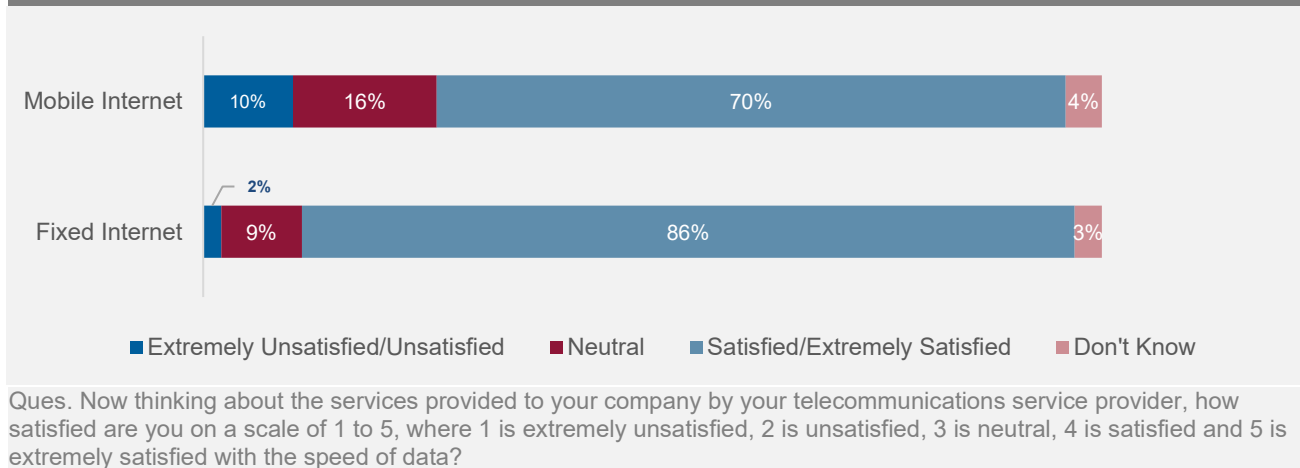


Table 26 illustrates customer satisfaction with the speed of data services over the years 2019 and 2023. In 2019, satisfaction with the speed of mobile internet was reported at 74%, which has slightly adjusted to 70% in 2023. Similarly, satisfaction with fixed internet speed has changed from 92% to 86% during the same period. Despite these adjustments, the majority of customers continue to report satisfaction with their internet speeds. This suggests that while customer expectations may be shifting, the performance of both mobile and fixed internet services still meets the satisfaction threshold for most users. Additionally, around one in six respondents (16%) maintain a 'neutral' perspective on the speed of Mobile Internet services.



**Table 26: Satisfaction with Speed of Data (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Internet	74%	70%
Fixed Internet	92%	86%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Mobile Internet?</p> <p>Base: N Mobile Internet=2047, N Fixed Internet=1672</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 27 illustrates customer satisfaction with the speed of mobile and fixed internet data services across various regions in Qatar. In Doha, the satisfaction with mobile internet speed is at 71%, while fixed internet satisfaction is higher at 85%. Al Rayyan and Al Wakrah have satisfaction rates of 67% and 72% for mobile internet respectively, with both areas showing greater satisfaction with fixed internet at 88% and 89%. Al Khor and Al Thakhira report a 65% satisfaction for mobile internet, with fixed internet at 88%. Al Sheehaniya shows a relatively high satisfaction with mobile internet at 77%. Umm Salal reflects a balanced satisfaction level for both services. Al Daayen has a notably lower satisfaction rate for mobile internet at 27%, yet a high satisfaction with fixed internet at 86%. Al Shamal shows a 76% satisfaction rate for mobile internet. These figures highlight regional variations in satisfaction with data speed, with fixed internet generally receiving higher satisfaction scores.

**Table 27: Satisfaction with Speed of Data by Area (% Satisfied)**

	Mobile Internet	Fixed Internet
Doha	71%	85%
Al Rayyan	67%	88%
Al Wakrah	72%	89%
Al Khor, Al Thakhira	65%	88%
Al Shahaniya	77%	83%

Umm Salal	72%	77%
Al Daayen	27%	86%
Al Shamal	76%	89%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the speed of data?</p> <p>All Respondents, n=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11)</p>		

Table 28 provides a comparison of customer satisfaction with the speed of data between Ooredoo Qatar and Vodafone Qatar. For mobile internet, Ooredoo has a satisfaction rate of 69%, while Vodafone is slightly higher at 73%. Both providers have an equal satisfaction rate of 86% for fixed internet. These figures indicate that customers of both service providers are more satisfied with the speed of fixed internet compared to mobile internet, reflecting the robustness and reliability of fixed network infrastructure. The higher satisfaction with Vodafone's mobile internet could suggest better performance or customer experience in that segment.

Table 28: Satisfaction with Speed of Data by Service Provider (% Satisfied)		
	Mobile Internet	Fixed Internet
Ooredoo Qatar	69%	86%
Vodafone Qatar	73%	86%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the speed of data?</p> <p>Base N Mobile Internet=2047, N Fixed Internet=1672</p>		

### 3.4.6. Variety of Plans

Figure 16 shows the level of satisfaction with a variety of Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Line services. Overall, business customers report high levels of satisfaction with the variety of plans provided for Fixed Voice (82%). In comparison, business customers are moderately satisfied with all the other services with Mobile Voice services (72% satisfied), Mobile Internet (70% Satisfied), Fixed Internet (74% satisfied), and Leased Lines (60% satisfied). One in ten respondents (11%) are 'neutral' with the variety of plans of Mobile Voice services.

Figure 16: Satisfaction with Variety of Plans

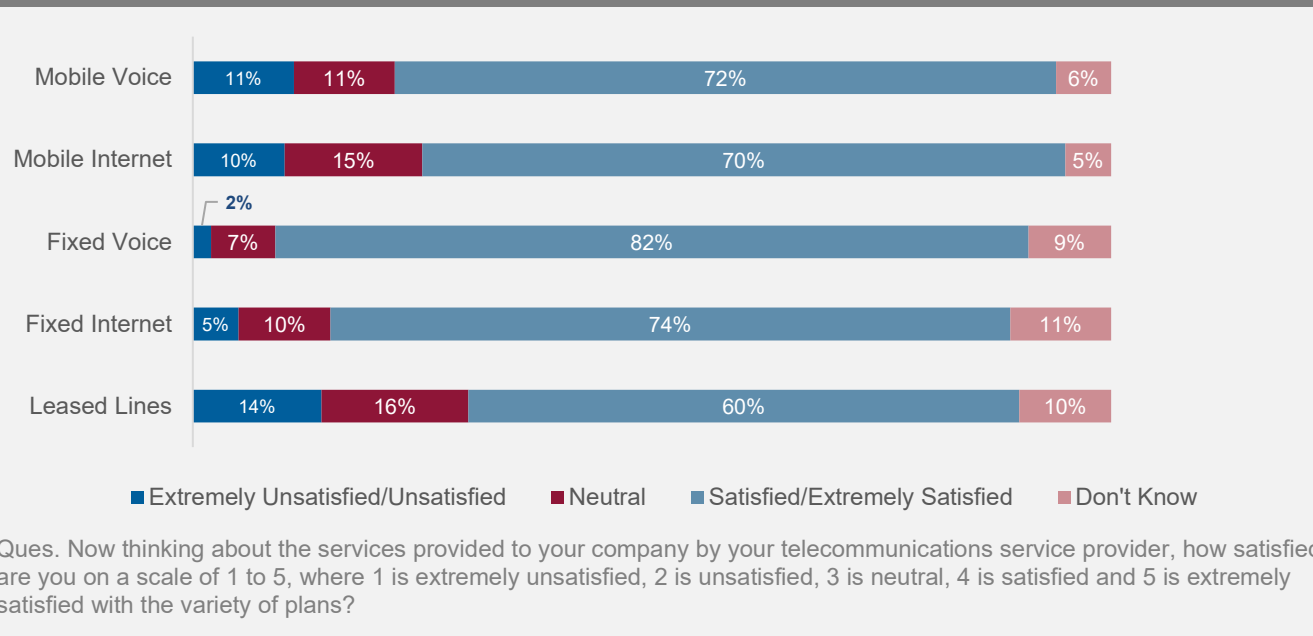


Table 29 presents customer feedback on the diversity of telecommunication plans available between 2019 and 2023. The satisfaction level for mobile voice plans was 80% in 2019 and has adjusted to 72% in 2023, indicating a reassessment of customer expectations. Mobile internet plans have shown a similar trend, moving from 76% satisfaction to 70%. For fixed voice plans, satisfaction has changed from 87% to 82%, and for fixed internet, from 80% to 74%. Leased lines show a slight increase in satisfaction, rising from 58% to 60%. Overall, the data suggest that customers are reassessing their needs, searching for plan features that better align with current requirements, while continuing to express satisfaction without marked dissatisfaction.

Table 29: Satisfaction with Variety of Plans (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Voice	80%	72%
Mobile Internet	76%	70%
Fixed Voice	87%	82%
Fixed Internet	80%	74%
Leased Lines	58%	60%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the Variety of Plans?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 30 displays the satisfaction levels among businesses of different sizes with the variety of rate plans offered by telecommunications providers. Micro businesses show a 72% satisfaction rate for mobile voice and 70% for mobile internet, indicating a moderately favorable view of the range of plans available. Small businesses report slightly lower satisfaction levels at 69% and 68% for both mobile internet and mobile voice, and similar for fixed internet at 68%. Medium businesses have similar satisfaction rates for mobile services and a higher rate for fixed voice at 85%. Large businesses show the highest satisfaction levels across all services, particularly for leased lines at 90%. These numbers suggest that while there is an overall positive reception to the rate plans offered, larger businesses are more satisfied, possibly due to more tailored options that cater to their extensive needs.

**Table 30: Satisfaction with the Variety of Rate Plans by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	72%	70%	81%	74%	57%
Small Businesses	68%	69%	83%	68%	62%
Medium Businesses	72%	70%	85%	74%	74%
Large Businesses	77%	77%	86%	74%	90%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684  
 Small Enterprises: 10 to 49 employees. N= 200  
 Medium Enterprises: 50 to 249 employees N=152  
 Large Enterprises: More than 250 employees N=64

Table 31 presents customer satisfaction with the variety of rate plans offered by two major service providers in Qatar, Ooredoo and Vodafone. Satisfaction with mobile voice services is similar for both providers, with Ooredoo at 72% and Vodafone at 71%. Mobile internet shows a slightly higher satisfaction with Vodafone at 73%, compared to Ooredoo's 69%. For fixed voice services, both providers score closely, with Ooredoo at 82% and Vodafone at 83%. Fixed internet satisfaction is higher with Ooredoo at 74%, while Vodafone has a lower satisfaction rate of 69%. Leased line satisfaction is 61% for Ooredoo and 57% for Vodafone. These figures indicate that customers find a reasonable variety of rate plans, with each provider having areas where they excel, suggesting that they are offering a range of options to cater to the diverse needs of their clientele.

**Table 31: Satisfaction with Variety of Rates by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	72%	69%	82%	74%	61%
Vodafone Qatar	71%	73%	83%	69%	57%

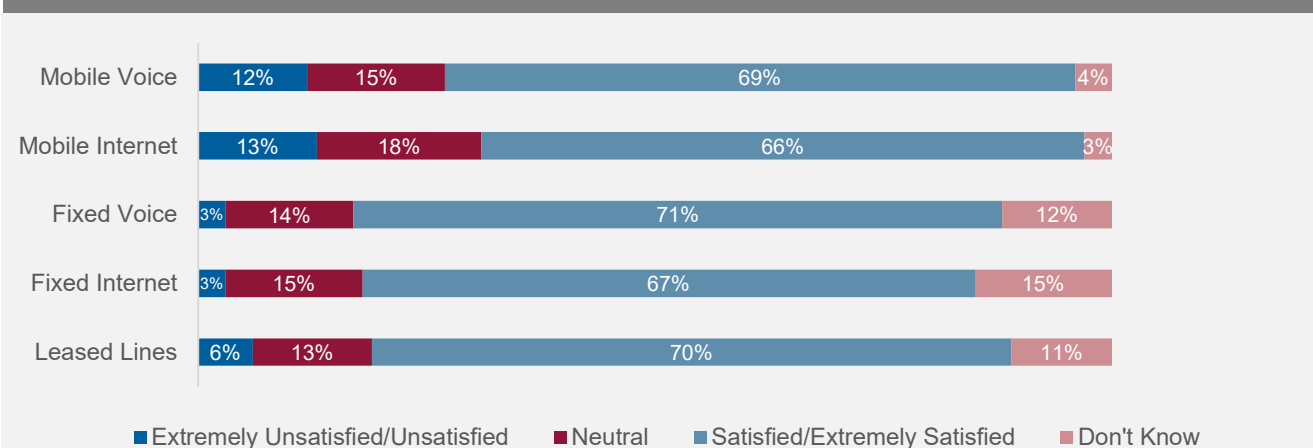
*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the speed of data?*

*Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256*

### 3.4.7. Quality of Customer Support

Figure 17 displays the level of satisfaction with customer support quality across various telecommunication services, including Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Line services. Business customers report moderate satisfaction levels with these services. Specifically, satisfaction rates are as follows: 69% for Mobile Voice, 66% for Mobile Internet, 71% for Fixed Voice, 67% for Fixed Internet, and 70% for Leased Lines. This moderate to high satisfaction can be partly attributed to business customers enhanced demand for technical support from Service providers and an expedited delivery of services. Additionally, a notable proportion of business consumers report neutral satisfaction with all telecommunication services, with responses exceeding 10% in each category.

**Figure 17: Satisfaction with Quality of Customer Support**



Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the quality of customer support?

Table 32 outlines the satisfaction levels with customer support across businesses of varying sizes. Micro businesses show a satisfaction rate of 69% for mobile voice and 71% for fixed voice, indicating a fairly positive perception of customer support. Small businesses report a higher satisfaction, particularly for leased lines at 73%. Medium businesses have the highest satisfaction for fixed voice at 76%, but their satisfaction with mobile internet support is lower at 59%. Large businesses have varying levels of satisfaction, with the highest being 70% for leased lines, and moderate satisfactions for mobile voice and fixed internet at 61% and 53%, respectively.

Table 32: Satisfaction with the Quality of Customer Support by Business Size (% Satisfied)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	69%	67%	71%	67%	71%
Small Businesses	74%	68%	67%	67%	73%
Medium Businesses	76%	59%	76%	66%	62%
Large Businesses	61%	57%	69%	53%	70%
<p>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684            Small Enterprises: 10 to 49 employees. N= 200            Medium Enterprises: 50 to 249 employees N=152            Large Enterprises: More than 250 employees N=64</p>					

Table 33 presents customer satisfaction with the quality of customer support from the major service providers in Qatar, Ooredoo and Vodafone. Both Ooredoo and Vodafone have a 69% satisfaction rate for mobile voice support. Ooredoo has a slightly lower satisfaction rate for mobile internet support at 65%, compared to Vodafone's 69%. For fixed services, Ooredoo's customer support satisfaction is 71% for voice and 67% for internet, while Vodafone has slightly lower satisfaction for voice at 70% but higher for internet at 68%. Notably, Vodafone leads in leased line support satisfaction at 80%, compared to Ooredoo's 67%. These figures suggest that customers find the quality of customer support satisfactory across both service providers, with Vodafone having a slight edge in mobile internet and leased line support.

Table 33: Satisfaction with Quality of Customer Support by Service Provider (% Satisfied)					
	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	69%	65%	71%	67%	67%
Vodafone Qatar	69%	69%	70%	68%	80%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the <i>Quality of Customer Support</i>?</p> <p>Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p>					

### 3.4.8. Ease of Understanding the Bills

Business customers were surveyed regarding their satisfaction with the clarity of their billing statements for each service. A substantial 88% of respondents reported being 'extremely satisfied' or 'satisfied' with the ease of understanding their bills for Fixed Voice and Fixed Internet services. This was followed by Mobile Internet at 71%, Leased Line at 69%, and Mobile Voice at 66%, with these services experiencing slightly lower satisfaction levels. Notably, Mobile Voice and Mobile Internet also registered the highest percentages of neutral responses, at 17% and 12% respectively, as illustrated in Figure 18

**Figure 18: Satisfaction with Ease of Understanding the Bill**

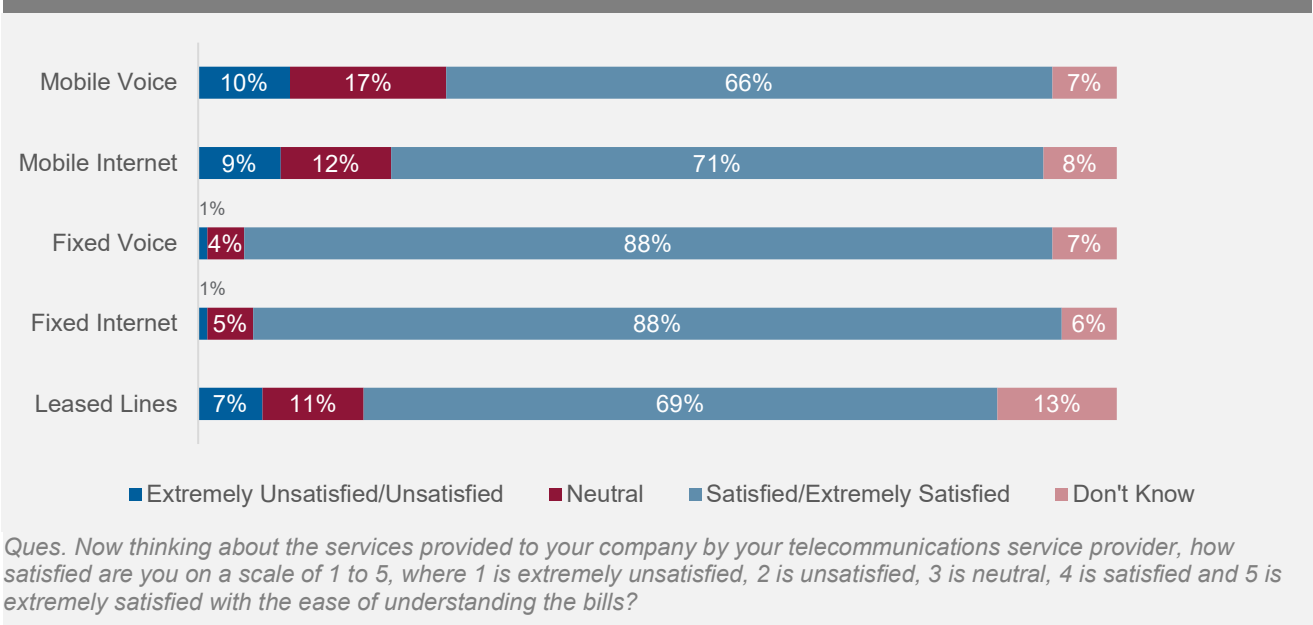


Table 34 provides a comparison of customer satisfaction regarding the ease of understanding their telecommunication bills from 2019 to 2023. In 2019, satisfaction with the clarity of mobile voice bills was at 73%, which decreased to 66% by 2023. Conversely, satisfaction with understanding mobile internet bills has remained stable, with a slight increase from 70% to 71%. Satisfaction levels for fixed voice and internet bills have shown significant improvement, rising from 82% and 79% in 2019 to 88% in 2023, respectively. However, satisfaction with leased lines bills has declined from 78% to 69%. These trends indicate that while there is a marked improvement in the comprehension of bills for fixed services, the clarity of mobile voice and leased lines bills could be enhanced to improve customer satisfaction.



**Table 34: Satisfaction with Ease of Understanding the Bills (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	73%	66%
Mobile Internet	70%	71%
Fixed Voice	82%	88%
Fixed Internet	79%	88%
Leased Lines	78%	69%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Ease of Understanding the Bills?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 35 outlines how businesses of various sizes rate their satisfaction with understanding their telecommunication bills. Micro businesses show a reasonable level of satisfaction at 66% for mobile voice and 70% for mobile internet. Satisfaction increases for fixed services, with 88% for fixed voice and 89% for fixed internet. Small businesses express a lower satisfaction for mobile voice at 63% but a higher satisfaction for fixed internet at 91%. Medium businesses report the highest satisfaction for fixed voice at 91%, but a lower 58% for leased lines. Large businesses have the least satisfaction with mobile voice at 61% and a moderate 76% for fixed internet. The satisfaction for understanding leased line bills is higher among large businesses at 70%. Overall, there's a trend of higher satisfaction with the clarity of fixed service bills compared to mobile and leased lines across business sizes.

**Table 35: Satisfaction with Ease of Understanding the Bills by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	66%	70%	88%	89%	69%
Small Businesses	63%	74%	87%	91%	71%
Medium Businesses	70%	72%	91%	85%	58%
Large Businesses	61%	74%	86%	76%	70%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684  
Small Enterprises: 10 to 49 employees. N= 200  
Medium Enterprises: 50 to 249 employees N=152  
Large Enterprises: More than 250 employees N=64

Table 36 compares customer satisfaction levels regarding the ease of understanding their bills from two major service providers in Qatar, Ooredoo and Vodafone. For Ooredoo, satisfaction with mobile voice billing stands at 65%, while mobile internet billing is slightly higher at 71%. Ooredoo's fixed voice and internet services both have higher satisfaction rates at 88%. In comparison, Vodafone customers report a slightly higher satisfaction for mobile voice and internet services, at 67% and 72% respectively. Satisfaction with Vodafone's fixed services is notably higher, at 90% for both voice and internet. For leased lines, satisfaction is 68% for Ooredoo and 70% for Vodafone customers. These figures suggest that while customers generally find their bills understandable, there is a higher satisfaction with the clarity of fixed service bills from Vodafone.

**Table 36: Satisfaction with Ease of Understanding the Bills by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	65%	71%	88%	88%	68%
Vodafone Qatar	67%	72%	90%	90%	70%

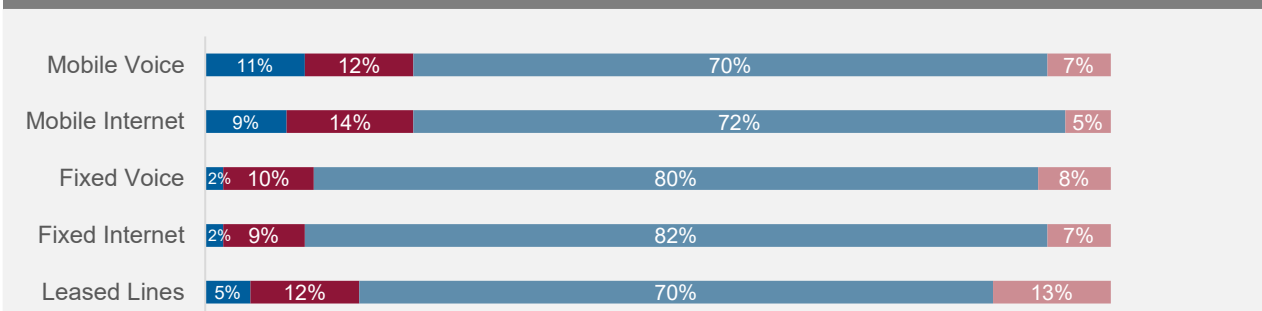
*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Ease of Understanding the Bills?*

*Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256*

### 3.4.9. Modes of Bill Payment

Business customers were also asked about their perceptions of the modes of bill payment options of telecommunication companies. The highest satisfaction with the bill payment options is noted on Fixed Internet (82%) followed by Fixed Voice (80%). Moderate satisfaction levels are observed on the Mobile Internet, Mobile Voice, and Leased Lines services (72%, 70%, and 70% respectively). Mobile Voice and Mobile Internet also garnered a (11% and 9%) total dissatisfaction rating for their bill payment options. Meanwhile, a combined 26% of business customers have neutral perceptions of the bill payment options of Mobile Voice and Mobile Internet (see Figure 19).

**Figure 19: Satisfaction with the Modes for Bill Payments**



Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the ease of understanding the bills?

Table 37 details customer satisfaction with bill payment methods for telecommunication services over the four-year period from 2019 to 2023. In 2019, satisfaction with mobile voice bill payment methods was at 75%, adjusting to 70% in 2023. Satisfaction with mobile internet payment methods has remained stable at 72%. For fixed voice services, satisfaction has shifted from 88% to 80%, while satisfaction with fixed internet remains consistent at 82%. Satisfaction with leased lines payment methods has moved from 81% to 70%. Despite these adjustments, the 2023 satisfaction rates indicate that a significant number of customers maintain a neutral stance towards the bill payment options available, suggesting that the service providers continue to offer methods that are accessible and convenient for most users.

**Table 37: Satisfaction with Modes for Bill Payment (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	75%	70%
Mobile Internet	72%	72%
Fixed Voice	88%	80%
Fixed Internet	82%	82%
Leased Lines	81%	70%

Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Modes for Bill Payment?

Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.

Table 38 displays customer satisfaction with the various modes of bill payment provided by telecommunications services, segmented by business size. Micro businesses show a 70% satisfaction level for mobile voice and a slightly higher 74% for mobile internet. Satisfaction is highest with fixed internet at 81%. Small businesses report similar satisfaction for mobile voice but higher for fixed internet at 86%. Medium-sized businesses express a 73% satisfaction for mobile voice, with a lower satisfaction rate of 65% for leased lines. Large businesses have a 69% satisfaction rate for mobile voice, with the lowest satisfaction for leased lines at 60%. The data indicates that while satisfaction is relatively consistent for mobile services, there is a variation in satisfaction with fixed services and leased lines, potentially reflecting the differing payment options or convenience across these services for businesses of varying sizes.

Table 38: Satisfaction with Modes of Bill Payment by Business Size (% Satisfied)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	70%	74%	79%	81%	71%
Small Businesses	70%	68%	83%	86%	74%
Medium Businesses	73%	69%	76%	85%	65%
Large Businesses	69%	74%	84%	83%	60%
<p><i>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684            Small Enterprises: 10 to 49 employees. N= 200            Medium Enterprises: 50 to 249 employees N=152            Large Enterprises: More than 250 employees N=64</p>					

Table 39 provides a breakdown of customer satisfaction with the modes of bill payment offered by two main service providers in Qatar, Ooredoo and Vodafone. Ooredoo's customers have reported a 71% satisfaction rate for mobile voice and a slightly higher 72% for mobile internet bill payment methods. Satisfaction with Ooredoo's fixed voice and internet bill payment stands at 80% and 82%, respectively, and 71% for leased lines. Vodafone's customers show a marginally lower satisfaction for mobile voice at 69% but a slightly higher satisfaction for mobile internet at 73%. Both service providers have an equal satisfaction rate of 80% for fixed voice bill payment methods, but Vodafone has a slightly higher rate for fixed internet at 83% and a lower 69% satisfaction rate for leased lines. These figures indicate that most customers are fairly satisfied with the current bill payment options available to them.

**Table 39: Satisfaction with Modes of Bill Payment by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	71%	72%	80%	82%	71%
Vodafone Qatar	69%	73%	80%	83%	69%

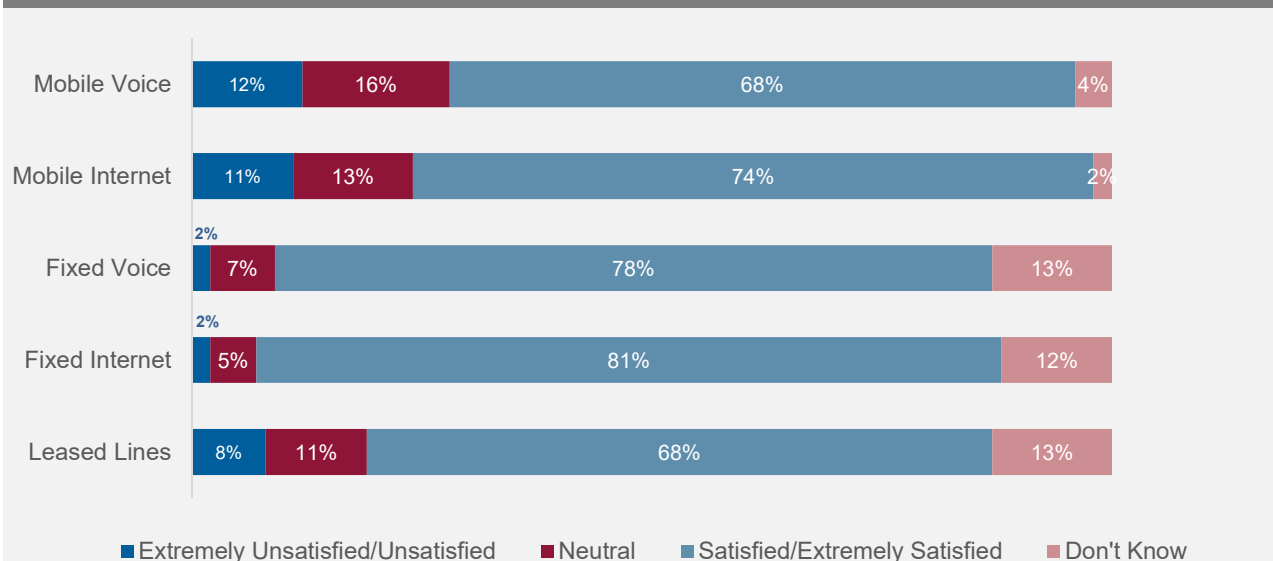
Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Modes of Bill Payment?

Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

### 3.4.10. Accuracy of the Bill

Business customers were also asked to rate their satisfaction with the accuracy of bills for services. The highest satisfaction can be noted on the Fixed Internet (81%) and Fixed Voice (78%). This is followed by Mobile Internet at 74%, Mobile Voice, and Leased Lines at 68% each. Satisfaction with the accuracy of bills on the Mobile Voice and Leased Lines is satisfactory at 68%. Meanwhile, some remain highly neutral with services like the Mobile Voice (16%) and Mobile Internet (13%). Higher dissatisfaction scores can be noted in the same categories with Mobile Voice (12%) and Mobile Internet (11%) (see Figure 20).

**Figure 20: Satisfaction with the Accuracy of the Bills**



Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the accuracy of the bills?

Table 40 presents a comparison of customer satisfaction with the accuracy of billing for various telecommunication services between 2019 and 2023. In 2019, satisfaction with the accuracy of mobile voice bills was at 71%, which slightly adjusted to 68% by 2023. Satisfaction with mobile internet billing accuracy showed improvement, rising from 68% to 74%. Fixed voice service billing accuracy shifted from 80% to 78%, while satisfaction with fixed internet service billing accuracy increased from 76% to 81%. Satisfaction regarding the accuracy of leased lines bills adjusted from 80% to 68%. These statistics reveal that, over the four-year span, there has generally been consistent maintenance or improvement in billing accuracy for internet services, while satisfaction with mobile voice and leased lines billing has seen marginal adjustments.

<b>Table 40: Satisfaction with Accuracy of the Bills (2019 vs. 2023) (% Satisfied)</b>		
	<b>2019</b>	<b>2023</b>
Mobile Voice	71%	68%
Mobile Internet	68%	74%
Fixed Voice	80%	78%
Fixed Internet	76%	81%
Leased Lines	80%	68%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Accuracy of the Bills?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 41 presents the satisfaction levels of businesses of various sizes with the accuracy of their telecommunication bills. Micro businesses report a satisfaction level of 68% for mobile voice and 75% for mobile internet, suggesting a favorable view of billing accuracy. Small businesses show slightly lower satisfaction rates, particularly for leased lines at 54%. Medium-sized businesses are more satisfied with mobile internet at 77% and fixed services at 79% for voice and 81% for internet. Large businesses have higher satisfaction with fixed voice at 82%, but report the least satisfaction with leased lines at 50%. Overall, while there are variations across different business sizes and services, the majority of businesses report a positive level of satisfaction with the accuracy of their telecommunication bills.

**Table 41: Satisfaction with Accuracy of the Bills by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	68%	75%	78%	82%	72%
Small Businesses	63%	73%	79%	81%	54%
Medium Businesses	70%	77%	79%	81%	65%
Large Businesses	66%	74%	82%	76%	50%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684  
 Small Enterprises: 10 to 49 employees. N= 200  
 Medium Enterprises: 50 to 249 employees N=152  
 Large Enterprises: More than 250 employees N=64

Table 42 examines customer satisfaction with the accuracy of the bills from two major service providers in Qatar, Ooredoo and Vodafone. For Ooredoo, 68% of customers report satisfaction with their mobile voice billing, 75% with mobile internet, 77% with fixed voice, and 82% with fixed internet. Satisfaction with Ooredoo's leased lines bills is at 67%. In contrast, Vodafone has slightly lower satisfaction for mobile voice at 67% but higher for fixed voice at 83%. Vodafone's customers also report 73% satisfaction with mobile internet, 80% with fixed internet, and a notably higher 72% satisfaction with leased lines billing. These figures suggest that customers generally regard the billing from both providers as accurate, with Vodafone customers expressing a slightly higher satisfaction for fixed voice and leased lines bills.

**Table 42: Satisfaction with Accuracy of the Bills by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	68%	75%	77%	82%	67%
Vodafone Qatar	67%	73%	83%	80%	72%

*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Accuracy of the Bills?*

*Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256*

### 3.4.11. Regularity of Bills Received

Respondents were asked about their satisfaction with the regularity of receiving bills for services. Figure 21 shows satisfaction with the regularity of receiving bills for the service. The highest satisfaction is noted on Fixed Voice and Fixed Internet (78% each) followed by Mobile Internet (70%). Meanwhile, the lowest satisfaction scores can be observed for Mobile Voice (66%) and Leased Lines (67%). Higher neutral scores can also be noted on Mobile Voice (17%) and Mobile Internet (14%).

**Figure 21: Satisfaction with the Regularity of Receiving Bills**

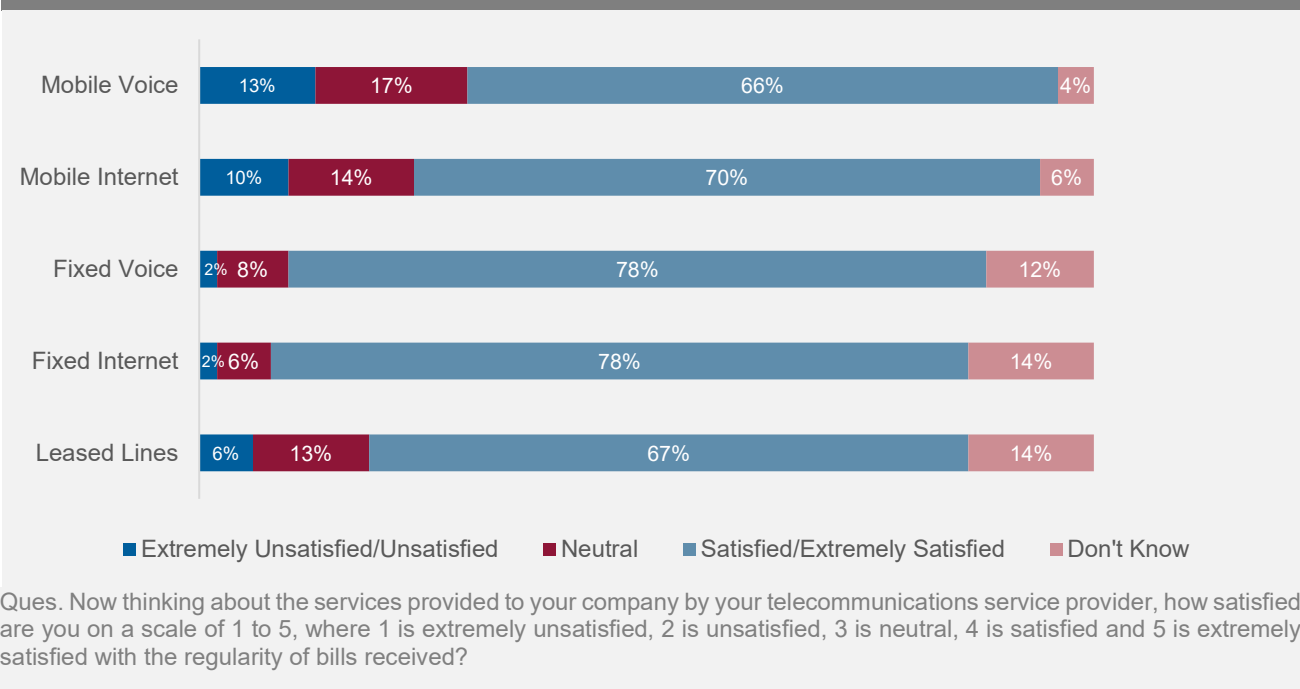


Table 43 outlines customer satisfaction with the regularity of billing for telecommunication services from 2019 to 2023. Satisfaction with mobile voice bill regularity adjusted from 73% in 2019 to 66% in 2023. Mobile internet bill regularity satisfaction saw a slight change from 71% to 70%. For fixed voice, satisfaction shifted from 81% in 2019 to 78% in 2023, while fixed internet bill regularity remained consistent at 78% throughout the period. The most notable adjustment occurred with leased lines, where satisfaction with bill regularity altered from 88% to 67%. Despite these adjustments, the data indicate that a majority of business consumers hold a neutral perspective, suggesting that most customers continue to receive their bills regularly and predictably, which is essential for efficient business planning and budgeting.



**Table 43: Satisfaction with Regularity of Bills Received (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	73%	66%
Mobile Internet	71%	70%
Fixed Voice	81%	78%
Fixed Internet	78%	78%
Leased Lines	88%	67%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Accuracy of the Bills?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 44 provides an overview of how satisfied businesses of varying sizes are with the regularity of their telecom billing. Micro businesses show a satisfaction level of 66% for mobile voice and 70% for mobile internet. There's higher satisfaction with fixed services, with 77% for voice and 78% for internet. Small businesses have a slightly lower satisfaction for mobile services, but a notable drop to 59% for leased lines. Medium-sized businesses express similar satisfaction for mobile services and a high 85% for fixed internet, with leased lines at 83%. Large businesses report the highest satisfaction across all services, particularly with leased lines at 90%. The data indicates that while satisfaction is generally good, particularly for fixed services, there may be room for improvement in the billing regularity for mobile services and leased lines, especially for smaller businesses.

**Table 44: Satisfaction with Regularity of Bills Received by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	66%	70%	77%	78%	65%
Small Businesses	64%	69%	78%	75%	59%
Medium Businesses	66%	68%	76%	85%	83%
Large Businesses	72%	67%	86%	74%	90%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684  
Small Enterprises: 10 to 49 employees. N= 200  
Medium Enterprises: 50 to 249 employees N=152  
Large Enterprises: More than 250 employees N=64

Table 45 compares customer satisfaction with the regularity of bills received from two main telecom service providers in Qatar, Ooredoo and Vodafone. Ooredoo customers report a 67% satisfaction rate for mobile voice and 70% for mobile internet, indicating that most users find billing occurs at consistent intervals. Satisfaction with Ooredoo's fixed voice and internet services is higher, at 77% and 78% respectively, while leased lines have a satisfaction rate of 67%. Vodafone's customers express slightly lower satisfaction for mobile services, at 64% for voice and 69% for internet, but report higher satisfaction for fixed services at 78% for voice and 79% for internet. The satisfaction rates for leased lines are identical for both providers at 67%. Overall, these figures suggest customers generally find the billing regularity satisfactory across both providers, with some room for improvement, particularly in mobile services.

**Table 45: Satisfaction with Regularity of Bills Received by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo	67%	70%	77%	78%	67%
Vodafone	64%	69%	78%	79%	67%

Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Regularity of Bills Received?

Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

### 3.4.12. Ease of Purchasing Services

To understand business customers' perceptions on provisioning, respondents were asked to rate their satisfaction with the ease of purchasing services for each service that their company uses. The highest satisfaction is noted Fixed Voice users (84%), followed by Fixed Internet users (75%) and Mobile Voice users (74%). A low level of satisfaction was noted for Mobile Internet users (66%) and Leased Lines users (69%). Almost, 20% Mobile Internet users have a neutral perspective with ease of purchasing services. (see Figure 22)

**Figure 22: Satisfaction with the Ease of Purchasing Services**

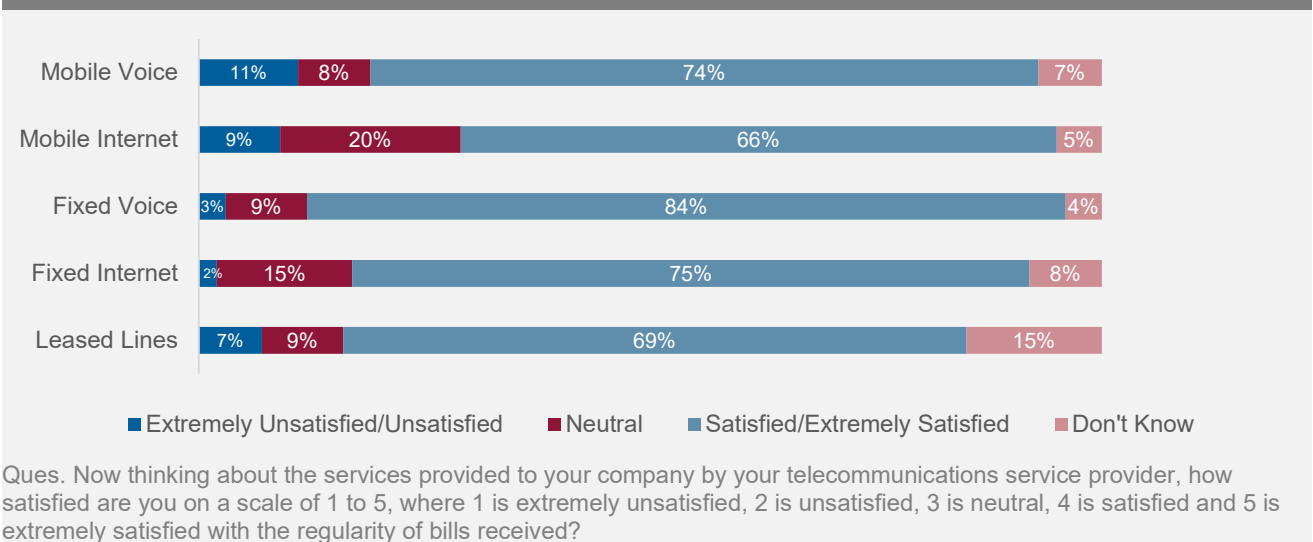


Table 46 presents a comparative view of customer satisfaction with the ease of purchasing telecommunication services in 2019 and 2023. There was a slight decrease in satisfaction for mobile voice services from 78% to 74%, and a more noticeable decrease for mobile internet from 75% to 66%. Fixed voice services saw a reduction from 94% to 84%, while fixed internet services experienced a drop from 87% to 75%. Leased lines also saw a decline in customer satisfaction from 83% to 69%. Although there is a downward trend in satisfaction with regards to purchasing across all services, the majority of customers still report a level of satisfaction above 65%, indicating that, overall, the process of purchasing services is relatively straightforward and accessible for most users. The data is valuable for service providers to identify areas for improvement in the purchasing experience.

**Table 46: Satisfaction with Ease of Purchasing Services (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	78%	74%
Mobile Internet	75%	66%
Fixed Voice	94%	84%
Fixed Internet	87%	75%
Leased Lines	83%	69%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Accuracy of the Bills?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 47 depicts satisfaction levels with the ease of purchasing telecom services among businesses of different sizes. Micro businesses report a 74% satisfaction rate for mobile voice and 66% for mobile internet, indicating a fairly positive experience in acquiring these services. For fixed services, they show higher satisfaction at 84% for voice and 75% for internet, with leased lines at 72%. Small businesses have slightly lower satisfaction rates, particularly for leased lines at 50%. Medium businesses are more satisfied with mobile voice services at 77%, while their satisfaction for leased lines is 58%. Large businesses show high satisfaction across all services, particularly noting an 80% satisfaction rate for fixed voice and leased lines. The data suggests that the process of purchasing services is generally satisfactory, with some variability across different service types and business sizes.

**Table 47: Satisfaction with Ease of Purchasing Services by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	74%	66%	84%	75%	72%
Small Businesses	71%	62%	82%	77%	50%
Medium Businesses	77%	65%	81%	75%	58%

Large Businesses	77%	77%	80%	79%	80%
<p><i>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>					

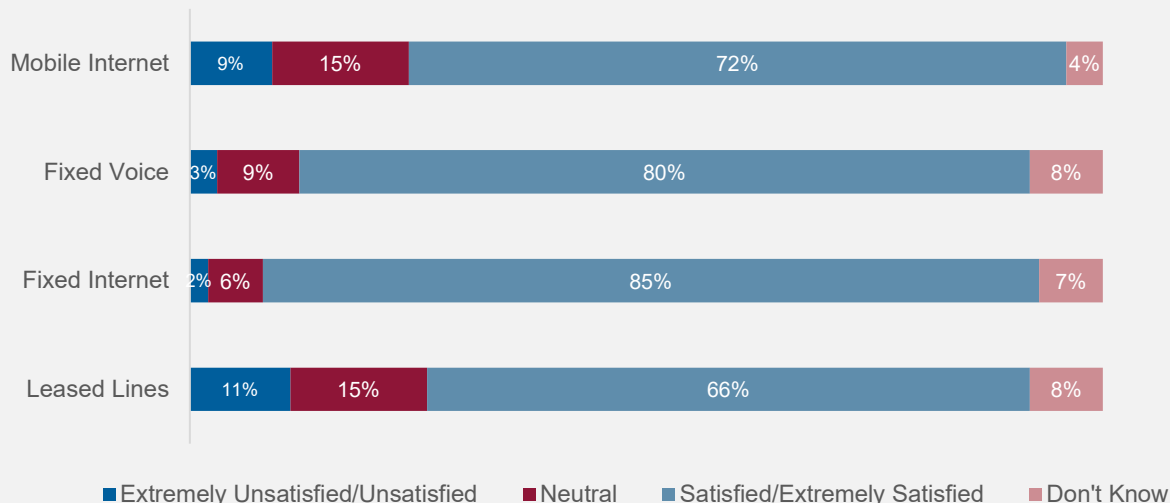
Table 48 presents customer satisfaction with the ease of purchasing various telecommunication services from Ooredoo and Vodafone in Qatar. Both providers scored equally for mobile voice services at 74% satisfaction. For mobile internet, Ooredoo is slightly ahead at 68% compared to Vodafone's 63%. Ooredoo also leads in fixed voice services satisfaction at 84%, while Vodafone's customers report a satisfaction rate of 83%. In terms of fixed internet, Ooredoo has a satisfaction score of 74%, with Vodafone slightly higher at 79%. For leased lines, customer satisfaction is 67% for Ooredoo and higher for Vodafone at 74%. These figures indicate that customers generally find the process of purchasing services from both providers to be satisfactory, with Vodafone having a slight edge in fixed internet and leased lines services.

<b>Table 48: Satisfaction with Ease of Purchasing Services by Service Provider (% Satisfied)</b>					
	<b>Mobile Voice</b>	<b>Mobile Internet</b>	<b>Fixed Voice</b>	<b>Fixed Internet</b>	<b>Leased Lines</b>
Ooredoo	74%	68%	84%	74%	67%
Vodafone	74%	63%	83%	79%	74%
<p><i>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Ease of Purchasing Services?</i></p> <p><i>Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</i></p>					

### 3.4.13. Transparency of Prices Offered

Another aspect of users' satisfaction with services provided to business consumers, is their satisfaction with the transparency of prices. Respondents were asked to indicate how satisfied they are with the transparency of prices for the different services they are provided. The highest level of satisfaction was noted for Fixed Internet (85%), followed by Fixed Voice (80%). Moderate satisfaction levels were witnessed for Mobile Internet (72%) and slightly lower level of satisfaction for Leased Lines (66%). Around 15% of business consumers had a neutral perspective for Mobile Internet and Leased Lines (see Figure 23).

Figure 23: Satisfaction with the Transparency of Prices



Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the transparency of prices offered?

Table 49 compares customer satisfaction with the transparency of pricing for telecommunication services between the years 2019 and 2023. In 2019, satisfaction with the price transparency of mobile internet was at 71%, which slightly improved to 72% in 2023. Satisfaction for fixed voice services adjusted from 88% to 80%, while leased lines saw a more significant adjustment from 81% to 66%. Satisfaction with fixed internet showed an enhancement, rising from 84% to 85%. These statistics indicate that while there has been an improvement in clarity regarding mobile and fixed internet services, there remains a significant opportunity to enhance the transparency of pricing for fixed voice and leased line services

Table 49: Satisfaction with Transparency of Prices (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Internet	71%	72%
Fixed Voice	88%	80%
Fixed Internet	84%	85%
Leased Lines	81%	66%

Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Transparency of Prices?

Base: N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.

Table 50 depicts the satisfaction of businesses of various sizes with the transparency of pricing for telecommunication services. Micro businesses show a 72% satisfaction level with mobile internet pricing, and a high of 85% satisfaction with fixed internet pricing. Small businesses have a 70% satisfaction rate for mobile internet and 75% for leased lines. Medium-sized businesses exhibit a slightly lower satisfaction for mobile internet at 68%, but a notable 90% for fixed internet. Large businesses report 70% satisfaction for mobile internet, with the least satisfaction for leased lines at 60%. Overall, fixed internet services tend to have higher satisfaction rates regarding price transparency, suggesting that businesses feel well-informed about the costs associated with these services. Conversely, leased lines have more varied satisfaction levels, indicating a potential area for improved pricing clarity.

Table 50: Satisfaction with Transparency of Prices by Business Size (% Satisfied)				
Industry	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	72%	81%	85%	64%
Small Businesses	70%	77%	84%	75%
Medium Businesses	68%	80%	90%	70%
Large Businesses	70%	82%	86%	60%
<p>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services on the overall? Please rate your satisfaction on the same 1 to 5 scale.</p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>				

Table 51 presents customer satisfaction ratings regarding the transparency of pricing from two telecom service providers, Ooredoo and Vodafone, in Qatar. For mobile internet, Ooredoo achieves a satisfaction score of 71%, while Vodafone slightly edges higher at 74%. Regarding fixed voice, Ooredoo maintains an 81% satisfaction rate, whereas Vodafone's customers report satisfaction level at 74%. Both providers receive an equal satisfaction rate of 85% for fixed internet.

However, there's a noticeable difference in satisfaction with leased lines, with Ooredoo at 68% and

Vodafone at 59%. These figures indicate that customers generally perceive fixed internet pricing to be the most transparent, with opportunities for enhancing transparency in pricing for leased lines.

Table 51: Satisfaction with Transparency of Prices by Service Provider (% Satisfied)				
	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo	71%	81%	85%	68%
Vodafone	74%	74%	85%	59%

Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Transparency of Prices?

Base N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256

#### 3.4.14. Quality of Video

Figure 24 shows the level of satisfaction with quality of video access and streaming for Mobile Internet and Fixed Internet services. Fixed Internet users are generally more satisfied with the quality of video access and streaming than Mobile Internet users (88% and 69% respectively extremely satisfied/satisfied).

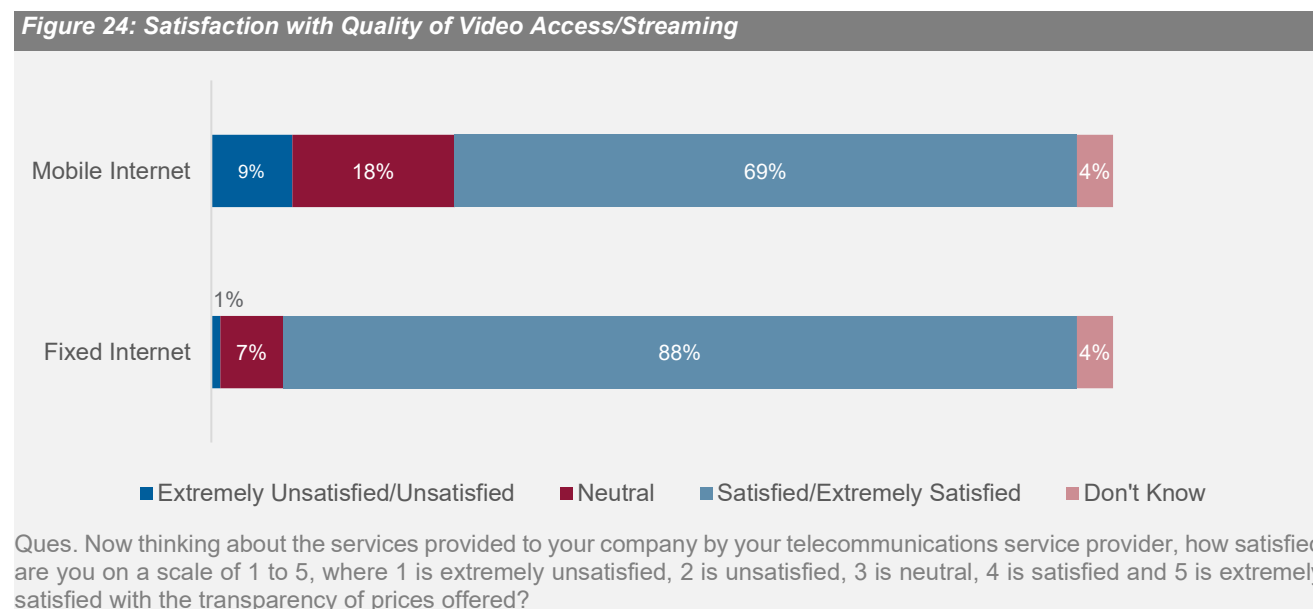


Table 52 presents customer satisfaction with the quality of video streaming services over mobile and fixed internet from 2019 to 2023. For mobile internet, there was a slight adjustment in satisfaction from 75% to 69%, indicating a subtle shift in user sentiment. Fixed internet services experienced satisfaction,



remained to be 88% in 2023. This data highlights the significance customers place on video streaming quality, with fixed internet maintaining a notably higher satisfaction rate. As digitalization in the business landscape increases, there is a growing demand for improvements in video streaming quality across Doha and the outskirts, alongside technological advancements. The adjustments over the four-year period suggest potential changes in customer expectations or experiences, yet the continued high satisfaction for fixed internet implies strong performance in video streaming services within that domain.

Table 52: Satisfaction with Quality of Video Streaming (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Internet	75%	69%
Fixed Internet	91%	88%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Transparency of Prices?</p> <p>Base: N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 53 presents customer satisfaction with the quality of video streaming by area, comparing mobile and fixed internet services. In Doha, satisfaction with mobile internet video quality is reported at 68%, while fixed internet enjoys higher satisfaction at 88%. Al Rayyan and Al Wakra display similar trends, with fixed internet satisfaction at 89% and 86%, respectively, surpassing mobile internet. Umm Salal also indicates higher satisfaction with fixed internet at 88%. Al Khor & Al Thakhira and Al Shamal show a preference for fixed internet, with Al Shamal notably reporting the highest fixed internet satisfaction at 95%. Al Daayen reflected where mobile internet satisfaction exceeds that of fixed internet. Overall, fixed internet generally provides a more satisfactory video streaming experience across most areas.

Table 53: Satisfaction with Quality of Video by Area (% Satisfied)		
	Mobile Internet	Fixed Internet
Doha	68%	88%
Al Rayyan	71%	89%

Al Wakra	72%	86%
Umm Salal	66%	88%
Al Khor & Al Thakhira	69%	83%
Al Shamal	66%	95%
Al Daayen	73%	71%
Al Sheehaniya	56%	84%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the quality of video?</p> <p><i>All Respondents, N=2100 (Doha: 1081; Al Rayyan: 515; Al Wakra: 148; Al Sheehaniya: 147; Al Khor/Al Thakhira: 121; Umm Salal: 51; Al Shamal: 26; Al Dayyen: 11)</i></p>		

Table 54 provides an insight into customer satisfaction with video streaming quality from the two main telecom service providers in Qatar, Ooredoo and Vodafone. Ooredoo's customers report a 69% satisfaction level for mobile internet, which is slightly outperformed by Vodafone at 70%. However, both providers show higher satisfaction rates for fixed internet, with Ooredoo at 88% and Vodafone at 89%. This data suggests that customers find fixed internet services to offer better video streaming quality compared to mobile internet. The close figures between the two service providers indicate a competitive market where both are nearly on par in terms of the service quality perceived by their customers. The higher satisfaction with fixed internet also reflects the likely superior stability and speed it offers for video content, a crucial factor for streaming services.

Table 54: Satisfaction with Quality of Video by Service Provider (% Satisfied)		
	Mobile Internet	Fixed Internet
Ooredoo Qatar	69%	88%
Vodafone Qatar	70%	89%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Transparency of Prices?</p> <p><i>Base N Mobile Internet=2047, N Fixed Internet=1672</i></p>		

### 3.4.15. Ease of Understanding Terms and Conditions

The respondents were asked to indicate their level of satisfaction with the terms and conditions for the services that are provided to them. Most users of Fixed Voice and Fixed Internet (88% each) are either 'satisfied' or 'extremely satisfied' with the terms and conditions. Leased Lines and Mobile Voice users have lower satisfaction levels with the terms and conditions (69% and 60% respectively but with a higher neutral stance (12% and 15% respectively). (See Figure 25)

**Figure 25: Satisfaction with Ease of Understanding Terms and Conditions**

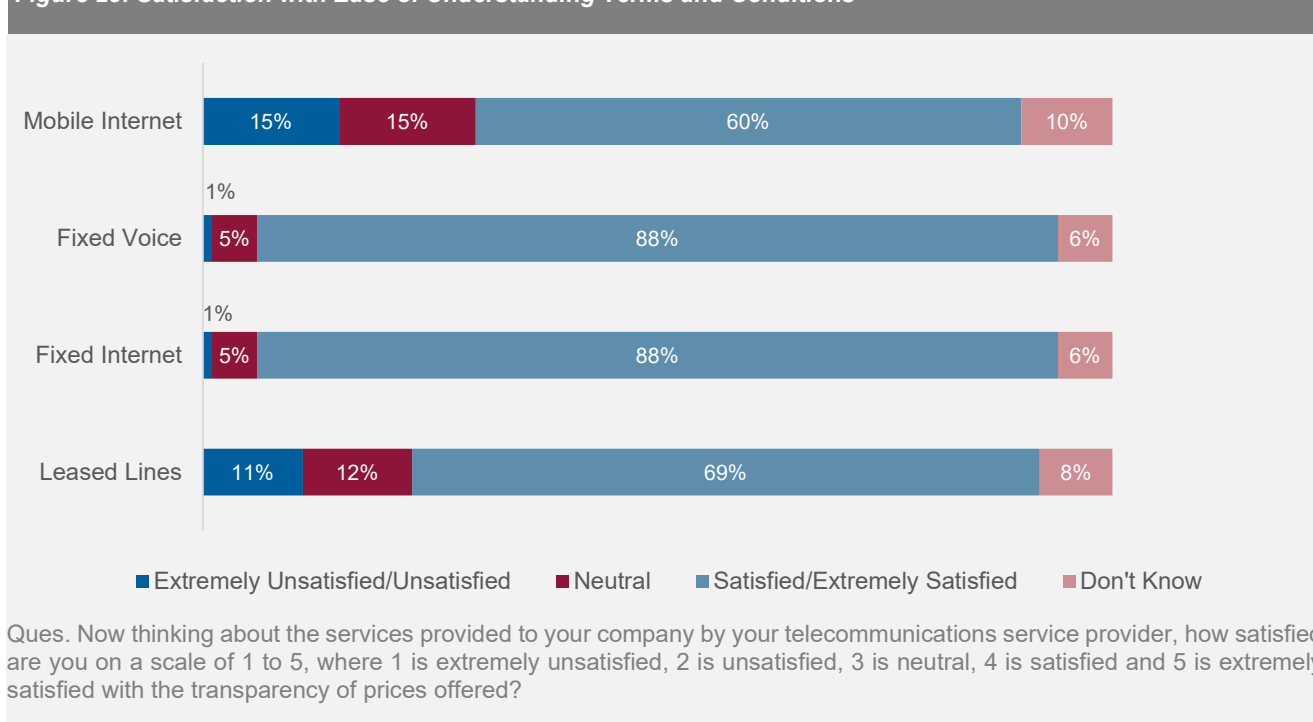


Table 55 compares customer satisfaction with the ease of understanding terms and conditions for various telecommunication services from 2019 to 2023. Satisfaction with mobile internet terms saw a notable decrease from 74% to 60%. Fixed internet service terms remained high, with a slight decrease from 90% to 88%. Fixed voice services saw an improvement in customer satisfaction, increasing from 87% to 88%. Notably, satisfaction with understanding the terms for leased lines improved, rising from 59% to 69%. This data indicates that while there may be challenges in understanding mobile internet service terms, overall satisfaction with fixed services remains high and has improved for leased lines. It highlights the importance of clear and comprehensible terms and conditions in customer service and satisfaction.

Table 55: Satisfaction with Ease of Understanding Terms and Conditions (2019 vs. 2023) (% Satisfied)		
	2019	2023
Mobile Internet	74%	60%
Fixed Internet	90%	88%
Fixed Voice	87%	88%
Leased Lines	59%	69%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Ease of Understanding Terms and Conditions?</p> <p>Base: N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 56 outlines the satisfaction rates of businesses of various sizes with their understanding of the terms and conditions for different telecommunication services. Micro businesses show a satisfaction rate of 59% for mobile internet, which is consistent across small and medium-sized businesses. However, these businesses report higher satisfaction with fixed services: 87% for fixed voice and internet among micro businesses and 88% for small businesses. Medium businesses have a notably high satisfaction for fixed voice at 93%, but this is not mirrored in their satisfaction with leased lines, which is lower at 49%. Large businesses report the highest satisfaction rates across all services, particularly a full 100% satisfaction with leased lines. This indicates that while the terms and conditions for mobile internet services may require more clarity, most businesses feel confident in understanding the terms for fixed services, with large businesses expressing the greatest level of comprehension and satisfaction.

Table 56: Satisfaction with Ease of Understanding Terms and Conditions by Business Size (% Satisfied)				
Industry	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	59%	87%	87%	68%
Small Businesses	58%	88%	88%	77%
Medium Businesses	59%	93%	86%	49%

Large Businesses	62%	88%	93%	100%
<p><i>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services overall? Please rate your satisfaction on the same 1 to 5 scale.</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>				

Table 57 evaluates customer satisfaction with the clarity of terms and conditions offered by two major service providers in Qatar. Ooredoo's customers report a 59% satisfaction rate for mobile internet, which is slightly lower than Vodafone's 62%. For fixed voice services, Ooredoo has an 88% satisfaction rate, with Vodafone surpassing this at 91%. Both providers score equally for fixed internet services, each with an 88% satisfaction rate. However, there's a notable difference in satisfaction with leased lines, where Ooredoo has a satisfaction score of 67% compared to Vodafone's higher rate of 78%.

These figures suggest that while both providers perform well in terms of clarity of terms for fixed services, Vodafone holds a slight edge in mobile internet and a more significant advantage in leased lines. This information is valuable for informing potential service improvements and for customers considering their options.

<b>Table 57: Satisfaction with Ease of Understanding Terms and Conditions by Service Provider (% Satisfied)</b>				
	<b>Mobile Internet</b>	<b>Fixed Voice</b>	<b>Fixed Internet</b>	<b>Leased Lines</b>
Ooredoo Qatar	59%	88%	88%	67%
Vodafone Qatar	62%	91%	88%	78%
<p><i>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with ease of understanding terms and conditions?</i></p> <p><i>Base N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</i></p>				

### 3.4.16. Time Taken for Service Activation

Another attribute that is included in measuring business customers' perceptions of provisioning is their satisfaction with the activation time of services. A high percentage of Fixed Internet users (88%) are satisfied with the time it takes to activate the service, followed by Fixed Voice users (86%) and Leased Line users (72%). Satisfaction for Mobile Voice and Mobile Internet users was relatively low (66% and 64% respectively) with the time taken to activate the mobile services. (see Figure 26)

**Figure 26: Satisfaction with the Time Taken for Service Activation**

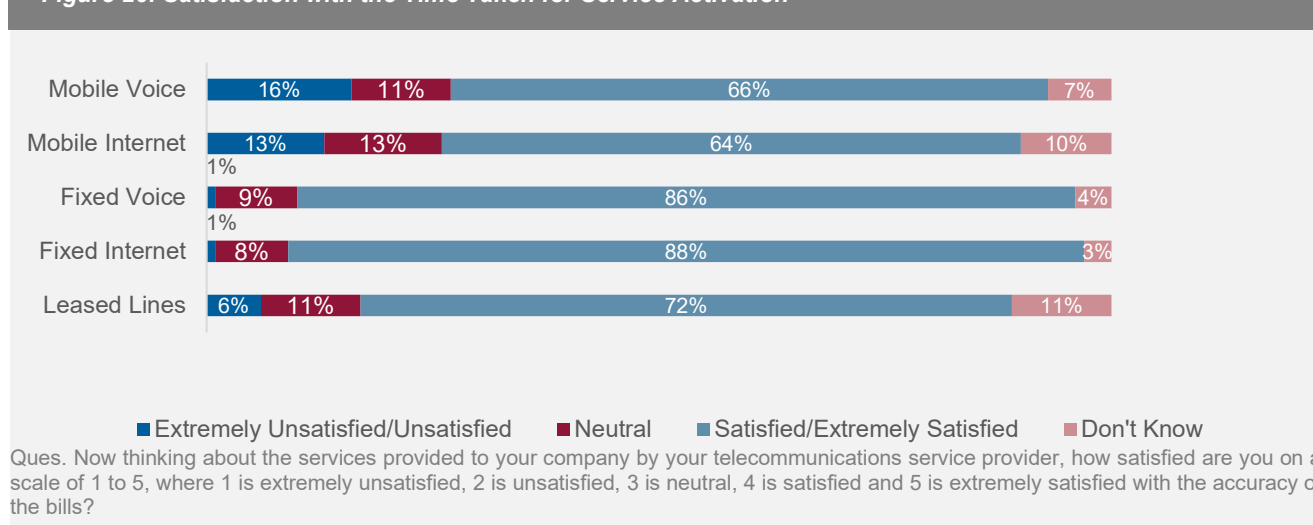


Table 58 presents customer satisfaction with the time taken for service activation in 2019 and 2023, showing variations across services. Mobile voice satisfaction changed from 77% to 66%, mobile internet from 73% to 64%, fixed voice from 90% to 86%, fixed internet remained at 88%, and leased lines from 88% to 72%. While there is satisfaction with the current service activation timeframe, many respondents believe the installation period for fixed services (7-8 days) could be reduced. A larger and more diverse sample also emphasized the need for faster activation, shorter response time, and expedited delivery.

**Table 58: Satisfaction with Time Taken for Service Activation (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	77%	66%
Mobile Internet	73%	64%
Fixed Voice	90%	86%

Fixed Internet	88%	88%
Leased Lines	88%	72%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the Time Taken for Service Activation?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 59 presents satisfaction levels with the time taken for service activation, segmented by business size. Micro businesses report reasonable satisfaction with mobile voice (68%) and mobile internet (64%), and higher satisfaction with fixed services (fixed voice at 86%, fixed internet at 88%), and leased lines at 72%. Small businesses show slightly lower satisfaction with mobile services but favor fixed internet (89%). Medium businesses reported satisfaction with mobile services (60% for voice, 63% for internet) but are highly satisfied with fixed services. Large businesses are more satisfied with mobile voice (69%) and show high satisfaction for leased lines (90%).

Moreover, it has been observed that medium and large enterprises in Qatar have higher expectations for service activation due to their larger operational scale and specific service needs. These enterprises require reduced activation time, supported by SLAs for quicker activation and higher bandwidth. Additionally, faster activation time can improve the integration of CRM and ERP systems into their business mobile services.

Table 59: Satisfaction with Time Taken for Service Activation by Business Size (% Satisfied)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	68%	64%	86%	88%	72%
Small Businesses	65%	66%	83%	89%	70%
Medium Businesses	60%	63%	88%	88%	71%
Large Businesses	69%	64%	80%	83%	90%
<p>Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services the overall? Please rate your satisfaction on the same 1 to 5 scale.</p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684</p>					

Small Enterprises: 10 to 49 employees. N= 200  
Medium Enterprises: 50 to 249 employees N=152  
Large Enterprises: More than 250 employees N=64

Table 60 depicts customer satisfaction regarding the timeframe for service activation as reported by businesses in Qatar, comparing two primary service providers. Ooredoo Qatar has a solid satisfaction score with 68% for mobile voice services and 64% for mobile internet. Their fixed services satisfaction is even higher, with 86% for voice and 88% for internet, and leased lines at 72%. Vodafone Qatar trails slightly behind in mobile voice at 64%, but their mobile internet satisfaction is on par with Ooredoo at 65%. However, Vodafone Qatar takes a slight lead in fixed voice services with 88% satisfaction and shows a competitive edge in leased lines at 74%, while their fixed internet satisfaction stands at 83%. The data indicates a trend of higher satisfaction with fixed services compared to mobile services and showcases a close competition between the two service providers in terms of service activation satisfaction.

Table 60: Satisfaction with Time Taken for Service Activation by Service Provider (% Satisfied)					
	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	68%	64%	86%	88%	72%
Vodafone Qatar	64%	65%	88%	83%	74%
Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the <i>Time Taken for Service Activation</i> ?					
Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256					



### 3.4.17. Choice of Contract Duration

The respondents were also asked to rate their satisfaction levels with the choices available for contract length and their duration. Satisfaction levels vary depending on the type of services, with Fixed Internet users being the most satisfied with choice of contract length and duration (88%), followed closely by Fixed Voice users (86%). Lower level of satisfaction was perceived for Mobile Voice, Mobile Internet and Leased Lines at 68% respectively. (see Figure 27).

**Figure 27: Satisfaction with the Choice of Contract Duration**

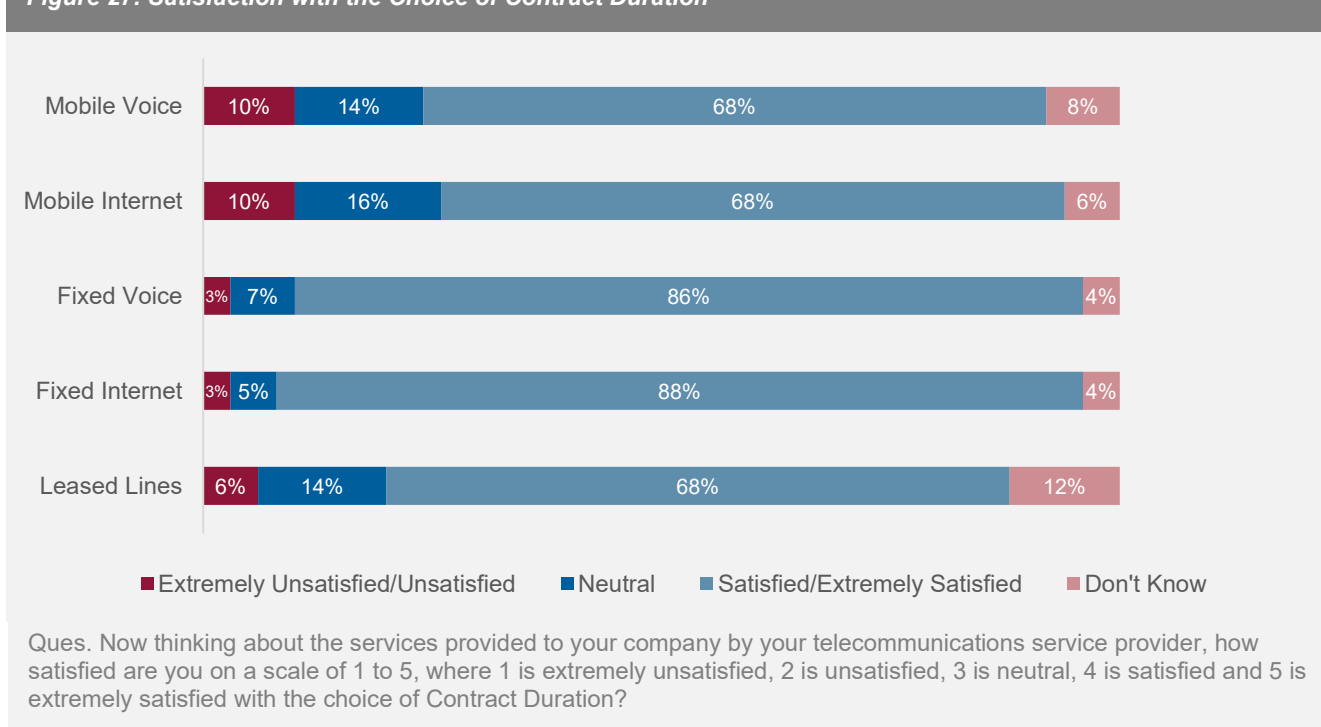


Table 61 illustrates customer satisfaction with contract duration options for different telecommunication services from 2019 to 2023. In 2023, satisfaction with mobile voice contract duration options changed to 68% from 80% in 2019, while mobile internet satisfaction shifted to 68% from 74%. Fixed services displayed mixed trend; satisfaction with fixed voice contracts slightly decreased to 86% from 90%, whereas satisfaction with fixed internet contract duration increased to 88% from 87%. Satisfaction with leased line contract durations also showed improvement, rising to 68% in 2023 from 63% in 2019. These figures reflect adjustments in satisfaction levels across contract duration options for various services over the four-year period.

**Table 61: Satisfaction with Choice of Contract Duration (2019 vs. 2023) (% Satisfied)**

	2019	2023
Mobile Voice	80%	68%
Mobile Internet	74%	68%
Fixed Voice	90%	86%
Fixed Internet	87%	88%
Leased Lines	63%	68%
<p>Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on with the Time Taken for Service Activation?</p> <p>Base: N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256</p> <p>Note: The satisfaction figures for 2023 are derived from a revised Likert scale that also includes a "don't know option" and an increased number of respondents N=2100.</p>		

Table 62 presents satisfaction rates with the choice of contract duration across different business sizes. Micro businesses show a 67% satisfaction rate for mobile voice and 69% for mobile internet, with higher rates for fixed services. Small businesses report a 68% satisfaction rate for mobile voice, but a notably lower 61% for mobile internet, and again, higher satisfaction for fixed services. Medium businesses follow a similar pattern, with 71% for mobile voice and 66% for mobile internet. Large businesses express the lowest satisfaction with mobile services, 66% for voice and 64% for internet, yet the highest for fixed voice at 92%. Across all business sizes, satisfaction with leased lines varies, indicating differing expectations or experiences with service flexibility.

**Table 62: Satisfaction with Choice of Contract Duration by Business Size (% Satisfied)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	67%	69%	87%	88%	71%
Small Businesses	68%	61%	82%	87%	63%
Medium Businesses	71%	66%	86%	87%	66%
Large Businesses	66%	64%	92%	84%	50%

*Ques. Now, taking everything into consideration, how would you rate your level of satisfaction with these services overall?  
Please rate your satisfaction on the same 1 to 5 scale.*

Micro Enterprises: Fewer than 10 employees. N= 1684  
Small Enterprises: 10 to 49 employees. N= 200  
Medium Enterprises: 50 to 249 employees N=152  
Large Enterprises: More than 250 employees N=64

Table 63 showcases the levels of satisfaction with the choice of contract duration offered by Ooredoo Qatar and Vodafone Qatar across different telecommunication services. Customer contentment with mobile voice and internet services is moderately high for both providers, with Ooredoo at 67% for both services and Vodafone slightly higher at 69% for voice and 68% for internet. Satisfaction climbs for fixed services, with Ooredoo users reporting 86% for voice and 87% for internet, while Vodafone users express higher satisfaction at 85% and 93%, respectively. Satisfaction with leased lines is the lowest among the services, yet relatively comparable between the two providers, with Ooredoo at 67% and Vodafone at 70%. This table suggests that while satisfaction is generally high, it is notably more pronounced in fixed services, especially with Vodafone Qatar.

**Table 63: Satisfaction with Choice of Contract Duration by Service Provider (% Satisfied)**

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Ooredoo Qatar	67%	67%	86%	87%	67%
Vodafone Qatar	69%	68%	85%	93%	70%

*Ques. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the Choice of Contract Duration?*

*Base N Mobile Voice=2074, N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256*

### 3.5. Consumer Perception on Pricing

#### 3.5.1. Value Perception of Telecommunication Services by Service Providers

Regarding the perceived value of Ooredoo's pricing across various services, a substantial eight out of ten businesses (80%) affirm that fixed internet services deliver good value. Additionally, satisfaction with the value provided in mobile voice (73%), mobile internet (70%), and fixed voice (70%) is expressed by seven out of ten businesses. While for leased lines the overall value perception for Ooredoo is at 63%. (see Figure 28).

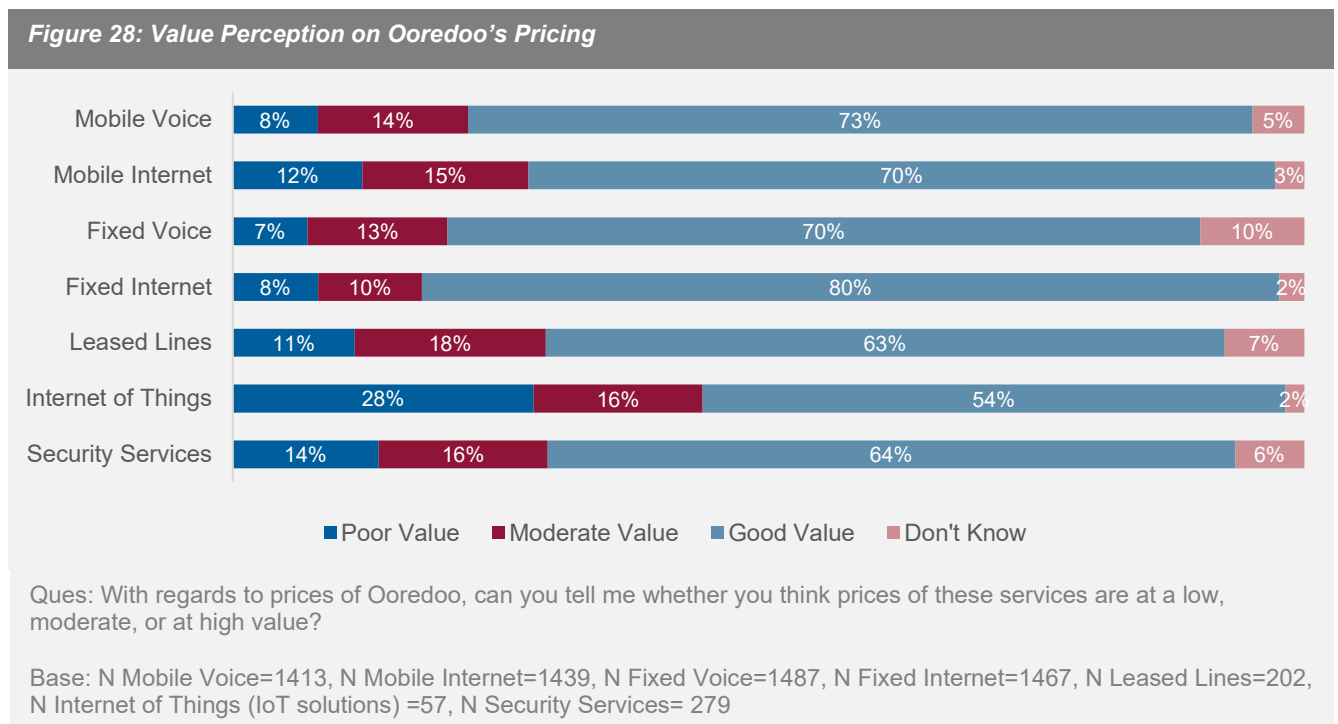


Table 64 illustrates the perception of value regarding Ooredoo's pricing as a telecommunications service provider for various services based on the size of businesses. In terms of mobile voice, 77% of large businesses mentioned finding good value in the prices levied by Ooredoo, followed by medium businesses (75%), micro-businesses (73%), and small businesses (67%). Conversely, for mobile internet services, 75% of medium businesses mentioned finding good value, followed by large businesses (74%), micro-businesses (69%), and small businesses (68%).

In the case of fixed internet services, the highest number of small businesses find good value in the services offered for the prices levied at 82%. Similarly, for leased lines, 79% of the small businesses find good value in the leased line services offered by Ooredoo followed by medium businesses (63%), micro-businesses (62%), and large businesses (43%).

**Table 64: Value Perception on Ooredoo's Pricing by Size of Business (% Good Value)**

Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	73%	69%	70%	80%	62%
Small Businesses	67%	68%	78%	82%	79%
Medium Businesses	75%	75%	66%	81%	63%
Large Businesses	77%	74%	70%	82%	43%

*Ques. With regards to the prices of Vodafone, can you tell me whether you think the prices of these services are at a poor, moderate, or good value?*

*Base: All respondents, N= 2100*

Micro Enterprises: Fewer than 10 employees. N= 1684

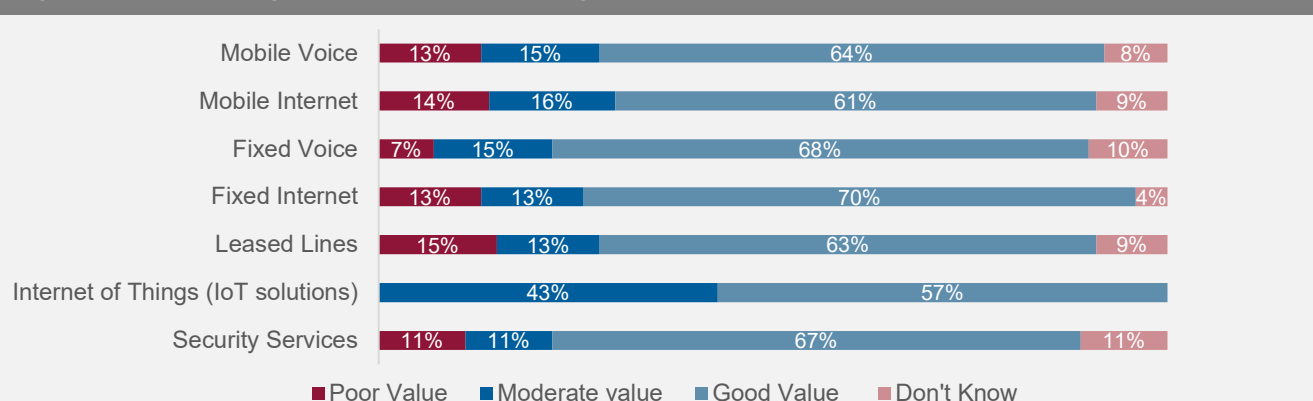
Small Enterprises: 10 to 49 employees. N= 200

Medium Enterprises: 50 to 249 employees N=152

Large Enterprises: More than 250 employees N=64

When evaluating the perceived value of Vodafone's pricing, 70% of respondents believe that fixed internet provides good value, closely followed by fixed voice with 68% of responses. Furthermore, 64% of respondents express satisfaction with the value offered by mobile voice, while 61% find good value in mobile internet and leased lines at 63%. Concerning the Internet of Things (IoT), 43% of respondents perceive a moderate value, while 16% report a similar valuation for mobile internet. Notably, 11% of respondents report perceiving poor value in Vodafone's security services. (see Figure 29)

**Figure 29: Value Perception on Vodafone's Pricing**



*Ques: With regards to the prices of Vodafone, can you tell me whether you think the prices of these services are at a poor, moderate, or at good value?*

*Base: N Mobile Voice=661, N Mobile Internet=608, N Fixed Voice=203, N Fixed Internet=205, N Leased Lines=54, N Internet of Things (IoT solutions) =14, N Security Services= 63*

Table 65 illustrates the perception of value regarding Vodafone's pricing as a telecommunications service provider for various services based on the size of businesses.

In the realm of mobile voice services, 72% of small businesses mentioned finding good value, followed by medium businesses at 67%, micro businesses at 64%, and large businesses at 56%. On the other hand, in the context of mobile internet services, 78% of large businesses find good value, closely followed by medium businesses at 68%, small businesses at 61%, and micro businesses at 59%.

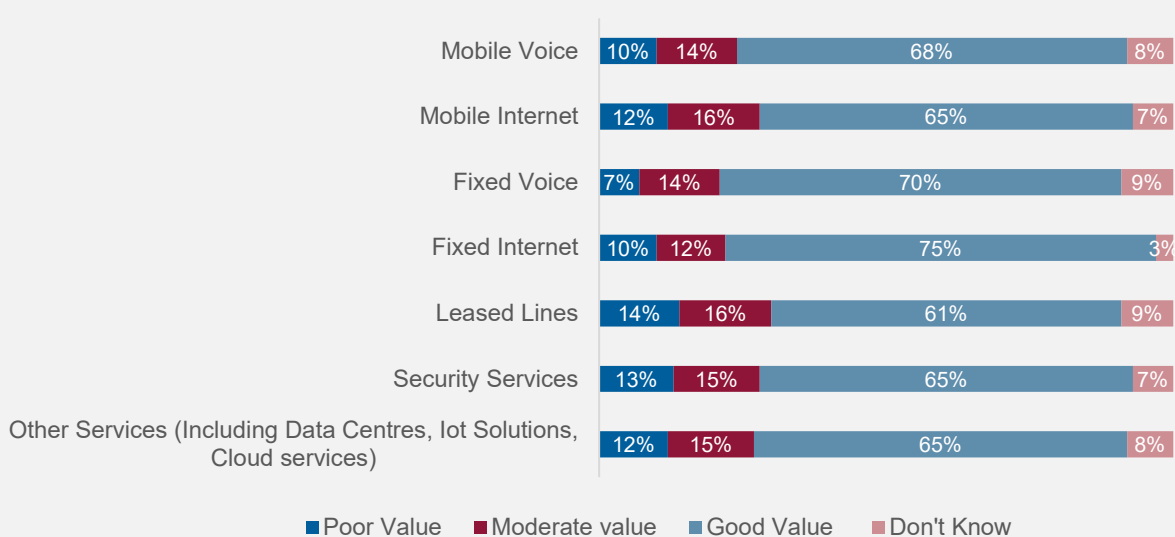
Concerning fixed voice services, 69% of the micro and medium businesses respectively perceive good value in the services offered for the prices levied, while the lowest respondents are from small businesses at 65%. Remarkably, 100% of large business respondents mention finding good value in the services offered by fixed internet services. Similarly, for leased lines, small businesses at 75% mention that the leased line services offered by Vodafone are of good value, followed by medium businesses at 75%, micro businesses at 63%, and large businesses at 33%.

Table 65: Value Perception on Vodafone's Pricing by Size of Business (% Good Value)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	64%	59%	69%	69%	63%
Small Businesses	72%	61%	65%	59%	75%
Medium Businesses	67%	68%	69%	67%	75%
Large Businesses	56%	78%	40%	100%	33%
<p><i>Ques. With regards to the prices of Vodafone, can you tell me whether you think the prices of these services are at a poor, moderate or at a good value?</i></p> <p><i>Base: All respondents, N= 2100</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>					

### 3.5.2. Overall Value Perception of Telecommunication Services

Regarding the overall value perception of services offered by telecommunication service providers, nearly seven out of ten respondents find good value in fixed internet service (75%), followed by fixed voice (70%). 68% of respondents express satisfaction with the value of mobile voice services in Qatar, followed by mobile internet (65%) and security services (65%). Additionally, 65% of respondents find good value in other services, including Internet of Things (IoT), cloud services, and data centers. Meanwhile, 14% of respondents state that the value offered by leased lines services in Qatar is poor followed by security services (13%), mobile internet (12%), and other services (12%). (see Figure 30)

Figure 30: Value Perception on Telecommunication Services



Ques: For all the services, like Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Lines: With regards to the amount, you pay as a business for this service and the value you receive, do you feel you receive poor value, moderate value or good value?

Base: N Mobile Voice=2074 N Mobile Internet=2047, N Fixed Voice=1690, N Fixed Internet=1672, N Leased Lines=256, N Security Services= 342, N Other Services =265.

Table 66 illustrates the percentage of respondents perceiving good value in overall pricing for each type of telecommunication service. For large businesses, 78% of the respondents perceive good value in fixed internet services followed by fixed voice services at 75%, mobile internet services at 66%, and mobile voice services at 66%. For medium businesses, 74% of the respondents perceive good value in fixed internet services followed by mobile voice services at 69% and fixed voice services at 64%. In the case of small businesses, 76% of consumers find good value in mobile voice, closely followed by fixed

internet at 74% and fixed voice services at 70%. For micro businesses, 75% of the consumers perceive good value in fixed internet, followed by fixed voice at 70% and mobile internet at 67% respectively.

Table 66: Value Perception on Overall Pricing by Size of Business (% Good Value)					
Industry	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Lines
Micro Businesses	67%	67%	70%	75%	64%
Small Businesses	76%	63%	70%	74%	45%
Medium Businesses	69%	60%	64%	74%	63%
Large Businesses	66%	66%	75%	78%	60%
<p><i>Ques. With regards to all the services, like Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, Leased Lines: With regards to the amount, you pay as a business for this service and the value you receive, do you feel you receive poor value, moderate value or good value?</i></p> <p><i>Base: All respondents, N= 2100</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>					

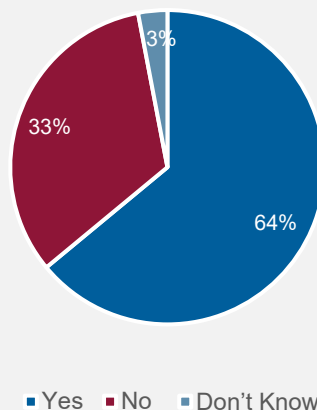
### 3.6. Consumer Perception on Rate Plans/ Tariffs

#### 3.6.1. Awareness regarding the Tariff Plans

Six out of every ten businesses (64%) report being aware of bill/tariff publications through various communication channels, including online platforms and newspapers. On the other hand, only three out of every ten businesses (33%) mention that they are not aware of the rate plans, tariffs, and bill payment publications. Meanwhile, a small percentage of respondents (3%) indicated that they don't know of the provision. (see Figure 31)



Figure 31: Awareness of the publishing of tariffs

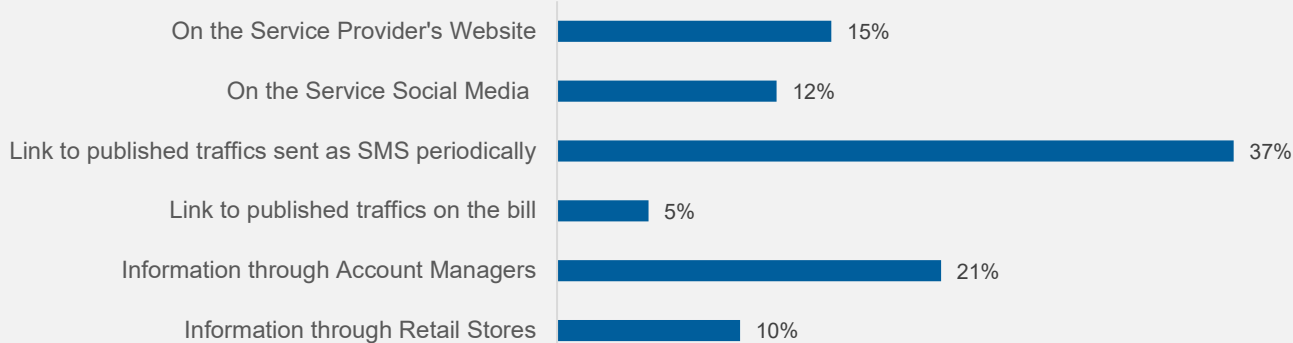


Ques: Are you aware that the service providers are required to publish their tariffs through multiple communication channels, including online platforms and newspapers? N= 2100

### 3.6.2. Accessibility of Tariff Plans

Among respondents who report being aware of tariff publications, approximately four in every ten individuals (37%) prefer accessing the details of the bill through a link sent via SMS periodically. Another two in every ten individuals (21%) prefer accessing the bill through account managers, while 15% prefer using the service provider's website. Additionally, one in every ten individuals (12%) opts for accessing the bill through the service provider's social media channels. The remaining businesses indicate their preference for accessing the bill through retail stores (10%) and via a link to the published tariff on the bill (5%). (see Figure 32)

Figure 32: Accessing information on Tariff Plans

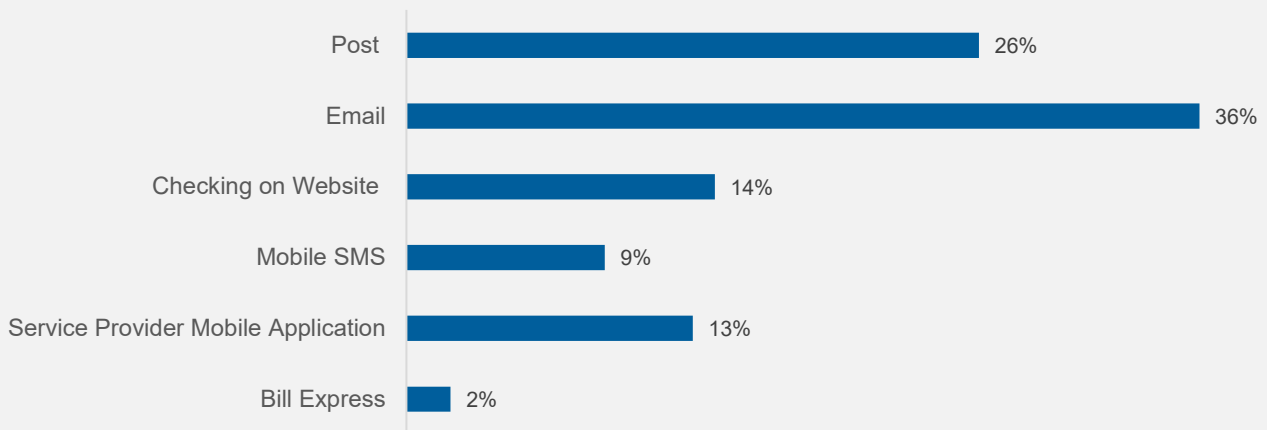


Ques: How do you prefer to access details regarding all the tariff plans available in the State of Qatar? N= 1342

### 3.6.3. Preference for Receiving Telecommunication Bills

Among all businesses, four in ten respondents prefer receiving the bills through email (36%) closely followed by post (26%). Almost one in ten individuals report to prefer receiving bills via the website (14%), service provider mobile application (13%), or mobile SMS (9%). (see Figure 33)

**Figure 33: Receiving Telecommunication Bills**

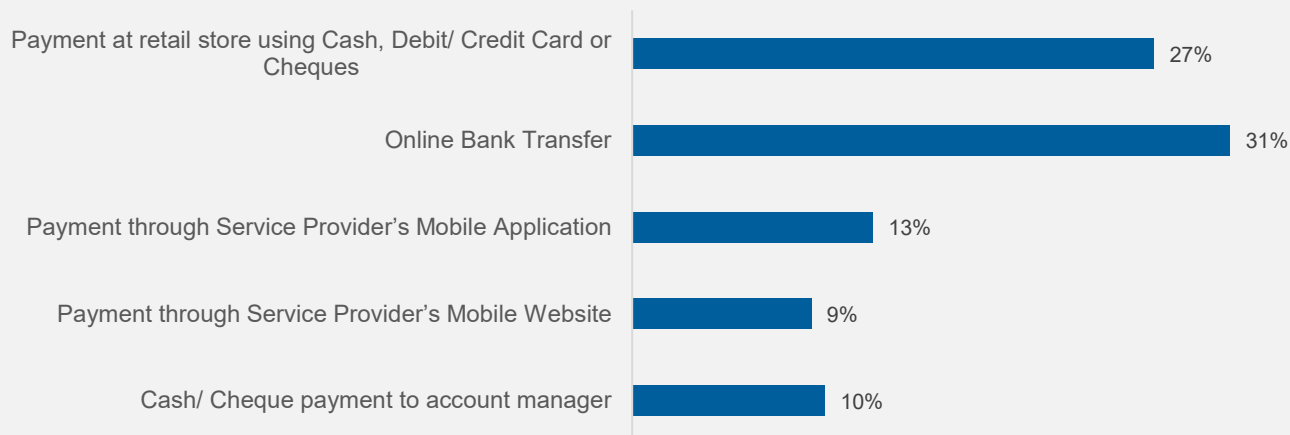


Ques: How do you as a business prefer to receive all the telecommunication bills? N= 2100

### 3.6.4. Preference for Mode of Bill Payments

When reporting their preferred method for paying telecommunication bills, three out of every ten businesses (31%) mentioned using online bank transfer as the preferred avenue, followed by payment at retail stores through cash, credit/debit cards, or cheques (27%). Almost one in ten individuals (13%) preferred to pay the bill through the service provider's mobile application followed by cash/cheque payment to account managers (10%) or the service provider's website (9%). The remaining businesses reported paying bills through self-service machines (9%). (see Figure 34)

**Figure 34: Paying Telecommunication Bills**



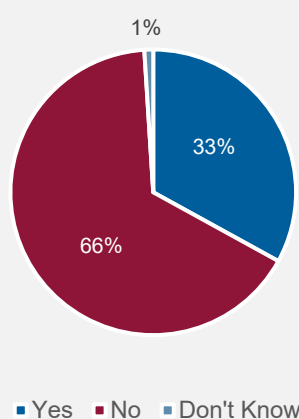
Ques: What method do you as a business prefer to pay all the telecommunication bills? N= 2100

### 3.7. Consumer Perception on Complaint Resolution Mechanism

#### 3.7.1. Complaint to Service Provider

Close to 33% of the respondents have previously raised complaints with the service provider, while almost six out of every ten businesses (66%) mentioned that they have not raised complaints before. (see Figure 35)

**Figure 35: Raising a complaint to the Service Provider**



■ Yes ■ No ■ Don't Know

Ques: In the past year, have you ever raised a complaint to the service provider?? N= 2100

Half of the complaints raised centered around mobile voice (49%), while one in every four businesses has raised a complaint regarding mobile internet services (45%). Almost 12% and 14% of the businesses have raised complaints previously revolving around fixed voice and fixed internet, respectively. Meanwhile, only a small section (4%) of the businesses has raised complaints about leased lines and (3%) other services including security services, Internet of Things (IoT) and more. (see Figure 36)

**Figure 36: Services that Respondents Complained About**

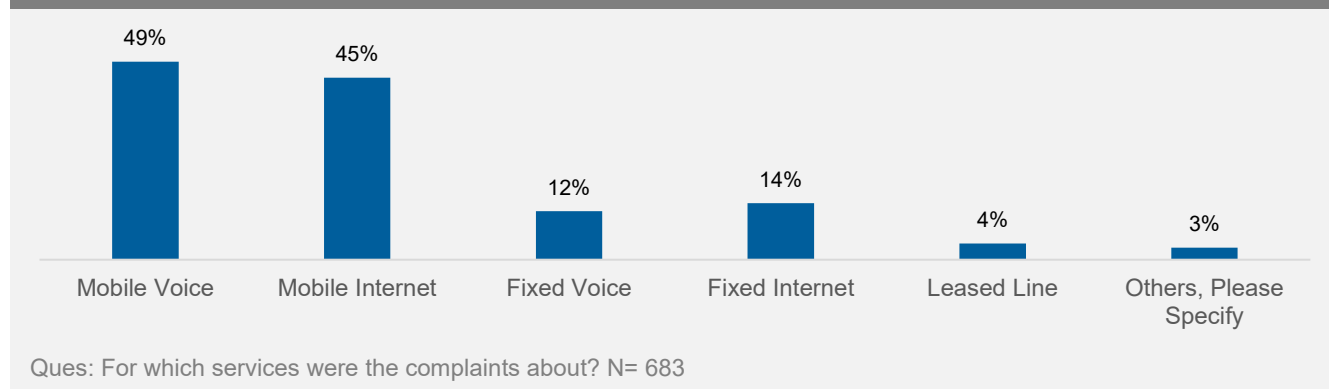


Table 67 presents the percentages of complaints for each type of telecommunication service by service provider. Among the businesses that complained about Mobile Voice services, 65% are users of Ooredoo, and the remaining 35% are users of Vodafone. The majority of businesses that complained about Mobile Internet services are users of Ooredoo (70%). Of the businesses that complained about Fixed Voice services, 84% are users of Ooredoo, while 16% are users of Vodafone. Of businesses that made complaints about Fixed Internet services, 87% are subscribers of Ooredoo. All respondents who reported complaints about Leased Line services are subscribed to Ooredoo as their main service provider.

**Table 67: Services that Respondents complained About by Service Provider**

	Ooredoo Users	Vodafone Users
Mobile Voice	65%	35%
Mobile Internet	70%	30%
Fixed Voice	84%	16%
Fixed Internet	87%	13%

Leased Lines	100%	---
<b>Ques. For which services were the complaint about?</b> Base: Respondents who have had raised a complaint to the service provider, N=683 (Mobile Voice: 332; Mobile Internet: 304; Fixed Voice: 85; Fixed Internet: 98; Leased Line: 29).		

Table 68 depicts the percentage shift in complaints related to telecommunications services with mobile services complaints having increased from 25% in 2019 to 49% in 2023 for Mobile Voice and decreased slightly from 48% in 2019 to 45% in 2023 for Mobile Internet. The percentage of businesses with complaints related to Fixed Voice services increased slightly from 11% in 2019 to 12% in 2023 while complaints related to fixed internet services decreased slightly from 15% to 14%. Meanwhile, complaints regarding leased lines increased from 1% to 4%.

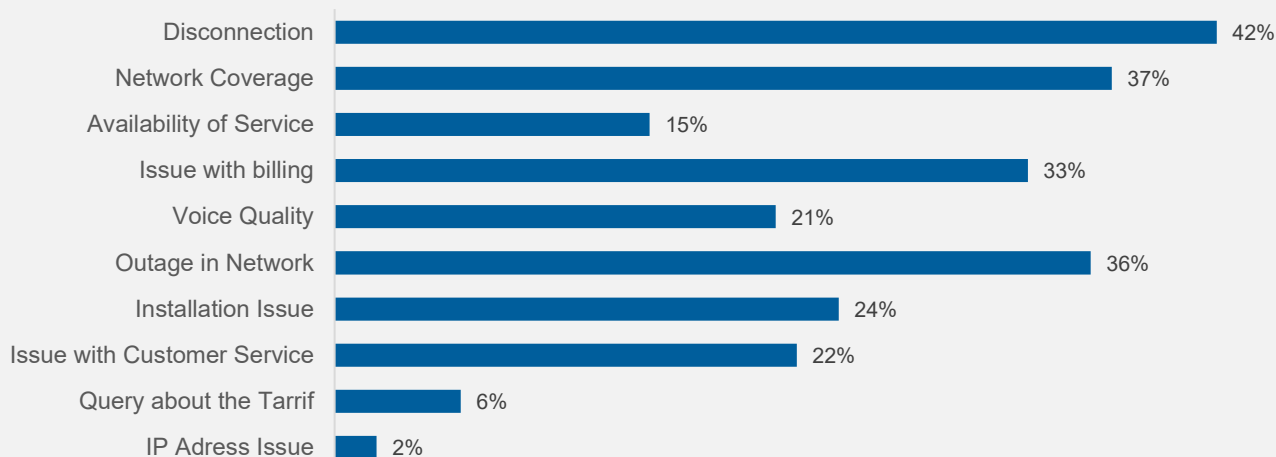
<b>Table 68: Services that Respondents complained about (2019 vs 2023)</b>		
	<b>2019</b>	<b>2023</b>
Mobile Voice	25%	49%
Mobile Internet	48%	45%
Fixed Voice	11%	12%
Fixed Internet	15%	14%
Leased Lines	1%	4%
<b>Ques. For which services were the complaint about?</b> Base: Respondents who have had raised a complaint to the service provider, N=683 (Mobile Voice: 332; Mobile Internet: 304; Fixed Voice: 85; Fixed Internet: 98; Leased Line: 29).		

Business consumers who raised a complaint to their service provider in the past year when asked about the reasons for the complaint. Those who raised a complaint mentioned the reasons as disconnection (42%); network coverage (37%); outage in the network (36%); issues with billing (33%); installation issues (24%); issues with customer service (22%); voice quality and clarity (21%); availability of service (15%); query about the tariff (6%); and IP address issue (2%) (see Figure 37).

Businesses who report to have raised a complaint preferred to have raised the complaint via Call service center (32%) closely followed by raising the issue with the account manager (27%). Almost one in every ten businesses (14%) prefer to raise the complaint via an email to the service provider or by using the mobile app of the service provider (10%) separately. Other remaining respondents prefer to send the

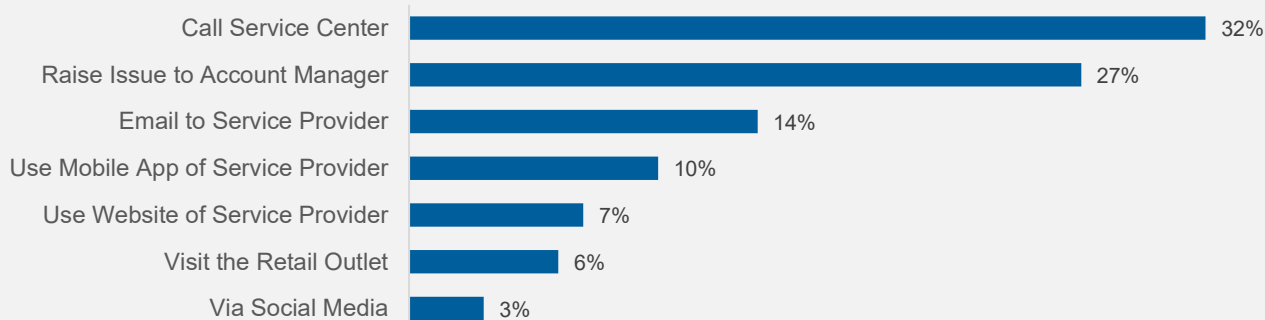
complaints via the website of the service provider (7%), visiting the retail outlet (6%), or via social media (3%). (see Figure 38)

**Figure 37: Reasons for complaining to the service provider**



Ques: What were the reasons you raised a complaint? N=683

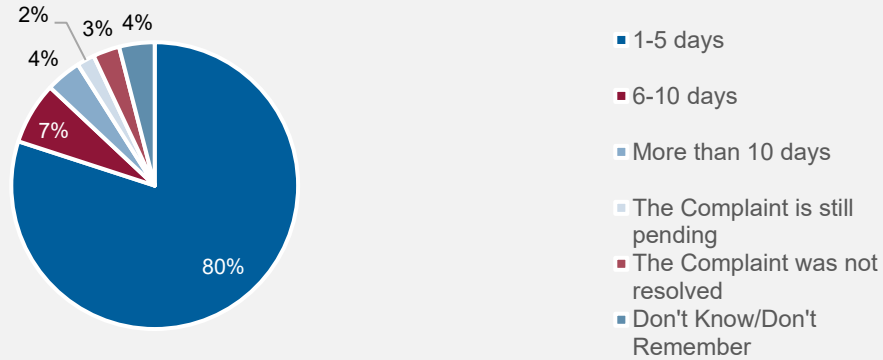
**Figure 38: Preference for submitting the complaint to the service provider**



Ques: How do you prefer to submit your complaint or query to the service provider? N= 683

80% of the respondents who raised a complaint with the service provider reported that the complaint was resolved within 1-5 days, followed by complaints resolved within 6-10 days at 7%. Meanwhile, close to 4% of the respondents mentioned that the complaint resolution took more than 10 days. However, 3% of the total respondents mentioned that the complaints raised by them are still pending. Additionally, 4% indicated their complaints were not resolved, and 2% did not recall the resolution time. (see Figure 39)

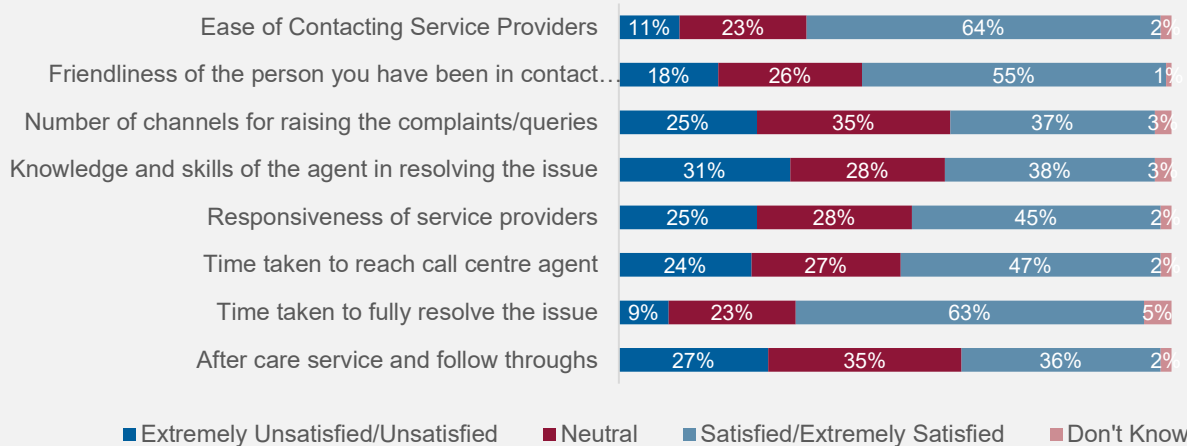
Figure 39: Resolution of the Complaint



Ques: For how long did it take for Service Providers to resolve your complaint? N= 683

Respondents were asked to indicate their satisfaction levels with various criteria related to the complaint resolution services. The highest satisfaction levels were reported for the ease of contacting/accessing the service provider (64%), the time taken to fully resolve the issue (63%), and the friendliness of the staff (55%). However, three in ten respondents (31%) expressed extreme dissatisfaction or dissatisfaction with the knowledge and skills of the agent in resolving the issue and after-care services and follow-throughs (27%). (see Figure 40).

Figure 40: Satisfaction with attributes related to the Complaint Resolution Mechanism

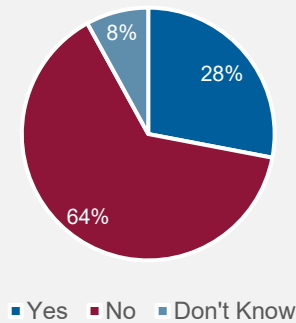


Ques: With regards to your recent complaint, on a scale of (1-5) how satisfied or dissatisfied are you with the complaint resolution in terms of the following parameters? N= 683

### 3.7.2. Complaint to CRA

Furthermore, all the respondents were asked whether they are aware of the complaint resolution mechanism at CRA with 64% of the respondents mentioning that they weren't aware of the resolution mechanism while only 28% mentioned that they were aware of the same, and 8% stated they don't know. (see Figure 41)

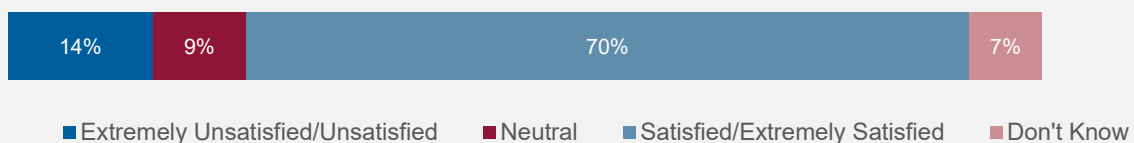
**Figure 41: Awareness regarding the complaint resolution mechanism at CRA**



Ques: Are you aware of the complaint escalation process at the CRA? N= 2100

Among consumers aware of the complaint resolution mechanism at the Communications Regulatory Authority (CRA), only 2% (N=9) reported having raised a complaint in the past twelve months, predominantly related to issues such as internet speed, billing discrepancies, and package concerns. Notably, 70% of those who were aware of the mechanism expressed satisfaction or extreme satisfaction with the resolution process. This high satisfaction rate was attributed primarily to the apt and quick response time from the CRA in addressing and resolving the reported issues. Conversely, 14% of respondents expressed dissatisfaction with the complaint resolution mechanism, while 9% remained neutral on the matter. These findings suggest that the majority of those who did were content with the efficiency and effectiveness of the resolution process.

**Figure 42: Satisfaction with the complaint resolution mechanism at CRA**



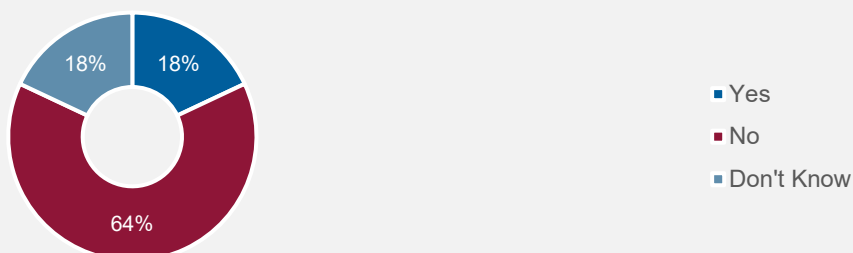
Ques: On a scale of (1-5), how satisfied or dissatisfied were you with the complaint mechanism resolution provided by the CRA? N= 588



### 3.8. Consumer Rights Protection

A significant portion of the total respondents, accounting for 64%, hold the belief that there are no misleading advertisements associated with telecommunication services in Qatar. In contrast, 18% of respondents express the perception that misleading advertisements are present in the country.

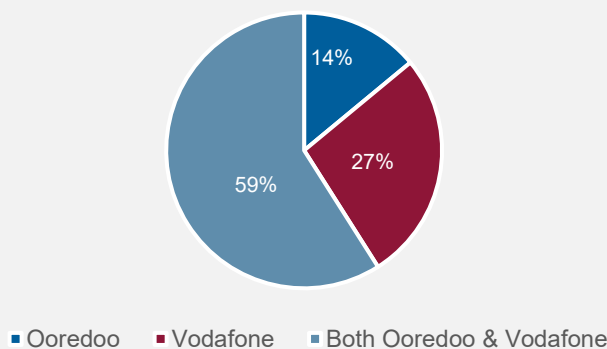
**Figure 43: Misleading Advertisements**



Ques: Do you believe there are misleading advertisements related to telecommunication services? (Advertisements that do not provide clear and transparent terms and conditions for the advertised product/service) N= 2100

Among those who identify misleading advertisements, nearly two-thirds feel that both Ooredoo and Vodafone have such advertisements, with Vodafone at 27% and Ooredoo with the lowest percentage share at 14%. It is noteworthy that respondents who believe in the existence of misleading advertisements did not specify the names of specific advertisements they deemed misleading. These insights highlight varying perceptions regarding the presence of misleading advertisements in the telecommunications sector in Qatar and underscore the need for clarity and transparency in advertising practices. (see Figure 43 and Figure 44)

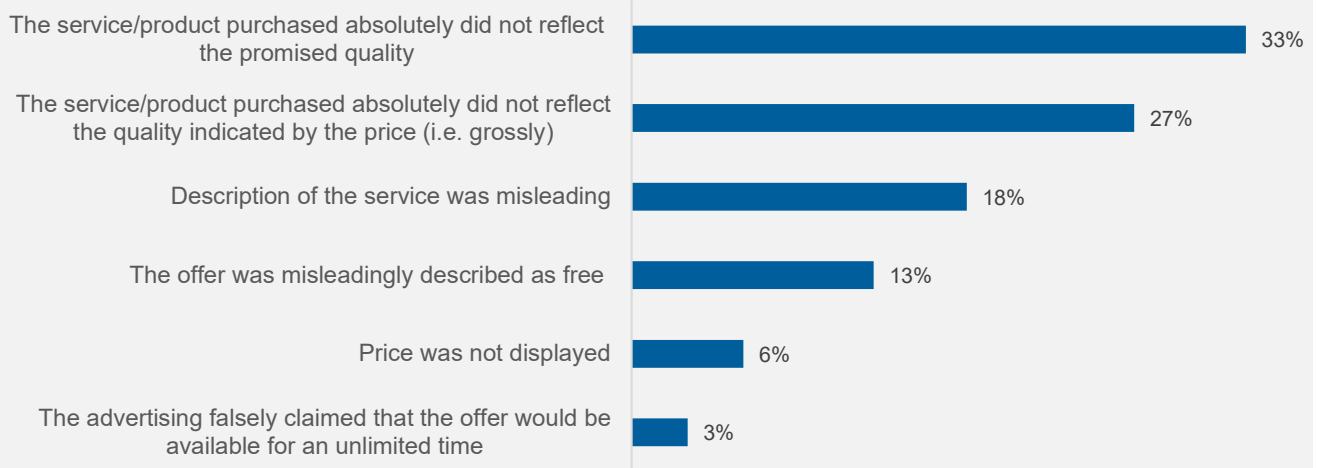
**Figure 44: Service provider's misleading advertisements**



Ques: Which Service Provider has misleading advertisements? N= 377

When inquired on the reasons for misleading advertisements, close to 33% of respondents mentioned that the service/ product purchased did not reflect the promised quality while another 27% of the respondents mentioned that the service/ product purchased did not reflect the quality indicated by the price (i.e., grossly overpriced). Another one in every five respondents (18%) mentioned that the description of the service was misleading while one in every eight individuals (13%) indicated that the offer was misleadingly described as free. (see Figure 45)

**Figure 45: Reasons for misleading advertisements**

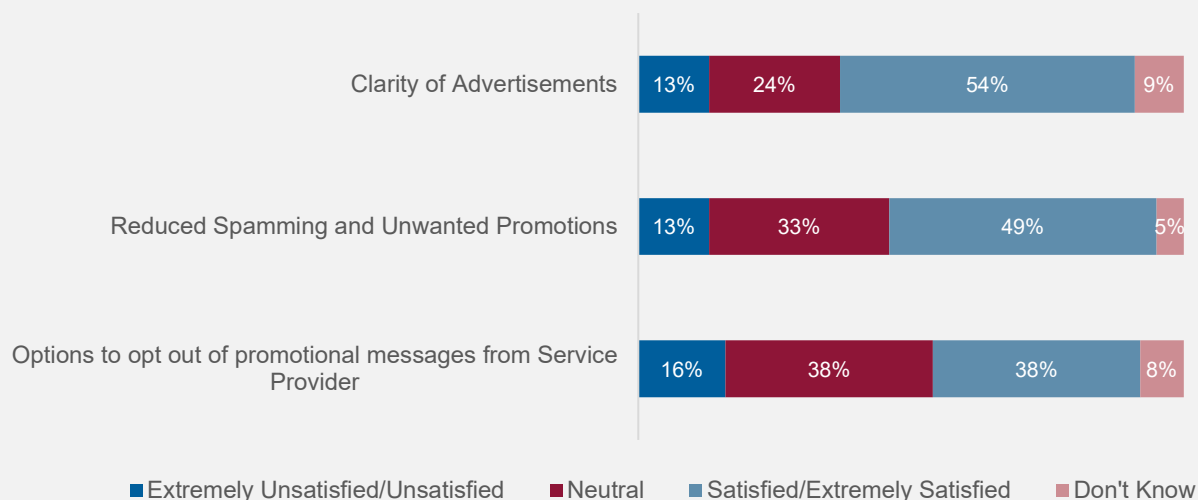


Ques: Why do you believe there are misleading advertisements? N= 377

When asked about the levels of satisfaction with telecommunication advertising on various parameters, close to 54% are satisfied/ extremely satisfied with the clarity of advertisements followed by reduced spamming and unwanted promotions with close to half of the total respondents (49%) being satisfied and extremely satisfied with the parameter.

However, only 38% of the businesses mentioned that they were satisfied with the option to opt out of promotional messages from the service provider. (see Figure 46)

Figure 46: Satisfaction with attributes related to telecommunication advertising



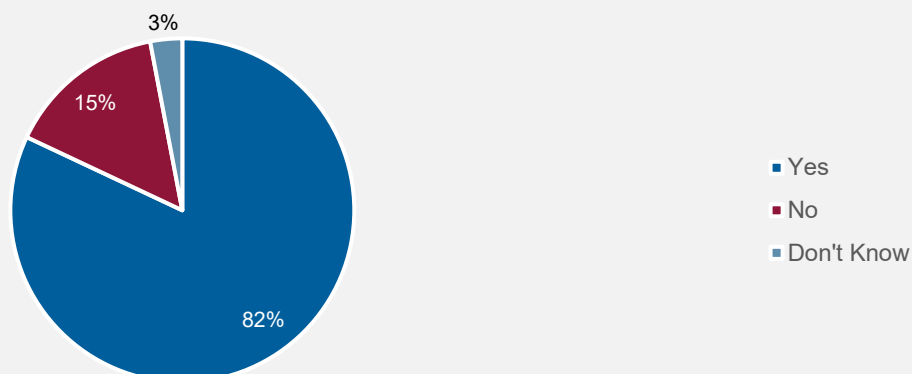
Ques: On a scale of (1-5) how satisfied are you with each of the following factors related to telecommunication advertising? N= 2100

### 3.9. Market Competitiveness

#### 3.9.1. Awareness regarding Mobile Number Portability (MNP) and Fixed Number Portability (FNP)

All respondents were asked about their awareness of Mobile Number Portability (MNP) and Fixed Number Portability (FNP) with 82% of the respondents signalling that they were aware of the services while 15% of the respondents indicated that they weren't aware of the services. (see Figure 47)

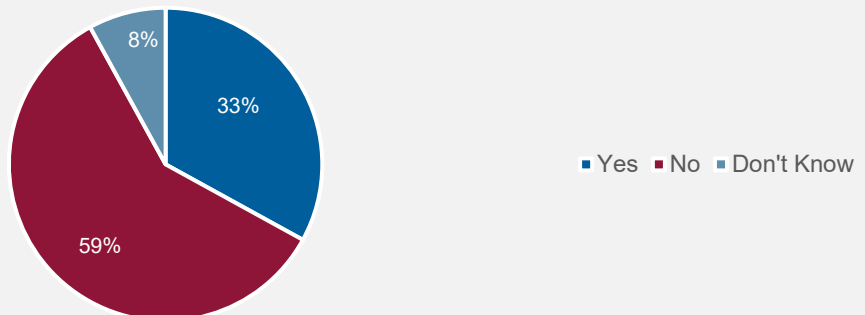
Figure 47: Awareness of MNP/ FNP



Ques: Are you aware of Mobile Number Portability (MNP) and Fixed Number Portability (FNP)? The N= 2100

Furthermore, of the sample respondents aware of the services, about 33% of the respondents mentioned that they had utilized these services in Qatar previously to switch their mobile number/ fixed number from one service provider to another while the remaining 8% of the respondents indicated that they weren't aware of such a case. (see Figure 48)

**Figure 48: Utilization of MNP/ FNP**

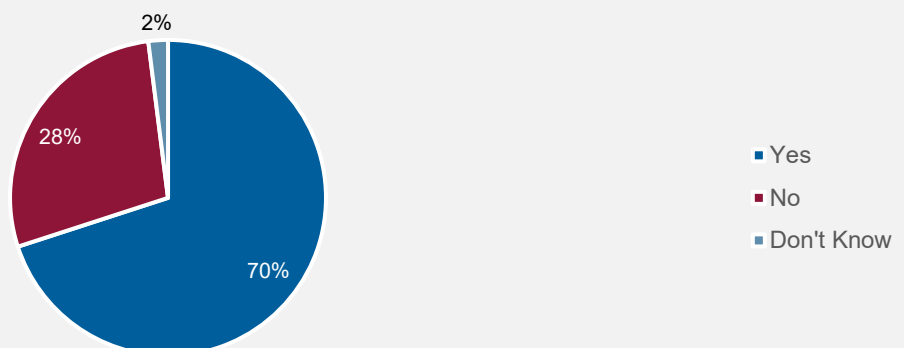


Ques: Have you ever utilized Mobile Number Portability (MNP) / Fixed Number Portability (FNP) services in Qatar to switch your phone number from one telecom provider to another? N= 1718

### 3.9.2. Need for a New Service Provider

All the respondents participating in the survey were asked if they felt that there was a need for a third service provider to enter the market to which almost two-thirds of the consumers (70%) mentioned that they were not completely satisfied with the current service providers and felt a need for a new service provider to enter the market. (see Figure 49)

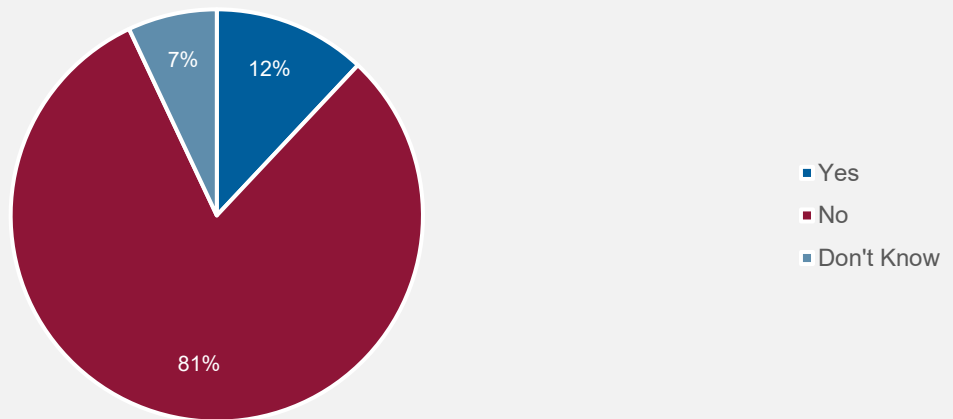
**Figure 49: Need for a new Service Provider**



Ques: Do you feel there is a need of a third or maybe a fourth player in the telecommunication market in Qatar? N= 2100

All the respondents were asked if they had switched from a service provider previously, with 12% of the consumers mentioning that they had previously switched their service provider while 81% had never used the same. Meanwhile, 7% of the respondents were not aware of the same. It's important to note that switching a service provider can involve changing to a new provider and potentially getting a new number, whereas Mobile Number Portability (MNP) and Fixed Number Portability (FNP) allow businesses to retain their existing mobile or fixed number while changing providers for convenience. (see Figure 50).

**Figure 50: Switch from the Service Provider**

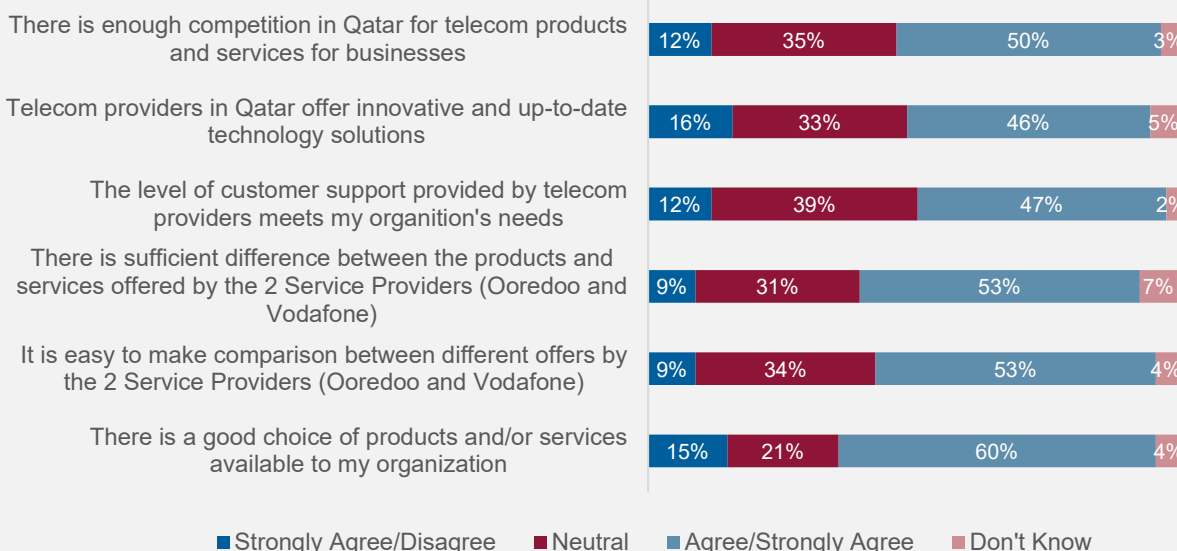


Ques: Has your company ever previously switched from a service provider to an another?? N= 2100

Furthermore, respondents were asked on their conformation with few aspect of the telecommunications industry in Qatar to which close to 60% of the consumers mentioned that they strongly agree with the statement that there is a good choice of products or services available to their organization closely followed by easy comparison matrix between offers from the two service providers at 53% and their being a sufficient differentiation between the products and services of the two service providers again at 53%.

However, the largest disagreements levels were seen with the statement on the telecom service providers in Qatar offering innovative and up-to-date technology solutions at 16% closely followed the levels of the customer support provided by the service providers to meet organizational needs at 12%. (see Figure 51)

Figure 51: Competition within the telecommunications market in Qatar



Ques: How much do you agree or disagree with the following statements? N= 2100

Table 69 depicts the percentage of respondents who agree to the statements by industry size with the highest percentage of respondents in real estate and arts and entertainment industry showcasing the highest numbers with industries such as accommodation and food service activities and transportation and storage showcasing the lowest agreements with the statements.

Table 69: Competition Within the Telecommunication Market in Qatar by Industry Type (% Agree)

Industry	Enough competition for telecom	Innovative and up-to-date technology solutions	Customer support meets organizational demands	Sufficient difference between products from 2 service providers	Easy comparison between offers by two service providers	Good choice of products/ services available to the organization
Wholesale and Retail Trade; Repair of Motor Vehicles	48%	45%	47%	53%	54%	62%
Accommodation and Food Service Activities	50%	43%	45%	53%	51%	56%
Other Service Activities	54%	50%	49%	45%	56%	56%
Construction	54%	46%	50%	55%	39%	54%

Transportation and Storage	48%	52%	52%	49%	47%	51%
Manufacturing	51%	45%	43%	54%	55%	60%
Administrative and Support Service Activities	59%	55%	40%	55%	50%	55%
Agriculture, Forestry and Fishing	49%	49%	59%	56%	59%	56%
Professional, Scientific and Technical Activities	39%	65%	57%	35%	70%	57%
Education	59%	49%	46%	49%	59%	63%
Financial and Insurance Activities	44%	31%	42%	60%	49%	64%
Real Estate Activities	68%	40%	48%	56%	58%	72%
Mining and Quarrying	44%	56%	33%	33%	50%	67%
Human Health and Social Work Activities	62%	62%	77%	62%	46%	69%
Information and Communication	42%	67%	75%	58%	67%	50%
Arts, Entertainment and Recreation	71%	29%	71%	57%	57%	71%
Water Supply, Sewerage, Waste Management and Remediation Activities	100%	33%	--	67%	67%	67%
Electricity, Gas, Steam and Air Conditioning Supply	50%	100%	100%	100%		

Q. How much do you agree or disagree with the following statements?

Base: All Respondents, N=2100 (Agriculture, forestry and fishing: 39; Manufacturing: 65; Construction: 74; Wholesale, retail trade and repair of motor vehicles: 1050; Accommodation and food service activities: 445)

Table 70 depicts the percentage of respondents that agree to the statements on the competition within the telecommunications market in Qatar. 53% of large businesses agreed to the statement that there is enough competition for telecom products and services in Qatar closely followed by small business (51%).

**Table 70: Competition Within the Telecommunication Market in Qatar by Size of Business (% Good Value)**

	Enough competition for telecom	Innovative and up-to-date technology solutions	Customer support meets organizational demands	Sufficient difference between products from 2 service providers	Easy comparison between offers by two service providers
Micro Businesses	50%	45%	46%	54%	54%
Small Businesses	51%	47%	52%	51%	46%
Medium Businesses	49%	57%	51%	45%	53%
Large Businesses	53%	42%	41%	52%	52%
<p><i>Ques. With regards to all the services, like Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet, and Leased Lines: With regards to the amount, you pay as a business for this service and the value you receive, do you feel you receive poor value, moderate value or good value?</i></p> <p><i>Base: All respondents, N= 2100</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>					

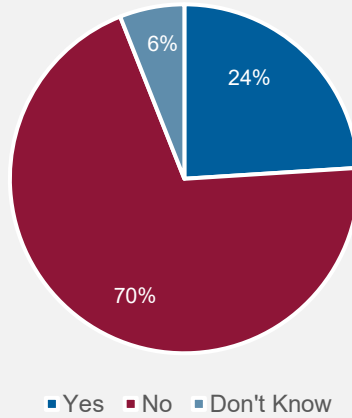
### 3.10. Consumer Perception on Telecommunication Services during COVID- 19

#### 3.10.1. Changes in Product Offerings

Overall awareness on changes in telecommunication services and product offerings during Covid 19 is quite low among business consumers who were part of the same organization with 70% of the responses mentioning that there has been no change seen in the telecommunication services during the pandemic. Only around 24% of the respondents said that they saw few noticeable changes in the product offerings from the service providers during the time period while the rest 6% being unaware of the changes. (see Figure 52)



Figure 52: Changes in product offerings during COVID- 19

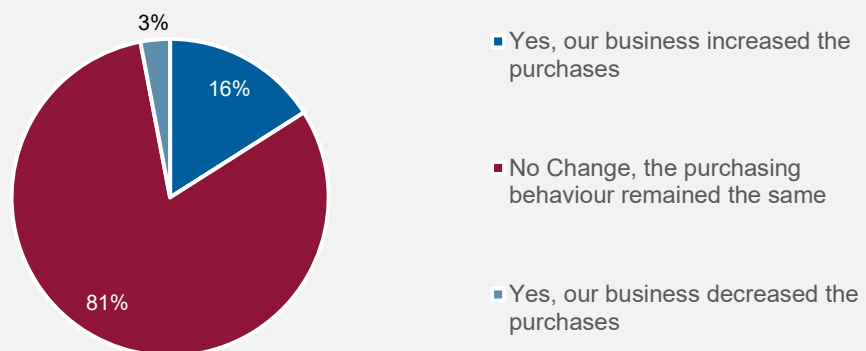


Ques: Have you noticed any changes in telecommunications services and products due to the coronavirus pandemic?  
N= 1394

### 3.10.2. Changes in Purchase Behavior

The respondents were further asked to indicate if there were any changes in the business's purchasing behavior with 16% mentioning that the COVID-19 pandemic led to a noticeable increase in telecommunications services purchases mainly owing to increased demand while only 3% mentioned that the pandemic led to decrease in purchases. More than 81% of the respondents however indicated that even during the pandemic, there was no change and the purchasing behavior remained the same. (see Figure 53)

Figure 53: Changes in purchase behavior during COVID-19



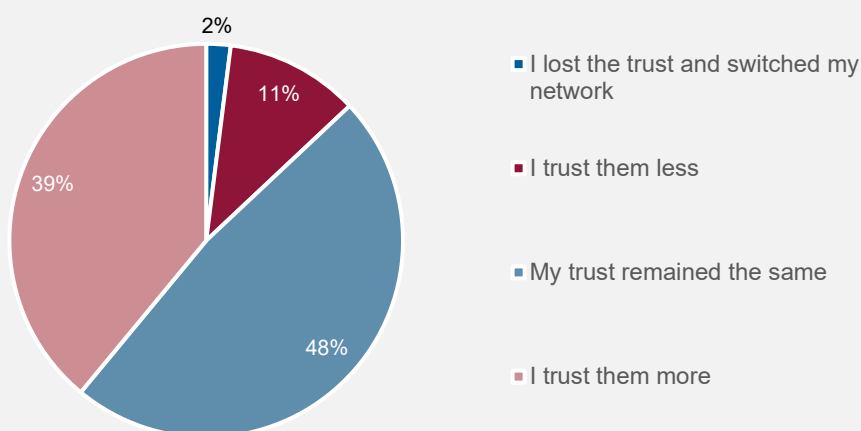
Ques: Have you noticed any changes in telecommunications services and products due to the coronavirus pandemic?  
N= 1394

The respondents were further also asked whether the pandemic led to any changes in their levels of trust in the service providers in relation to overall satisfaction with 39% of the respondents mentioning

that they trust the service provider their business currently uses more while 48% mentioning that irrespective of the effects of the pandemic on the business landscape, their trust levels have remained the same.

Additionally, 11% of the respondents of the total sample indicated that they lost trust in the current service provider and a further 2% mentioned that they had to switch their network provider. (see Figure 54)

**Figure 54: Effect of the pandemic on the trust level in the Service Provider**

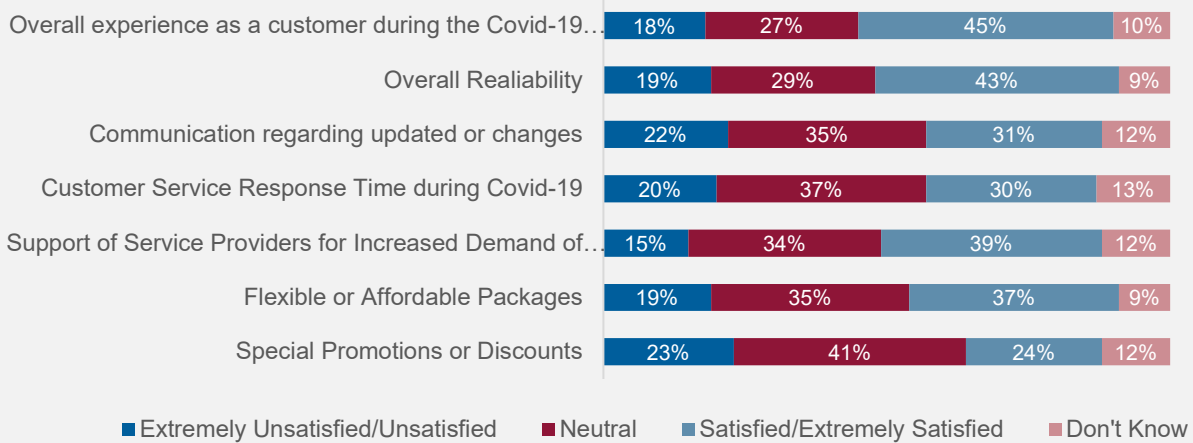


Ques: How did the pandemic affect your level of trust in the Service Providers your business regularly uses? N= 1394

Satisfaction levels during Covid 19 were also measured on various parameters with 45% satisfaction levels for overall experience as a business customer during the Covid 19 pandemic closely followed by overall reliability with 43% satisfaction. Close to 31% and 30% of the total respondents indicated that they were satisfied with the regular updates and changes on the service offerings and customer service response time during the pandemic.

Special promotions and discounts, accounting for 41% of respondents, elicited neutral satisfaction levels and 24% underscored high satisfaction (see Figure 55)

Figure 55: Satisfaction during COVID- 19



Ques: Taking into consideration the COVID-19 period, how satisfied were you with the following parameters? N= 1394

Table 71 depicts the overall recommendation for telecommunication services by type of industry with 54% transportation and storage followed by education at 50% and mining and quarrying at 50%. Meanwhile, 35% of the respondents for wholesale and retail trade mentioned that they would highly recommend the telecommunication services to the business ecosystem closely followed by accommodation and food service activities at 31%.

Table 71: Recommendation for Telecommunication Services by industry type during COVID-19 (% Highly Recommended)

Industry	Overall Recommendation
Wholesale and Retail Trade; Repair of Motor Vehicles	35%
Accommodation and Food Service Activities	31%
Other Service Activities	39%
Construction	35%
Transportation and Storage	54%
Manufacturing	41%
Administrative and Support Service Activities	38%

Agriculture, Forestry and Fishing	29%
Professional, Scientific, and Technical Activities	29%
Education	50%
Financial and Insurance Activities	19%
Real Estate Activities	38%
Mining and Quarrying	50%
Human Health and Social Work Activities	38%
Information and Communication	--
Arts, Entertainment and Recreation	25%
Water Supply, Sewerage, Waste Management and Remediation Activities	--
Electricity, Gas, Steam, and Air Conditioning Supply	--
<p><i>Ques. How likely are you to recommend your telecommunication service provider based on their performance during the Covid-19 crisis?</i></p> <p><i>Base: N= 1394 (Wholesale and retail trade: 697; Accommodation and food service activities: 290; Other service activities: 71; Construction: 51).</i></p>	

Table 72 presents the overall recommendation for telecommunication services by type of business with 36% for micro businesses, 36% for large businesses followed by small and medium businesses at 29% respectively.

<b>Table 72: Recommendation for the Telecommunication Services by Type of Business during COVID- 19 (% Highly Recommended)</b>	
<b>Industry</b>	<b>Overall Recommendation</b>
Micro Businesses	36%
Small Businesses	29%
Medium Businesses	29%
Large Businesses	36%

Ques. How likely are you to recommend your telecommunication service provider based on their performance during the COVID-19 crisis?

Base: N= 1394

Micro Enterprises: Fewer than 10 employees. N= 1118

Small Enterprises: 10 to 49 employees. N= 132

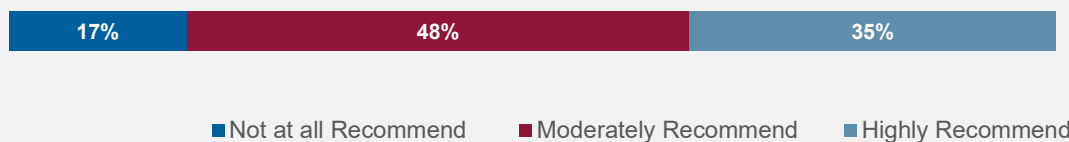
Medium Enterprises: 50 to 249 employees N=97

Large Enterprises: More than 250 employees N=47

Business consumers were asked whether they would recommend the current telecommunication service provider to other businesses in Qatar based on the performance during Covid 19. Of the total sample, 35% of the respondents mentioned would highly recommend the service provider with close to half of the sample size indicating that they were neutral about the service provider and would moderately recommend it to the businesses.

Only less than two in every ten respondents indicated that they would not recommend the service provider at all. (see Figure 56)

Figure 56: Recommendation during COVID- 19



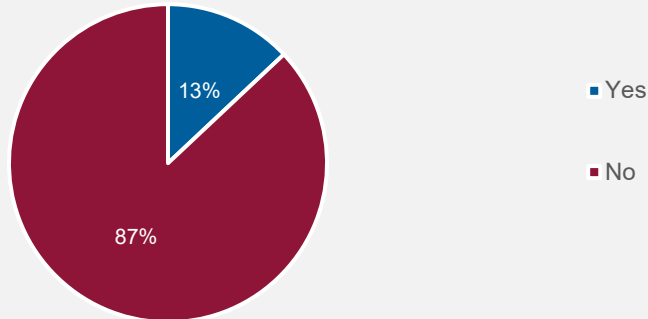
Ques: How likely are you to recommend your telecommunication service provider based on their performance during the Covid-19 crisis? N= 1394

### 3.11. Consumer Perception of Telecommunication Services during FIFA World Cup 2022

#### 3.11.1. Overall Satisfaction

To understand the telecommunications landscape and the impact on businesses during FIFA World Cup 2022, respondents were asked if they faced issues with only about 13% mentioning that they did face issues inside the stadium for various attributes largely revolving around network coverage, network availability and voice clarity and quality. (see Fig 57).

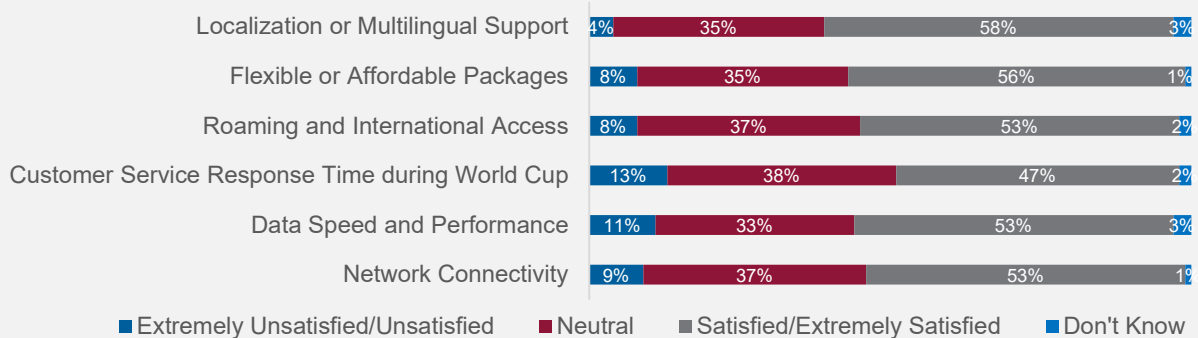
Figure 57: Issues during FIFA World Cup 2022



Ques: Did you face any issues concerning telecommunication services during the FIFA World Cup 2022 in any of the stadiums while attending the match? N= 2100

Furthermore, respondents were asked to rate their satisfaction on various parameters for telecommunication services during FIFA World Cup 2022 with the highest satisfaction levels seen for localization and multilingual support, network connectivity, and data speed & performance at 58% and 53% respectively. Meanwhile, respondents exhibited a low satisfaction level for flexible and affordable packages at 46% (see Figure 58)

Figure 58: Satisfaction with the telecommunication services during FIFA World Cup 2022



Ques: Taking into consideration the FIFA World Cup 2022 period, how satisfied were you with the following parameters? N= 2100

Table 73 shows the overall recommendation for telecommunication service by type of industry during FIFA World Cup 2022 with figures as follows:

Wholesale and retail trade (27%); accommodation and food service activities (26%); construction (35%); transportation and storage (32%); agriculture, forestry and fishing (31%) and more. The human health and social work activities industry saw the highest recommendation for telecommunication services at 46% followed by arts, entertainment, and recreation at 43%.

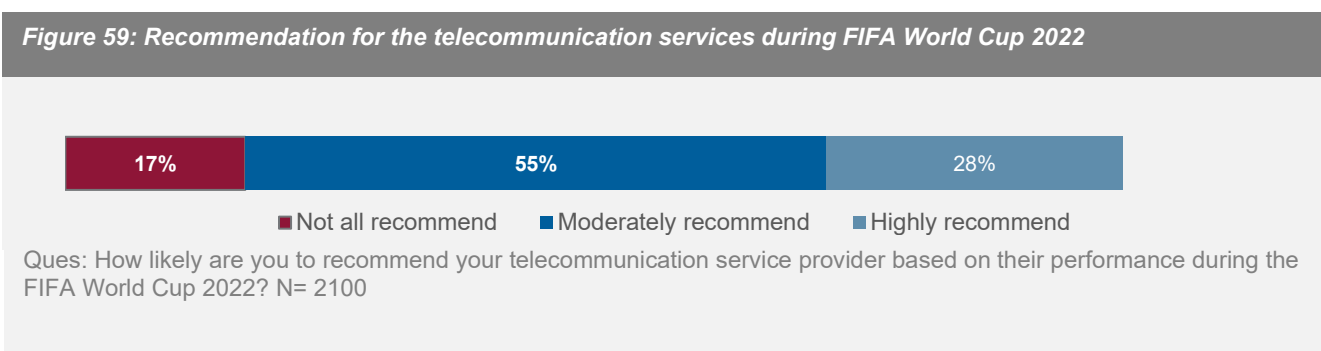
**Table 73: Recommendation for Telecommunication Services by industry type during FIFA World Cup 2022 (% Highly Recommended)**

Industry	Overall Recommendation
Wholesale and Retail Trade; Repair of Motor Vehicles	27%
Accommodation and Food Service Activities	26%
Other Service Activities	34%
Construction	35%
Transportation and Storage	32%
Manufacturing	26%
Administrative and Support Service Activities	22%
Agriculture, Forestry and Fishing	31%
Professional, Scientific and Technical Activities	17%
Education	32%
Financial and Insurance Activities	27%
Real Estate Activities	36%
Mining and Quarrying	33%
Human Health and Social Work Activities	46%
Information and Communication	17%
Arts, Entertainment and Recreation	43%
Water Supply, Sewerage, Waste Management and Remediation Activities	--
Electricity, Gas, Steam, and Air Conditioning Supply	--
<p><i>Ques. How likely are you to recommend your telecommunication service provider based on their performance during the FIFA World Cup crisis?</i></p> <p><i>Base: n= 2100 (Wholesale and retail trade: 1038; Accommodation and food service activities: 445; Other service activities: 113; Construction: 74).</i></p>	

In Table 74, the comprehensive recommendations for telecommunication services, categorized by industry during the FIFA World Cup 2022, reveal distinctive patterns among respondents from varying business scales. Micro businesses demonstrate a notable 28% endorsement, expressing their intention to recommend or highly recommend the services to the broader business ecosystem in Qatar. Meanwhile, small businesses offer a 24% recommendation, medium-sized businesses stand at 29%, and large businesses register a 27% recommendation level. These variations highlight nuanced perspectives across different business sizes regarding the commendation of telecommunication services during the high-profile event.

Table 74: Recommendation for the Telecommunication Services by Type of Business during FIFA World Cup 2022 (% Highly Recommended)	
Industry	Overall Recommendation
Micro Businesses	28%
Small Businesses	24%
Medium Businesses	29%
Large Businesses	27%
<p><i>Ques. How likely are you to recommend your telecommunication service provider based on their performance during the FIFA World Cup 2022 crisis?</i></p> <p><i>Base: N= 2100</i></p> <p>Micro Enterprises: Fewer than 10 employees. N= 1684  Small Enterprises: 10 to 49 employees. N= 200  Medium Enterprises: 50 to 249 employees N=152  Large Enterprises: More than 250 employees N=64</p>	

Based on the overall experiences during the FIFA World Cup 2022, about 28% indicated that they would highly recommend the service provider to other businesses in Qatar while around 55% mentioned that they would moderately recommend these services. (see Figure 59)





## 4. Key Takeaways for CRA

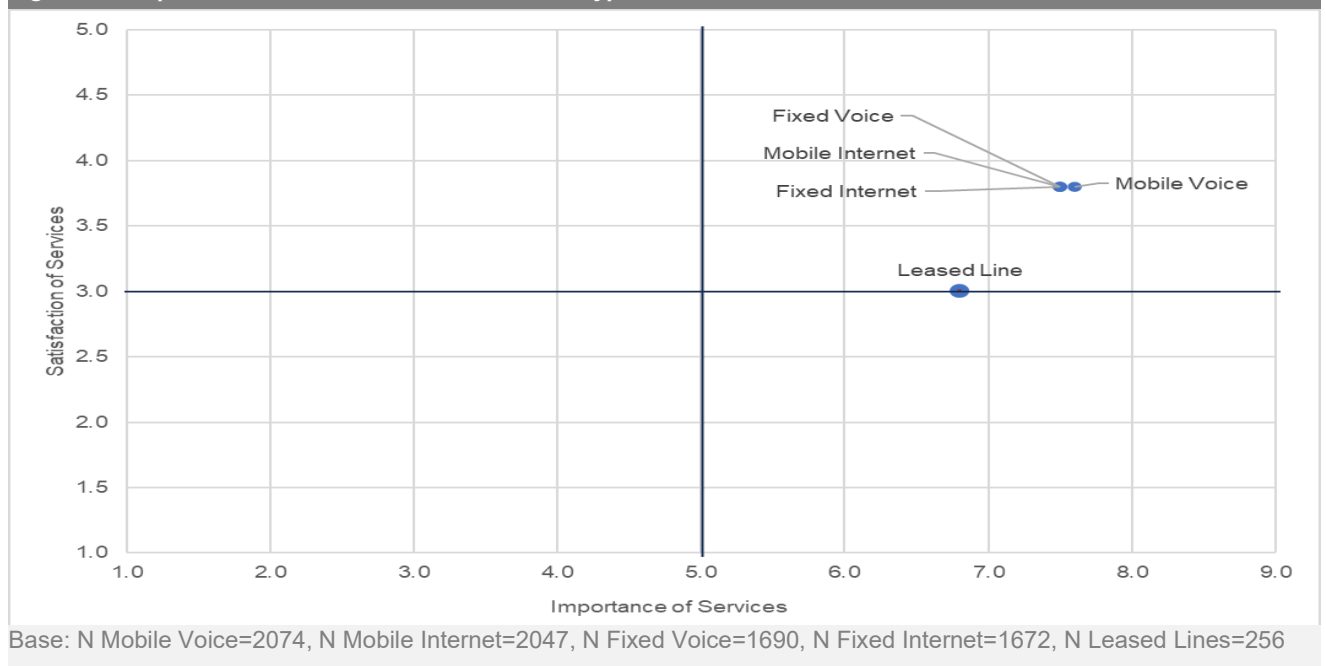
### 4.1. Importance-Satisfaction Matrix

Figure 60 presents an Importance-Satisfaction Matrix focused on various telecommunication services. The horizontal axis is labelled "Importance of Services" and runs from 1.0 to 9.0, indicating the relative importance of each service to the business. The vertical axis is labelled "Satisfaction of Services" and ranges from 1.0 to 5.0, reflecting how satisfied business customers are with each service.

Five services are plotted on the graph: Fixed Voice, Mobile Internet, Fixed Internet, and Mobile Voice and Leased Line. Each service is represented by a blue dot and is accompanied by a text label for clear identification. The position of each dot corresponds to its importance and satisfaction rating.

The services of Mobile Voice along with Mobile Voice, Fixed Voice, and Fixed Internet are located closely together, indicating a similar level of importance and satisfaction among them. Mobile Voice appears to be the most important service, positioned furthest to the right, while the other three services are slightly less important but have a higher satisfaction rating. The Leased Line has the lowest importance and satisfaction ratings among all the services plotted.

Figure 60: Importance-satisfaction matrix for each type of service



## 4.2. Key Findings and Recommendations

Table 75: Key Findings and Implications for CRA		
Key Findings	Recommendations	CRA Department
<b>Awareness Regarding CRA Qatar</b>		
<ul style="list-style-type: none"> <li>❖ <b>Awareness of CRA among Business Consumers:</b> Awareness remains consistent with 2019, with less than half of the respondents aware of the CRA. Awareness has slightly increased by +2% from 2019.</li> <li>❖ <b>Understanding of CRA's Roles and Responsibilities:</b> <ol style="list-style-type: none"> <li>1. High awareness of CRA's role in regulating telecommunications at 81% vs 76% in 2019</li> <li>2. Moderate awareness of licensing &amp; spectrum allocation at 65% vs 69% in 2019</li> <li>3. Good awareness of dedicated process for resolving consumer queries 72% vs 57% in 2019.</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Increase Awareness Campaigns:</b> Implement targeted awareness campaigns to improve knowledge of CRA's role and services among business consumers. <ul style="list-style-type: none"> <li>• <b>Example:</b> The FCC's COVID-19 Telehealth Program provided \$200 million to support remote healthcare services, using outreach and media to enhance FCC awareness. Similarly, CRA can use Vision 2030 to boost its visibility and credibility in Qatar.</li> <li>• <b>Example:</b> The "Connect with Confidence" campaign can run for 3-6 months to enhance business awareness of CRA's role in Qatar's telecom market. It could feature a launch event with key stakeholders, dynamic social media efforts, a dedicated campaign website, and regular email updates. Additionally, partnerships with business associations and educational resources on regulatory compliance could be used to broaden outreach and establish CRA's credibility.</li> </ul> </li> <li>❖ <b>Enhance Communication Channels:</b> Utilize multiple communication channels effectively to reach a broader audience and ensure clear, transparent information about CRA's activities and consumer rights. <ul style="list-style-type: none"> <li>• <b>Email Newsletters:</b> CRA to send email newsletter to registered businesses with updates on regulatory changes, compliance tips, educational resources, and upcoming events. Newsletters can include articles on recent regulatory developments, Q&amp;A sessions with industry experts, highlights of CRA initiatives, and links to relevant webinars or workshops</li> <li>• <b>Global Industry Partnerships:</b> CRA collaborates with a prominent business association to host a joint webinar on "Navigating Telecommunications Regulations for Small Businesses."</li> <li>• <b>Webinars, Workshops and FGDs:</b> The CRA hosts a series of webinars on topics such as "Data Protection in Telecommunications" and</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Public Relations, Communications Unit</b></li> <li>❖ <b>Consumer Affairs Department</b></li> </ul>

	<p>"Understanding Spectrum Licensing Requirements." Webinars can delve into specific regulatory topics, provide updates on recent legal changes or enforcement trends, offer practical tips for compliance, and allow participants to ask questions and seek clarification from experts. The webinar could cover topics such as common compliance challenges faced by small businesses, tips for achieving regulatory compliance on a budget, resources available from the CRA for business owners, and case studies of successful compliance strategies.</p> <ul style="list-style-type: none"> <li>❖ <b>Improve Stakeholder Engagement:</b> Continuously engage with stakeholders to gather feedback and adapt regulatory measures that reflect the evolving needs of the market.</li> <li>❖ <b>Strengthen Consumer Protection Mechanisms:</b> Focus on enhancing consumer protection mechanisms, including the complaint resolution process, to build consumer trust and ensure fair practices in the telecommunication industry.</li> <li>❖ <b>Promote Market Competitiveness:</b> Encourage fair pricing and service quality-based competition within the Service Providers. CRA can take a proactive role by raising awareness through collaborative campaigns with service providers. These campaigns should showcase successful case studies that highlight each provider's adaptability in addressing telecom challenges. Additionally, CRA can encourage transparency in service offerings and promote competitive pricing plans. By doing so, CRA can help create a more balanced market environment, allowing new and existing businesses to make informed decisions based on service quality, innovation, and cost-effectiveness.</li> </ul>	
<b>Business Customer Usage of Telecommunication Services</b>		
<ul style="list-style-type: none"> <li>❖ The Qatari business telecom market shows a high utilization of mobile services, with mobile voice and internet being the most used services across businesses of various sizes.</li> </ul> <p>Micro Businesses (fewer than 10 employees):</p> <ol style="list-style-type: none"> <li>1. Mobile Voice: 99% usage</li> <li>2. Mobile Internet: 97% usage</li> </ol> <p>Small Businesses (10 to 49 employees):</p> <ol style="list-style-type: none"> <li>1. Mobile Voice: 98% usage</li> </ol>	<ul style="list-style-type: none"> <li>❖ <b>Encourage Competition and Innovation:</b> Since Ooredoo holds a majority share across most services, CRA could encourage more competition to ensure fair pricing and innovation. This could involve incentivizing new entrants into the market or supporting Vodafone to expand their services.</li> <li>❖ <b>Promote the Adoption of Emerging Technologies:</b> With a growing trend towards cloud computing and substantial use of OTT services like WhatsApp, CRA should promote further adoption of these technologies. This could include regulatory support for cloud services and ensuring that OTT services can operate effectively within Qatar's telecom framework.</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Regulation Affairs and Competition Department</b></li> <li>❖ <b>Technical Affairs Department</b></li> <li>❖ <b>Consumers Affairs Department</b></li> </ul>

<p>2. Mobile Internet: 98% usage</p> <p>Medium Businesses (50 to 249 employees):</p> <ol style="list-style-type: none"> <li>1. Mobile Voice: 100% usage</li> <li>2. Mobile Internet: 99% usage</li> </ol> <p>Large Businesses (more than 250 employees):</p> <ol style="list-style-type: none"> <li>1. Mobile Voice: 100% usage</li> <li>2. Mobile Internet: 95% usage</li> </ol> <ul style="list-style-type: none"> <li>❖ Fixed voice and internet services have a strong presence, with consistent usage across micro to large businesses, though slightly lower in medium businesses for fixed internet.</li> <li>❖ Ooredoo emerges as the predominant telecommunication service provider across various sectors in the Qatari business market, holding the majority share in services such as mobile voice (91%), mobile internet (90%), and fixed services including voice and internet (both 89%)</li> <li>❖ Ooredoo is the preferred provider in all sectors listed, with its highest penetration in the Education sector (88%), followed by Water Supply, Sewerage, Waste Management and Remediation Activities (93%), and Professional, Scientific and Technical Activities along with Real Estate Activities (both at 87%). Vodafone in turn, has raised its market share in sectors such as Information and Communication Space and Agriculture.</li> <li>❖ Mobile services are the most utilized, with Mobile Voice at 99% and Mobile Internet at 97%. Fixed Voice and Fixed Internet services also have a strong usage rate at 80% each. Security services and Over-The-Top (OTT) services like</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Support for Small and Medium-Sized Enterprises (SMEs):</b> Given the high usage of mobile services among all business sizes, CRA could implement initiatives that provide support to SMEs in leveraging these services for growth and efficiency, potentially through subsidies or specialized service packages.</li> <li>❖ <b>Consumer Awareness and Protection:</b> Increase efforts in consumer education and protection, focusing on the rights and options available to businesses in telecommunications services, and setting up a clear and effective complaints resolution mechanism by enhancing already launched Telecom Complaint Management System. Additionally, encouraging dedicated account managers from the Service Providers will assist in effective turnaround time in resolving complaints.</li> <li>❖ <b>Diversification of Service Providers in Various Sectors:</b> Encourage diversification of service providers in sectors where there is a heavy dominance of one provider to ensure businesses have choices and can benefit from competitive service offerings.</li> </ul>	
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<p>streaming and messaging apps are used by 16% of the organizations surveyed. Cloud Services are used by 16% of the respondents, indicating a growing trend towards cloud computing.</p> <p>❖ WhatsApp is the leading OTT service, used by a vast majority of businesses at 99%. This reflects its pivotal role in business communication. The second most popular service is IMO, used by almost half of the businesses at 49%, followed by Skype with 43% usage, which underscores its continued relevance in professional settings.</p>		
<b>Importance of Telecommunication Services</b>		
<p>❖ High Importance is recorded for Mobile Voice (93%), Mobile Internet (90%), Fixed Voice (92%) and Fixed Internet (87%).</p> <p>❖ Mobile Voice services are highly valued across all sectors, with the Financial and Insurance Activities sector attributing the highest importance to it at 98%.</p> <p>❖ Importance of leased lines is less for Wholesale and Retail with 51%</p> <p>❖ Importance of mobile internet is less for Scientific and Technical activities with 78%</p> <p>❖ Importance of Fixed Voice and Fixed Internet is lowest for Transportation and Storage Industry with 46% and 47% respectively</p> <p>❖ Inclination towards leased lines is least for all the sectors combined</p> <p>❖ Top users for all the services by industry</p> <ol style="list-style-type: none"> <li>1. Mobile Voice: Financial and Insurance Activities, Professional, Scientific and Technical Activities and Education</li> <li>2. Mobile Internet: Mining and Quarrying, Education,</li> </ol>	<p>❖ <b>Enhance Mobile and Internet Service Quality:</b> Given the high importance of mobile voice, mobile internet, fixed voice, and fixed internet services for businesses, CRA Qatar should focus on enhancing the quality, reliability, and coverage of these services.</p> <p>❖ <b>Support for Leased Line Services:</b> With a notable increase in the importance of leased lines from 2019, it's recommended to encourage service providers to offer competitive and reliable leased line services to meet the growing demand, particularly among businesses requiring dedicated connections for operational integrity.</p> <p>❖ <b>Sector-Specific Focus:</b> The varying importance of telecommunications services across different sectors suggests the need for tailored services that cater to the unique needs of each sector, such as more robust mobile connectivity for the Information and Communication sector and dedicated lines for the Water Supply and Waste Management sector.</p> <p>❖ <b>Encourage Innovation in OTT and Cloud Services:</b> Moderate importance ratings for OTT, cloud services, and other digital services indicate an opportunity for growth. CRA Qatar could promote innovation and investment in these areas to support businesses in their digital transformation efforts.</p> <p>❖ <b>Broaden Access to Telecommunication Services:</b> Efforts should be made to ensure that businesses of all sizes, especially micro and small enterprises, have access to essential telecommunication services at competitive prices to support their smooth operation and growth.</p>	<p>❖ <b>Technical Affairs Department</b></p> <p>❖ <b>Regulation Affairs and Competition Department</b></p>

<p>Wholesale and Retail Trade; repair of Motor Vehicles and Accommodation and Food Service Activities.</p> <p>3. Fixed Voice: Financial and Insurance Activities, Education and Professional, Scientific and Technical Activities.</p> <p>4. Fixed Internet: Mining and Quarrying, Agriculture, Forestry and Fishing and Financial and Insurance Activities</p> <p>5. Leased Lines: Administrative and Support Service Activities, Financial and Insurance Activities, Professional, Scientific and Technical Activities</p>		
Overall Satisfaction of Telecommunication Services		
<ul style="list-style-type: none"> <li>❖ <b>High Levels of Satisfaction:</b> A significant majority of users remain satisfied with Mobile Voice (78%) and Fixed Voice (75%) services, indicating a strong positive reception for these services.</li> <li>❖ <b>Stable Satisfaction with Mobile Internet:</b> Despite changes in survey methodology, over 70% of respondents still report satisfaction with Mobile Internet services.</li> <li>❖ <b>Moderate Satisfaction with Fixed Internet:</b> While there has been a shift in satisfaction levels for Fixed Internet, a majority (67%) of respondents are still satisfied with the service.</li> <li>❖ <b>Diverse Opinions on Leased Lines:</b> Leased Lines show a more varied response, with 47% of respondents satisfied, but also a notable proportion (29%) remaining neutral, indicating an area for potential improvement without significant dissatisfaction.</li> </ul> <p><b>Considerable 'Don't Know' Responses:</b> The 'Don't Know' responses are considerable across services, especially for Leased Lines (16%), suggesting that there</p>	<ul style="list-style-type: none"> <li>❖ <b>Enhance Customer Education and Awareness:</b> Given the considerable 'Don't Know' responses, particularly for Leased Lines, the CRA should work with service providers to enhance customer education and awareness about leased line services, their benefits, and use cases. This could involve informational campaigns, easily accessible online resources, and targeted workshops for businesses that could benefit most from leased lines.</li> <li>❖ <b>Improve Overall Quality for Fixed Internet:</b> With a moderate satisfaction level for Fixed Internet services, focusing on improving the quality of service is essential. This could involve setting stricter quality standards for providers, encouraging the development of infrastructure to increase speed and reliability, and addressing any regional disparities in service quality.</li> <li>❖ <b>Strengthen Customer Service:</b> Implement policies that ensure service providers offer robust customer support and timely resolution of complaints. This includes regular monitoring of customer service performance and setting benchmarks for response times and problem resolution rates.</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Public Relations and Communications Unit</b></li> <li>❖ <b>Technical Affairs Department</b></li> <li>❖ <b>Consumers Affairs Department</b></li> </ul>

might be a lack of awareness or understanding of the service among respondents.		
Mobile Voice		
<ul style="list-style-type: none"> <li>❖ It is highly complained service at 49%. The percentage has increased from 2019.</li> <li>❖ Compared with other services, Mobile Voice has lower satisfaction scores on the following: <ol style="list-style-type: none"> <li>1. Variety of Plans (72%)</li> <li>2. Modes of bill payments (70%)</li> <li>3. Quality of Customer Support (69%)</li> <li>4. Time taken for Service Activation (66%)</li> <li>5. Regularity of receiving bills (66%)</li> <li>6. Ease of understanding bills (66%)</li> <li>7. Accuracy of the bills (60%)</li> </ol> </li> <li>❖ The data highlights specific areas for improvement in mobile voice services in Qatar, particularly in Al Shamal where satisfaction issues are more apparent regarding network coverage. While there is a need for improvement in Umm Salal.</li> <li>❖ Furthermore, moderate satisfaction with both Ooredoo and Vodafone Qatar's mobile voice service, specifically concerning network reliability, variety of rate plans, quality of customer support, ease of understanding bills, regularity of bills, modes of bill payment, accuracy of the bills and variety of rate plans, necessitates targeted interventions</li> <li>❖ Considering the breakdown by business size, small businesses express dissatisfaction in areas such as variety of rate plans (68%), ease of understanding bills (63%), accuracy of bills (63%), regularity of bills (64%),</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Enhancement of Mobile Voice Service Quality:</b> The increasing complaints and lower satisfaction scores in Mobile Voice services signal a critical need for telecommunication providers to enhance service quality. This includes improving network coverage, especially in regions like Al Shamal and Umm Salal, where satisfaction issues are more pronounced. Efforts should be concentrated on ensuring robust network reliability across all areas.</li> <li>❖ <b>Diversification and Customization of Plans:</b> There is a clear demand for a greater variety of mobile voice plans. Providers should consider introducing more tailored plans that cater to the specific needs and usage patterns of different customer segments, including personal users, small businesses, and large enterprises.</li> <li>❖ <b>Improvement in Customer Support Services:</b> Given the low satisfaction scores in the quality of customer support, there is an urgent need to overhaul customer service operations. This could involve training staff more effectively, implementing more responsive customer service channels, and ensuring queries and complaints are resolved promptly and satisfactorily.</li> <li>❖ <b>Targeted Interventions for Businesses:</b> Both small and large businesses have expressed specific areas of dissatisfaction. Tailored interventions that address the unique needs of these business segments are necessary. For small businesses, this could mean offering more varied rate plans and simplifying the process of purchasing services. For large businesses, improving the quality of customer support and making bill payments more flexible could be beneficial.</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Technical Affairs Department</b></li> <li>❖ <b>Spectrum Management Department</b></li> <li>❖ <b>Consumers Affairs Department</b></li> <li>❖ <b>Regulation Affairs and Competition Department</b></li> </ul>



<p>ease of purchasing services (62%)</p> <p>Similarly, large business express dissatisfaction in areas such as Quality of Customer Support for Large Businesses (61%), ease of understanding bills (61%), modes of bill payment (69%), accuracy of bills (66%)</p>		
<b>Mobile Internet</b>		
<ul style="list-style-type: none"> <li>❖ Mobile Internet remains the second most complained service in 2023 at 45% with a slight drop from 2019.</li> <li>❖ Compared with other services, mobile internet exhibits low to moderate satisfaction levels on the following: <ol style="list-style-type: none"> <li>1. Variety of Plans (70%)</li> <li>2. Speed of Data (70%)</li> <li>3. Quality of Customer Support (69%)</li> <li>4. Regularity of Bills (70%)</li> <li>5. Video Quality (69%)</li> <li>6. Customer Support (66%)</li> <li>7. Ease of purchasing services (66%)</li> </ol> </li> <li>❖ With regards to geographic coverage, there is a need of improvement in Al Shahaniya and Al Shamal with regards to network coverage and network reliability. While there is also a need of improvement in Al Daayen with regards to speed of data.</li> <li>❖ Additionally, with regards to service providers, there is a scope of improvement for both the service providers in areas such as network reliability, speed of data, variety of plans, regularity of bills, ease of understanding bills and quality of video.</li> <li>❖ Furthermore, with regards to satisfaction levels by the business size, microbusinesses exhibit moderate satisfaction levels for variety of plans (70%), ease of understanding bills</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Optimize service provision for all business sizes:</b> For large, medium, and small businesses, CRA should work with service providers to optimize service provisions, focusing on regularity of bills, time taken for service activation, ease of purchasing services, and modes of bill payments. Tailoring services to meet the unique requirements of businesses of different sizes will enhance overall satisfaction.</li> <li>❖ <b>Tailor Plans for Microbusinesses:</b> Acknowledging the moderate satisfaction levels for microbusinesses in areas like variety of plans, ease of understanding bills, modes of bill payments, and ease of purchasing services, CRA should advocate for tailored mobile internet plans that cater specifically to the needs and preferences of microbusinesses.</li> <li>❖ <b>Encourage Innovation for Improved Video Quality:</b> Recognizing the need for improvement in the quality of video services, CRA should encourage service providers to invest in innovative technologies that enhance video streaming quality. This may involve the adoption of advanced video compression techniques and network optimizations.</li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Regulation Affairs and Competition Department</b></li> <li>❖ <b>Spectrum Management Department</b></li> <li>❖ <b>Technical Affairs Department</b></li> </ul>



<p>(70%), modes of bill payments (72%) and ease of purchasing services (66%).</p> <p>❖ Similarly, for large, medium and small businesses, there is a necessitated need for improvements in service provisions such as regularity of bills, time taken for service activation, ease of purchasing services and modes of bill payments</p>		
<b>Fixed Voice</b>		
<p>❖ Fixed voice services largely exhibit higher satisfaction levels among business consumers when compare to mobile services on following parameters:</p> <ol style="list-style-type: none"> <li>1. Ease of understanding bills (88%)</li> <li>2. Voice clarity and voice quality (85%)</li> <li>3. Ease of purchasing services (84%)</li> <li>4. Variety of Plans (82%)</li> <li>5. Service Availability (80%)</li> </ol> <p>❖ Despite achieving moderate satisfaction levels for fixed voice services across various provisions, there is a notable need for improvement in customer support services across business sizes. Enhancements in customer support are crucial for expediting complaint resolutions and addressing other customer concerns promptly. This improvement would contribute to an overall more satisfactory experience for users of fixed voice services.</p> <p>❖ When evaluating satisfaction levels for fixed voice services across geographic regions, there is a discernible need for improvement in areas like Al Shahaniya and Al Shamal to enhance voice clarity and quality.</p>	<p>❖ <b>Enhance Customer Support Across Business Sizes:</b> Recognizing the need for improvement in customer support services across business sizes despite moderate satisfaction levels, CRA should work closely with fixed voice service providers to enhance customer support mechanisms. This includes expediting complaint resolutions and addressing customer concerns promptly, contributing to an overall more satisfactory experience for users.</p> <p>❖ <b>Focus on Voice Clarity and Quality in Specific Regions:</b> In regions like Al Shahaniya and Al Shamal, where there is a discernible need for improvement in voice clarity and quality for fixed voice services, CRA should collaborate with service providers to address these specific challenges. Infrastructure enhancements and technology upgrades may be necessary to ensure a consistent and high-quality voice experience in these areas.</p> <p>❖ <b>Promote Transparency and Variety in Plans:</b> To maintain the higher satisfaction levels observed in fixed voice services compared to mobile services, CRA should advocate for transparency in billing practices and a diverse range of plans. Ensuring clear and understandable bills, offering a variety of plans, and promoting service availability (80%) will contribute to continued satisfaction among business consumers.</p>	<p>❖ <b>Consumers Affairs Department</b></p> <p>❖ <b>Technical Affairs Department</b></p> <p>❖ <b>Spectrum Management Department</b></p>
<b>Fixed Internet</b>		
<p>❖ Fixed internet services show notably higher satisfaction levels</p>		<p>❖ <b>Planning and Quality Unit</b></p>

<p>among business consumers when compared to mobile services, particularly in the following service provisions:</p> <ol style="list-style-type: none"> <li>1. Ease of understanding bills (88%)</li> <li>2. Video quality (88%)</li> <li>3. Speed of Data (86%)</li> <li>4. Service Availability (80%)</li> <li>5. Transparency of Prices (85%)</li> </ol> <p>❖ Despite overall higher satisfaction levels in fixed internet services among business consumers, there exists an enhanced scope for improvements in specific areas. Notably, enhancements are warranted in customer support (67%), ease of purchasing services (75%), and regularity of bills (78%).</p> <p>❖ Furthermore, when assessing satisfaction levels for fixed internet services across different business sizes, there is a clear need for improvement in crucial parameters such as customer support (67%) and variety of plans (68%), particularly for small businesses and microbusinesses.</p> <p>❖ Additionally, when scrutinizing satisfaction levels with specific service providers, there is a distinct scope for improvement in services offered by Vodafone. Areas requiring attention include the variety of plans (69%) and customer support (67%). Engaging actively with Vodafone to address these specific areas will enhance the overall quality of services for fixed internet users.</p>	<p>❖ <b>Streamline the Purchasing Process:</b> Addressing the identified area of improvement in ease of purchasing services (75%), CRA should advocate for streamlined processes that make it easier for businesses to acquire fixed internet services. This could include simplified onboarding procedures, clear documentation, and user-friendly interfaces for service acquisition.</p> <p>❖ <b>Ensure Regularity and Clarity in Billing:</b> Considering the highlighted need for enhancements in the regularity of bills (78%), CRA should work with service providers to ensure consistent and clear billing practices. This involves providing transparent and understandable bills at regular intervals, minimizing customer confusion, and fostering overall satisfaction.</p> <p>❖ <b>Monitor and Assess Progress:</b> CRA should implement a robust monitoring and assessment framework to track the progress of recommended enhancements. Regular evaluations of customer satisfaction, service quality, and adherence to recommended improvements will ensure the ongoing success of the initiatives.</p> <p>❖ <b>Engage with Vodafone for Service Improvements:</b> Acknowledging the distinct scope for improvement in Vodafone's fixed internet services, particularly in the variety of plans (69%) and customer support (67%), CRA should actively engage with Vodafone. Facilitating dialogue and collaboration will enable targeted improvements, enhancing the overall quality of services for users of Vodafone's fixed internet.</p>	<p>❖ <b>Regulation Affairs and Competition Department</b></p>
<p><b>Leased Line</b></p>		
<p>❖ Leased Lines exhibit an overall moderate satisfaction level with scope of improvements in areas such as:</p> <ol style="list-style-type: none"> <li>1.Variety of plans: 60%</li> <li>2.Regularity of bills received: 67%</li> <li>3. Accuracy of bills: 68%</li> <li>4.Ease of purchasing services: 69%</li> <li>5.Modes of bill payment: 70%</li> <li>6.Customer support: 70%</li> </ol>	<p>❖ <b>Diversify Plans and Enhance Transparency:</b> Recognizing the scope for improvement in the variety of plans (60%) and transparency of prices (59%), CRA should encourage leased line service providers, especially Vodafone, to diversify their plans and ensure transparent pricing structures. This will offer businesses a broader range of options and foster clearer communication on costs.</p> <p>❖ <b>Address Billing Concerns:</b> Acknowledging the identified areas for improvement in the regularity of</p>	<p>❖ <b>Spectrum Management Department</b></p> <p>❖ <b>Consumers Affairs Department</b></p> <p>❖ <b>Regulation Affairs and Competition Department</b></p>

<p>❖ When examined on the satisfaction levels with regards to business sizes on various parameters, the satisfaction levels are moderate to low as following:</p> <ol style="list-style-type: none"> <li>1. Modes of bill payment: (Medium- 65%)</li> <li>2. Accuracy of bills received: (Small- 54%; Medium- 65%)</li> <li>3. Regularity if bills received: (Small- 59%; Micro- 65%)</li> <li>4. Ease of purchasing services: (Small- 50%; Medium- 58%)</li> </ol> <p>❖ With regards to satisfaction levels on the service providers, there is an enhanced need for improvement in Vodafone's services for parameters such as transparency of prices (59%), and regularity of bills received (67%)</p>	<p>bills received (67%), accuracy of bills (68%), and ease of purchasing services (69%), CRA should collaborate with leased line service providers to streamline billing processes. Ensuring consistent and accurate bills, as well as simplifying service acquisition, will contribute to increased satisfaction.</p> <p>❖ <b>Enhance Customer Support:</b> Given the moderate satisfaction level in customer support (70%), CRA should advocate for enhancements in customer support services provided by leased line service providers. This may involve training programs for customer service representatives and the implementation of more efficient communication channels to address customer queries and concerns promptly.</p> <p>❖ <b>Tailor Services for Different Business Sizes:</b> Considering the varying satisfaction levels among different business sizes, CRA should encourage leased line service providers to tailor their offerings to meet the specific needs of each segment. This includes improving modes of bill payment (Medium - 65%, Small - 54%) and addressing concerns related to regularity of bills received and ease of purchasing services for smaller businesses.</p>	
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## 5. Appendices

### A. Research Methodology

#### Sample Framework

According to the most recent Qatar Census (2020), 71,203 business establishments were identified as operating at the time the Census was conducted. By operating, it means the business was routinely engaged in its daily operation with workers doing their work as usual.

Based on this business establishment population size, the survey was conducted with a total sample of n=2,100 business consumer participants.

Based on a business population size of 71,203, the sample size of n=2,100 allows a margin of error of  $\pm 3\%$  on a 99% confidence level and a margin of error of  $\pm 2\%$  on a 95% confidence level. Both margin of error meets best practice standards of  $\pm 5\%$ .

The survey targeted two main profiles as follows:

- i) Direct Decision makers for the telecommunications services' procurement and/or implementation within a business.
- ii) Users of telecommunication services who are not the direct decision makers for the telecommunications services but are somewhat aware regarding the procurement and/or implementation within a business.

The eligible profiles have been determined by a screening question included in the first section of the survey questionnaire. An eligible respondent must be aware of telecommunication services usage within their respective businesses.

Soft quotas have been applied during the data collection based on the 2020 Census data for business establishments. The quotas have been implemented based on the following:

- Industry Sector
- Business Sector
- Size of Business (by number of employees)
- Geographic Location (municipality)

## Survey Methodology

Once the questionnaire had been approved, a pilot test was conducted to ensure the validity of the questionnaire. The pilot test was conducted with 10 respondents, which have been included in the final total completed data after their validation.

The surveys have been conducted at the respondent's place of work at a time that is convenient to the respondent. In most instances, a pre-arranged time and day has been scheduled with the respondent for the interview.

The CRA provided a formal letter endorsing Prudent Qatar to conduct the study on its behalf and requesting Business consumers' participation in this strategically important study.

## Sample Distribution

A total of 2,254 respondents were interviewed. 93% of the interviews i.e. 2,100 were conducted with the direct decision makers for the telecommunications services' procurement and/or implementation within

a business and people who are not direct decision-makers but somewhat aware of telecommunication services within their businesses and 7% were the terminated interviews

## Limitations

- **Response Bias:** Respondents might have provided answers they believe are socially acceptable or expected rather than their true feelings, especially if the survey method lacks anonymity.
- **Survey Fatigue:** Given the comprehensive nature of the survey with over 70+ questions, respondents may experience survey fatigue, leading to less thoughtful responses or higher dropout rates, especially if the survey is lengthy.
- **Don't Know Responses:** A Considerable number of 'Don't Know' responses, especially for services like Leased Lines; indicate a lack of awareness or understanding among respondents. This limits the usefulness of the data for making specific recommendations or assessing satisfaction accurately.

Figure 61, illustrates the profile of respondents by level of awareness and decision making in relation to the telecommunications. 97% of the total respondents interviewed stated to being aware of the telecommunication services whereas only 3% of the overall respondents were not aware of the telecommunication services. These interviews were terminated due to lack of awareness on the subject matter.

**Figure 61: Respondents' profile by level of awareness and decision making in relation to the telecommunications services**

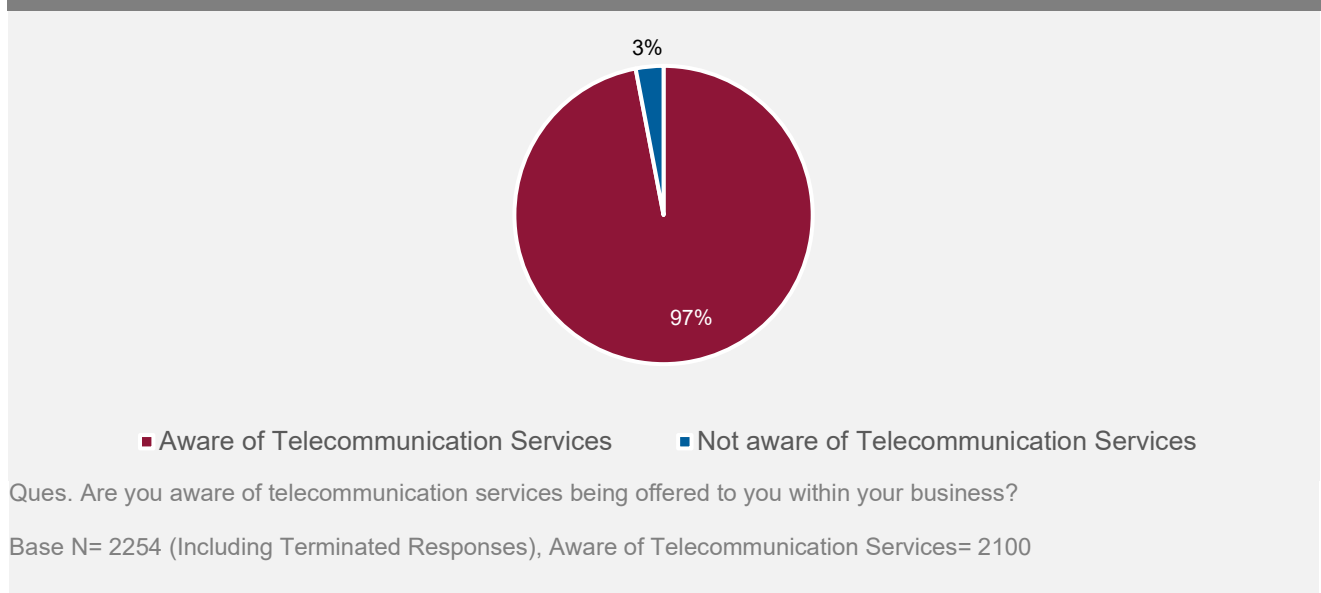
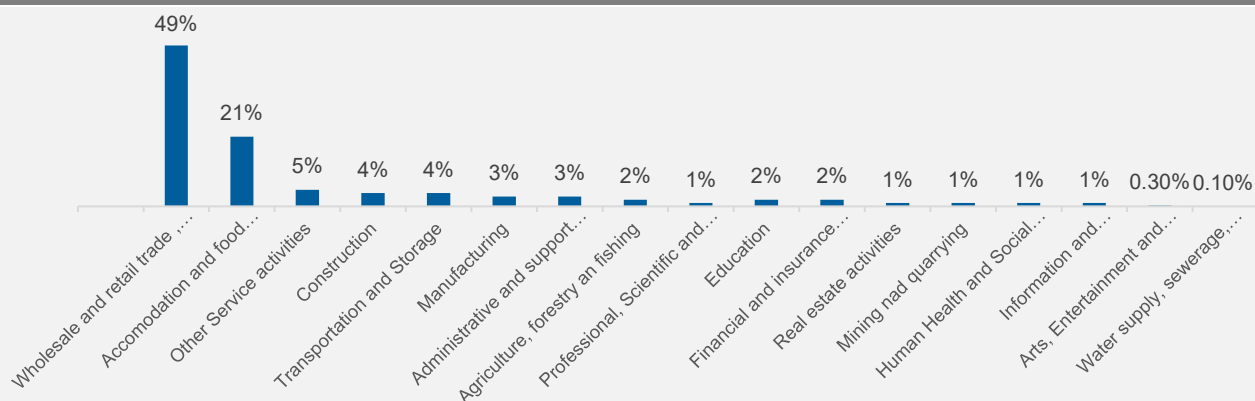


Figure 62, illustrates the respondent's profile by industry sector as reported. A significant proportion, 49%, of the respondent's were part of the wholesale and retail trade followed by accommodation and food services at 21%. The remaining respondents were split across other service activities at 5%, construction at 4%, transportation and storage at 4%, manufacturing at 3%, administrative and support services at 3%, agriculture, forestry and fishing at 2% and others.

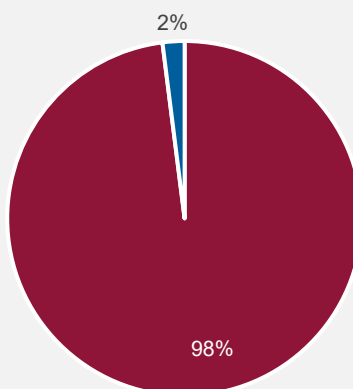
**Figure 62: Respondents' profile by Industry Sector**



Ques. Which industry does your business operate in? Base N= 2100

Figure 63, illustrates the profile of respondents by business sector. A significant portion of respondent's formed part of the private sector companies at 98% while the remaining were either government or semi-government sector respondents at 2%.

**Figure 63: Respondents Profile by Business Sector**



■ Private Company ■ Governmetn Entity / Semi Government

Ques. Which of the following best describe your company?

Base N= 2100, N Private Company= 2053; N Government/Semi-Government= 47

Figure 64, illustrates the profile of respondents by business size. A significant portion of respondent's formed part of the micro businesses at 80%, small businesses at 10%, medium businesses at 7% and large businesses at 3%.

**Figure 64: Respondents Profile by Nationality**

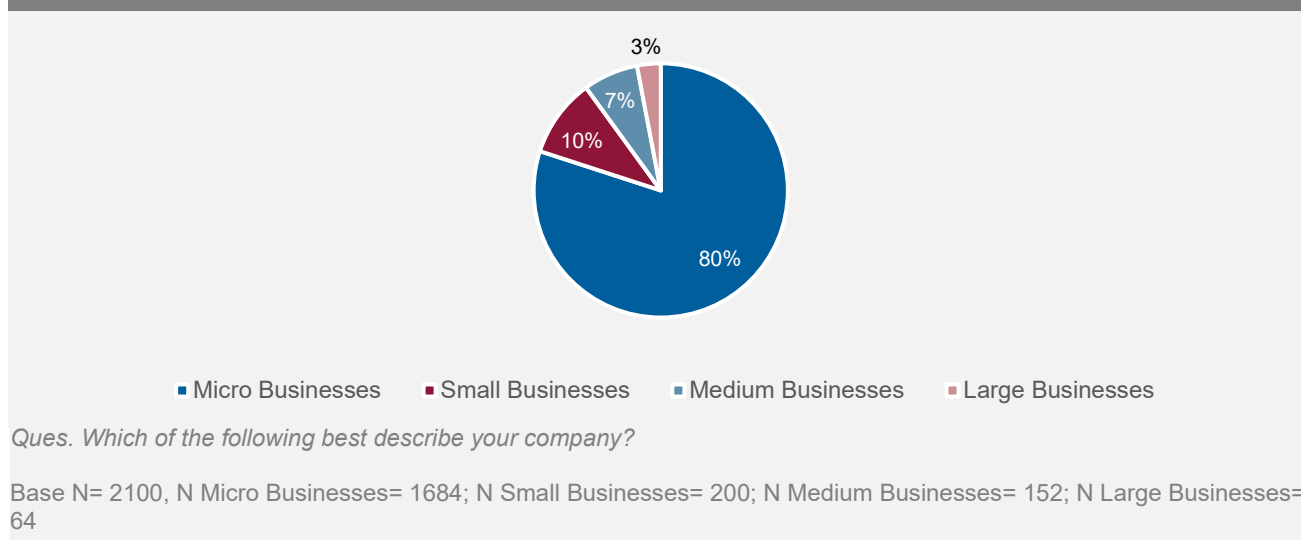


Figure 65, illustrates the profile of respondents by geographic location. Highest number of respondents put in Doha at 51% followed by Al Rayaan at 25%, Al Wakrah at 7%, Al Shahaniya at 7%, Al Khor at 6%, Umm Salal at 2%, Al Daayen and Al Shamal at 1% each.

**Figure 65: Respondents Profile by Geographic Location**

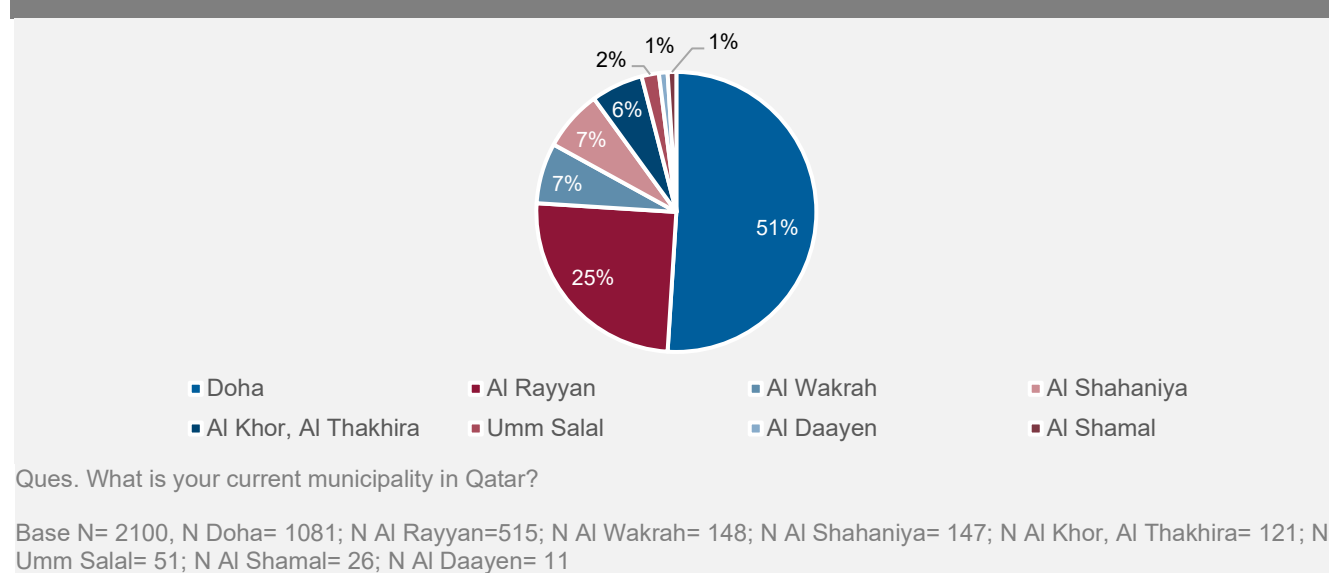


Figure 66, illustrates the operational tenure of companies in Qatar as reported by survey respondents. A significant proportion, 40%, indicate their companies have been operating for a period between 5 to 10 years, suggesting a stable presence in the market. Companies with over a decade of operations constitute 28%, underscoring a substantial experienced business segment. Those within a 1 to 5-year range represent 26%, highlighting a dynamic market with newer entrants. Companies less than a year old, along with respondents who are unsure of the operational duration, each make up 3%, reflecting a small fraction of new and indeterminate enterprises.

**Figure 66: Respondents Profile by Company's Operational Year in Qatar**

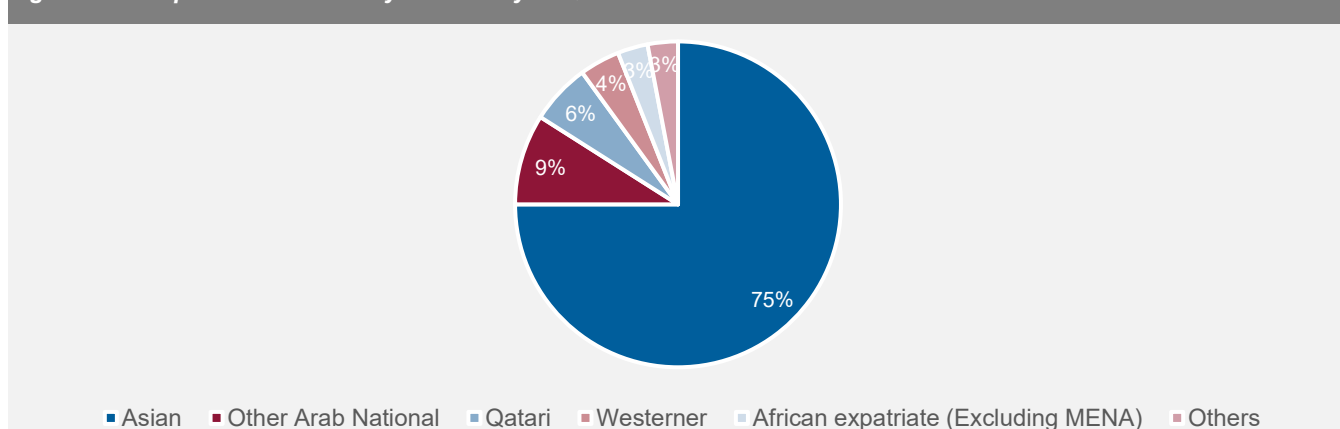


Ques. For how many years your company has been operating in Qatar?

Base N= 2100, N Less than a year= 68; N 1-5 years= 546; N 5-10 years= 832; N More than 10+ years= 598; N Don't Know= 56

Figure 67, illustrates the respondent's profile by nationality. The respondents who took part in the study are mainly Asian expatriates (75%) followed by Other Arab National at 9% and Qatari at 5%. Westerns closely follow at 4% and Other African Expatriates (Excluding MENA) at 3%.

**Figure 67: Respondents Profile by Nationality in Qatar**



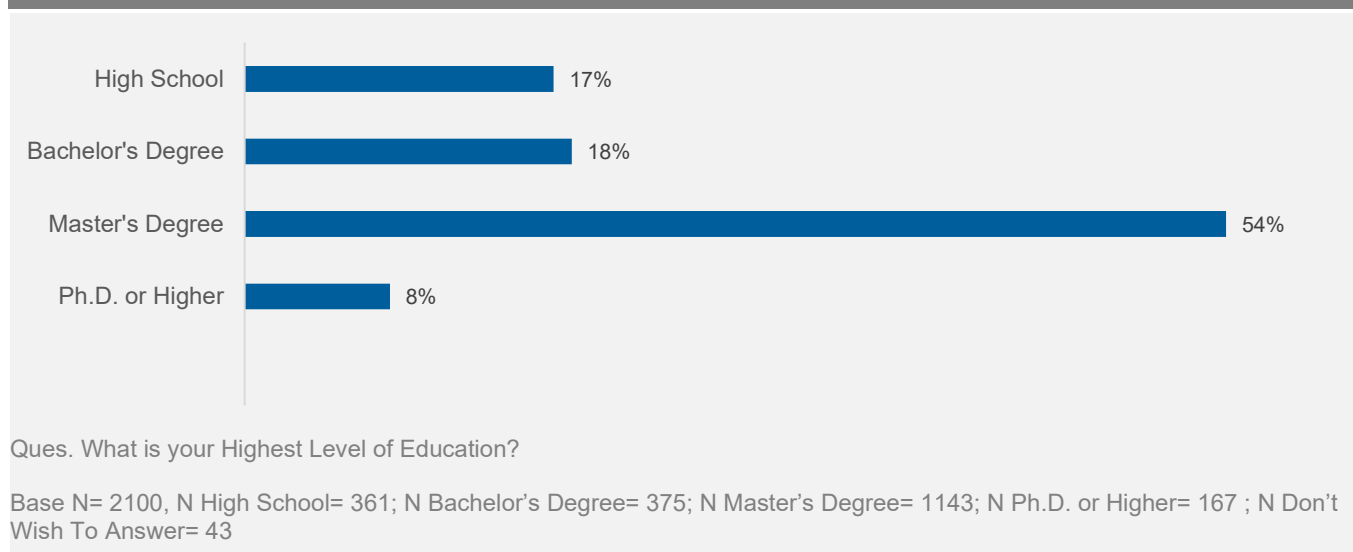
Ques. What is your Nationality?

Base N= 2100, N Asian= 1582; N Other Arab National= 191; N Qatari= 104; N Westerner=87; N African Expatriate (Excluding MENA)= 71; Others= 65



Figure 68, illustrates the respondent's highest level of education in Qatar. A significant number of respondents at 54% held master's degree followed by Bachelor's Degree at 18% and High School Degree at 17%. This was followed by respondent's who hold Ph.D. at 8% and don't wish to answer at 2%.

**Figure 68: Respondents Profile by Highest Level of Education**



## B. List of Abbreviations

List of Abbreviations	
Abbreviation	Definition
CRA	Communications Regulatory Authority
SP	Service Provider
FTP	File Transfer Protocol
MNP	Mobile Number Portability
FNP	Fixed Number Portability
OTT	Over-The-Top
IoT	Internet of Things

GNI	Gross National Income
AI	Artificial Intelligence

## C. List of Figures

List of Figures		
Figures	Description	Page Number
Figure 1	GNI per Capita (Current US\$)	22
Figure 2	Awareness Regarding CRA	30
Figure 3	Scope of CRA	31
Figure 4	Telecommunication Service Providers Within Businesses	32
Figure 5	Usage of Telecommunication Services	36
Figure 6	OTT services used by businesses	36
Figure 7	Access to Fixed Internet	37
Figure 8	Importance of Telecommunication Services	41
Figure 9	Overall Satisfaction with Telecommunication Services	45
Figure 10	Satisfaction with Telecommunication Services by Type of Service	45
Figure 11	Satisfaction with Network Coverage	49
Figure 12	Satisfaction with Network Reliability	52
Figure 13	Satisfaction with Availability of Service	55
Figure 14	Satisfaction with Voice Quality & Clarity	58
Figure 15	Satisfaction with Speed of Data	61
Figure 16	Satisfaction with Variety of Plans	64

Figure 17	Satisfaction with Quality of Customer Support	67
Figure 18	Satisfaction with Ease of Understanding the Bill	69
Figure 19	Satisfaction with the Modes for Bill Payments	72
Figure 20	Satisfaction with the Accuracy of the Bills	74
Figure 21	Satisfaction with the Regularity of Receiving Bills	77
Figure 22	Satisfaction with the Ease of Purchasing Services	80
Figure 23	Satisfaction with the Transparency of Prices	83
Figure 24	Satisfaction with Quality of Video Access/Streaming	85
Figure 25	Satisfaction with Ease of Understanding Terms and Conditions	88
Figure 26	Satisfaction with the Time Taken for Service Activation	91
Figure 27	Satisfaction with the Choice of Contract Duration	94
Figure 28	Value Perception of Ooredoo's Pricing	97
Figure 29	Value Perception on Vodafone's Pricing	98
Figure 30	Value Perception on Telecommunication Services	100
Figure 31	Awareness of the publishing of tariffs	102
Figure 32	Accessing information on Tariff Plans	102
Figure 33	Receiving Telecommunication Bills	103
Figure 34	Paying Telecommunication Bills	104
Figure 35	Raising a complaint to the Service Provider	104
Figure 36	Services that Respondents Complained About	105
Figure 37	Reasons for complaining to the service provider	107

Figure 38	Preference for submitting the complaint to the service provider	107
Figure 39	Resolution of the Complaint	108
Figure 40	Satisfaction with attributes related to the Complaint Resolution Mechanism	108
Figure 41	Awareness regarding the complaint resolution mechanism at CRA	109
Figure 42	Satisfaction with the complaint resolution mechanism at CRA	109
Figure 43	Misleading Advertisements	110
Figure 44	Service providers misleading advertisements	110
Figure 45	Reasons for misleading advertisements	111
Figure 46	Satisfactions with attributes related to telecommunication advertising	112
Figure 47	Awareness of MNP/ FNP	112
Figure 48	Utilization of MNP/ FNP	113
Figure 49	Need for a new Service Provider	113
Figure 50	Switch from the Service Provider	114
Figure 51	Competition within the telecommunications market in Qatar	115
Figure 52	Changes in product offerings during COVID-19	118
Figure 53	Changes in purchase behavior during COVID-19	118
Figure 54	Effect of the pandemic on the trust level in the Service Provider	119
Figure 55	Satisfaction during COVID-19	120
Figure 56	Recommendation during COVID-19	122
Figure 57	Issues during FIFA World Cup 2022	123
Figure 58	Satisfaction with the telecommunication services during FIFA World Cup 2022	123

Figure 59	Recommendation for the telecommunication services during FIFA World Cup 2022	125
Figure 60	Importance-satisfaction matrix for each type of service	126
Figure 61	Respondents' profile by level of awareness and decision-making in relation to the telecommunications Services	138
Figure 62	Respondents' profile by Industry Sector	139
Figure 63	Respondents Profile by Business Sector	139
Figure 64	Respondents Profile by Nationality	140
Figure 65	Respondents Profile by Geographic Location	140
Figure 66	Respondents Profile by Company's Operational Year in Qatar	141
Figure 67	Respondents Profile by Nationality in Qatar	141
Figure 68	Respondents Profile by Highest Level of Education	142

#### D. List of Tables

List of Tables		
Tables	Description	Page Number
Table 1	Awareness of Roles and Responsibilities of the CRA (2019 vs 2023)	31
Table 2	Main Telecommunication Service Providers by Industry Sectors	33
Table 3	Main Telecommunication Service Providers by Business Size	34
Table 4	Main Telecommunication Service Providers Within Each Service	35
Table 5	Usage of Telecommunication Services by Industry Sector	38
Table 6	Usage of Telecommunication Services by Business Size	39
Table 7	Usage of Telecommunication Services by Geographic Location	40
Table 8	Importance of Telecommunication Services (2019 vs 2023) (% of High Importance)	42

Table 9	Importance of Telecommunication Services by Industry Sector (% High Importance)	43
Table 10	Importance of Telecommunication Services by Business Size (% High Importance)	44
Table 11	Satisfaction with Telecommunication Services (2019 vs. 2023) (% Satisfied)	46
Table 12	Satisfaction with Telecommunication Services by Industry Sector (% Satisfied)	47
Table 13	Satisfaction with Telecommunication Services by Business Size (% Satisfied)	48
Table 14	Satisfaction with Network Coverage (2019 vs. 2023) (% Satisfied)	50
Table 15	Satisfaction with Network Coverage by Area (% Satisfied)	51
Table 16	Satisfaction with Network Coverage by Service Provider (% Satisfied)	51
Table 17	Satisfaction with Network Reliability (2019 vs. 2023) (% Satisfied)	53
Table 18	Satisfaction with Network Reliability by Area (% Satisfied)	53
Table 19	Satisfaction with Network Reliability by Service Provider (% Satisfied)	54
Table 20	Satisfaction with Availability of Services (2019 vs. 2023) (% Satisfied)	56
Table 21	Satisfaction with Availability of Services by Area (% Satisfied)	57
Table 22	Satisfaction with Availability of Services by Service Provider (% Satisfied)	58
Table 23	Satisfaction with Voice Quality and Clarity (2019 vs. 2023) (% Satisfied)	59
Table 24	Satisfaction with Voice Quality and Clarity by Area (% Satisfied)	60
Table 25	Satisfaction with Voice Quality and Clarity by Service Provider (% Satisfied)	60
Table 26	Satisfaction with Speed of Data (2019 vs. 2023) (% Satisfied)	62
Table 27	Satisfaction with Speed of Data by Area (% Satisfied)	62
Table 28	Satisfaction with Speed of Data by Service Provider (% Satisfied)	63
Table 29	Satisfaction with Variety of Plans (2019 vs. 2023) (% Satisfied)	65

Table 30	Satisfaction with the Variety of Rate Plans by Business Size (% Satisfied)	66
Table 31	Satisfaction with Variety of Rate by Service Provider (% Satisfied)	66
Table 32	Satisfaction with the Quality of Customer Support by Business Size (% Satisfied)	68
Table 33	Satisfaction with Quality of Customer Support by Service Provider (% Satisfied)	68
Table 34	Satisfaction with Ease of Understanding the Bills (2019 vs. 2023) (% Satisfied)	70
Table 35	Satisfaction with Ease of Understanding the Bills by Business Size (% Satisfied)	70
Table 36	Satisfaction with Ease of Understanding the Bills by Service Provider (% Satisfied)	71
Table 37	Satisfaction with Modes for Bill Payment (2019 vs. 2023) (% Satisfied)	72
Table 38	Satisfaction with Modes of Bill Payment by Business Size (% Satisfied)	73
Table 39	Satisfaction with Modes of Bill Payment by Service Provider (% Satisfied)	74
Table 40	Satisfaction with Accuracy of the Bills (2019 vs. 2023) (% Satisfied)	75
Table 41	Satisfaction with Accuracy of the Bills by Business Size (% Satisfied)	76
Table 42	Satisfaction with Accuracy of the Bills by Service Provider (% Satisfied)	76
Table 43	Satisfaction with Regularity of Bills Received (2019 vs. 2023) (% Satisfied)	78
Table 44	Satisfaction with Regularity of Bills Received by Business Size (% Satisfied)	78
Table 45	Satisfaction with Regularity of Bills Received by Service Provider (% Satisfied)	79
Table 46	Satisfaction with Ease of Purchasing Services (2019 vs. 2023) (% Satisfied)	81
Table 47	Satisfaction with Ease of Purchasing Services by Business Size (% Satisfied)	81
Table 48	Satisfaction with Ease of Purchasing Services by Service Provider (% Satisfied)	82
Table 49	Satisfaction with Transparency of Prices (2019 vs. 2023) (% Satisfied)	83
Table 50	Satisfaction with Transparency of Prices by Business Size (% Satisfied)	84

Table 51	Satisfaction with Transparency of Prices by Service Provider (% Satisfied)	85
Table 52	Satisfaction with Quality of Video Streaming (2019 vs. 2023) (% Satisfied)	86
Table 53	Satisfaction with Quality of Video by Area (% Satisfied)	86
Table 54	Satisfaction with Quality of Video by Service Provider (% Satisfied)	87
Table 55	Satisfaction with Ease of Understanding Terms and Conditions (2019 vs. 2023) (% Satisfied)	89
Table 56	Satisfaction with Ease of Understanding Terms and Conditions by Business Size (% Satisfied)	89
Table 57	Satisfaction with Ease of Understanding Terms and Conditions by Service Provider (% Satisfied)	90
Table 58	Satisfaction with Time Taken for Service Activation (2019 vs. 2023) (% Satisfied)	91
Table 59	Satisfaction with Time Taken for Service Activation by Business Size (% Satisfied)	92
Table 60	Satisfaction with Time Taken for Service Activation by Service Provider (% Satisfied)	93
Table 61	Satisfaction with Choice of Contract Duration (2019 vs. 2023) (% Satisfied)	95
Table 62	Satisfaction with Choice of Contract Duration by Business Size (% Satisfied)	95
Table 63	Satisfaction with Choice of Contract Duration by Service Provider (% Satisfied)	96
Table 64	Value Perception on Ooredoo's Pricing by Size of Business (% Good Value)	98
Table 65	Value Perception on Vodafone's Pricing by Size of Business (% Good Value)	99
Table 66	Value Perception on Overall Pricing by Size of Business (% Good Value)	101
Table 67	Services that Respondents Complained About by Service Provider	105
Table 68	Services that Respondents complained about (2019 vs 2023)	106
Table 69	Competition Within the Telecommunication Market in Qatar by Industry Type (% Agree)	115
Table 70	Competition Within the Telecommunication Market in Qatar by Business Size (% Good Value)	117
Table 71	Recommendation for Telecommunication Services by industry type during COVID-19 (% Highly Recommended)	120



Table 72	Recommendation for the Telecommunication Services by Type of Business during Covid 19 (% Highly Recommended)	121
Table 73	Recommendation for Telecommunication Services by industry type during FIFA World Cup 2022 (% Highly Recommended)	124
Table 74	Recommendation for the Telecommunication Services by Type of Business during FIFA World Cup 2022 (% Highly Recommended)	125
Table 75	Key Findings and Implications for CRA	127

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