Communications Regulatory Authority
State of Qatar
هيئة تنظيم الاتصالات
دولة قطر

# Business Customer Satisfaction Survey 2015
# Report of Survey Findings

April, 2015

Developed by: AMRB

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# List of Abbreviations

IDC Telecom: International Data Corporation
CAPI: Computer Assisted Personal Interviewing
CRA: Communications Regulatory Authority
ICT: Information and Communication Technology
ictQATAR: Ministry of Information and Communications
ITU: International Telecom Union
IVR: Interactive Voice Response
MDPS: Ministry of Development Planning and Statistics
MENA: Middle East & North Africa
QoS: Quality of Services
QSA: Qatar Statistics Authority
SIM: Subscriber Identity Module
VAS: Value Added Services

# 1. Executive Summary

The Business Sector in Qatar is a heavy user of communication services, with total spending on communication services reaching about $547 million in 2014 and a projected spending of $670 million by 2018 (Source: International Data Corporation Telecom database, 2014). Given the importance of communication services for the segment and consequently the overall health of the economy, the CRA conducted a customer satisfaction survey among business customers with the key objective of measuring the satisfaction with Quality of Service (QoS) delivered by the service providers under its purview.

In 2014, the Communications Regulatory Authority (CRA) was established by Emiri Decree (42) with the aim of providing advanced and reliable telecommunications services across the state of Qatar. CRA regulates the Telecommunications and Information Technology sector, postal services as well as access to digital media and spectrum.

The CRA uses its full range of regulatory powers to ensure that competition in the communications sector thrives and consumer rights are protected.

An Emiri decree gives CRA mandate to:

- regulate the communications sector,
- ensure the efficient management and allocation of scarce resources such as radio spectrum, numbering, and domain names
- protect consumers from misleading and unfair practices
- set quality of service standards and monitor compliance
- manage a dispute resolution system that is transparent, fair, speedy, and effective

This report details the findings of the survey among business customers reporting on their experiences with communication services including Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet and Fixed Link services (leased lines, IPLC, IP VPN, Ethernet, Managed VPN, Dedicated VPN and MPLS)

## *Key Findings*

Communication services are important for business customers for their day to day business activities and effective functionality. Given the importance of Fixed Voice and Fixed Internet services, more than 80% of the respondents consider these services critical services for their business.

Fixed Voice, in particular, is more significant among smaller enterprises (1-9 employees) as it provides a sense of genuineness to users.

Overall, 91% of business customers are satisfied with the quality of communication services provided in Qatar. The overall satisfaction is high for Fixed Voice service (91%) and Fixed Internet services (87%), but it is relatively low among Mobile Internet users (69%). A sizeable number of businesses have neutral responses towards various communication services (neither satisfied nor dissatisfied) and as such this indicates scope for improvement.

It is found that satisfaction levels with QoS are vary across various business segments. The Construction and Manufacturing businesses have relatively low satisfaction levels as compared to other segments. This could be due to the nature of the business that involves a need for communication services at site offices or temporary set-ups. Furthermore, the satisfaction with QoS also varies according to the size of the enterprise, and it is higher among smaller businesses as compared to larger businesses since the latter tends to use multiple services and has complex needs.

### *Network experiences*

The levels of satisfaction with network related experiences such as coverage, availability, reliability, voice quality and speed of data services vary considerably among different communication services. Business customers are satisfied with the network coverage for Mobile Voice services (81%) in contrast to the Mobile Internet (59%). The network coverage satisfaction levels for Mobile Voice are higher for Ooredoo (83%) as compared to Vodafone (74%).

The satisfaction levels on *availability of services at all locations* is low among Fixed Link users at 67%. Business customers perceive that Fixed Link services are not available across all locations in Qatar. Moreover, 13% of Fixed Link customers seem to be dissatisfied on the reliability of services even though such services are consumed by limited number of business.

### *Market Competitiveness*

While about two-third of business customers believe that there is enough competition in Qatar's telecom market, a one-third thinks otherwise. One of the main reasons for business customers' perception of a lack of competition is a dearth of availability of fixed services from Vodafone in most areas. Most customers expect both operators to have a wider geographical network coverage that meets all of their communication needs. Business customers understand that Qatar may be a relatively smaller market for telecom enterprises as compared to the UAE or KSA, but they expect at least the two players should offer all communication services across all geographical regions in Qatar.

A majority of the business customers consider that variety of offerings from service providers makes comparison between providers easier, facilitates a suitable choice of product, and helps in negotiating with a service provider.

### *Price Perception*

Overall, while some business customers consider prices for communication services in Qatar to be moderate to low, there is considerable number of customers who perceive prices to be high. The discontent with pricing is high for Mobile Internet (48%), Fixed Link (41%), Mobile Voice (32%), Fixed Internet (31%) and Fixed Voice (31%).

The price perceptions vary with different services and aspects of pricing:

- Voice Services : More than 35% businesses respondents perceive Mobile and Fixed Voice services to be high priced
- International roaming charges: Perceived to be high priced for voice and data by 54% and 34% of businesses respectively
    - Smaller business (1-9 employees) in particular state that

roaming as well as international calling prices are high in Qatar. Similar is the case with Wholesale and Retail businesses, most of whom happen to be small businesses (>59%)

- Installation and Monthly rental charges for Fixed Link services are also perceived to be high by almost of 1/3$^{rd}$ of the businesses.

A majority of business customers are satisfied with tariff related parameters of ‘clear terms and conditions’, ‘transparency of prices’ and ‘variety of rate plans’. However, there is an 18% dissatisfaction for Fixed Link and 11% dissatisfaction is found for Mobile Internet on the ‘clear terms and conditions’ aspect, which indicates that there is a need for interventions and or actions in this regard.

*Provisioning: Purchase and Activation Process*

Business customers are satisfied with provisioning related parameters like ‘ease of purchase’ and ‘time for activation’. However, the time taken for activation is an area of concern for Fixed Link services as 24% of customers reported being dissatisfied. The findings suggest that, in this aspect, large organizations have lower satisfaction levels on all product lines compared to smaller enterprises. The CRA can explore the option of establishing different KPIs for purchase and activation parameters as per the size of the organization.

*Billing and Payment*

Business customers’ adoption rates of environmentally friendly billing options is low with about 40% preferring to receive the bills in their mail box. This could be because of their need to have original hard copies of bills for accounting / auditing purposes. While service providers actively encourage customers to opt for e-billing as per new initiatives, the CRA can also emphasize this in more innovative ways. Further, business customers also tend to prefer cash payment options available at retail outlets. Business customers are reluctant to move from their traditional ways in terms of billing and payment, suggesting a dire need to educate and foster a sense of security for technology adoption. The CRA, in collaboration with service providers, can promote steps towards online payment options.

Business customers are satisfied with all the billing and payment experiences. There is no discernable dissatisfaction on any of the billing and payment parameters across all services as long as they continue with their traditional methods.

### *Consumer Rights Protection*

Presently, only 5% of the business customers believe that the advertisements are misleading. They feel that advertisements do not provide clear terms and conditions and as well as pricing on offers that leads to misinterpretation giving way to discrepancies. The qualitative research highlighted business customers' opinion on a majority of the advertisements that are mainly for general consumers and hardly any for businesses.

### *Complaint Resolution Mechanism*

One of the key mandates of the CRA is to ensure fair resolution of complaints. Presently the incidence of raising complaints varies across various products with Mobile Internet users raising highest (41% claiming to have raised a complaint) number of complaints and Mobile Voice (13% claiming to have raised a complaint). The main reason for complaining being 'disconnection of service' across all services while 'network connectivity issues' features are high for Mobile Internet and installation for Fixed Services.

There is a considerable dissatisfaction across different product lines on various parameters related to complaint resolution. It is observed in 'ease of contacting the service providers' to raise a complaint or query, and it is particularly observed in Fixed Services channel (31% for Fixed Voice and 24% for Fixed Internet). The dissatisfaction is also high on 'Ease of resolution' (Mobile Voice: 16%, Mobile Internet: 19%, Fixed Voice: 18% and Fixed Internet: 12%) and 'time taken for resolution' (Mobile Voice: 15%, Fixed Voice: 11% and Fixed Internet: 11%) across different services.

75% of business customers prefer calling the call center to raise complaints and end up being dissatisfied on the time taken to connect to the call center agent. Therefore, this leads to an overall dissatisfaction with the complaint resolution process.

### *Communication Regulatory Authority*

Currently, about 41% of business customers in Qatar are aware of the existence of the CRA. Since the CRA is mandated to ensure protection of consumer rights on communication services, it is essential that customers are made aware of the CRA to establish credibility and confidence in governance. A significant proportion of business enterprises that are aware of the CRA and are clear about CRA's mandate to regulate the communications sector and protect consumers' rights.

The CRA can implement campaigns aiming to raise further awareness among the business customers. The media consumption of business enterprises varies widely from the consumer segment and hence can be targeted accordingly.

### *Key Takeout for CRA from Business Customer Satisfaction Survey*

The business customers' satisfaction survey has the following implications for CRA:

#### *A need for increased competition*

- The competition in Fixed Services for enterprise is very limited with second operator limiting availability of services to just a few geographical locations. The CRA can increase and promote competition in the market particularly for the Fixed Services.
- The CRA can also make it easier for business customers to make comparisons between different offerings particularly for Mobile services through proper advertisements/marketing activities with complete information in order to avoid discrepancies.

#### *Pricing*

- Price perception among businesses needs to be positively enhanced by offering better value added services. The benefits of price should be made clear for business customers by imparting precise and clear information on rate plans and their pricing.
- Strategic review of the pricing conducted by CRA should be used as an input in highlighting the relative competitiveness of communication services in Qatar. Further, CRA needs to take necessary steps to ensure that Qatar's communication prices are competitive and among the best in the region.

*Complaint Resolution Mechanism*

- Enforcing service providers to improve on increasing the effectiveness of query and complaint handling at all contact points – call response, accessing call center agents, timely resolution, etc.
- Separate KPIs should be developed for enquiries, complaints and resolutions for business customers and these should be well communicated to service providers and to customers.
- A system can be established which auto-escalates unresolved complaints after a certain period of time.
- For installation related complaints, it is recommended that a mechanism is created to monitor the speed of resolution. CRA should also develop KPIs governing provisioning related complaints resolution times.

# 2. Background

The Communications Regulatory Authority (CRA) is the Communications Regulator in the state of Qatar established by Emiri Decree (42) in 2014. The CRA regulates the Telecommunications and Information Technology sector, postal services and access to digital media. CRA encourages and supports an open and competitive Information & Communications Technology (ICT) sector that provides advanced, innovative, and reliable communications services. Balancing the rights of consumers with the needs of service providers is at the heart of everything the CRA does.

In 2014, CRA conducted a research study on understanding general consumers' experiences with communication services in the State of Qatar. In continuation, CRA commissioned a research study on understanding the experiences and views of the 'Business Customers' and has now assessed the resulting implications for CRA.

The Communications Regulatory Authority (CRA) commissioned AMRB, to conduct a customer satisfaction survey to be carried out among business customers in Qatar. The main objective was to evaluate satisfaction levels with various communication services across parameters that include pricing, transparency and service offerings among the business market players. The study's purpose is to understand the overview of the competitive landscape in order to promote consumer sovereignty within the 'Communications' domain.

This study will serve as an essential baseline that allows CRA to propel policy and advocacy work to ensure high standards of Quality of Services (QoS) and competition within the communication sector in the state of Qatar.

## 2.1. Research Objectives

Therefore, the objectives of this customer satisfaction study or survey are:

- To understand the experience of business customers with the existing telecom services among the different providers, and how these vary in terms of customer segment, type and size of business.
- To gauge satisfaction levels with communication services among business customers in Qatar , focusing on;

- Quality of Services (QoS)
- Pricing

- To understand the service experience at every touch-point with the communication service provider in order to enhance overall quality of the services, aiming towards a 'happy' business customer;
- Understanding customers' perceptions on parameters that are important and relevant to CRA's core objectives, such as:
    - The competitive landscape of communications market in the state of Qatar in terms of both services and pricing.
    - The role of CRA in the marketplace.

## 2.2. Research Methodology

A four-phase research design was adopted to generate insights into the market needs and drivers as well as validating the hypothesis through a large sample survey. The four phases were as follows:

- Exploratory phase (among CRA stakeholders)
- Secondary research phase (from credible sources)
- Qualitative phase (among business customers)
- Quantitative phase (among business customers)

### 2.2.1. Exploratory Phase

As a first step, the exploratory phase was conducted among the key stakeholders (internal and external) to gauge their opinions, perceptions, initiatives, need-gaps and expectations. In-depth interviews were conducted within CRA premises with Internal Stakeholders (the Tariff team, QoS team, Complaints Team, Legal, Planning and Quality team, MNP and the Spectrum team). Further, in-depth interviews were also conducted with both service providers (Ooredoo and Vodafone) using semi-structured discussion guides by expert moderators with a sound understanding of the sector.

### 2.2.2. Secondary Research

To develop well-designed research, robust secondary research was imperative in order to understand the entire market construct. Information about industry classification, total number of businesses in Qatar, private and government establishments, and key ICT initiatives were collected from various government sources including Ministry of Development Planning and Statistics (MDPS) and Ministry of Transport and Communications. Results from this were used in the development of the sampling plan, weighing approach and projection of findings. Furthermore, the regulatory sites of various countries were also meticulously studied in addition to gaining published reports from several international as well as local sources that were used to obtain global benchmarks. The benchmarking was conducted with consumer satisfaction reports for the following countries:

- Singapore: Consumer Awareness and Satisfaction Survey 2014 – iDA Singapore
- UK: Ofcom – The Communication Market Report, 7th August 2014
- Australia: ACMA – Communication Report 2014
- UAE: ICT in the UAE Household Survey, 2014

#### 2.2.3.Qualitative Phase

The objective of this phase was to get a deeper understanding of elements that are important to business customers when consuming communication services. This helped to identify the parameters and attributes that are important across various services.

In this phase, in-depth interviews were conducted among business customers; mainly the decision makers or influencers for purchase of telecom services in their companies – small, medium and large (total representation). These were conducted by senior researchers from AMRB.

The inputs of this qualitative phase and the initial exploratory and secondary research phases were used in developing research instruments for the following quantitative phase.

#### 2.2.4.Quantitative Phase

A large-scale quantitative survey was conducted to quantify the customer satisfaction among business customers. A sample of 1068 interviews were conducted amongst primary decision makers of communication services users across different industry sectors in Qatar. Interviews were conducted from October 30th 2015 to December 10th 2015 in English and Arabic as per the language preference and comfort levels of the respondents.

Businesses of all sizes were surveyed, including those with fewer than five employees. Since the representative sample could have been dominated by businesses with fewer than five employees, quota sampling was necessary. The quotas allow for reliable sub-group analysis across four enterprise size bands and seventeen industry sector groupings. The data was later weighted to ensure that the findings are representative of business customers of communication services in the State of Qatar.

The length of the interview was approximately 30 minutes and mainly consisted of closed ended questions with a limited number of open-ended questions. It was administered using CAPI (Computer Aided Personal Interview) methodology.

Complete details of the quantitative phase including the sampling units, respondent profiles, survey methodology, sample distribution and weighting approach are detailed in Appendix I at the end of this report.

## 2.3. Report outline

This report presents the findings of the business customers' satisfaction survey focusing on the satisfaction with QoS, network quality, pricing, provisioning, complaint resolution and billing and payment process with communication services in the State of Qatar. Further, perception on competitiveness among the communication service providers is also captured in this survey.

The report presents the findings at an overall level for all the business establishments in Qatar. Also, wherever relevant, the findings have been reported by 'size of the business establishment' or 'main economic activity or other relevant sub-segmentation.

The size breaks are; business enterprises having, 1-9 employees, 10-49 employees, 50-249 employees and 250 or more employees. These are as per international standards for business sizes used by agencies like United Nations Conference on Trade and Development (UNCTAD).

The findings by economic activity are presented for a selective set of industries in the report and these segments are selected based on

- Industry segments which represent a high proportion of the business establishments in the State of Qatar OR
- Industry segments that are of strategic importance.

Remaining segments have been clubbed under 'Others' category and include Agriculture and Fishing, Electricity, Gas, Water supply, Waste management, Transportation and Logistics, Information and Communication, Banking, Financial and Insurance activities, Education, Health and Social activities, Arts, Entertainment and recreation and other service activities.

The key findings presented in the report include overall satisfaction levels on:

- QoS of all communication services
- Network related parameters
- Pricing and tariff related parameters
- Purchase and activation process
- Complaint resolution
- Billing and payment process
- Perception on market competitiveness

# 3. Qatar Enterprise Communication Market

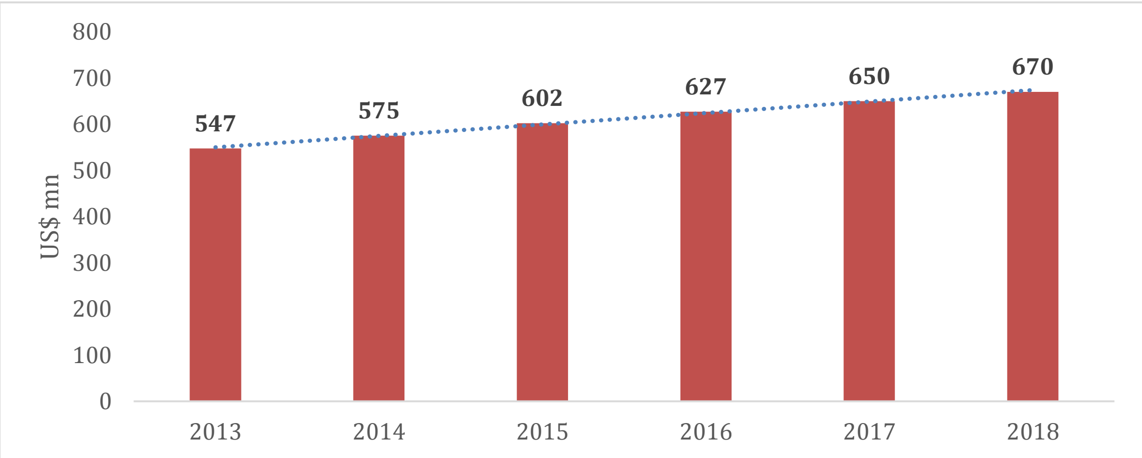
## 3.1. Qatar Business Environment

The Qatari economy has been experiencing steady growth for the last 10 years, and this is expected to continue into the foreseeable future. The rapid growth in Qatar is not only attracting foreign direct investment, but also drawing a considerable expat population that is required to build a strong and stable economy.

More than 40,000 businesses operate in the State of Qatar, employing approximately 2.4 million people, according to 2015 data published by the MDPS [1]. Furthermore, the government is heavily investing in infrastructure development and actively supporting the ICT sector as a catalyst for business growth.

The Qatar enterprise's (business) segments are heavy users of communication services such as mobile lines, fixed lines and data services with total spending estimated to be approximately $547 million[2]. This is anticipated to reach approximately $670 million by 2018.

*Figure 1: Enterprise Telecom Market*




*Source: IDC MEA, Telecom Services Database, Q1 2014*

Considering the high spends in communication services, it is important that the satisfaction level of business customers is thoroughly understood.

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[1] Ministry of Development Planning and Statistics (MDPS)
[2] IDC MEA, Telecom Services Database, Q1 2014

## 3.2 Three Key Stakeholders in Qatar's Telecom Market

With two service providers currently operating, the telecom market in Qatar is characterized by its duopoly with the CRA (Communications Regulatory Authority) as the market regulator. The three key stakeholders include:

1. Ooredoo, incumbent telecom service provider
2. Vodafone, second telecom service provider
3. Communication Regulatory Authority (CRA)

Ooredoo has a strong portfolio of enterprise offerings, ranging from mobile services, fixed services and end-to-end Managed services. The communication provider has a great emphasis on enterprise segment and has been constantly introducing new products like Office in Box, Managed Software Services, Managed Security Services, Etc. Ooredoo is emerging as an integrated and converged ICT player that offers end-to-end managed solutions, especially to its large enterprise clients.

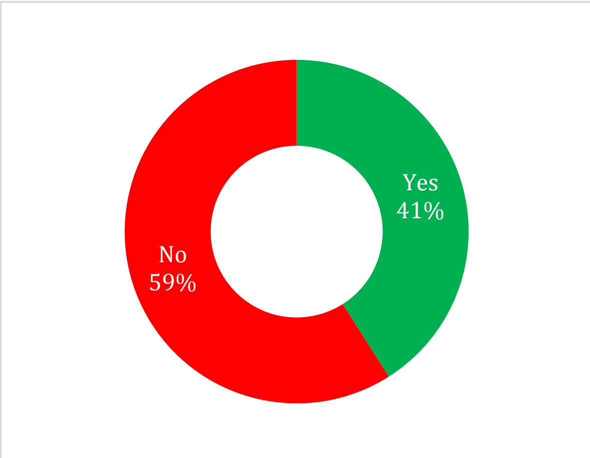
Vodafone Qatar is the country's second telecom service provider. Vodafone is licensed to offer fixed, mobile and internet services. Primarily, it has a wide coverage of mobile services, but has recently started offering fixed line services in a few areas of Qatar, mainly in Barwa city and Pearl. Its portfolio of enterprise services is therefore heavily centered on mobility with solutions for mobile internet, high-speed 3G and more recently 4G dongles for tablets and PCs.

### 3.1.1.Communication Regulatory Authority (CRA)

The Communication Regulatory Authority was established with the main objective of regulating the communication sector in Qatar. It is also mandated to ensure that individuals, businesses, and government have access to a broad range of innovative and reasonably priced communications services. The CRA strives to ensure that consumers' voices are heard, and they are made aware of their rights. The CRA is committed to ensure transparency and efficiency of the telecom consumer protection process in Qatar.

The awareness of the CRA among business customers is at 41% (Figure 2). The same was 19% according to the CRA Consumer Satisfaction Survey Report, 2014. It is encouraging to note that awareness is higher among enterprise customers considering that CRA has been operational only from September 2014. Nevertheless, CRA could further improve the awareness among business customers.

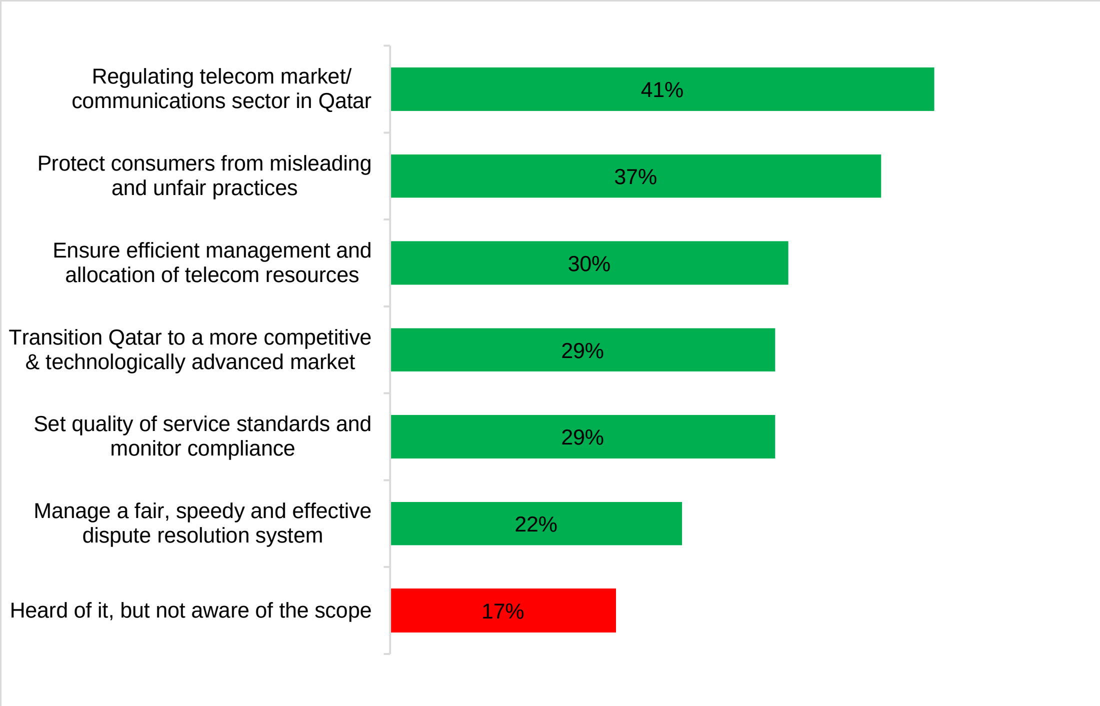
*Figure 2: Awareness of CRA*




*Source: Business Customer Satisfaction survey 2015; All enterprises n= 1068*

The majority of business customers, who are aware of the CRA, also understand the scope of CRA's role and functions. They have correctly identified them as regulating the telecom market, protecting customers from being misled and falling prey to any unfair practice as some of its important functions.

*Figure 3: Scope of CRA*




*Source: Business Customer Satisfaction survey 2015; Enterprise aware of CRA n= 439*

The CRA needs to increase its efforts to improve awareness among business customers, possibly through more engagement. It could actively engage with the business community by advertising new initiatives to improve technology adoption, educate them of the positive impact it can create on the business, and other elements that most resonate with them.

# 4. Business Customers' Perceived Quality of Communication Services in the State of Qatar

## 4.1. Importance of Communication Services

The scope of study includes the services used by business customers as below:

- **Mobile Voice**: This includes accessing voice services over mobile for business purposes. Moreover, these should be purchased and used on behalf of the business
- **Mobile Internet**: Accessing data services on mobile handset (smartphones), using dongles (Mi-Fi etc.) or using data specific SIM. These again, should be

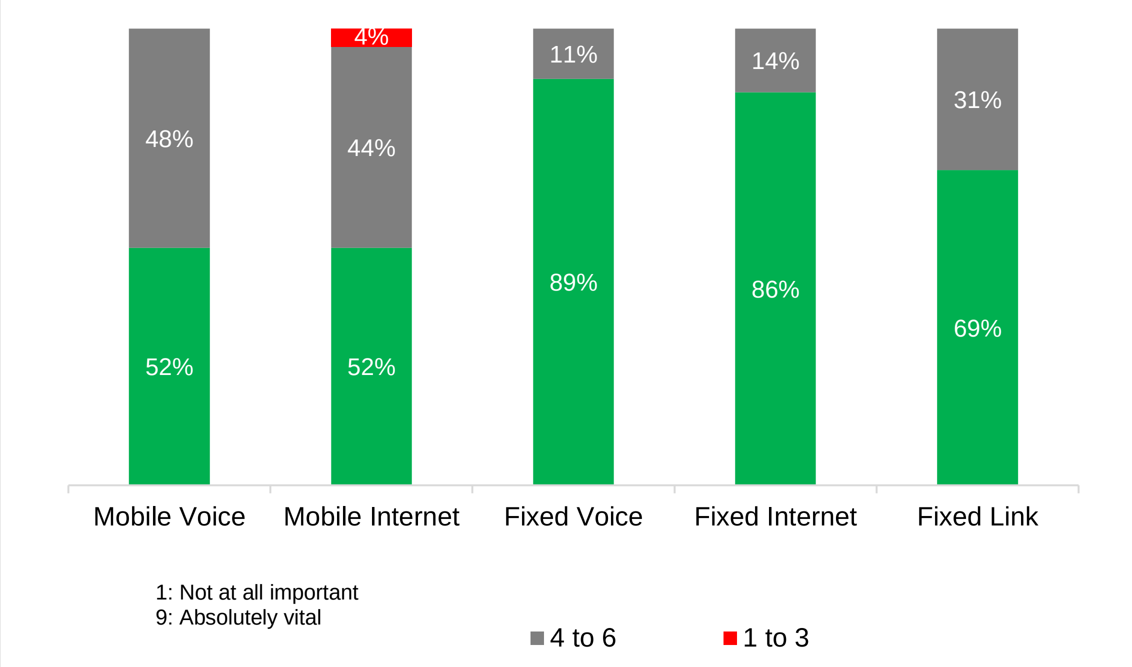
purchased and primarily used on behalf of the business

- **Fixed Voice**: Covers the delivery of voice services over a copper pair-based PSTN access network or fixed-line broadband network
- **Fixed Internet**: Covers the delivery of data services over a copper pair-based PSTN access network or fixed-line broadband network
- **Fixed Links**: Communication services, such as, leased lines, International leased lines, Ethernet, VPN, MPLS, IP VPN services, etc. are included under Fixed link services

Business Customers place a high degree of importance on all communication services. The research reveals that Fixed Voice and Fixed Internet connections are of high importance with more than 80% businesses rating them as 7 or higher on a scale of 1 to 9 (1 being not at all important and 9 being absolutely vital) (Figure 4). The importance of these services is particularly high among the small businesses indicating that communication services serve as the backbone of their functioning. Subsequently, Mobile Services (Voice and Data), and Fixed Link services are also of high importance to business customers.

It is often cited that Qatar is making conscious efforts to diversify its economy and increase the contribution of SME to the overall economy. The importance of Fixed Services indicates that small businesses rely on communication services to prove their authenticity by creating the impression of having a fixed office address.

*Figure 4: Importance of Communication Services*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 1: Importance of Communication Services: By size of enterprise (Number of employees)*

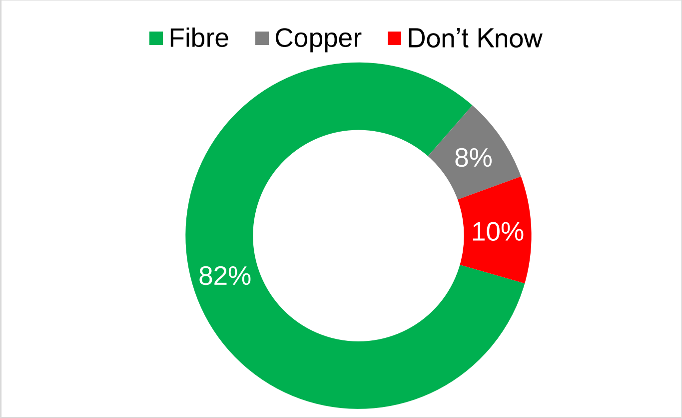
| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **52** | **52** | **89** | **86** | **69** |
| | | | | | |
| 1 – 9 (Small) | 54 | 58 | 95 | 94 | - |
| 10 – 49 (Medium) | 51 | 50 | 85 | 82 | - |
| 50 – 249 (Large) | 46 | 41 | 57 | 56 | - |
| 250+ (Very large) | 48 | 42 | 48 | 61 | - |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Figure represent proportion (%) of customers rating 7 or above on importance scale of 1 to 9*

Enterprise customers tend to use business plans for Fixed Voice (89% use business plans) and Fixed Internet (99% respondents use business plans). The practicality of residential connection in terms of product and price makes 11% small enterprises (1-9 employees) use residential connection for business purposes.

Further, 82% of the enterprise customers claim to access Fixed Internet through the fiber network (Figure 5)

*Figure 5: Mode of access to Fixed Internet*

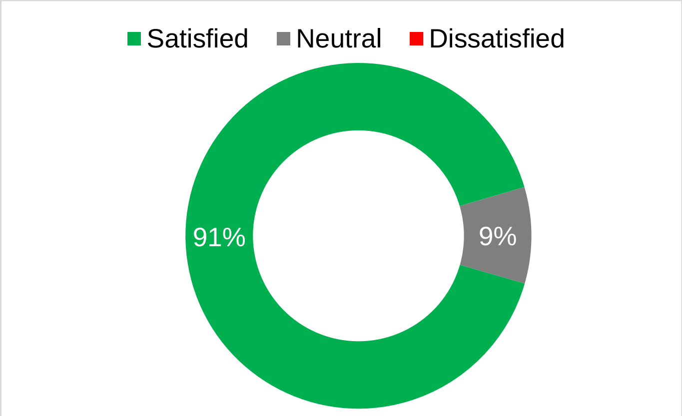



*Source: Business Customer Satisfaction Survey 2015; Overall Sample using Fixed Internet n=595*

## 4.2. Overall Perceived Quality of Service (QoS)

One of the key objectives of the CRA mandate is to set quality of service standards and monitor compliance. The perceived overall quality of the service among business customers is an important parameter to understand as part of the CRA mandate.

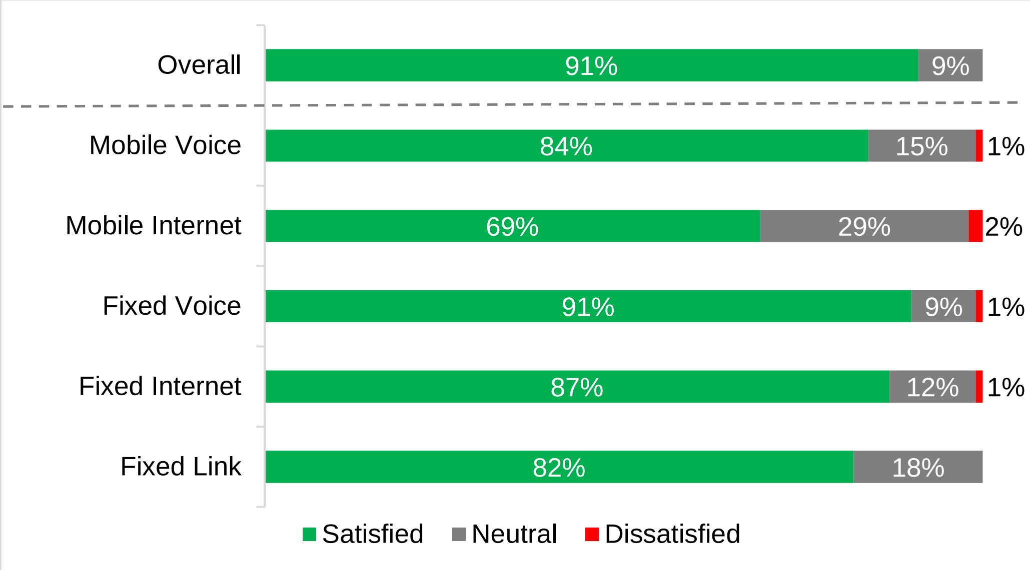
*Figure 6: Overall Quality of Service Perception*




*Source: Business Customer Satisfaction Survey; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

At an overall level, 91% enterprise customers are satisfied with the overall Quality of Services (Figure 6).

*Figure 7: Quality of Service Perception: By Type of Service*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

However, satisfaction levels vary among different services; Fixed Voice at 91% having high satisfaction (*Figure 7*) and Mobile Internet relatively lower at 69%.

One of the key findings from these results is that there are no significant enterprise customers dissatisfied with the overall Quality of Services

*Table 2: Quality of Service: Country Wise benchmarks*

| | Qatar – Business Customers | UK Consumers | Australia consumer | Singapore Consumers* | UAE consumers |
|---|---|---|---|---|---|
| Mobile Voice | 84 | 93 | 86 | 73 | 93 |
| Mobile Internet | 69 | 88 | 79 | 66 | 93# |
| Fixed Voice | 91 | 89 | 89 | 78 | 94 |
| Fixed Internet | 87 | 88 | 79 | 65 | 93# |
| Fixed Links | 82 | NA | | | |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
**Singapore benchmarks are calibrated from Mean*
*# Only Internet has been mentioned instead of Mobile Broadband and Fixed Broadband*

The perceived QoS among business customers in Qatar is observed to be at par with the customer satisfaction standards in countries like UK, Australia and Singapore (*Table 2*)

*Table 3: Quality of Service Perception: By Main Economic Activity*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **84** | **69** | **91** | **87** | **82** |
| | | | | | |
| Administrative and support service activities | 89 | 100 | 100 | 96 | - |
| Construction | 59 | 45 | 49 | 66 | - |
| Manufacturing | 75 | 96 | 81 | 78 | - |
| Mining and Quarrying | 88 | 95 | 87 | 87 | - |
| Professional, scientific and technical activities | 100 | 77 | 100 | 100 | - |
| Real estate | 80 | 100 | 86 | 90 | - |
| Wholesale, Retail & Repair of motor vehicles | 84 | 96 | 99 | 96 | - |
| Other Industries | 94 | 72 | 98 | 93 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

The satisfaction with QoS varies by industry sectors across different products. The construction industry has relatively lower satisfaction with QoS across all products (Table 3), while it is higher across other industries. The low satisfaction with the former could be due to the nature of industry that needs availability of services across the region and particularly on construction sites on city outskirts. The construction industry thus, seems to have a specific need for communication services. Hence, new solutions can be developed specifically for this segment.

*Table 4: Quality of Service Perception: By size of Enterprise*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **84** | **69** | **91** | **87** | **82** |
| | | | | | |
| 1 – 9 (Small) | 86 | 73 | 96 | 92 | - |
| 10 – 49 (Medium) | 79 | 66 | 84 | 83 | - |
| 50 – 249 (Large) | 73 | 60 | 74 | 76 | - |
| 250+ (Very large) | 79 | 74 | 56 | 82 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

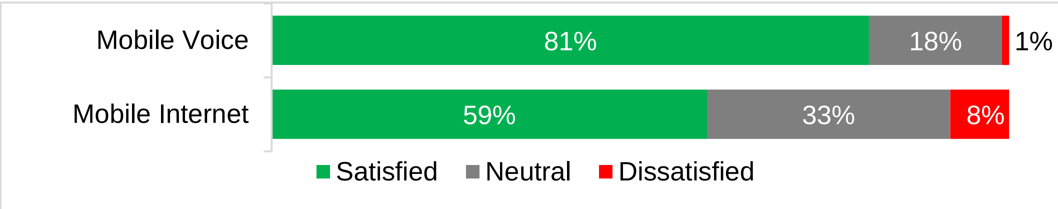
Furthermore, the overall satisfaction with QoS varies with size of enterprise as well. Among the smaller businesses, a relatively higher percentage is satisfied contrary to the larger businesses (Table 4). The reason being their need and expectations of customized services probably because of their multi-location/ multi-national presence.

## 4.3. Customer Experience with Communication Network

A key element of the study was to measure customer experience on network related parameters such as coverage, reliability, voice quality and data services. The observations in the following sections are drawn at an overall level as well as a segment level wherever relevant anomaly was observed.

### 4.3.1. Network Coverage

*Figure 8: Satisfaction with Network Coverage*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*
*Note: Numbers may not add up to 100 percent due to rounding off*

The satisfaction with the network parameters varies widely across products. While the satisfaction scores for network coverage are high at 81% for Mobile Voice, they are quite low at 59% for Mobile Internet (Figure 8). Additionally, it is observed that a section (8%) of business customers have expressed dissatisfaction with Mobile Internet coverage in Qatar.

*Table 5: Satisfaction with Network Coverage: By Main Economic Activity*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | **81** | **59** |
| | | |
| Administrative and support service activities | 57 | 27 |
| Construction | 69 | 73 |
| Manufacturing | 78 | 42 |
| Mining and Quarrying | 42 | 57 |
| Professional, scientific and technical activities | 71 | 72 |
| Real estate | 49 | 100 |
| Wholesale, Retail & Repair of motor vehicles | 84 | 61 |
| Other Industries | 90 | 48 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*

The satisfaction levels with the network coverage vary across industry sectors. Enterprises in Mining & Quarrying and Real Estate have relatively lower scores on Mobile Voice coverage, which could be due to the location of their operations, which at times is spread to developing pockets of the country with a lean population-base at the moment. Thus, it is important to address their needs and issues and work towards providing flawless network coverage across Qatar.

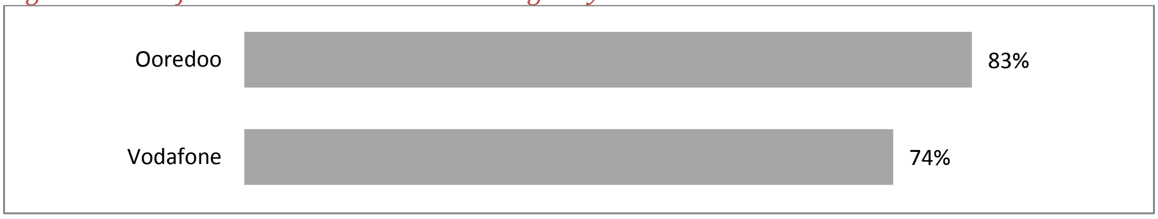
*Table 6: Satisfaction with Network Coverage: By size of enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | **81** | **59** |
| | | |
| 1 – 9 (Small) | 84 | 54 |
| 10 – 49 (Medium) | 74 | 58 |
| 50 – 249 (Large) | 73 | 75 |
| 250+ (Very large) | 77 | 56 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*

The overall satisfaction levels are low with Mobile Internet services. Further it is observed to be low among small (1-9 employees) and medium business (10- 49 employees).

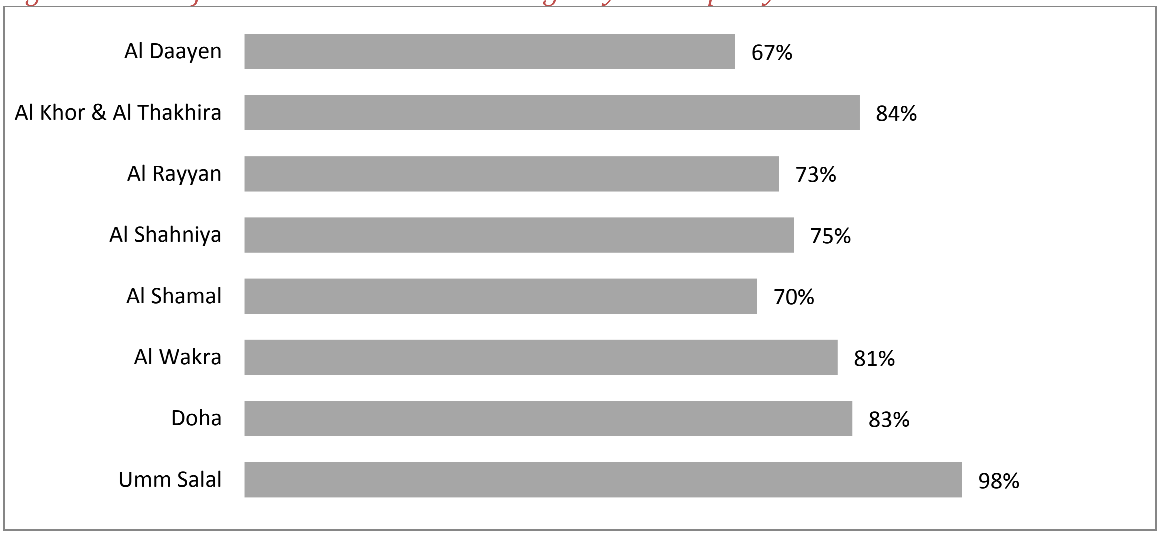
*Figure 9: Satisfaction with Network Coverage: By Service Provider*




*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample Mobile Voice: 651*

At the same time, the network coverage satisfaction is higher with Ooredoo as compared to Vodafone (Figure 9).

*Figure 10: Satisfaction with Network Coverage: By Municipality*



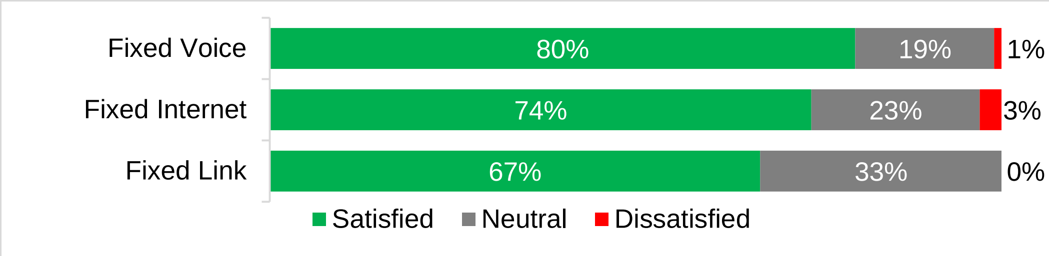

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample Mobile Voice: 651*

There is variation in the satisfaction levels on network coverage across geographies within Qatar. Business customers in Al Dayyan and Al Shamal are less satisfied with the network coverage as compared to other municipalities (*Figure 10*)

### 4.3.2. Availability of Service

Another important mandate for the CRA is to ensure availability of a wide range of communication services across Qatar.

*Figure 11: Satisfaction with Availability of Service*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Business customers are more satisfied with the Fixed Voice services at 80% than Fixed Internet and Fixed Link services that score 74% and 67% respectively (Figure 11). However, hardly any dissatisfaction was noticed with the availability of these services.

*Table 7: Satisfaction with Availability of Service: By Main Economic Activity*

| | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|
| **Overall** | **81** | **74** | **67** |
| | | | |
| Administrative and support service activities | 71 | 77 | - |
| Construction | 75 | 87 | - |
| Manufacturing | 69 | 57 | - |
| Mining and Quarrying | 31 | 48 | - |
| Professional, scientific and technical activities | 74 | 83 | - |
| Real estate | 60 | 63 | - |
| Wholesale, Retail & Repair of motor vehicles | 85 | 78 | - |
| Other Industries | 85 | 74 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

Among the industry sectors, enterprises from Mining and Quarrying particularly have low satisfaction on availability of both Fixed Voice and Fixed Internet Services (Table 7).

Further, 18% of enterprise customers access Fixed Internet through copper due to the unavailability of fiber network in their areas. This may have led to a drop in satisfaction levels with availability of services among such business customers (60%).

*Table 8: Satisfaction with Availability of Service: By size of enterprise (Number of employees)*

| | Fixed Voice | Fixed Internet |
|---|---|---|
| **Overall** | **81** | **74** |
| | | |
| 1 – 9 (Small) | 81 | 73 |
| 10 – 49 (Medium) | 73 | 75 |
| 50 – 249 (Large) | 81 | 75 |
| 250+ (Very large) | 78 | 77 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540)*

*Table 9: Satisfaction with Availability of Service: By Service Provider*

| | Fixed Voice | Fixed Internet |
|---|---|---|
| **Overall** | **81** | **74** |
| | | |
| Ooredoo | 80 | 74 |
| Vodafone | 68 | 70 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540)*

Further, the satisfaction with availability of services is lower among Vodafone customers (*Table 9*). This is expected as Vodafone services in Fixed Communication are limited to a few areas in Qatar.

*Table 10: Satisfaction with Availability of Service: By Municipality*

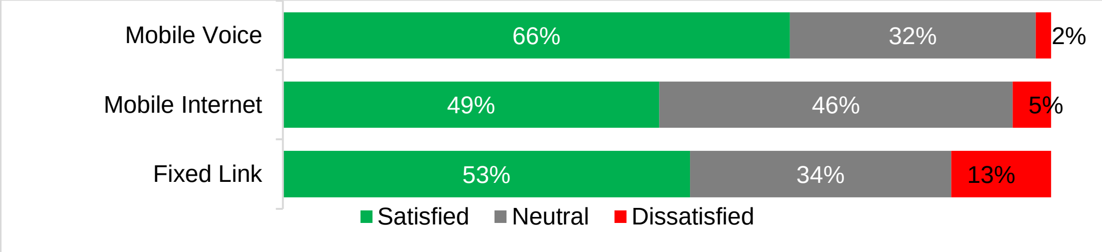
| | Fixed Voice | Fixed Internet |
|---|---|---|
| **Overall** | **81** | **74** |
| | | |
| Al Dayyan | 62 | 72 |
| Al Khor and Al Thakira | 87 | 87 |
| Al Rayyan | 82 | 72 |
| Al Shahniya | 80 | 70 |
| Al Shamal | 86 | 84 |
| Al Wakra | 73 | 85 |
| Doha | 81 | 73 |
| Umm Salal | 59 | 59 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540)*

The satisfaction is also lower among business customers based in Al Dayyan and Umm Salal Municipalities (Table 10)

### 4.3.3.Network Reliability

*Figure 12: Satisfaction with Network Reliability*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Satisfaction scores on Network Reliability vary widely across different services. Business customers have relatively low scores at 49%. Even though the usage of Fixed Link services is low, 13% of the users are dissatisfied with Fixed link Services.

*Table 11: Satisfaction with Network Reliability: By Main Economic Activity*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | **66** | **49** |
| | | |
| Administrative and support service activities | 57 | 44 |
| Construction | 56 | 26 |
| Manufacturing | 42 | 70 |
| Mining and Quarrying | 63 | 46 |
| Professional, scientific and technical activities | 61 | 100 |
| Real estate | 65 | 100 |
| Wholesale, Retail & Repair of motor vehicles | 72 | 63 |
| Other Industries | 71 | 62 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*

The satisfaction with reliability of Mobile Internet varies widely across industry sectors such as administrative and support services, construction, mining and quarrying, that all have relatively low satisfaction scores (*Table 11*).

*Table 12: Satisfaction with Network Reliability: By Size of enterprise (Number of Employees)*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | **66** | **49** |
| | | |
| 1 – 9 (Small) | 67 | 56 |
| 10 – 49 (Medium) | 63 | 46 |
| 50 – 249 (Large) | 64 | 38 |
| 250+ (Very large) | 62 | 47 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*

Moreover, the size of the enterprise has an impact on the satisfaction with 'Reliability of Mobile Internet', which is observed to be lower among enterprises with 50-249 employees (Table 12).

*Table 13: Satisfaction with Network Reliability: By Service Provider*

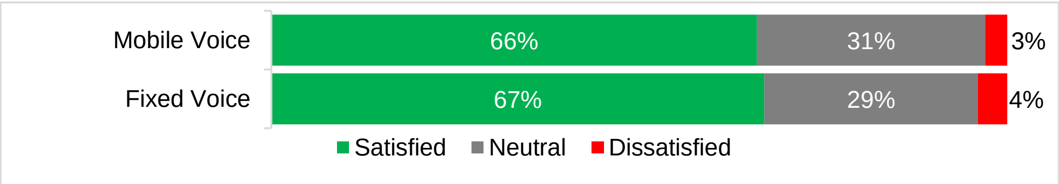
| | Mobile Voice |
|---|---|
| **Overall** | **66** |
| | |
| Ooredoo | 64 |
| Vodafone | 73 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651)*

In contrast to availability, the reliability of Mobile Voice service is higher for Vodafone at 73% as compared to Ooredoo at 64% (Table 13).

### 4.3.4. Voice Quality & Clarity

*Figure 13: Satisfaction with Voice Quality & Clarity*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Fixed Voice: 760)*
*Note: Numbers may not add up to 100 percent due to rounding off*

About two-thirds of the business customers are satisfied with the voice quality and clarity for both Mobile Voice and Fixed Voice services, and only a miniscule number of customers expressed dissatisfaction on these; 3% and 4% respectively (Figure 13).

*Table 14: Satisfaction with Voice Quality & Clarity: By Main Economic Activity*

| | Mobile Voice | Fixed Voice |
|---|---|---|
| **Overall** | **66** | **67** |
| | | |
| Administrative and support service activities | 34 | 60 |
| Construction | 45 | 41 |
| Manufacturing | 43 | 48 |
| Mining and Quarrying | 76 | 74 |
| Professional, scientific and technical activities | 62 | 81 |
| Real estate | 53 | 78 |
| Wholesale, Retail & Repair of motor vehicles | 74 | 70 |
| Other Industries | 76 | 77 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Fixed Voice: 760)*

It is surprising to note that satisfaction with the Quality and Clarity of voice services (Table 14) is quite low among construction and manufacturing sector enterprises. It could be due to factors such as temporary site office locations needing frequent change of connection or poor mobile coverage. Lower scores among businesses in Administrative and support services could be due to their location in buildings that do not have signal boosters.

*Table 15: Satisfaction with Voice Quality & Clarity: By size of enterprise (Number of employees)*

| | Mobile Voice | Fixed Voice |
|---|---|---|
| **Overall** | **66** | **67** |
| | | |
| 1 – 9 (Small) | 68 | 71 |
| 10 – 49 (Medium) | 62 | 62 |
| 50 – 249 (Large) | 56 | 48 |
| 250+ (Very large) | 67 | 55 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Fixed Voice: 760)*

The lower satisfaction with voice quality and clarity was felt among enterprises with 50-249 employees. Their service requirements could be specific and the service providers may be providing fewer or limited customized solutions to customers in this segment.

*Table 16: Satisfaction with Voice Quality & Clarity: By Service Provider*

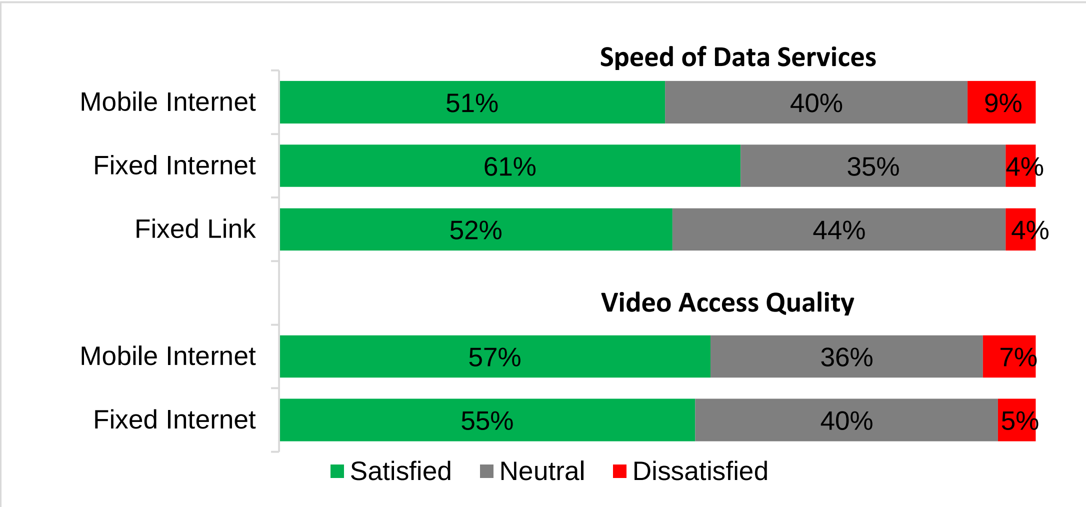
| | Mobile Voice |
|---|---|
| **Overall** | **66** |
| | |
| Ooredoo | 65 |
| Vodafone | 69 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651)*

The satisfaction with voice quality and clarity is very similar for both Ooredoo and Vodafone and is only average for both the service providers and requires improvement.

### 4.3.5.Speed of Data Services and Video Quality

*Figure 14: Satisfaction with Speed of Data Services and Video Access Quality*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Internet: 200; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Business customer's satisfaction with speed of data services varies with the products. The satisfaction with Mobile Internet is lower compared to Fixed Internet services. This could be due to uneven geographical coverage for mobile Internet in the state or could even be due to place of access point e.g. a basement or a very high floor.

*Table 17: Satisfaction with Speed of Data Services: By Main Economic Activity*

| | Mobile Internet | Fixed Internet |
|---|---|---|
| **Overall** | **51** | **61** |
| | | |
| Administrative and support service activities | 54 | 46 |
| Construction | 44 | 36 |
| Manufacturing | 59 | 73 |
| Mining and Quarrying | 59 | 55 |
| Professional, scientific and technical activities | 81 | 83 |
| Real estate | 100 | 66 |
| Wholesale, Retail & Repair of motor vehicles | 37 | 66 |
| Other Industries | 59 | 65 |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Internet: 200; Fixed Internet: 540)*

It is observed (Table 17) that satisfaction with data services (mobile and fixed internet) is low among enterprises in the construction industry.

*Table 18: Satisfaction with Speed of Data Services: By size of enterprises (number of employees)*

| | Mobile Internet | Fixed Internet |
|---|---|---|
| **Overall** | **51** | **61** |
| | | |
| 1 – 9 (Small) | 44 | 67 |
| 10 – 49 (Medium) | 60 | 52 |
| 50 – 249 (Large) | 50 | 60 |
| 250+ (Very large) | 57 | 44 |

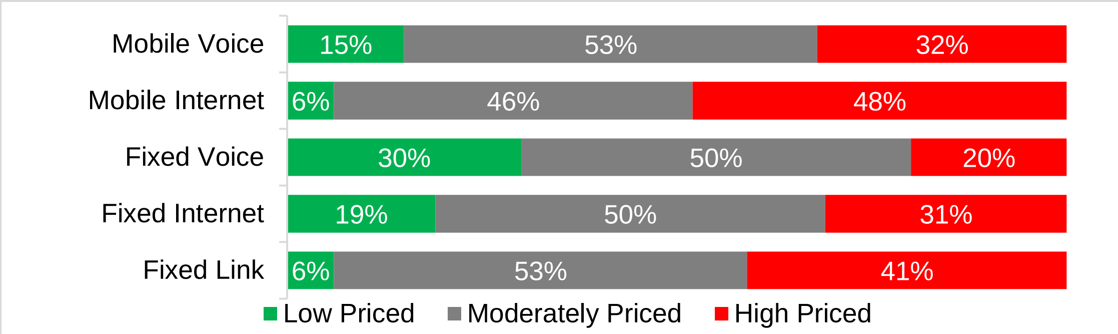
*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Internet: 200; Fixed Internet: 540)*

Interestingly, while larger size enterprises have low satisfaction with the speed of data services for Fixed Internet, smaller size enterprises (1-9 employees) have low satisfaction scores in the speed of data services among Mobile Internet (Table 18). It could be due to the need for higher speed at larger enterprises. Lower satisfaction with Mobile data speed among small business customers could be due to location of the business, which in many cases is in areas lacking a good coverage or in buildings which are not equipped with mobile signal boosters.

## 4.4. Business Customers' Perceptions on Pricing

According to the CRA mandate, business customers should have access to communication services at affordable prices. Thus, the CRA deems it important to understand the customers' perception on the pricing of communication services in Qatar and take necessary steps to ensure businesses have access to affordable and impeccable communication services to make them competitive globally.

*Figure 15: Overall Perception on Price*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Overall, the majority of business customers perceive that the prices as moderate across different services. However, a significant number perceive the prices to be high, and it is observed across all communication services (Figure 15).

*Table 19: Price Perception: Country Wise Benchmarks*

| | Qatar – Business Customers | UK Consumers | Australia consumer | Singapore Consumers* | UAE consumers |
|---|---|---|---|---|---|
| Mobile Voice | 68 | NA | 72 | 64 | NA |
| Mobile Internet | 52 | NA | 63 | 61 | NA |
| Fixed Voice | 80 | NA | 72 | 70 | NA |
| Fixed Internet | 69 | NA | 63 | 64 | NA |
| Fixed Links | 59 | NA | | | NA |

*Figures above for Qatar represent Very Low/ Low/ Moderately Priced*
*Figures for Australia represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
**Singapore benchmarks are calibrated from Mean*

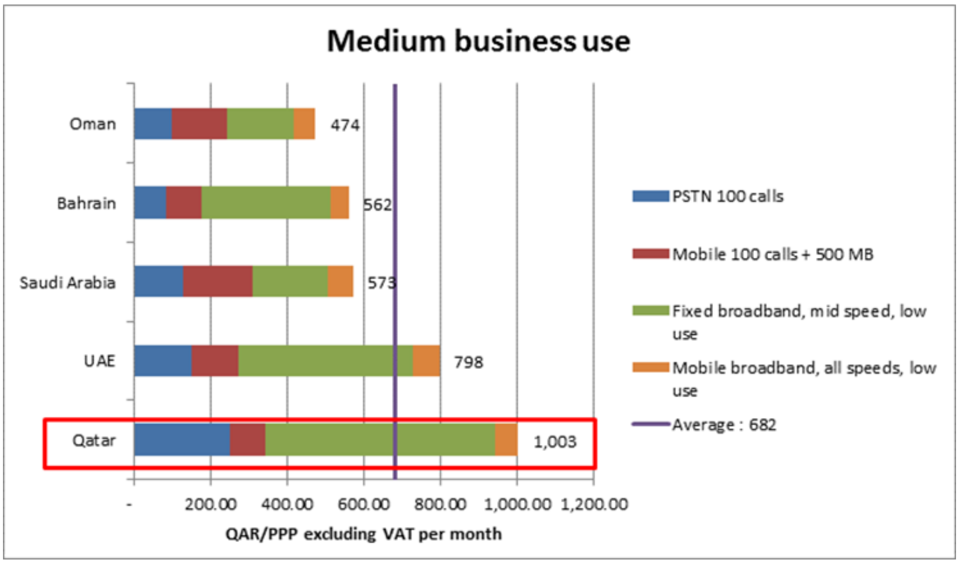
The price perception among Qatar business customers is at par with customers in Australia and Singapore (Table 19).

Furthermore, an internal CRA analysis on benchmarking Qatar telecom pricing[3] for

[3] Qatar Telecom Pricing - International Benchmarking Report, comparing prices in Qatar with other GCC countries, Internal CRA document, November 2015. *The information behind this report is drawn from the price benchmarking study for Aregnet countries performed by Strategy Analytics Ltd. This study is based on OECD price benchmarking methodologies, and uses data gathered in June 2015.*

medium business usage of communication services, shows that Qatar is the most expensive among GCC countries.

*Figure 16: Qatar Telecom pricing comparison: Business aggregate basket result*




The satisfaction with prices varies significantly with the size of enterprise. Across the product lines, the perception among large enterprises (250+ employees) is that services are high priced as compared to enterprises with lower numbers of employees (Table 20).

This perception could be positively influenced by offering discounted pricing, as large enterprises often are large consumers of communication services

*Table 20: Price Perception: By Size of Enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **68** | **52** | **80** | **69** | **59** |
| | | | | | |
| 1 – 9 (Small) | 70 | 46 | 86 | 76 | - |
| 10 – 49 (Medium) | 65 | 59 | 75 | 67 | - |
| 50 – 249 (Large) | 57 | 59 | 54 | 50 | - |
| 250+ (very large) | 44 | 44 | 45 | 55 | - |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

Price perception varies by type of industry, with mining and quarry customers having a perception that communication services in Qatar are high priced (Table 21). Given that the scores on satisfaction are low on quality, clarity, and reliability in conjunction with lower scores on pricing of communication services, operators must look specifically into developing solutions for businesses that need connectivity in remote locations such as construction sites.

*Table 21: Price Perception: By Main Economic Activity*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **68** | **52** | **80** | **69** | **59** |
| | | | | | |
| Administrative and support service activities | 68 | 66 | 85 | 71 | - |
| Construction | 35 | 43 | 33 | 22 | - |
| Manufacturing | 71 | 57 | 72 | 80 | - |
| Mining and Quarrying | 37 | 60 | 53 | 57 | - |
| Professional, scientific and technical activities | 88 | 81 | 97 | 96 | - |
| Real estate | 48 | 100 | 66 | 64 | - |
| Wholesale, Retail & Repair of motor vehicles | 67 | 49 | 90 | 81 | - |
| Other Industries | 84 | 59 | 89 | 71 | - |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

*Table 22: Price Perception: By Service Provider*

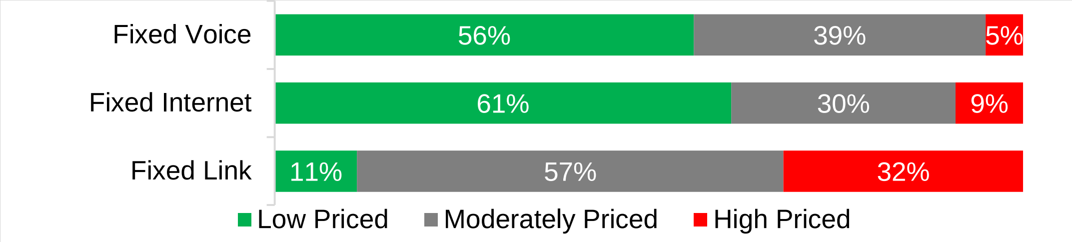
| | Mobile Voice |
|---|---|
| **Overall** | **68** |
| | |
| Ooredoo | 66 |
| Vodafone | 76 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced*

### 4.4.1.Perception on Purchase and Installation Cost

The majority of business customers perceive purchase and installation costs to be moderate to low for Fixed Voice (95%) and Fixed Internet (91%) connections as compared to Fixed Link services (62%). Approximately 32% of business customers have a perception that the purchase and installation cost for Fixed Link services are very high. (Figure 17).

*Figure 17: Purchase and Installation Price Perception*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 23: Purchase and Installation Price Perception: By Main Economic Activity*

| | Fixed Voice | Fixed Internet |
|---|---|---|
| **Overall** | **95** | **91** |
| | | |
| Administrative and support service activities | 100 | 98 |
| Construction | 80 | 83 |
| Manufacturing | 91 | 89 |
| Mining and Quarrying | 71 | 74 |
| Professional, scientific and technical activities | 100 | 96 |
| Real estate | 78 | 80 |
| Wholesale, Retail & Repair of motor vehicles | 100 | 98 |
| Other Industries | 96 | 87 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

*Table 24: Purchase and Installation Price Perception: By size of enterprise (Number of employees)*

| | Fixed Voice | Fixed Internet |
|---|---|---|
| **Overall** | **95** | **91** |
| | | |
| 1 – 9 (Small) | 86 | 76 |
| 10 – 49 (Medium) | 75 | 67 |
| 50 – 249 (large) | 54 | 50 |
| 250+ (Very large) | 45 | 55 |

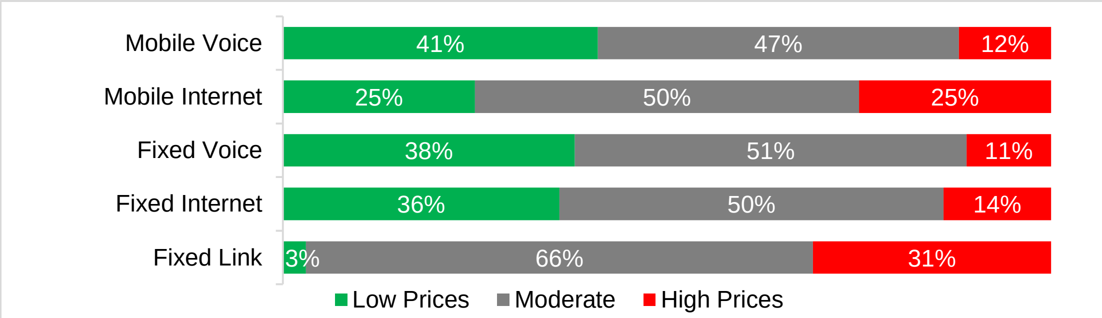
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Fixed Voice: 760; Fixed Internet: 540)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

According to the study results, the large establishments (250+ employees) perceive prices to be high for Fixed Voice and Fixed Internet services. They also feel that the cost of purchase and installation are higher for both these services (Table 24). The large enterprises seem to expect customized solutions, which may not be as cost effective.

### 4.4.2.Perception on Monthly Rental

Across most of the communication products, a majority of the customers perceive the monthly rental prices as moderate to low. However, some business customers feel the monthly rental charges to be significantly high for Mobile Internet (25% of customers) and Fixed Links (31%).

*Figure 18: Monthly Rental Charge Perception*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Large enterprises perceive the monthly rental rates to be high for Fixed Voice and Fixed Internet services (Table 25). Providing customized solutions that costs more along with the raised expectation of getting discounted rates for a larger spend could be feeding into their perception.

*Table 25: Monthly Rental Charge Perception: By size of enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet |
|---|---|---|---|---|
| **Overall** | **88** | **75** | **89** | **86** |
| | | | | |
| 1 – 9 (Small) | 89 | 70 | 91 | 91 |
| 10 – 49 (Medium) | 88 | 75 | 88 | 81 |
| 50 – 249 (Large) | 84 | 89 | 87 | 80 |
| 250+ (Very large) | 88 | 74 | 71 | 76 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced*

*Table 26: Monthly Rental Charge Perception: By Main Economic Activity*

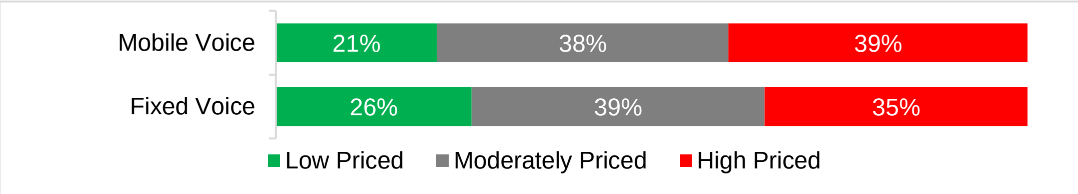
| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet |
|---|---|---|---|---|
| **Overall** | **88** | **75** | **89** | **86** |
| | | | | |
| Administrative and support service activities | 97 | 66 | 97 | 87 |
| Construction | 78 | 73 | 87 | 88 |
| Manufacturing | 90 | 69 | 89 | 78 |
| Mining and Quarrying | 74 | 73 | 59 | 60 |
| Professional, scientific and technical activities | 97 | 100 | 99 | 95 |
| Real estate | 55 | 100 | 69 | 70 |
| Wholesale, Retail & Repair of motor vehicles | 85 | 52 | 87 | 94 |
| Other Industries | 97 | 92 | 91 | 83 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced*

### 4.4.3. Perception on International Call Charges

A high percentage of customers perceive international call charges to be steep across both Mobile Voice (39%) and Fixed Voice (35%) customers (Figure 19)

*Figure 19: International Call Charge Perception*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Fixed Voice: 760)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 27: International Call Charges Perception: By Size of Enterprise*

| | Mobile Voice | Fixed Voice |
|---|---|---|
| **Overall** | **61** | **65** |
| | | |
| 1 – 9 (Small) | 59 | 63 |
| 10 – 49 (Medium) | 60 | 69 |
| 50 – 249 (Large) | 67 | 69 |
| 250+ (Very large) | 79 | 78 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Fixed Voice: 760)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced*

*Table 28: International Call Charges Perception: By Main Economic Activity*

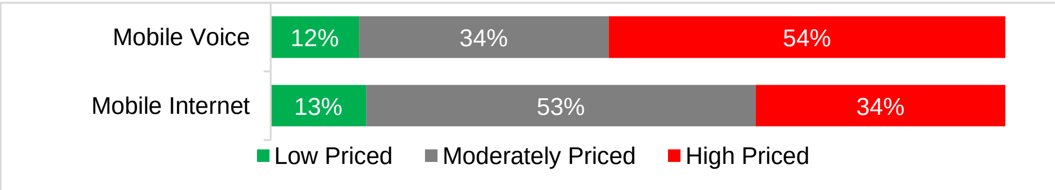
| | Mobile Voice | Fixed Voice |
|---|---|---|
| **Overall** | **61** | **65** |
| | | |
| Administrative and support service activities | 53 | 73 |
| Construction | 84 | 81 |
| Manufacturing | 86 | 53 |
| Mining and Quarrying | 45 | 69 |
| Professional, scientific and technical activities | 89 | 88 |
| Real estate | 55 | 61 |
| Wholesale, Retail & Repair of motor vehicles | 43 | 80 |
| Other Industries | 76 | 53 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651 Fixed Voice: 760)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

### 4.4.4.Perception on International Roaming Charges

A majority of the business customers perceive the international roaming charges to be high for both Voice and Internet services, particularly the Voice with 54% (*Figure 20*) claiming so. Particularly the Small and Medium business customers feel that International roaming charges are high. This could actually be due to their limited international roaming usage as compared to their larger counterparts who have come to see prices as more acceptable.

*Figure 20: International Roaming charges perception*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 29: International Roaming Charges Perception: By size of enterprise*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | 46 | 76 |
| | | |
| 1 – 9 (Small) | 44 | 52 |
| 10 – 49 (Medium) | 46 | 74 |
| 50 – 249 (Large) | 58 | 79 |
| 250+ (Very large) | 58 | 77 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

*Table 30: International Roaming Charges Perception: By Main Economic Activity*

| | Mobile Voice | Mobile Internet |
|---|---|---|
| **Overall** | **46** | **76** |
| | | |
| Administrative and support service activities | 52 | 83 |
| Construction | 90 | 77 |
| Manufacturing | 38 | 51 |
| Mining and Quarrying | 70 | 71 |
| Professional, scientific and technical activities | 47 | 74 |
| Real estate | 40 | 100 |
| Wholesale, Retail & Repair of motor vehicles | 25 | 61 |
| Other Industries | 72 | 53 |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200)*
*Figures represent proportion (%) of business customers perceiving prices of communication services to be moderate to low priced)*

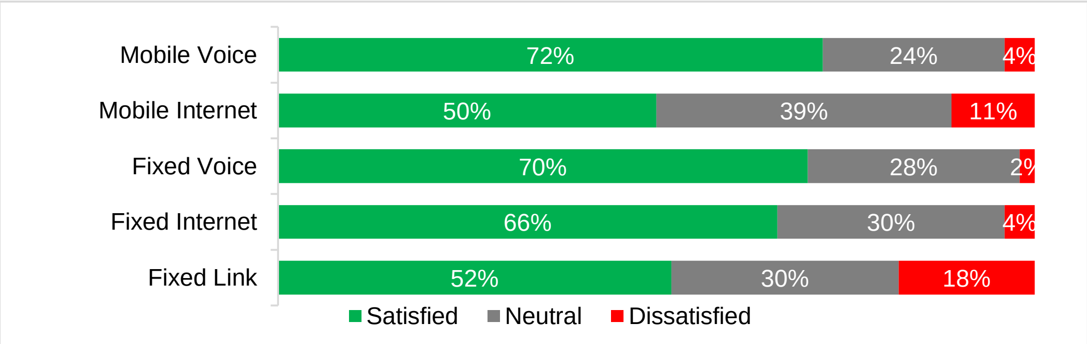
## 4.5. Business Customer Perceptions on Rate Plans/ Tariffs

Business customers' perception on rate plans and tariff has an impact on the overall satisfaction with the services available in the state of Qatar. It is hence pertinent to understand their perception on these parameters.

### 4.5.1. Perception on Clear Terms and Conditions

Business customers have a positive opinion on the terms and conditions of most of the rate plans of various services. However, 18% of the users are dissatisfied with Fixed Links services and this needs to be addressed. Business customers using Mobile Internet for business purposes are also not as satisfied with clarity of terms and conditions. This is particularly observed among the smaller enterprises.

*Figure 21: Satisfaction with Clear Terms and Conditions*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 31: Satisfaction with Clear Terms and Conditions: By size of enterprise*

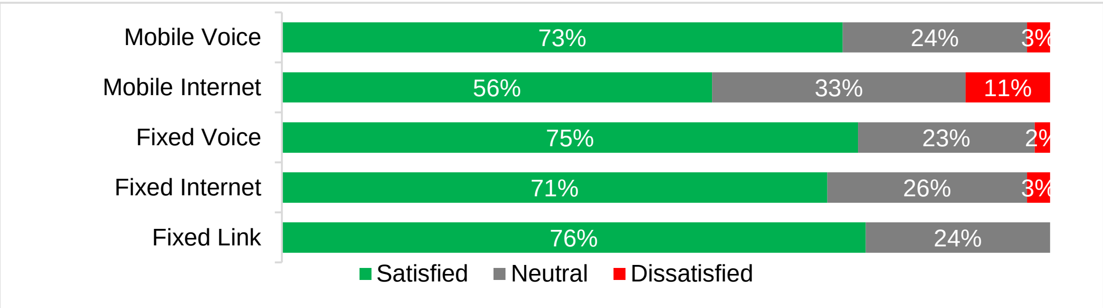
| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **72** | **50** | **70** | **66** | **52** |
| | | | | | |
| 1 – 9 (Small) | 75 | 44 | 72 | 70 | - |
| 10 – 49 (Medium) | 67 | 54 | 69 | 63 | - |
| 50 – 249 (Large) | 63 | 50 | 58 | 55 | - |
| 250+ (Very large) | 62 | 64 | 58 | 56 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

### 4.5.2.Perception on Transparency of prices

A majority of the business customers in Qatar seem to be satisfied with the transparency of prices across various communication products. Minor dissatisfaction is observed among Mobile Internet customers (11%) indicating that the prices need to be more transparent (Figure 20). This is observed among the large enterprises (Table 32) indicating that customized solutions pricing needs to be clear to business customers. At the same time, medium (50-249 employees) and large (250+ employees) rate transparency of prices for Mobile voice and data services low (Table 34). These businesses demand more transparency, as they need to scrutinize communication costs to meet their expense budgets.

*Figure 22: Satisfaction with Transparency of prices*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 32: Satisfaction with Transparency of Prices: By size of enterprise (number of employees)*

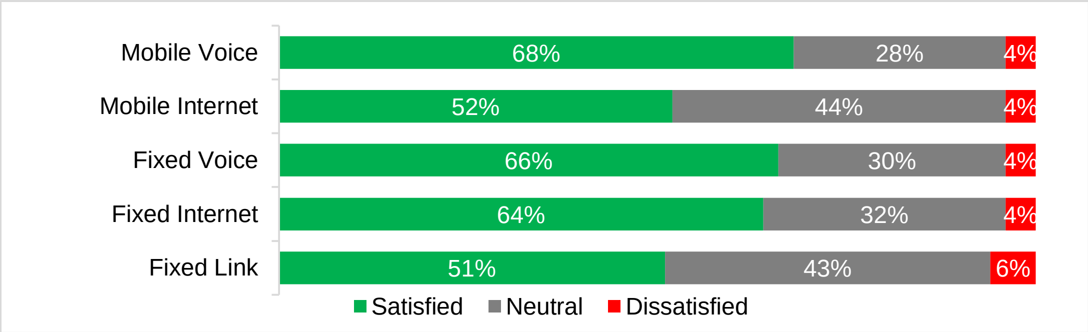
| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **73** | **56** | **75** | **71** | **76** |
| | | | | | |
| 1 – 9 (Small) | 77 | 66 | 78 | 79 | - |
| 10 – 49 (Medium) | 70 | 46 | 66 | 67 | - |
| 50 – 249 (Large) | 61 | 50 | 72 | 53 | - |
| 250+ (Very large) | 52 | 47 | 54 | 54 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

### 4.5.3.Perception on Variety of Rate Plans

A sizeable number of the business customers are seen to have an average rating on the variety of rate plans available across different communication products. However, the neutral scores for Mobile Internet (44%) and Fixed Link (43%) imply that there is room for improvement and more variety can be added to give customers a better choice and hence, increase satisfaction with 'getting a rate plan of their choice' (Figure 23).

*Figure 23: Satisfaction with Variety of Rate Plans*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 33: Satisfaction with Variety of Rate Plan: By size of enterprise (number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **68** | **52** | **66** | **64** | **51** |
| | | | | | |
| 1 – 9 (Small) | 70 | 40 | 67 | 68 | |
| 10 – 49 (Medium) | 68 | 69 | 67 | 62 | |
| 50 – 249 (Large) | 61 | 51 | 52 | 53 | |
| 250+ (Very large) | 33 | 63 | 55 | 51 | |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

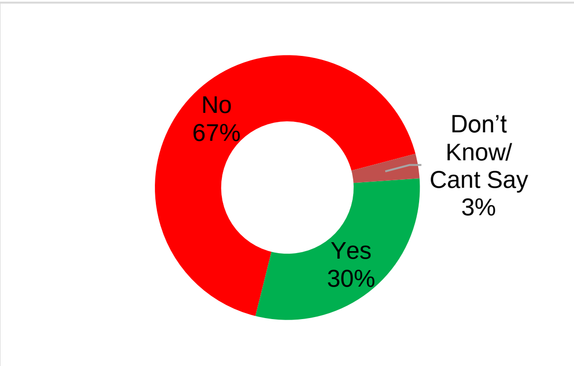
The findings suggest that larger enterprises have relatively lower satisfaction levels on the variety of rate plans available across communication products (Table 33). This indicates that customized solutions currently available for large enterprises are limited and the industry expects more options.

### 4.5.4. Publishing of Tariff

The CRA mandate requires the service providers to publish all tariff plans and make them accessible to consumers through multiple channels such as print, website, stores, etc. This is to ensure fairness and transparency on ‘access to information’.

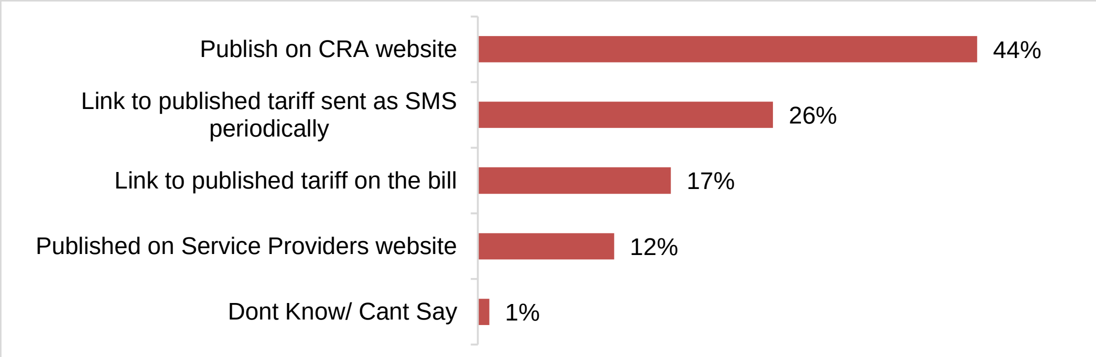
Only 30% of business customers are aware of the CRA’s mandate that it is obligatory for service providers to publish tariff plans (Figure 24) through multiple channels. Therefore, this calls for creating an increased awareness to showcase integrity in governance.

*Figure 24: Awareness of Tariff Publishing*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Figure 25: Options for accessing Published Tariff*




*Source: Business Customer Satisfaction Survey 2015*
*Question asked specifically to those aware of requirement to publish tariff (n=295)*

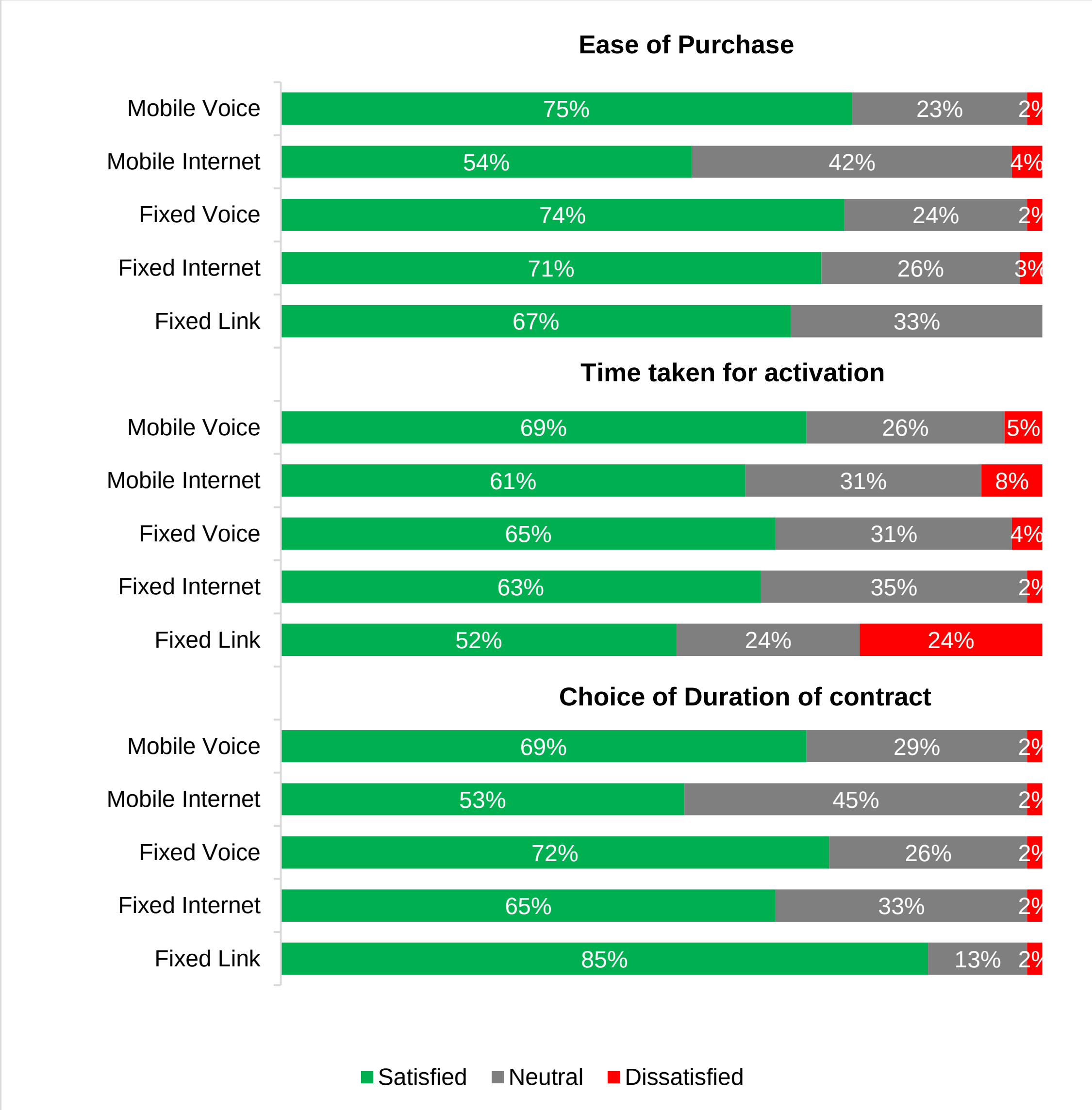
Business customers prefer to access details on the tariff plans from the CRA website and via links to published tariff sent as SMS periodically. Few also prefer to see it on their bills and their service providers' websites (Figure 25)

## 4.6. Business Customer Perceptions on Provisioning (Purchase and Activation process)

Business customers are in general, satisfied on various provision related aspects such as ease of purchase, time taken for activation and choice on duration of contract across all communication products.

However, around 24% of businesses expressed dissatisfaction on 'Time taken for activation' particularly for Fixed Link services. However, at less usage of Fixed Link services in Qatar, it is an issue for a limited set of customers.

*Figure 26: Satisfaction Provisioning Process parameters*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 34: Satisfaction with Ease of Purchasing: By size of enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **75** | **54** | **74** | **71** | **67** |
| | | | | | |
| 1 – 9 (Small) | 80 | 54 | 77 | 76 | - |
| 10 – 49 (Medium) | 66 | 59 | 71 | 68 | - |
| 50 – 249 (Large) | 59 | 49 | 63 | 57 | - |
| 250+ (Very large) | 68 | 46 | 50 | 61 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

*Table 35: Satisfaction with Time taken for Activation: By size of enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **69** | **61** | **65** | **63** | **52** |
| | | | | | |
| 1 – 9 (Small) | 72 | 71 | 67 | 69 | - |
| 10 – 49 (Medium) | 64 | 53 | 63 | 54 | - |
| 50 – 249 (Large) | 66 | 51 | 58 | 61 | - |
| 250+ (Very large) | 58 | 61 | 47 | 53 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

It is seen that the satisfaction levels with time taken for activation vary depending on the size of an enterprise. Large enterprises have low satisfaction scores across all product lines as compared to the smaller ones (Table 35). Requirements for customized solutions or complicated needs (integrated solutions for example) of large enterprises could be the reason for more time taken to activation of services, which in turn impacts the satisfaction.

*Table 36: Satisfaction with choice of length of contract: By Size of enterprise (Number of employees)*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **69** | **53** | **72** | **65** | **85** |
| | | | | | |
| 1 – 9 (Small) | 70 | 45 | 74 | 67 | - |
| 10 – 49 (Medium) | 69 | 63 | 71 | 65 | - |
| 50 – 249 (Large) | 69 | 53 | 55 | 54 | - |
| 250+ (Very large) | 61 | 59 | 66 | 50 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

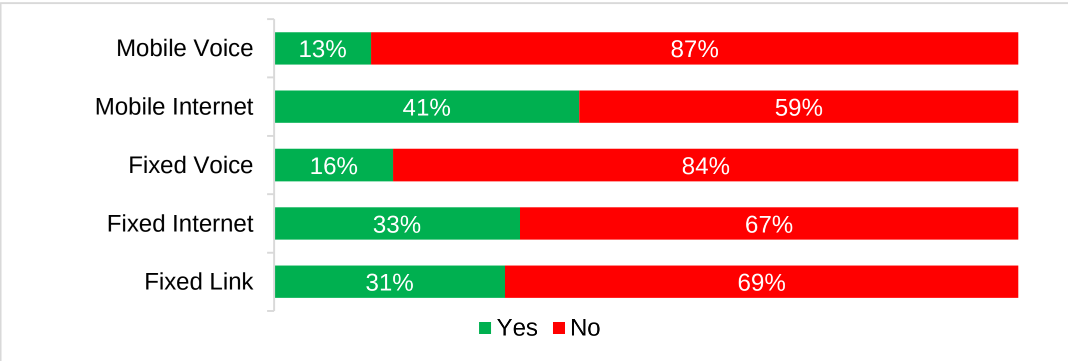
Furthermore, large organizations are not as satisfied with the duration of contract choices across all communication products (Table 36).

## 4.7. Complaint Resolution Mechanism

Another key mandate for the CRA is to manage complaint and dispute resolution in a manner that is transparent, fair and effective. In this context, it becomes critical to understand the present complaint resolution mechanism for business customers, the channels used, the complaints as they are, the satisfaction with complaint resolutions, the awareness and usage of complaint escalation processes.

The findings suggest that the incidence of lodging complaints is higher for Internet services (both Mobile and Fixed) and Fixed Link services, and is relatively less for Mobile Voice and Fixed Voice services (Figure 27).

*Figure 27: Raised a complaint/ query*

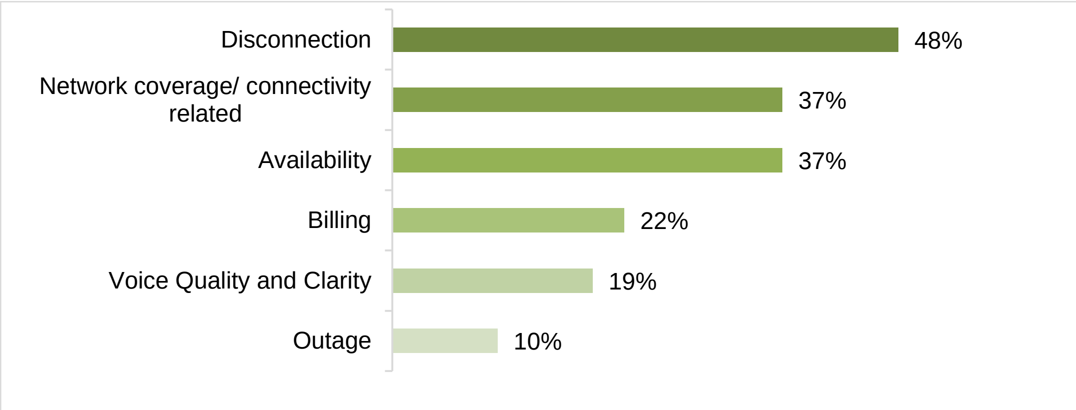



*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

Reasons for complaints vary across communication products. It must be noted that ‘disconnection of line’ is seen as the main reason for lodging a complaint for Mobile Voice (48% Ref: Figure 28). Fixed Internet (33% Ref: Figure 30), and poor network coverage/connectivity are the main complaints with Mobile Internet (67% Ref: Figure 29).

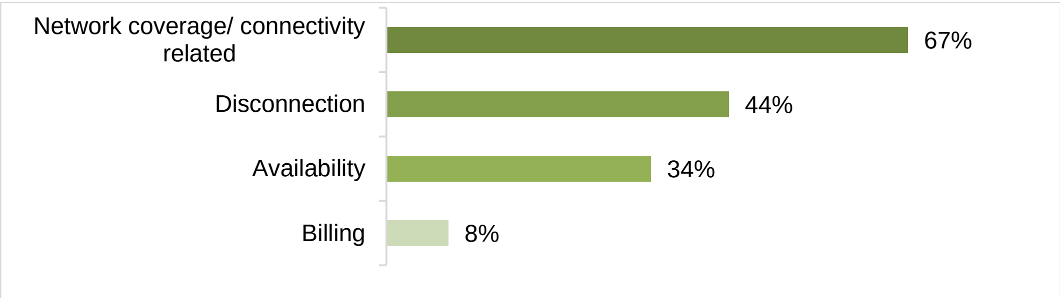
Within the Fixed Voice and Fixed Internet connection, installation related issues are the main complaints, along with queries related to availability of fiber, being among the top three reasons for reaching out to the service provider.

*Figure 28: Reasons for Complaint for Mobile Voice*



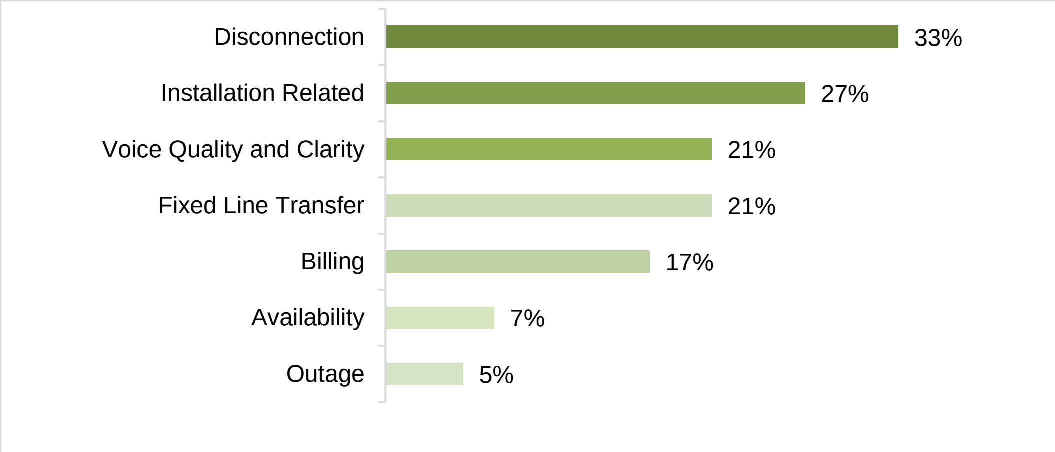

*Source: Business Customer Satisfaction Survey 2015; Sample of those who said yes to raise complaints for Mobile Voice n= 325*

*Figure 29: Reasons for Complaint- Mobile Internet*



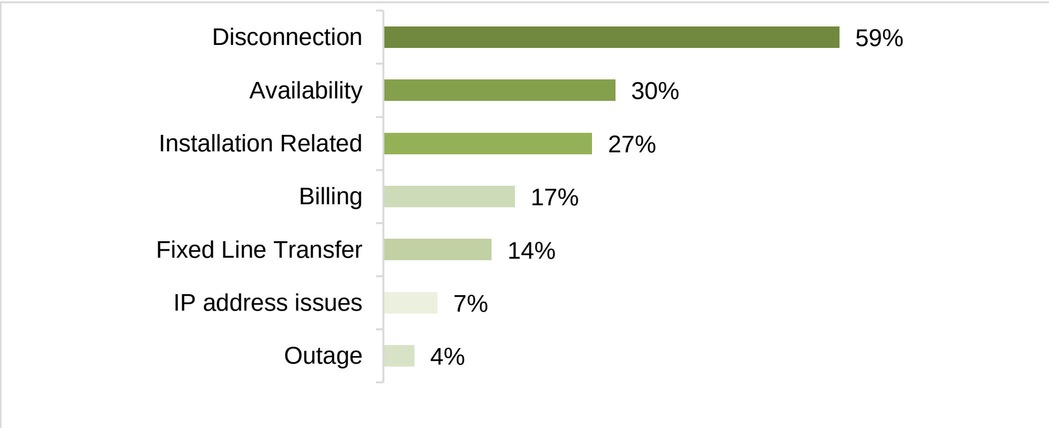

*Source: Business Customer Satisfaction Survey; Sample of those who said yes to raise complaints for Mobile Internet n= 94*

*Figure 30: Reasons for Complaint - Fixed Voice*




*Source: Business Customer Satisfaction Survey; Sample of those who said yes to raise complaints for Fixed Voice n=267*

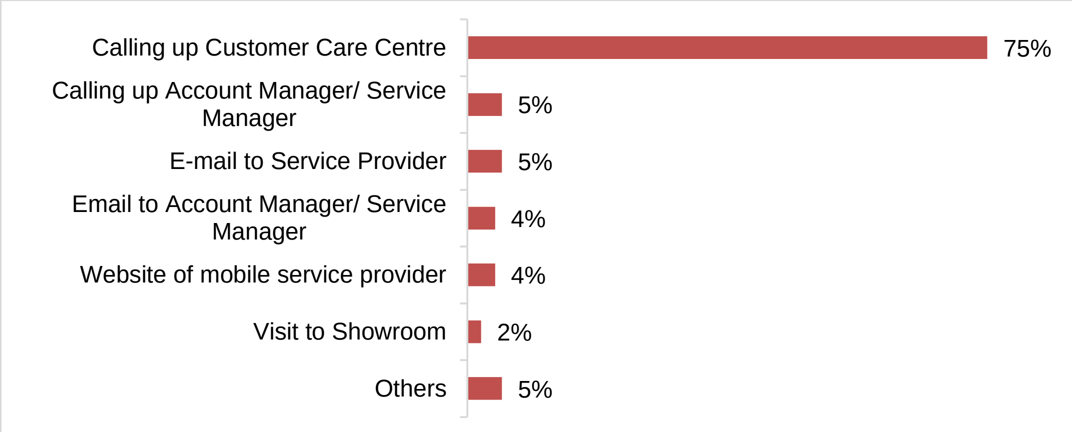
*Figure 31: Reasons for Complaint - Fixed Internet*




*Source: Business Customer Satisfaction Survey; Sample of those who said yes to raise complaints for Fixed Internet n= 250*

A majority of the enterprises (75%) prefer to contact the Service Provider's customer care call center for their queries or complaints (Figure 32) because of the easy and 24/7 access. In addition, dedicated business customer care numbers offered by both service providers contribute to the dedicated usage of this channel. Contrary to this, the usage of other channels for complaints is minimal. It is also observed that the preference to call the customer care is higher in smaller organizations, whereas email to the account manager is the most preferred way of complaining among larger organizations (250 or more employees). This could be because smaller organizations are often not aligned to an Account Manager; hence, have no option but to call the customer service call center.

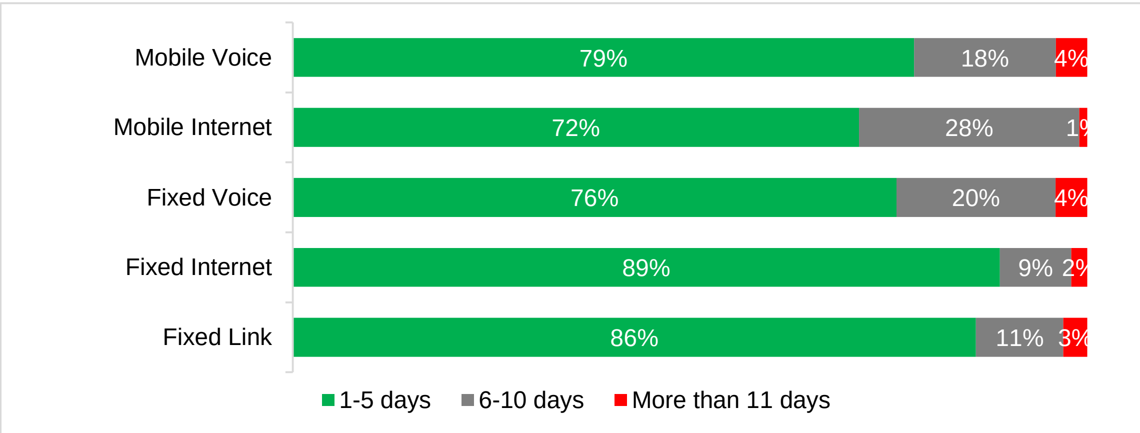
*Figure 32: Preferred Mode of Raising Complaint*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

A majority of the enterprises (70% or more) claim that the average time taken for the resolution of queries or complaints is 1-5 days across different product lines (Figure 33). This is in line with the broad KPIs laid down by the CRA for service providers on complaint/query resolution in the License obligations.

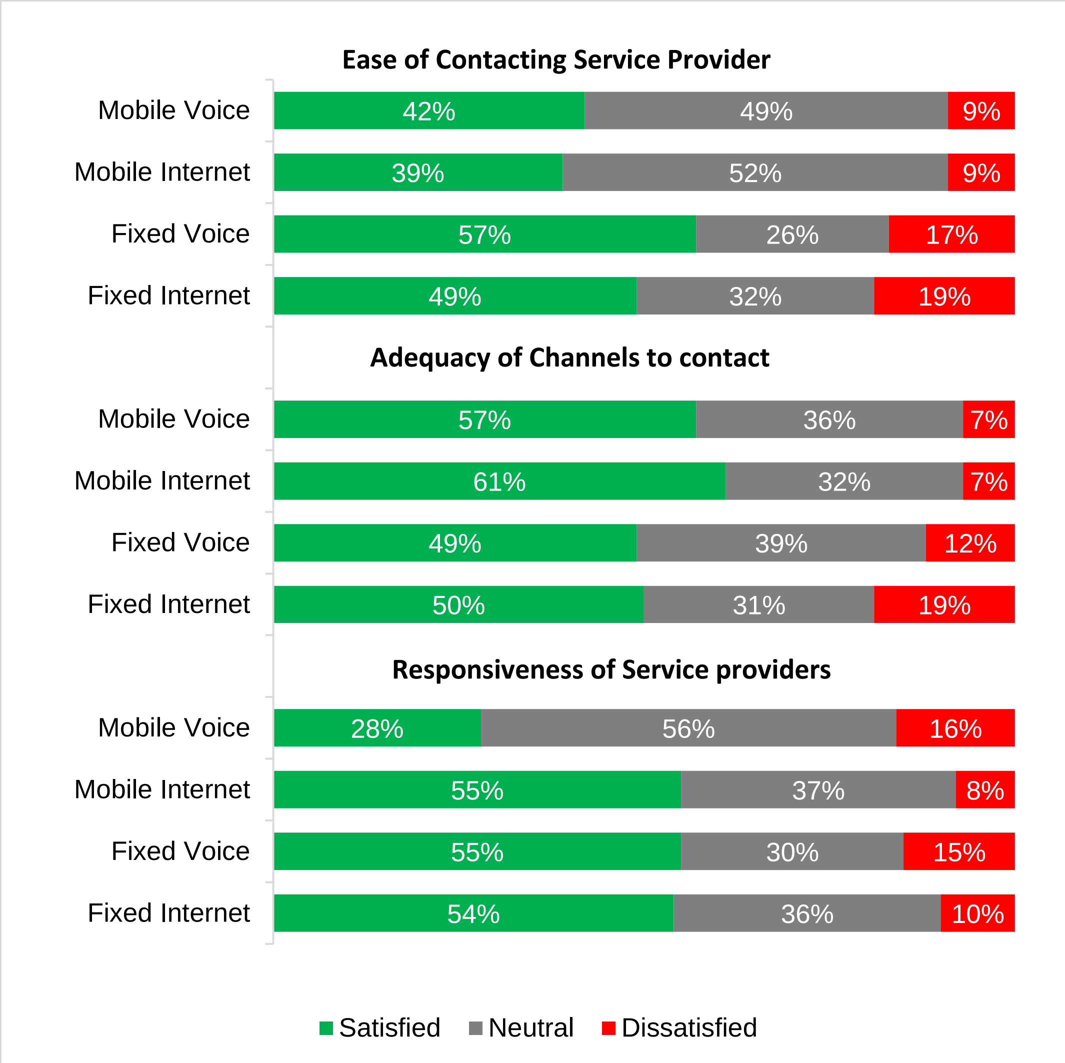
*Figure 33: Time for Resolution of complaints or queries*




*Source: Business Customer Satisfaction Survey 2015; only those who have raised a complaint (Mobile Voice: 130; Mobile Internet: 80; Fixed Voice: 138; Fixed Internet: 209; Fixed Link: 12)*
*Note: Numbers may not add up to 100 percent due to rounding off*

There is a concerning dissatisfaction seen across product lines on different parameters related to complaint resolution. For example, the ease of contacting the service providers to raise a complaint and enquiry for the Fixed services shows that 17% of Fixed Voice and 19% of Fixed Internet enterprises users experience difficulty in contacting the Service Provider (Figure 34). This proves the inadequacies of the channels and this concern will need action and address by service providers. Business customers also expressed dissatisfaction with the responsiveness of service providers on both; the time taken and the quality of response, particularly for Mobile Voice and Fixed Voice services

*Figure 34: Satisfaction with Complaint Resolution parameters: Ease, Channel Adequacy and Responsiveness*

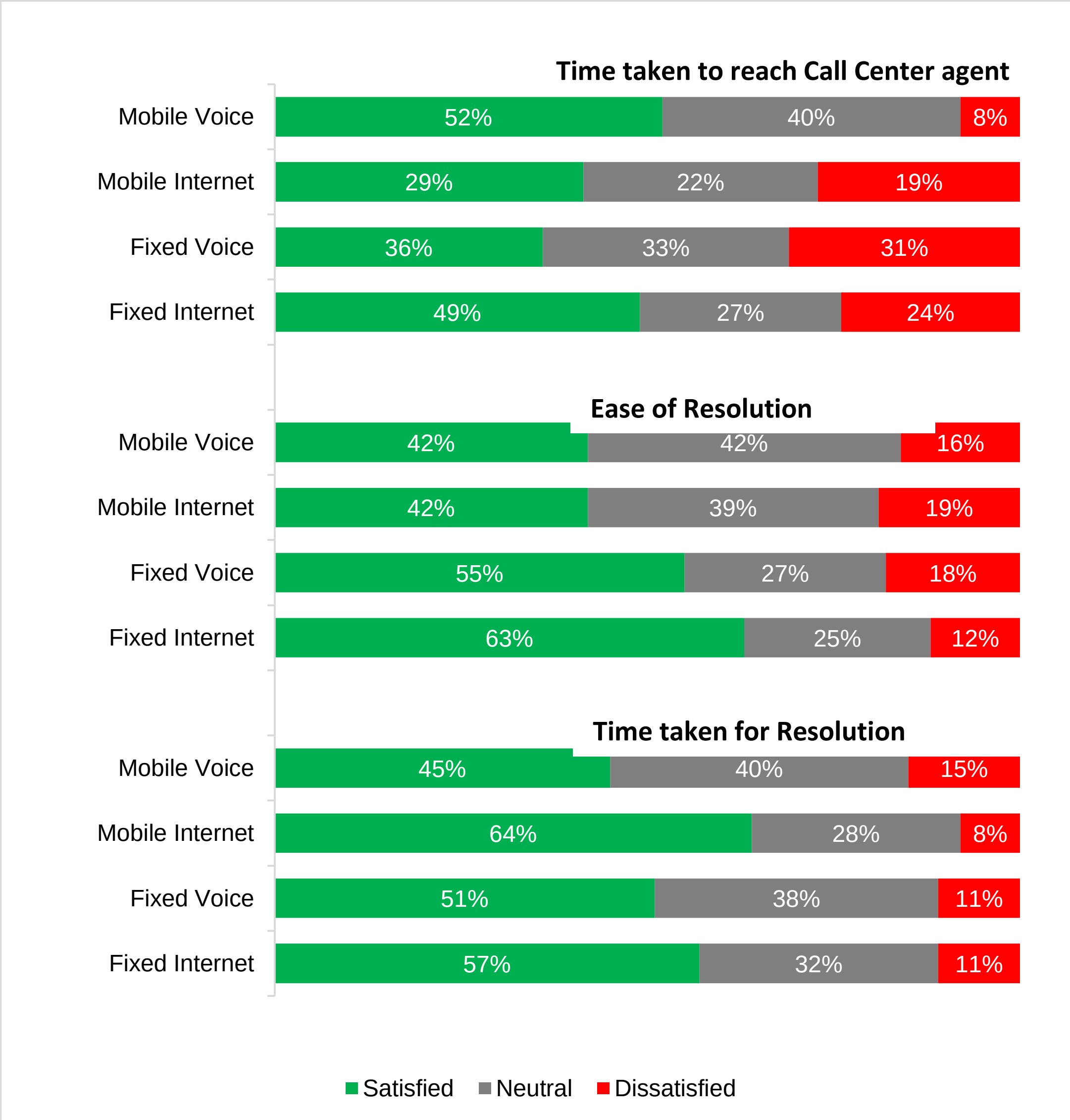



*Source: Business Customer Satisfaction Survey 2015; only those who have raised a complaint (Mobile Voice: 130; Mobile Internet: 80; Fixed Voice: 138; Fixed Internet: 209; Fixed Link: 12)*
*Note: Numbers may not add up to 100 percent due to rounding off*

It is also observed that enterprise customers are highly dissatisfied with the time taken to reach call center agents. This dissatisfaction is seen across all product lines with the highest dissatisfaction for Fixed Voice (31%) and lowest for Mobile Voice (8%). The availability of account managers for all business accounts may help in minimizing this dissatisfaction.

Furthermore, the enterprises have also a low satisfaction with the ease of resolution process and the time taken for resolution.

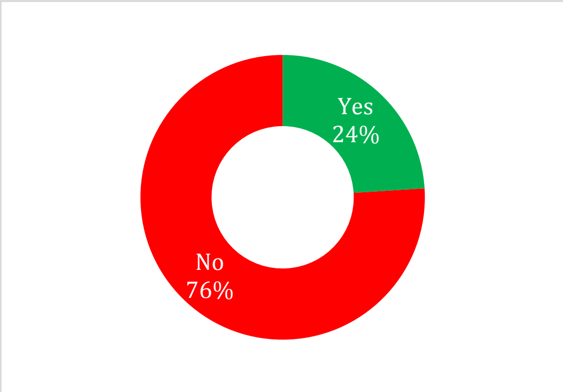
*Figure 35: Satisfaction with Complaint Resolution parameters: Ease of Resolution, Time for Resolution and Time taken to Reach Call Center agent*




*Source: Business Customer Satisfaction Survey 2015; only those who have raised a complaint (Mobile Voice: 130; Mobile Internet: 80; Fixed Voice: 138; Fixed Internet: 209; Fixed Link: 12)*
*Note: Numbers may not add up to 100 percent due to rounding off*

The CRA has established a complaint escalation process, where all customers can escalate their complaints to the CRA in case of non- resolution. According to the survey, only 24% of business customers are aware of this complaint escalation process. This necessitates the need for the CRA to implement further steps to increase the awareness and educate business customers on availability of different channels for complaint escalation with the CRA.

*Figure 36: Awareness of Complaint escalation process at CRA*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

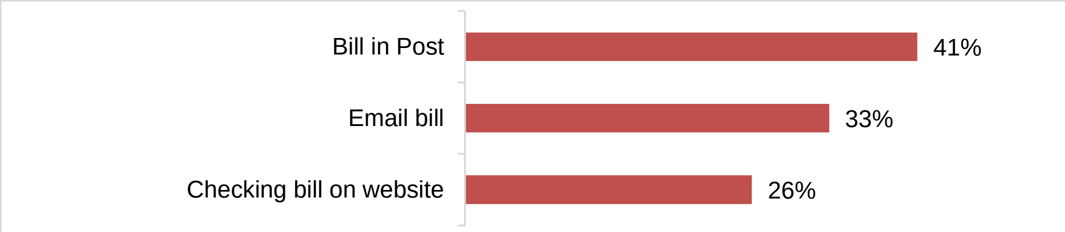
In the period from May 2014 to May 2015, only 52 complaints were registered with the CRA from various communication channels, which is suggestive of the fact that the usage of the complaint escalation process is minimal among business customers. This reinforces the earlier conclusion that low awareness is leading to even lower use of the option available to business customers. Thus, as a priority, the CRA should develop a plan to improve awareness of the 'complaint escalation process' in case business customers have unresolved issues with service providers.

## 4.8. Business Customer Perceptions on Billing and Payment

Queries pertaining to billing and payments is also one of the main reasons business customers contact service providers. Consequently, it is important to understand their satisfaction within these parameters.

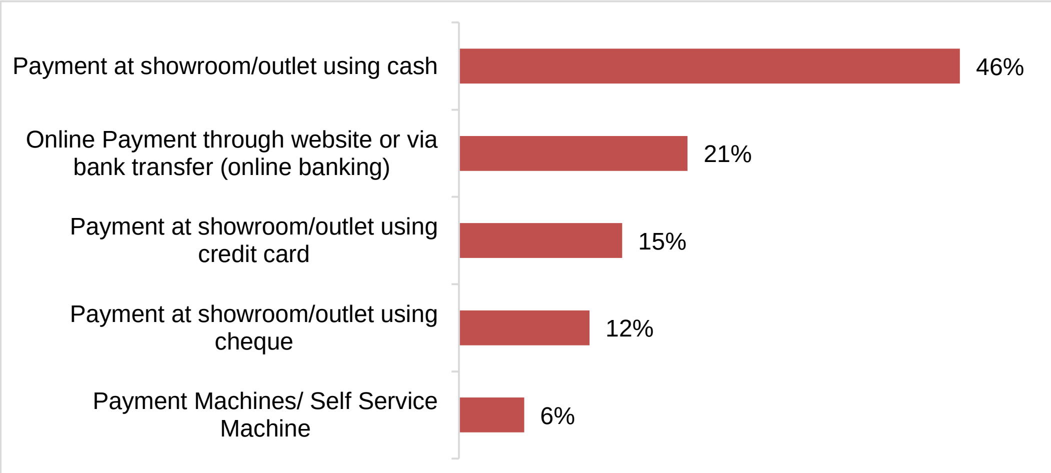
Business customers do not have a clear preference in terms of a preferred channel for receiving their bills. Around 41% prefer to receive their bills in their post boxes, while 33% prefer more environment friendly options such as bills via emails (e-bills) or an online access (26%) (*Figure 37*).

*Figure 37: Preferred Mode of Receiving Bill*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*

*Figure 38: Preferred Mode of Payment*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*

In terms of payments, cash payment at the retail outlet is the most preferred payment method for enterprise customers, more so among the smaller enterprises (Table 37). The lack of corporate credit card or online banking options may have led small enterprises using cash payment methods more effectively. However, it is quite evident that larger enterprises (50+ employees) have a preference for online payment (Table 37).

*Table 37: Preferred Mode of Payment: By size of enterprise (Number of employees)*

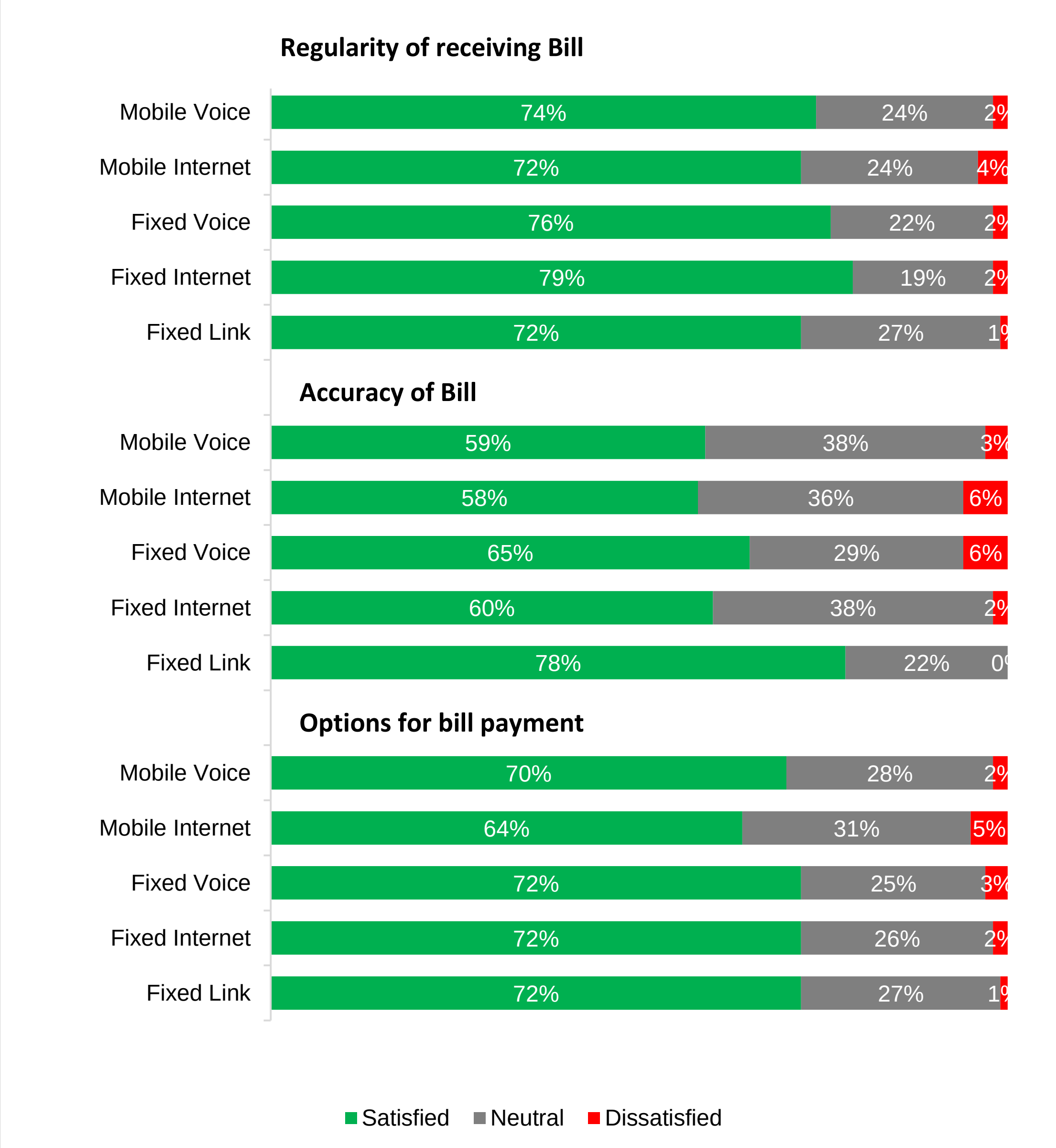
| | Overall | 1-9 | 10-49 | 50-249 | 250+ |
|---|---|---|---|---|---|
| Payment at showroom/ outlet using cash | 46% | 51% | 40% | 22% | 5% |
| Online Banking | 21% | 18% | 22% | 46% | 46% |
| Payment at showroom using credit card | 15% | 16% | 11% | 16% | 21% |
| Payment at showroom using cheque | 12% | 11% | 15% | 7% | 18% |
| Payment Machine | 6% | 4% | 12% | 9% | 10% |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*

Enterprise customers are highly satisfied with all billing and payment experiences.

There is no discernable dissatisfaction on any of the billing and payment parameters for any service.

*Figure 39: Satisfaction with Billing Parameters*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 38: Satisfaction with Regularity of Receiving Bill: By size of enterprise*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **74** | **72** | **76** | **79** | **72** |
| | | | | | |
| 1 – 9 (Small) | 74 | 77 | 77 | 82 | - |
| 10 – 49 (Medium) | 77 | 65 | 73 | 81 | - |
| 50 – 249 (Large) | 80 | 72 | 77 | 64 | - |
| 250+ (Very large) | 51 | 75 | 71 | 71 | - |

*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

*Table 39: Satisfaction with Accuracy of Bill: By size of enterprise*

| | Mobile Voice | Mobile Internet | Fixed Voice | Fixed Internet | Fixed Links |
|---|---|---|---|---|---|
| **Overall** | **59** | **58** | **65** | **60** | **78** |
| | | | | | |
| 1 – 9 (Small) | 59 | 55 | 67 | 60 | - |
| 10 – 49 (Medium) | 56 | 54 | 59 | 56 | - |
| 50 – 249 (Large) | 64 | 62 | 65 | 67 | - |
| 250+ (Very large) | 66 | 78 | 60 | 54 | - |

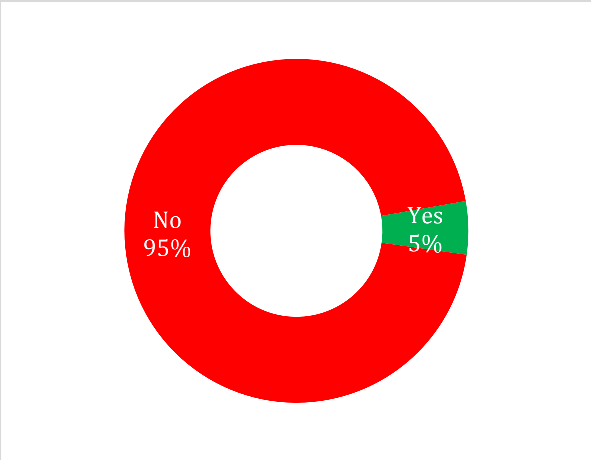
*Figures above represent proportion (%) of satisfied consumers*
*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096 (Mobile Voice: 651; Mobile Internet: 200; Fixed Voice: 760; Fixed Internet: 540; Fixed Link: 30)*

## 4.9. Consumer Rights Protection

The CRA is also mandated to protect telecom consumers from being misled and from unfair practices. Hence, one of the important parameters is to monitor all advertisements from the service providers to keep a check on any misleading advertising or marketing.

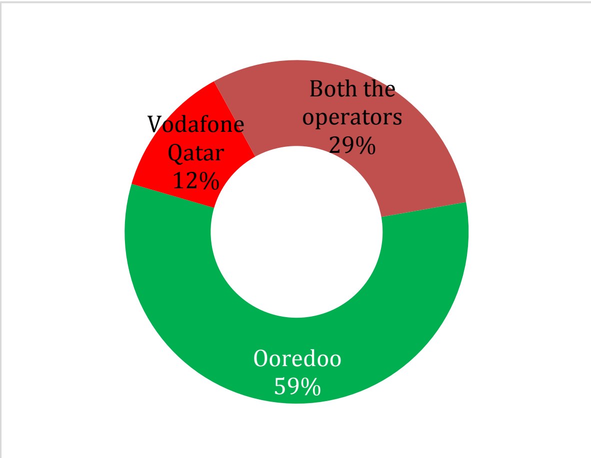
Presently, only 5% of the consumers believe that the advertisements are misleading; in other words, not providing clear terms and conditions applicable for the advertised product. Additionally, the customers believe that the prices are not always clearly mentioned in the advertisements leading to misinformation.

*Figure 40: Misleading Advertisements*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

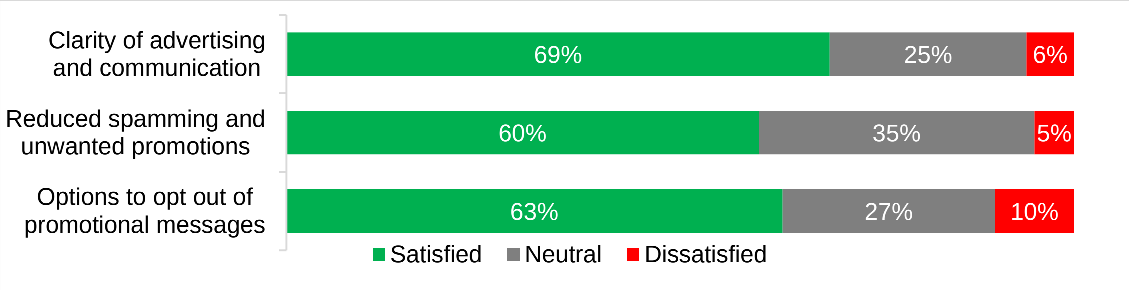
*Figure 41: Operator with Misleading Advertisements*




*Source: Business Customer Satisfaction Survey; Overall Sample n=58, those who have answered Yes to misleading advertisements*
*Note: Numbers may not add up to 100 percent due to rounding off*

Business customers are satisfied with the clarity of advertisements, with only 6% expressing dissatisfaction. Other than that, just about 5% are dissatisfied with spamming and unwanted promotions. However, in terms of options to opt out, about 10% of the customers are dissatisfied (Figure 42). This indicates that customers need to have clear options to opt out of unsolicited communication and promotions or Spam.

*Figure 42: Perception on Promotion and clarity of advertisements*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*

## 4.10. Market Competitiveness

Another key mandate for the CRA is to ensure that the communication services market in Qatar is competitive. All the stakeholders, including both service providers and the CRA have been launching initiatives to increase competitiveness and ensure adoption of new technologies.

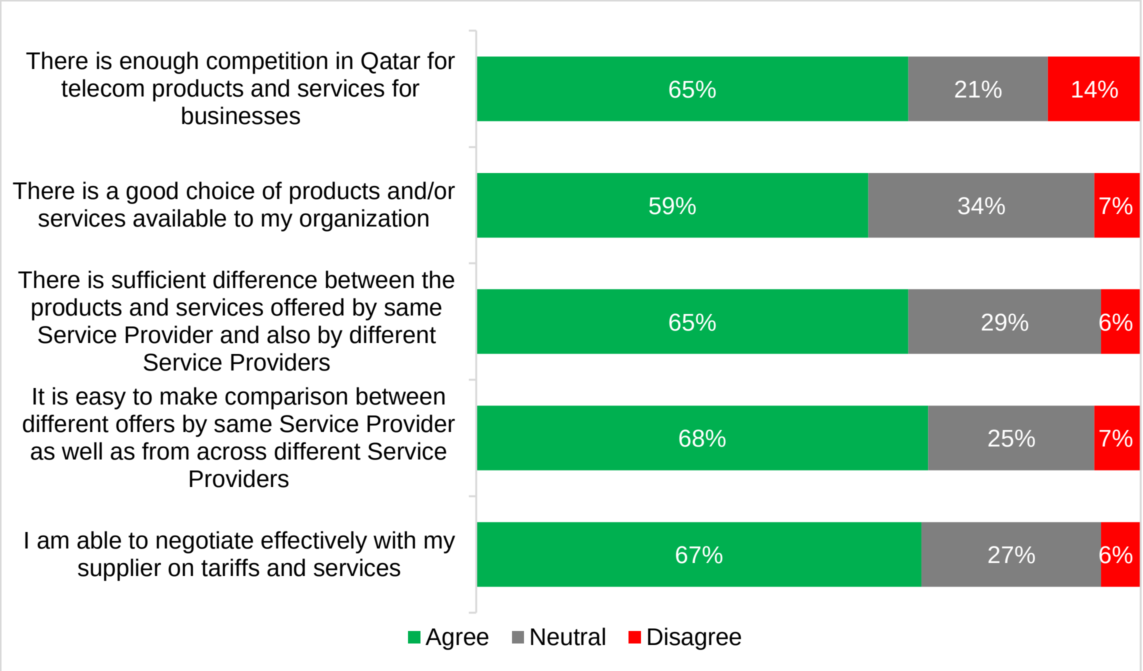
Almost two-thirds (65%) of business customers agree with the statement that, '*there is enough competition in Qatar for telecom products and services in Qatar*'. However, 14% of the customers completely disagree with the statement indicating there is scope for improvement in terms of market competitiveness. Further, the overall agreement at 59% to the statement *'there is good choice of products available to organization'* indicates that there is definitely a room for improvement.

Large enterprises (250+ employees) tend to agree to a lesser extent on market competitiveness across all parameters of competition as compared to small enterprises (1- 9 employees). The requirements of large enterprises are specialized and the limited options in fixed services in Qatar may be leading to this perception.

*"Competition between Ooredoo and Vodafone is bad where there is no creativity and smart ways to attract customers"*

*"Competition is very low so it is a good chance for both providers to provide the best they have, however, I don't see that happening"*

*Figure 43: Perception on Market Competitiveness*




*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Note: Numbers may not add up to 100 percent due to rounding off*

*Table 40: Perception on Market competitiveness - By size of enterprise*

| | Overall | 1-9 | 10-49 | 50-249 | 250+ |
|---|---|---|---|---|---|
| There is enough competition in Qatar for telecom products and services for businesses | 65% | 64% | 66% | 71% | 67% |
| There is a good choice of products and/or services available to my organization | 59% | 61% | 58% | 51% | 39% |
| There is sufficient difference between the products and services offered by same Service Provider and also by different Service Providers | 65% | 64% | 72% | 60% | 52% |
| It is easy to make comparison between different offers by same Service Provider as well as from across different Service Providers | 68% | 68% | 67% | 72% | 58% |
| I am able to negotiate effectively with my supplier on tariffs and services | 67% | 69% | 63% | 54% | 58% |

*Source: Business Customer Satisfaction Survey 2015; Overall Sample n=1096*
*Figure represents % of business customers who have agreed with statement*

## 4.11. Strength and Improvement Areas

The business customer satisfaction survey has revealed that Qatar's communication market has some inherent strengths and some improvement areas, which are outlined in the following tables.

*Table 41: Key Leveraging Strengths*

| PRODUCT | OVERALL EXPERIENCE AREA | CUSTOMER INTERACTION ASPECT |
|---|---|---|
| **MOBILE VOICE** | QUALITY OF SERVICE | ➢ Overall QoS |
| | NETWORK | ➢ Geographical coverage |
| | PROVISIONING | ➢ Ease of purchase |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Clear Terms and Conditions of Rate Plans<br>➢ Transparency of pricing |
| | BILLING | ➢ Regularity in receiving bills<br>➢ Channel for payment |
| **MOBILE INTERNET** | BILLING | ➢ Regularity in receiving bills |
| **FIXED VOICE** | QUALITY OF SERVICE | ➢ Overall QoS |
| | NETWORK | ➢ Geographical availability |
| | PROVISIONING | ➢ Ease of purchase<br>➢ Choice available for duration of contracts |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Transparency of pricing |
| | BILLING | ➢ Regularity in receiving bills<br>➢ Channel for payment |
| **FIXED INTERNET** | QUALITY OF SERVICE | ➢ Overall QoS |
| | NETWORK | ➢ Geographical availability |
| | PROVISIONING | ➢ Ease of purchase |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Transparency of pricing |
| | BILLING | ➢ Regularity in receiving bills<br>➢ Channel for payment |
| **FIXED LINKS** | QUALITY OF SERVICE | ➢ Overall QoS |
| | PROVISIONING | ➢ Choice available for duration of contracts |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Transparency of pricing |
| | BILLING | ➢ Regularity in receiving bills<br>➢ Channel for payment |

*Table 42: Key Improvement Areas*

| PRODUCT | OVERALL EXPERIENCE AREA | CUSTOMER INTERACTION ASPECT |
|---|---|---|
| **MOBILE VOICE** | PRICE | ➢ Overall Price<br>➢ Monthly rental charges<br>➢ International call charges<br>➢ International roaming charges |
| | COMPLAINT RESOLUTION | ➢ Responsiveness of Service providers<br>➢ Ease in resolving complaints<br>➢ Duration for resolving complaints<br>➢ Ease of contacting service provider<br>➢ Adequacy of channels for raising complaints<br>➢ Time taken to reach call center agents |
| **MOBILE INTERNET** | PRICE | ➢ Monthly rental charges<br>➢ International data roaming charges |
| | NETWORK | ➢ Speed of data service |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Clear Terms and conditions of Rate Plans<br>➢ Transparency of prices |
| | COMPLAINT RESOLUTION | ➢ Time taken to reach call center agents Ease in resolving complaints<br>➢ Duration for resolving complaints<br>➢ Responsiveness of Service providers<br>➢ Ease of contacting service provider<br>➢ Adequacy of channels for raising complaints |
| **FIXED VOICE** | PRICE | ➢ Overall Price<br>➢ Monthly rental charges<br>➢ International call charges |
| | COMPLAINT RESOLUTION | ➢ Responsiveness of Service providers<br>➢ Ease in resolving complaints<br>➢ Duration for resolving complaints<br>➢ Ease of contacting service provider<br>➢ Adequacy of channels for raising complaints<br>➢ Time taken to reach call center agents |
| | BILLING | ➢ Accuracy of Billing |
| **FIXED INTERNET** | PRICE | ➢ Overall Price<br>➢ Monthly rental charges<br>➢ International call charges |
| | COMPLAINT RESOLUTION | ➢ Responsiveness of Service providers<br>➢ Ease in resolving complaints<br>➢ Duration for resolving complaints<br>➢ Ease of contacting service provider<br>➢ Adequacy of channels for raising complaints<br>➢ Time taken to reach call center agents |
| **FIXED LINKS** | PRICE | ➢ Overall Price<br>➢ Purchase and Installation cost |

| | | |
|---|---|---|
| | | ➢ Monthly rental charges<br>➢ International call charges |
| | RATE PLAN/ TARIFF & PROMOTIONS | ➢ Clear Terms and conditions of rate plans |
| | PROVISIONING | ➢ Time taken for activation |
| | NETWORK | ➢ Reliability |

## 5. Key Take-outs for CRA

Based on the mandate of CRA and the enterprise customer's feedback, the key take-outs for CRA are listed below.

| Observations | What CRA can do/ facilitate |
|---|---|
| **PRICING**<br>Pricing is an important issue among enterprise consumers and a significant proportion of enterprise consumers feel that prices in Qatar are high at an overall level and aspects such as; monthly rental, international and local call charges as well as roaming charges. | • The CRA has recently published a competitive pricing study in GCC and the Arab World. The research reveals that Qatar's pricing for business purposes is indeed on the higher side and needs to be more competitive<br>• The CRA needs to take necessary steps to ensure that Qatar's communication prices are competitive and among the best in the region. |

| Observations | What CRA can do/ facilitate |
|---|---|
| **MARKET COMPETITIVENESS**<br>Presently only 65% of enterprise customers believe there is enough competition in communications market. Further similar proportion of business customers believes that there is a sufficient difference between products and services offered by service providers and it is easy to make comparison between the products. | • The competition in fixed services for enterprise is virtually limited with second operator limiting availability to just a few geographical locations. The CRA needs to ensure the availability of choices across all products and services<br>• Further, a study can be conducted to look at opportunities with infrastructure sharing between the two operators to ensure consumers get options to choose services from either of the players. |

| Observations | What CRA can do/ facilitate |
| --- | --- |
| **COMPLAINT RESOLUTION**<br>There is considerable dissatisfaction with the time taken to reach the call center to register a complaint and the speed of resolution. | • A system can be established which auto-escalates unresolved issues after a certain period of time<br>• For installation related complaints, it is recommended that a mechanism to monitor speed of resolution is created. The observation thus made, shall be used as basis to define the KPIs governing provisioning related complaints resolution time limit |

| Observations | What CRA can do/ facilitate |
| --- | --- |
| **CRA AWARENESS**<br>Awareness of the CRA is only 41% among enterprise customers. | • CRA can develop campaigns targeted at business customers about its mandate, and how can businesses in Qatar benefit on issues related to communication services in the state<br>• The CRA shall make it mandatory for service providers to mention CRA contact details (such as email, phone line, social media etc. on all online and printed bills where customers can reach in case of unresolved service issues. CRA can also ask service providers to share with customers KPIs on turnaround time for complaints received while acknowledging the complaint. |

# 6. Appendix I: Research Details

A quantitative survey of 1068 sample size was conducted among business customers as part of the research program. The survey was conducted from October to December 2015.

## 6.1. Sampling Unit

For the purpose of the study, the sampling unit was taken as 'enterprise'[4]. The reason for using enterprise as the sampling unit is based on the assumption that the enterprises in Qatar make the decision regarding purchase of telecom/ Internet services. In Qatar; as in many developing economies, where the share of micro and small enterprises is high, number of establishments and enterprises are generally similar. Further, the survey was administered in HO (Head Office), the main office in Qatar.

## 6.2. Target Group

Enterprises responding to the survey were business enterprises registered and running operations in Qatar - national or foreign companies, Private and Government/ Mixed business enterprises, which were using any of the communication services like Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet and Fixed Links services for business purposes.

The enterprises surveyed in the service include:

- Private businesses establishment
- Government /Mixed businesses establishments

## 6.3. Respondent Profile

Considering the nature of the information to be developed through this research, the target respondents for this research were employees who were:

- aware of telecom/ Internet/ connectivity services usage within the enterprise

[4] **Enterprise** - An enterprise is a business organization consisting of one or more domestic establishments that were specified under common ownership or control. The enterprise and the establishment are the same for single-establishment firms. Each multi-establishment company forms one enterprise - the enterprise employment and annual payroll are summed from the associated establishments.

AND

- decision makers/ influencers for telecom/ Internet/ connectivity procurement or implementation

The most common profiles encountered during the survey meeting the above criteria were:

- IT managers / CIOs / IT Heads
- owner (mostly in case of small and medium establishments)

## 6.4. Survey Methodology

Face-to-Face interviews were conducted with the respondents meeting the criteria specified above. Wherever required, prior telephone appointments were obtained from the respondent.

In order to ensure high quality, Computer Assisted Personal Interviews (CAPI) methodology using tablets were used to conduct the interviews.

A letter from the CRA explaining the purpose and nature of the study and identifying AMRB as being vested with the research execution was presented to the respondent.

The respondents were encouraged to refer or consult their colleagues and provide the most accurate data for the survey. Particularly, in case of large establishments, where information related to diverse topics is expected to be unavailable from one officer, consultation with other relevant senior officers were encouraged to generate better quality statistics.

## 6.5. Sample Distribution

A total of 1068 enterprises were interviewed. This is a sizeable sample and the results from the survey are statistically valid with a confidence level of 95% and +/ -3 % margin of error.

Quota based sampling was adopted to ensure that the sample was distributed among different categories.

- Main economic activity (sector of operation)
- Size of the business establishment (number of employees)
- Ownership of business
- Geographical location

The sample distribution by each parameter is presented below:

*Table 43: Sample distribution by main economic activity*

| Serial Number | Main Economic Activity | (ISIC Rev.4)[5] Class | Proportion in Sample |
|---|---|---|---|
| **1** | Agriculture, forestry and fishing | 01-03 | 3% |
| **2** | Mining and quarrying | 05-09 | 3% |
| **3** | Manufacturing | 10-33 | 13% |
| **4** | Electricity, gas, water supply and waste management | 35-39 | 2% |
| **5** | Construction | 41-43 | 7% |
| **6** | Wholesale and retail trade; repair of motor vehicles | 45-47 | 25% |
| **7** | Transportation and storage | 49-53 | 3% |
| **8** | Accommodation and food service activities | 55-56 | 7% |
| **9** | Information and communication | 58-59 | 3% |
| **10** | Financial and insurance activities | 64-66 | 3% |
| **11** | Real estate activities | 68 | 3% |
| **12** | Professional, scientific and technical activities | 69-75 | 5% |
| **13** | Administrative and support service activities | 77-82 | 5% |
| **14** | Education | 85 | 4% |
| **15** | Human health and social work activities | 86-88 | 3% |
| **16** | Arts, entertainment and recreation | 90-93 | 2% |
| **17** | Other Service Activities | 94-96 | 9% |
| ***Total*** | | | **100%** |

*Table 44: Sample distribution by size of enterprise (Number of employees)*

| Serial Number | Number of Employees | Proportion in Sample |
|---|---|---|
| **1** | (1-9) | 37% |
| **2** | (10-49) | 35% |
| **3** | (50-249) | 20% |
| **4** | (250+) | 8% |
| ***Total*** | | **100%** |

[5] As per international Standard Industrial Classification of All Economic Activities (ISIC), Revision 4, United Nations

*Table 45: Sample distribution by municipality*

| Serial Number | Geographical Location (Municipality) | Proportion in Sample |
|---|---|---|
| 1 | Doha | 53% |
| 2 | Al Rayyan | 22% |
| 3 | Al Wakra | 7% |
| 4 | Umm Salal | 5% |
| 5 | Al Khor & Thakira | 5% |
| 6 | Al Shamal | 3% |
| 7 | Al Dayyan | 3% |
| 8 | Al Shahaniya | 3% |
| ***Total*** | | **100%** |

*Table 46: Sample distribution by ownership*

| Serial Number | Ownership of business | Proportion in Sample |
|---|---|---|
| 1 | Privately owned | 97% |
| 2 | Government owned/Mixed | 3% |
| ***Total*** | | **100%** |

*Table 47: Sample achieved by different products*

| Serial Number | Products used | Sample |
|---|---|---|
| 1 | Mobile Voice | 651 |
| 2 | Mobile Internet | 200 |
| 3 | Fixed Voice | 760 |
| 4 | Fixed Internet | 540 |
| 5 | Fixed Link | 30 |

*Table 48: Sample distribution by Service Providers*

| Serial Number | Products used | Overall Sample | Ooredoo | Vodafone |
|---|---|---|---|---|
| 1 | Mobile Voice | 651 | 81% | 19% |
| 2 | Mobile Internet | 200 | 90% | 10% |
| 3 | Fixed Voice | 760 | 95% | 5% |
| 4 | Fixed Internet | 540 | 97% | 3% |
| 5 | Fixed Link | 30 | 97% | 3% |

## 6.6. Weighing Approach

In order to represent the population of the business enterprises, the sample data was weighted taking two key parameters into account:

- Size of the business establishment (Number of employees)
- Main economic activity (Sector of operation)

The weighing proportions were obtained from the most recent business establishments census published by MDPS in 2010.

The weighting grid used was:

*Table 49: Weighting factors*

| Industry Verticals ISIC Rev 4.0 | 01 to 09 | 10 to 49 | 50-249 | 250+ | Total |
|---|---|---|---|---|---|
| **01-03 Agriculture, forestry and fishing** | 9.06% | 0.94% | 0.07% | 0.02% | **10.09%** |
| **05-09 Mining and quarrying** | 0.14% | 0.17% | 0.22% | 0.13% | **0.67%** |
| **10-33 Manufacturing** | 6.00% | 3.10% | 0.73% | 0.17% | **10.00%** |
| **35-39 Electricity, gas, water supply and waste management** | 0.21% | 0.06% | 0.02% | 0.01% | **0.30%** |
| **41-43 Construction** | 1.49% | 2.75% | 3.02% | 0.89% | **8.16%** |
| **45-47 Wholesale and retail trade; repair of motor vehicles** | 34.35% | 6.70% | 1.26% | 0.14% | **42.45%** |
| **49-53 Transportation and storage** | 1.27% | 0.81% | 0.20% | 0.05% | **2.32%** |
| **55-56 Accommodation and food service activities** | 3.67% | 2.22% | 0.37% | 0.05% | **6.30%** |
| **58-59 Information and communication** | 0.31% | 0.24% | 0.06% | 0.01% | **0.62%** |
| **64-66 Financial and insurance activities** | 0.41% | 0.72% | 0.12% | 0.02% | **1.27%** |
| **68 Real estate activities** | 0.98% | 0.32% | 0.07% | 0.02% | **1.40%** |
| **69-75 Professional, scientific and technical activities** | 1.93% | 0.84% | 0.19% | 0.03% | **2.99%** |
| **77-82 Administrative and support service activities** | 3.12% | 1.20% | 0.18% | 0.09% | **4.60%** |
| ***85 Education*** | 0.46% | 0.48% | 0.28% | 0.02% | **1.25%** |
| ***86-88 Human health and social work activities*** | 0.53% | 0.25% | 0.10% | 0.04% | **0.92%** |
| **90-93 Arts, entertainment and recreation** | 0.67% | 0.13% | 0.02% | 0.01% | **0.83%** |
| **94-96 Other service activities** | 5.37% | 0.45% | 0.03% | 0.00% | **5.85%** |
| **Total Enterprises** | 70% | 21% | 7% | 2% | 100% |
| | | | | | |

# 7. Table of Figures

# 8. Table of Tables