

CONFIDENTIAL

BUSINESS CONSUMERS SATISFACTION SURVEY WITH THE TELECOMMUNICATION SERVICES 2019

REPORT OF SURVEY FINDINGS

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Prepared By: Intelligence Qatar

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1. EXECUTIVE SUMMARY

The '**Business Consumer Satisfaction Survey 2019**' presents the detailed findings of satisfaction among business consumers in Qatar with their telecommunication service providers, Ooredoo and Vodafone Qatar. The findings are based on a nationally representative survey of 1,635 businesses across a broad range of industry sectors, business sizes and geographic locations in Qatar. The study gathers the opinions from individuals within the business who are either decision makers for procurement or responsible for managing the telecommunication service needs of the business. This report marks the second wave of research conducted to measure satisfaction levels among business consumers in Qatar across all facets of telecommunication services including network coverage, service value, rate plans and tariffs, billing and payment, customer service and complaint resolution. Results for 2019 are benchmarked against the 2015 baseline study. The summary of the survey findings is outlined below.

Industry Overview

The telecommunications sector is expected to contribute significantly to the country's economy and is expected to grow by 3.2% year on year to \$4.4bn in 2021 making telecommunications a major pillar in economic development in the country. With the Qatar economy expected to flourish over the coming years due to the World Cup 2022 and the initiatives implemented by the Government to diversify the economy and boost the private sector, the telecommunications service providers will benefit from a growing customer base with the number of businesses, international and local, expected to rise. There will be greater demand for telecommunication services and businesses will most likely look for new emerging technologies to help meet their Information Communication and Technology (ICT) requirements. The growth of the telecommunications sector will place greater demands on the CRA to maintain an open and competitive communications sector that brings a broad range of advanced, innovative, and reliable products and services to businesses in Qatar at competitive prices.

Awareness of the CRA

Awareness of the Communications Regularly Authority (CRA) is low among business consumers in Qatar with less than one in two respondents aware of the CRA when prompted. Awareness of the CRA has slightly increased from 2015 levels rising from 41% in 2015 to 46% in 2019. Awareness levels are highest for the CRA's role in protecting consumers from misleading and unfair practices and regulating

the telecommunications market and communications sector in Qatar (81% and 76% aware respectively). Business consumers aware of the CRA have moderate knowledge that the CRA is responsible for managing the escalation of complaints related to telecommunication services (57%), setting the quality of service standards and monitoring compliance (67%), ensuring Qatar has a competitive and technologically advanced telecommunications market (67%), and ensuring the efficient management and allocation of telecommunication resources (69%).

Usage of Telecommunication Services

Ooredoo holds the largest market share among the surveyed population of business consumers with 92% reporting to be subscribed to Ooredoo services. Half of Ooredoo's business subscriber base report to be serviced by Vodafone Qatar (47%). One in three of the respondents (39%) are subscribed to both Ooredoo and Vodafone Qatar, with the majority stating that Vodafone Qatar is their main service provider (55% Vodafone vs. 43% Ooredoo).

Mobile services are the strongest performing segment with at least nine in ten business consumers reporting to be using Mobile Voice and Mobile Internet services (95% and 94% respectively). In comparison, two thirds of business consumers report to use Fixed Voice services and just over half (55%) report to use Fixed Internet. Usage rates of Leased Line services continue to decline with only 5% of business consumers reporting to be subscribed to the service. The findings suggest businesses in Qatar are following global trends and moving towards emerging technologies rather than traditional telecommunication services.

Adoption of Over-the-Top (OTT) services by businesses in Qatar is strong with 72% of respondents reporting to use the services to communicate with clients and colleagues and to quickly disseminate information. WhatsApp dominates the market with 99% usage among businesses that use OTT services, followed by IMO (50%), Skype (40%) and Viber (33%).

Importance of Telecommunication Services

The most important telecommunication services that help businesses in Qatar run effectively, in descending order, are Mobile Voice, Mobile Internet, Fixed Voice and Fixed Internet. At least three-quarters of business consumers rate each of these services as highly important and give a score of between '7' and '9' on a 9-point rating scale. In comparison, OTT services (59% rate '7 to 9'), Security services (58%), Leased Line (55%) and Internet of Things (IoT) services (54%) are considered

moderately important to the business operations.

In 2019, businesses place greater importance on mobile services to effectively run their businesses when compared to 2015, whereas the level of importance placed on fixed services has declined. This downward trend of fixed services is reflected in the higher usage rates of mobile services among businesses in Qatar. Given the lower level of importance placed on fixed services, it is likely that the fixed service market will decline in market share over the coming years.

Overall Satisfaction with Telecommunication Services

Overall satisfaction with telecommunication services among businesses in Qatar is high. The findings show strong results for the level of satisfaction across all service categories. Fixed services including Voice, Internet and Leased Lines report to have the highest levels of business consumer satisfaction with at least 90% of respondents either 'extremely satisfied' or 'satisfied' with the services. Overall satisfaction is slightly lower for Mobile Voice and Mobile Internet services but is still high at 84% and 83% satisfaction respectively. Given the higher usage rates and level of importance placed on mobile services, business consumers most likely expect a higher service standard when compared to fixed services.

In 2019 the level of overall satisfaction with all telecommunication services has either increased or remained consistent when compared to the 2015 baseline study. Mobile Internet shows the largest gain in satisfaction, with an increase of 14 percentage points from 69% in 2015 to 83% in 2019.

Customer Experience with Telecommunication Services

Business consumers in Qatar report very high satisfaction levels with all fixed services. At least nine out of ten business consumers that use fixed services are either 'extremely satisfied' or 'satisfied' with the following:

- Availability of fixed services (Fixed Voice 95%, Fixed Internet 93%, Leased Lines 91%)
- Network reliability of Leased Line services (90%)
- Quality and clarity of Fixed Voice (94%)
- Speed of data provided by Fixed Internet and Leased Lines (92% and 90% respectively)
- Quality of video access and streaming provided by Fixed Internet (91%).

Satisfaction levels are generally lower among users of mobile services with around three-quarters of business consumers reporting to be either 'extremely satisfied' or 'satisfied' with:

- Network coverage of Mobile Internet (77%)
- Network reliability of Mobile Voice and Mobile Internet (78% and 75% respectively)
- Quality and clarity of Mobile Voice (79%)
- Speed of data of Mobile Internet (74%)
- Quality of video access and streaming provided by Mobile Internet (75%).

Geographic Location

Satisfaction levels vary according to geographic location of businesses in Qatar. Business users located in Doha and Al Wakra report higher levels of satisfaction with most telecommunication services when compared to other municipalities within Qatar. At least nine in ten business consumers located in Doha and Al Wakra are satisfied with the network coverage, availability of services, network reliability, quality and clarity of voice and speed of data.

Businesses operating in the Northern municipality of Al Khor/Al Thakhira have relatively lower levels of satisfaction when compared to businesses located in Doha and Al Wakra. Less than half of business consumers in this area report are satisfied with network coverage, availability of Leased Line services, quality and clarity of Mobile Voice services, and the speed of data and quality of video access/streaming provided by Mobile Internet services.

Satisfaction with telecommunication services is also substantially lower among businesses located in Al Sheehaniya when compared to the high satisfaction levels of businesses in the more central locations of Doha. Satisfaction is particularly low in Al Sheehaniya with less than a third of business consumers reporting to be satisfied with the network coverage (Mobile Voice and Mobile Internet), speed of Mobile Internet data, quality and clarity of Mobile Voice services and the quality of video access and streaming provided by Mobile Internet services.

Similar to businesses in Al Sheehaniya, organizations in Al Daayen also report low levels of satisfaction with speed of Mobile Internet data and quality of video access and streaming provided by Mobile Internet services.

Business Customers' Value Perceptions

Business consumers were asked about their value perceptions regarding different aspects of telecommunication services. Overall, the value perceptions of telecommunication services are considered average among business consumers in Qatar with most aspects of telecommunication services being rated as 'good value' by less than three-quarters of respondents. The exceptions are monthly rental charges associated with Fixed Voice and Fixed Internet where a higher proportion of users rate the charges as 'good value' (79% and 76% respectively). In comparison, around six in ten business users rate installation prices for fixed services as 'good value' (Fixed Voice 67%, Fixed Internet 58% and Leased Line 60%), as well as, Fixed Internet and Mobile Internet data charges (61% and 57% respectively).

International calls via Fixed Voice and International roaming charges via Mobile Voice and Mobile Internet record the lowest value perceptions among business consumers with one in two users rating these services as 'good value' (54%, 48% and 46% respectively).

Business Customers' Perceptions on Rate Plans / Tariffs

Business consumers in Qatar generally have higher satisfaction levels with the rate plans and tariffs associated with Fixed Voice and Internet when compared to Mobile Voice and Internet services. At least eight out of ten business consumers are satisfied with the variety and transparency of rate plans and tariffs and the terms and conditions for Fixed Voice and Fixed Internet services. In comparison, around three-quarters of business users are satisfied with the above service aspects related to Mobile Voice and Internet services.

Satisfaction levels are somewhat lower for Leased Line services with 58% of users satisfied with the variety of rate plans offered for Leased Lines and 59% satisfied with the clarity of the terms and conditions for the service.

Publishing of Tariffs

Awareness that telecommunication service providers are required to publish their tariffs is average among business consumers in Qatar. Just over a half of surveyed business consumers (55%) report to be aware that service providers are required to publish tariffs through multiple communication channels including online platforms and newspapers. Business consumers prefer to receive information

about tariffs via an embedded link in a SMS.

Business Customers' Perceptions on Provisioning

Business consumers were asked to rate their level of satisfaction regarding the ease of purchasing and activating telecommunication services. Overall, satisfaction levels are high among business consumers with the initial stages of arranging telecommunication services for the business. Consistent with the previous findings, the level of satisfaction is slightly higher for fixed services when compared to mobile services. A high 94% of users are satisfied with the ease of purchasing Fixed Voice services, 87% Fixed Internet and 83% Leased Line services. This compares to a lower 78% of users who are satisfied with the ease of purchasing Mobile Voice services and 75% Mobile Internet services.

Satisfaction levels are also higher for the time taken to activate fixed services when compared to mobile services - Fixed Voice (90% satisfied), Fixed Internet (88%), Leased Line (88%) versus Mobile Voice (77%) and Mobile Internet (73%). This pattern also follows for the level of satisfaction for choice of contract length and duration. Satisfaction is higher for choice of contracts related to Fixed Voice and Internet services (90% and 87% respectively) when compared to the choice available for Mobile Voice and Internet contracts (80% and 74% respectively). Satisfaction is substantially lower for the choice of contracts related to Leased Line services with 63% of users stating they are 'extremely satisfied' or 'satisfied' with the choice available.

Business Customers' Perceptions on Billing and Payment

Overall satisfaction among business consumers with the options available for bill payments is high, particularly for fixed services including Fixed Voice (88% satisfied), Fixed Internet (82%) and Leased Line services (81%). The level of satisfaction with bill payment options for mobile services is lower in comparison to fixed services – Mobile Voice (75%) and Mobile Internet (72%).

Most business consumers prefer to receive their telecommunication bills via SMS or email (67% and 57% respectively). A third of business consumers prefer to receive bills via the post or through the service provider's website. There is a tendency for business consumers to prefer traditional methods of bill payment with 73% of respondents indicating a preference to pay their bills at the retail store either using cash, credit card or cheque. A smaller proportion of respondents prefer to pay their bill online through the service provider's website or via bank transfer (61%), through payment machines (60%), and to a lesser extent through mobile apps (16%).

Satisfaction with the regularity of receiving bills is high among business consumers for fixed services (88% Leased Line, 81% Fixed Voice and 78% Fixed Internet) and moderate for mobile services (73% Mobile Voice and 71% Mobile Internet). Satisfaction levels for the accuracy of bills is also lower for mobile services when compared to fixed services. Eight in ten business consumers are either 'extremely satisfied' or 'satisfied' with the accuracy of Leased Line and Fixed Voice service bills and 76% are satisfied with Fixed Internet bills. This compares to 71% of respondents who are satisfied with the accuracy of Mobile Voice bills and 68% who are satisfied with Mobile Internet bills.

Business consumers also find it easier to understand fixed service bills when compared to mobile service bills. Higher satisfaction levels are recorded for ease of understanding the bills for Fixed Voice (82%), Fixed Internet (79%) and Leased Line services (78%), compared to Mobile Voice (73%) and Mobile Internet services (70%).

Business Customers' Perceptions on Customer Services

Customer Service Team

One in three business consumers (39%) report to have dealt with the customer service team at Ooredoo or Vodafone Qatar in the past three months in relation to a business enquiry. Satisfaction levels with the services provided by the customer service team are moderate with 62% of the respondents who contacted their service provider indicating they are satisfied with the level of service provided. Satisfaction levels are low for the customer service team being friendly and courteous (38%), providing helpful information (34%) and attending to the business enquiry (30%). Satisfaction with the Vodafone Qatar's customer service team is well below levels recorded for Ooredoo's service delivery particularly in terms of the friendliness and courteousness of the staff (12%), their ability to attend to their enquiry (12%) and providing helpful information (13%).

Technical Team

Most business customers who contacted the customer service team (83%) received a visit from the technical team to help resolve their issue. Satisfaction levels with the services provided by the technical team are also moderate with 59% of respondents indicating they are satisfied with the level of service provided and 25% indicating they are unsatisfied with the service. Satisfaction levels are highest for the timeliness of the technical team in resolving the issue (52%) and lowest for the friendliness and courteousness of the staff (44%).

Account Managers

Four in ten respondents report to have an account manager assigned to their organization by their main service provider. Overall, most respondents with an account manager are moderately satisfied with the level of service provided by their account manager. Satisfaction levels are higher for account managers representing Ooredoo when compared to account managers representing Vodafone Qatar (95% Ooredoo and 46% Vodafone).

Complaint Resolution Mechanism

Complaint to Service Provider

Three in ten business consumers have raised a complaint to their telecommunication service provider in the past twelve months. Most complaints were related to mobile services (48% Mobile Internet and 25% Mobile Voice), and to a lesser extent fixed services (Fixed Internet 15%, Fixed Voice 11%, Leased Line 1%).

In 2019 there has been a rise in complaints related to mobile services when compared to the 2015 baseline study. Complaints related to fixed services have declined since 2015. Disconnection, billing issues and network coverage are the main reasons as to why business consumers registered a complaint with their telecommunication service provider.

Overall, business consumers who made a complaint to their service provider have moderate to low satisfaction with the complaint resolution process. Satisfaction is moderate for the ease of contacting the service provider (61%), the time taken to reach the call center person through the IVR system (52%) and the friendliness of the staff (50%). Satisfaction is low for the knowledge and skills of the agent in resolving the issue (42%) and the time taken to resolve the issues (41%).

Complaint to CRA

Escalation of complaints to the CRA is low among business consumers in Qatar as only 1% of respondents aware of the CRA complaint escalation process report to have raised a complaint to the CRA.

Consumer Rights Protection

Whilst, in general business consumers do not feel that telecommunication service providers in Qatar are misleading in their advertising and promotions, they are only moderately satisfied with telecommunication advertising. One in five respondents (21%) claim that Ooredoo and Vodafone Qatar have misleading advertisements related to their telecommunication services and two-thirds of respondents are satisfied with the clarity of advertising and communication, 60% are satisfied with the ability to opt out of promotional messages from service providers and 58% are satisfied with the reduced spamming and unwanted promotions.

Market Competitiveness

Around two-thirds of business consumers (64%) believe there is a good choice of products and/or services available to their organization and half of the respondents believe there is enough competition in Qatar for telecommunication products and services for businesses (57%) and that they are able to negotiate effectively with their telecommunications supplier on tariffs and services (55%). Micro businesses with less than 10 employees are most least likely to agree that there is sufficient competition and choice of products and services at competitive prices to meet the needs of their business.

Summary

In summary,

- Overall business consumers are highly satisfied with the quality of telecommunication services in Qatar. Satisfaction levels have increased since 2015 for most services.
- Mobile services have higher usage rates and are considered more important to ensuring the effective operation of businesses in Qatar when compared to fixed services. Overall, business consumers are less satisfied with mobile services than fixed services.
- Ooredoo continues to hold market share in the business sector in Qatar. There is little difference between the satisfaction levels recorded for telecommunication services provided by Ooredoo and Vodafone Qatar. Both service providers have achieved high levels of satisfaction with their business consumers and there are no significant differences in performance, except for customer service delivery, where Vodafone performs poorly in comparison to Ooredoo.

- Lower levels of satisfaction with telecommunication services are reported in Al Khor / Al Thakira and Al Sheehaniya, particularly in relation to network coverage and availability.

Key Considerations for CRA

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

CONSIDERATION 1: Develop strategies to raise brand awareness

Awareness of the CRA remains low among the business consumer segment in Qatar. Less than half of business consumers surveyed (46%) report to be aware of the CRA when prompted. CRA's brand profile has only marginally improved from the baseline study conducted in 2015. This indicates the need for the CRA to proactively promote its brand to the business sector in Qatar. This includes not only raising awareness of the brand name 'CRA' but also increasing awareness of the Authority's roles and responsibilities in regulating the telecommunications industry in Qatar. The low awareness of the CRA is mostly likely the reason as to why only a very small number of surveyed business consumers have escalated complaints regarding telecommunication services to the Authority. Effective strategies for disseminating information to the business community about the CRA need to be developed as a priority including driving visitation to the CRA website which hosts important information about the regulatory framework and helpful guides on ICT products and services in Qatar. Consideration should be given to leveraging communication channels used by Ooredoo and Vodafone Qatar to help promote the CRA brand. These may include incorporating the CRA brand on service providers websites, service contracts, information guides, advertising and placing promotional material in their retail stores.

CONSIDERATION 2: Review telecommunications network in select areas

Business consumer satisfaction is relatively low for Mobile Voice and Internet services in the north of Qatar (Al Khor / Al Thakhira) and in Al Sheehaniya. Further investigation is required by the CRA to determine the drivers of dissatisfaction with network coverage and availability, network reliability, voice quality and clarity, speed of data and the quality of video access or streaming in these areas. Prioritization of infrastructure improvement works may need to be focused in these areas.

CONSIDERATION 3: Review pricing for select services

Pricing is an important component of the value proposition of any product or service. Whilst most business consumers are satisfied with the pricing of telecommunication services, there are some service offerings that may need to be reviewed by the CRA and by the service providers. These include: the costs associated with the installation of Fixed Internet and Leased Line services (mainly for Ooredoo users); charges related to international calls via Fixed Voice (mainly for Ooredoo users) and Mobile Voice (mainly for micro businesses and Vodafone Qatar users); and charges related to international roaming via Mobile Voice and Mobile Internet (mainly for micro and medium sized businesses, and Vodafone Qatar users).

CONSIDERATION 4: Review rate plans and tariffs for Leased Line services

It is recommended that a review of the rate plans and tariffs, contract duration, terms and conditions and ease of purchase associated with Leased Line services is undertaken due to lower levels of satisfaction with this service aspect particularly among micro and small businesses. It is recommended that the terms and conditions of Leased Line services provided by Vodafone Qatar are reviewed as a priority due to low satisfaction levels among businesses that subscribe to Vodafone Qatar's Leased Line services.

CONSIDERATION 5: Raise awareness of tariffs

Four in ten business consumers are unaware that service providers are required to publish their tariffs through multiple communication channels. Whilst awareness levels of this fact have increased since 2015, overall awareness of the publishing of tariffs is at a moderate level. The CRA needs to ensure that service providers actively promote tariff information amongst business consumers. Strategies for publishing information include embedded links in SMS or via electronic bills and/or through service provider websites and social media channels. These are the most preferred methods of receiving information on tariffs mentioned by business consumers.

CONSIDERATION 6: Review Fixed Voice & Fixed Internet service billing from Vodafone Qatar

Satisfaction with the regularity of receiving fixed service bills from Vodafone Qatar is at a moderate level and is substantially lower when compared to Ooredoo. Satisfaction levels are also lower for the accuracy and ease of understanding Vodafone Qatar's Fixed Voice and Fixed Internet bills. It is recommended the CRA investigates this further and undertakes an in-depth comparison between the

fixed service bills of Ooredoo and Vodafone to determine reasons as to why subscribers to Vodafone Qatar's fixed services are dissatisfied with the billing information and the duration of the billing cycle.

CONSIDERATION 7: Monitor customer service team delivery

Satisfaction with the level of service provided by the customer service teams at Ooredoo and Vodafone Qatar is moderate. Satisfaction levels are low for the customer service team being friendly and courteous, providing helpful information and attending to enquiries, particularly among business consumers who had recently contacted the Vodafone Qatar customer service team. It is recommended the CRA mandates Ooredoo and Vodafone Qatar to submit regular reports on business consumer satisfaction with their customer service delivery teams so performance can be evaluated and benchmarked on a regular basis to allow the immediate resolution of any issues.

CONSIDERATION 8: Review complaint process

Complaints not resolved within 30 days should be automatically escalated to the CRA and service providers should file a monthly summary report with CRA of complaints registered and resolved. This information should be collated and published on a quarterly basis on the CRA website.

Information should be included on the website explaining the process that is undertaken when a complaint is made online with the CRA.

CONSIDERATION 9: Review products & services available to small and medium enterprises (SME)

To help support the Qatar National Vision 2030 to diversify the economy by supporting the private sector and SME growth, the CRA should conduct a review of the existing tailored products and services available to micro, small and medium sized businesses. Smaller sized businesses feel there is limited choice in tailored products and services currently offered by the service providers that meet the needs of their business. They also feel they do not have the buying power that larger organizations hold to effectively negotiate on tariffs and pricing.

2. BACKGROUND

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

The Consumer Affairs Department of the CRA carries out regular monitoring of consumer satisfaction with the two licensed Service Providers, Ooredoo Qatar and Vodafone Qatar to evaluate and monitor the latest developments in the telecommunications industry and to understand the customer experience in terms of telecommunications service delivery. The CRA conducted a 'Consumer Satisfaction Survey' in 2014 and a 'Business Customer Satisfaction Survey' in 2015. The reports established the baseline measure for business and consumer satisfaction with telecommunication providers in Qatar.

A second wave of business consumer satisfaction research was conducted in 2019 to measure shifts in satisfaction with telecommunication providers from the baseline measure conducted in 2015. The study involved qualitative and quantitative research and consisted of a series of executive in-depth interviews with key stakeholders and decision makers, focus group discussions with business consumers and a nationally representative satisfaction survey with business consumers in Qatar. Secondary research was also conducted to provide regional and international benchmarking and comparative data and indicators relating to the performance of telecommunication carriers and carriage service providers, the findings of which are presented in a separate report titled, 'The State of Telecommunications in Qatar Report'.

2.1. Research Methodology

In order to address the desired information outputs, the research approach involved four key components: (1) Stakeholder Engagement; (2) Regional & International Benchmark Study; (3) Business Consumer Insight; and (4) Business Consumer Satisfaction Survey.

2.1.1. Stakeholder Engagement

'Stakeholder Engagement' involved a series of in-depth interviews with selected key leadership within the CRA and the two licensed service providers, Ooredoo Qatar and Vodafone Qatar. The in-depth

interviews were conducted to determine key considerations for the Business Consumer Satisfaction Study in terms of the study outcomes, the approach and the analysis of findings. A total of six in-depth interviews were conducted across the three organizations: four in-depth interviews with key units within the CRA, one with Ooredoo Qatar representatives and one with Vodafone Qatar representatives. The key departments of the CRA involved in the research were Consumer Affairs, Technical Affairs, Planning & Quality and Regulatory Affairs & Competition.

2.1.2. Regional & International Benchmark Study

The 'Regional & International Benchmark Study' involved secondary research to provide the CRA with regional and international benchmarking and comparative data and indicators relating to the performance of telecommunication carriers and carriage service providers. The findings from the benchmark study were presented in a separate report titled 'The State of Telecommunications in Qatar Report'. The report provides an overview of the telecommunications ecosystem in Qatar and identifies gaps in service delivery that may impact business customer satisfaction with the service providers. The report benchmarks Qatar against ten economies including neighbouring countries the Kingdom of Saudi Arabia (KSA); United Arab Emirates (UAE), and Oman, as well as leading telecommunication markets Australia, New Zealand, Singapore, Netherlands, Spain, Sweden and the United Kingdom of Great Britain and Northern Ireland (UK).

2.1.3. Business Consumer Insight

'Business Consumer Insight' involved qualitative research consisting of ten mini focus group discussions among business consumers to gain insights into their attitudes towards telecommunication service providers, as well as to gain an in-depth understanding of the customer service experience. Participants of the focus group discussions were selected according to their knowledge of telecommunication services within their organization and the extent to which they make decisions on telecommunication products and services employed within the business.

2.1.4. Business Consumer Satisfaction Survey

The 'Business Consumer Satisfaction Survey' consisted of a nationally representative survey of 1,635 business consumers in Qatar. The research measured business consumers satisfaction with the following service and product delivery aspects:

- Sales and marketing services
- Ordering and installation experiences
- Customer service and support experience
- Retail/service center experience
- Complaints handling experience
- Billing experience
- Pricing & value for money
- Competitive landscape
- Social media customer engagement
- Bundling of services and packages
- Fault restoration, connection of services and fiber rollout
- Mobile number portability (MNP)
- Modes of service interface.

The survey was conducted using a computer assisted personal interview (CAPI) method of surveying. The data was collected through a questionnaire with an average length of 30 minutes. The questionnaire was developed, translated, scripted and tested (English & Arabic) by the research team prior to fieldwork launch. Sampling quotas were applied by industry sector, business sector, size of business (number of employees) and geographic region to ensure a nationally representative study of business consumers in Qatar.

Business consumers' satisfaction was measured across the various categories of fixed and mobile services as outlined below:

International Calls (IDD)	Mobile Voice	Mobile Data
<ul style="list-style-type: none"> Means of use (fixed, mobile, calling cards) Importance of the service Quality of service satisfaction level Customer overall service satisfaction Price satisfaction Level of satisfaction with competition 	<ul style="list-style-type: none"> Importance of the service Voice quality satisfaction Network coverage Customer service satisfaction Dropped call rate Price satisfaction Level of satisfaction with competition 	<ul style="list-style-type: none"> Importance of the service Speed Service quality satisfaction Services offered Easiness of use Customer service satisfaction Price satisfaction Level of satisfaction with competition
Fixed Voice	Fixed Data (Broadband)	Roaming Services
<ul style="list-style-type: none"> Importance of the service Voice quality satisfaction Customer service satisfaction Fiber service delivery and satisfaction with service Price satisfaction Level of satisfaction with competition 	<ul style="list-style-type: none"> Importance of the service Throughput quality satisfaction Services offered Easiness of use Price satisfaction Level of satisfaction with competition Customer service satisfaction 	<ul style="list-style-type: none"> Importance of the service Voice quality satisfaction Customer service satisfaction Impact of bill shock Price satisfaction Level of satisfaction with competition Billing experience

The detailed methodology for the Business Consumer Satisfaction Survey is presented in Appendix A of this report.

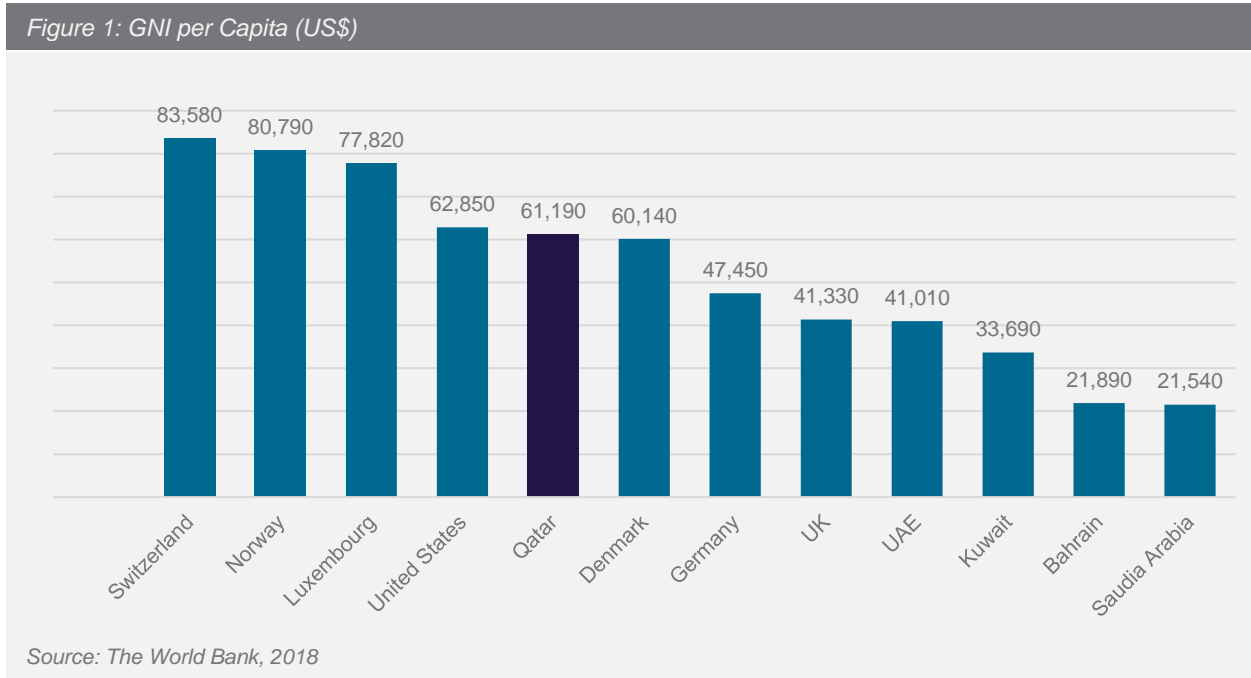
2.2. Report Outline

This report presents the detailed findings from the fourth component of the study, the 'Business Consumer Satisfaction Survey'. The results are compared to the findings reported in the previous edition of the 'Business Consumer Satisfaction Survey' published in 2015. The findings of the study are organized into three main sections as outlined below:

- **Qatar enterprise telecommunication market:** this section of the report presents an overview of the Qatar business environment and telecommunications market.
- **Business customers' perceptions on telecommunication services:** this section of the report presents the findings related to telecommunication services including: usage; level of importance placed on services; value perceptions; satisfaction with services such as the network, tariffs, purchasing/activation, billing, payment, customer services, complaint resolution and overall satisfaction. This section also reports on awareness of consumer rights protection and market competitiveness among business consumers.
- **Key take-outs for CRA:** this section of the report presents the observations based on the survey findings including the strengths and improvement areas for the telecommunications market in Qatar.

2.3. Qatar Business Environment

2.3.1. Economic Indicators



Qatar performs well on key economic indicators when compared to other developed economies. When compared to the 11 selected benchmarked countries in the “*The State of the Telecommunications Sector in Qatar*” report, Qatar is ranked fifth on Gross National Income (GNI)¹ per capita with a GNI per capita of \$61,190 (see Figure 1). The country records the highest gross national savings rate at 50.2% of GDP (Gross Domestic Product)². Qatar is also ranked third in the world in terms of economic performance, according to the International Competitiveness Report 2019 published annually by the International Institute for Management Development (IMD) in Switzerland, which confirms the continued strong performance of the Qatari economy. This advanced ranking was supported by a number of factors, including strong economic performance represented by low unemployment rate, high fixed capital formation ratio of GDP, the domestic saving ratio of GDP, trade balance of GDP ratio,

¹ Gross National Income (GNI), previously known as gross national product (GNP), is the total domestic and foreign output claimed by residents of a country, consisting of gross domestic product (GDP), plus factor incomes earned by foreign residents, minus income earned in the domestic economy by non-residents (Todaro & Smith, 2011: 44)

² Gross Domestic Product (GDP) is a monetary measure of the market value of all the final goods and services produced in a specific time period, often annually

high level of total productivity, in addition to rising per capita GDP and low inflation³.

According to the Qatar Economic Outlook 2018-2020 report⁴, the economic growth between 2018 and 2020 will be propelled by the growth of non-oil sectors (5.2% average annual growth rate), and will mainly be supported by construction, manufacturing, and an increase in service activities. In particular, the service sector is expected to grow unprecedentedly and become one of the major contributors to economic growth. This is especially seen in service activities related to the ongoing preparation of the World Cup in 2022 which includes transport, public services, real estate, and banking activities.

The telecommunications sector is also expected to contribute significantly to the country's economy following its contribution of at least 1.7% to the GDP in 2016⁵. In September 2018, the Minister of Transport and Communications announced Qatar's ICT sector was estimated to be worth \$3.9bn in 2017 and was expected to grow by 3.2% year on year to \$4.4bn in 2021⁶ making telecommunications a major pillar in economic development in the country.

2.3.2. Business Environment

Over the past four years, Qatar has implemented several regulatory reforms to stimulate private sector development and diversification of the economy. In 2016, Qatar reduced the time for border compliance for importing products by reducing the number of days of free storage which reduced the time required for port handling. In 2017, Qatar implemented reforms to make starting a business easier. The country abolished the paid-in minimum capital requirement for limited liability companies and made registering property easier by increasing the transparency of land registration. In 2018, Qatar improved access to credit information by providing consumer credit scores to banks, financial institutions and borrowers and made exporting and importing easier with the inauguration of the new Hamad Port⁷.

In accordance with the Emir's directives to support and encourage the private sector and increase its contribution to the process of sustainable development in the country, HE the Prime Minister and Interior Minister Sheikh Abdullah bin Nasser bin Khalifa Al-Thani, issued in January 2018 a number of decisions to promote the national economy for all investors in the Economic Zones in the south of Qatar for the years 2018 and 2019 so that the rent fees decrease from QR40 to QR20 per square metre. In line with the directives of His Highness the Emir Sheikh Tamim bin Hamad Al-Thani, the new draft law aimed to attract foreign capital by 100% in all activities and sectors, economic and trade, which will help the inflow of foreign

³ <https://www.thepeninsulaqatar.com/article/29/05/2019/Qatar-ranked-third-in-world-economic-performance-for-2019>

⁴ Qatar Economic Outlook (2018-2020), published by the Planning and Statistics Authority in the State of Qatar, December 2018

⁵ Communications Regulatory Authority (CRA) Assessment Report, published in 2017

⁶ <https://oxfordbusinessgroup.com/overview/plugged-5g-technology-ushers-next-generation-ict-services>

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

capital and add to the country's economic development. The State also planned to award contracts worth \$29bn to the private sector in order to encourage diversification, and focus on supporting food security projects, small and medium enterprises, and the development of infrastructure in economic zones and free trade zones. Qatar aims to target 1,000 companies and create nearly 10,000 additional jobs by 2022. Qatar also pledged US\$ 3 billion to attract foreign companies focusing on chemicals, plastics, logistics and artificial intelligence related ventures, to its new free zones⁸.

In 2019, Qatar made starting a business easier by removing the requirement to open a bank account to deposit the minimum capital and improved access to credit information by guaranteeing borrowers the legal right to inspect their credit data from the credit registry⁹.

Qatar is ranked 83 among 190 economies in the ease of doing business, according to the latest World Bank annual ratings. The rank of Qatar remained unchanged at 83 in 2017 and 2018¹⁰. According to the Qatar Chamber of Commerce, Qatar recorded a 13.4 percent increase in the number of registered companies in Qatar from 2016 to 2017¹¹. The Qatar economy is expected to grow 3 percent in 2019 and 2020 as part of the State's approach to fully supporting foreign investment¹². According to the World Economic Forum, in 2018, Qatar was ranked in 30th place out of 140 countries on the Global Competitiveness Index. Qatar was ranked first in the world in terms of low inflation, sixth globally in terms of effects of taxes on competition and eight globally on venture capital¹³.

With the Qatar economy expected to flourish over the coming years due to the World Cup 2022 and the initiatives implemented by the Government to diversify the economy and boost the private sector, Ooredoo and Vodafone Qatar will benefit from a growing customer base with the number of businesses, international and local, expected to rise. There will be greater demand for telecommunication services and businesses will most likely look for new emerging technologies to help meet their ICT requirements.

⁸ <https://www.gulf-times.com/story/577595/Qatar-Economy-in-2018-Advanced-strategies>

⁹ GEM 2018 / 2019 Global Report: <https://www.gemconsortium.org/report>

¹⁰ <https://tradingeconomics.com/qatar/ease-of-doing-business>

¹¹ <https://www.doingbusiness.org/content/dam/doingBusiness/country/q/qatar/QAT.pdf>

¹² <http://www.qatar-tribune.com/news-details/id/167433>

¹³ http://reports.weforum.org/global-competitiveness-report-2018/country-economy-profiles/?doing_wp_cron=1564550185.6713719367980957031250#economy=QAT

2.4. Key Stakeholders in Qatar's Telecommunications Market

2.4.1. Changes in Qatar's Telecommunications Market

This section of the report presents some of the changes in the telecommunications market in Qatar that have occurred over the past four years since the baseline study was conducted in 2015. These changes are outlined below:

In July 2016 and in line with Qatar National Vision 2030 and the hosting of the 2022 World Cup, Qatar has taken measures to stimulate many of its vital sectors by providing financial support and issuing related regulatory legislation and incentives in the technology, media and telecommunications sectors. Qatar's commitment to support these sectors has seen the formation of the Ministry of Transport and Telecommunications and the Ministry of Culture and Sports. These two Ministries were formed to consolidate efforts and focus on the development of the technology, media, telecommunications and sports sectors, as well as securing various expertise required to meet market demands. To further assist in the growth and development of these areas, an array of legislation has been issued to regulate these sectors and set out related investment rules. While the general rule for foreign investment in Qatar is that a local Qatari partner must hold at least 51% of the shares of any business to be established in Qatar, the Qatar Foreign Investment Law No. 13 of 2000 as amended (the "Foreign Investment Law") exempts governmental projects from the application of this rule. In particular, the Foreign Investment Law permits a foreign investor to establish a branch office (the "Branch") that can be utilised in circumstances where a foreign investor is performing a specific governmental-related contract in Qatar in various sectors, including technology, media and telecommunications. Such a Branch shall be allowed to perform the specific contract for which it is registered, and a Qatari partner is not necessary¹⁴.

In October 2017, His Highness Sheikh Tamim Bin Hamad Al-Thani, Emir of the State of Qatar issued Law No. (17) of 2017 amending some provisions of the Telecommunications Law issued by the decree Law No. (34) of 2006. These amendments are designed to strengthen the executive powers of the Communications Regulatory Authority (CRA) established by the Amiri Decree No. (42) of 2014 to regulate ICT and Postal sectors and access to digital media. Law No. (17) of 2017 contains several fundamental amendments, it cancels decree Law No. (36) of 2004 of establishing the Supreme Council for Information and Communication Technology (ictQATAR). The Law transferred the powers of the Board of Directors' of ictQATAR set in the Telecom Law No. (36) of 2004 to the Minister of Transport

¹⁴ https://www.zawya.com/mena/en/story/Qatar_Stimulates_TMT_Sector_Growth-ZAWYA20160726075007/

and Communications (MoTC) and transferred ictQATAR's General Secretariat's power to the CRA. Also, the Law stipulates that the Minister has the power to issue the executive regulations of the Telecommunications Law, while CRA has the power to issue technical regulations, decisions and orders, codes and instructions, and circulars required to implement the provisions of the Law¹⁵.

In September 2018, the CRA joins the Réseau Francophone de la Régulation des Télécommunications (FRATEL) to foster dialogue with key international stakeholders and industry leaders in the ICT and postal sectors and leverage from these partnerships and discussions to implement effective regulatory instruments, regulations and policies in Qatar¹⁶.

In June 2019, the CRA urged landlords to grant service providers with access to their properties to deploy fibre optic network which comes in line with CRA's aim and efforts to encourage customer choice and to improve the quality of service in the fixed-line market in Qatar¹⁷.

2.4.2. Telecommunications Service Providers: Ooredoo & Vodafone Qatar

Ooredoo: (formerly Qtel) was founded in Doha in 1987 initially as a telephone exchange company. The Qtel Group and all its operating companies worldwide were officially unified under Ooredoo Group in February 2013, as part of the company's strategy to combine its assets in order to form a global business within the telecommunications industry. Ooredoo now operates across the Middle East, North Africa and Southeast Asia and is one of the world's largest mobile telecommunications companies with a customer base of more than 100 million. Ooredoo is the largest communications operator in Qatar and provides a broad range of content and services via its advanced, data-centric mobile and fixed networks¹⁸.

Ooredoo provides business consumers with customized up-to-date offerings such as mobile and fixed connectivity, broadband, internet leased lines, intra-city/inter-city leased lines, Multi-Protocol Label Switching (MPLS), Internet Protocol Virtual Private Network (IPVPN) and many other new solutions such as Machine to Machine (M2M), cloud and mobile applications¹⁹.

¹⁵ <https://www.zawya.com/mena/en/press-releases/story/Qatar-Telecommunications-Law-amendments-aim-to-strengthen-CRAs-executive-powers-and-allow-more-effective-regulation-ZAWYA20180225093530/>

¹⁶ <https://www.zawya.com/mena/en/press-releases/story/CRA-Joins-FRATEL-regulators-network-ZAWYA20180925131704/>

¹⁷ <https://www.zawya.com/mena/en/press-releases/story/CRA-urges-landlords-to-grant-Service-Providers-with-access-to-their-properties-to-deploy-fiber-network-ZAWYA20190618133651/>

¹⁸ <https://ipfs.io/ipfs/QmXoyvizjW3WknFiJnKLwHCnL72vedxjQkDDP1mXWo6uco/wiki/Ooredoo.html>

¹⁹ <https://www.ooredoo.com/en/who-we-are/ooredoo-business/>

Vodafone Qatar: In December 2007, a Vodafone Group-led consortium was awarded the second mobile phone license in Qatar by the CRA under the name "Vodafone Qatar" and officially commenced commercial operations on 1st March 2009²⁰. The service provider has grown to serve 1,417,000 customers in Qatar. Since it was established in 2009, Vodafone Qatar's financial losses have been building to amount to more than \$1 billion dollars. In February 2018, Vodafone Europe agreed to sell its 51% stake in the Qatari operations to its existing partner, Qatar Foundation. The brand name, Vodafone Qatar, will be retained in Qatar with Vodafone Global agreeing to extend the technical support for another five years. Vodafone Qatar's license, originally granted by the CRA for 20 years has been extended for an additional 40 years until 2068, which will greatly reduce annual amortization costs from QR403mn to about QR100mn, making it profitable in the foreseeable future²¹.

For the first time since the telecommunications provider commenced operations in Qatar, Vodafone Qatar posted a net profit of QR118mn for the year end December 2018, resulting in an increase of QR374mn compared to the year prior. According to the company, Vodafone Qatar's "strong" financial results were achieved primarily due to its success in growing its post-paid subscribers and fixed services, as well as its effective cost optimization program. Post-paid customers grew outstandingly last year by 24.1% due to the innovative products and the popularity of Vodafone's 'FLEX', 'Red' and 'Enterprise' plans²².

Major achievements: Ooredoo and Vodafone Qatar, 2016 to 2019

Year 2016: In June 2016, Ooredoo signed a major agreement with Qatar Chamber to coordinate a series of initiatives in Qatar and internationally designed to highlight the wide range of business opportunities across all sectors in Qatar. As part of the agreement, Ooredoo provided communication services and innovative apps to support the chamber's outreach activities to the business community. In return, the chamber worked to connect its members with Ooredoo when they require business services and new technology, helping to drive innovation across industries and support the growth of the knowledge-based economy²³.

In July 2016, Cisco awarded Ooredoo with a highly-regarded service provider's certification. The Cloud and Managed Services Certification (CMSP) confirms Ooredoo's ability to offer Cisco-powered

²⁰ <https://en.wikipedia.org/wiki/Vodafone>

²¹ <https://www.gulf-times.com/story/583093/Vodafone-selling-its-51-stake-Qatar-JV-to-partner->

²² <https://www.gulf-times.com/story/621880/Vodafone-Qatar-posts-net-profit-of-QR118mn-in-2018>

²³ https://www.zawya.com/mena/en/business/story/Ooredoo_and_QC_sign_deal_to_boost_business_growth-ZAWYA20160630032043/

solutions of the highest standards to business customers across Qatar²⁴.

In July 2016, Vodafone Qatar completed its "comprehensive network modernisation" programme, spending nearly QR1bn in total and launched the global 'Machine to Machine' platform, part of the Internet of Things (IoT) for enterprise customers²⁵.

Later in the same year (November), in collaboration with Ericsson, Ooredoo deployed the next generation charging and billing solution, which enabled the telecommunication service provider to offer customers the products they need more quickly and to tailor pricing, packages and services according to customer demand in each market. In the same month, Ooredoo was ranked as one of the worlds' fastest fibre operator in the report "Race to Next Generation Fibre – Arthur D. Little's Global FTTH/B Study"²⁶.

Year 2017: In February 2017, Ooredoo and Qatar's Commercial Bank partnered to offer unique bulk bill payment service enabling all Commercial Bank corporate customers the ability to quickly and easily pay their Ooredoo Business bill through Commercial Bank's online Corporate Internet Banking channel²⁷.

In March 2017, Ooredoo built its position as the leading IoT player by working with a wide range of enterprises, government and small businesses to develop solutions on its IoT platforms. One of the key services provided by Ooredoo is the Managed Connectivity solution IoT Connect. This service includes a central control dashboard, IoT Connect Manager, which provides companies with a comprehensive overview of its IoT connectivity and gives them total control over inventory²⁸.

In April 2017, Vodafone invested \$274.5mln over two years to boost network in Qatar in addition to launching a range of innovative products and services such as their Internet of Things (IoT) solutions for business customers²⁹.

Year 2018: In May 2018, Vodafone Qatar announced it will supply New Salata and the Industrial area

²⁴ https://www.zawya.com/mena/en/business/story/Ooredoo_Cisco_build_on_strategic_partnership-ZAWYA20160714034650/

²⁵ https://www.zawya.com/mena/en/story/Vodafone_Qatar_completes_QR1bn_network_modernisation-ZAWYA20160726033704/

²⁶ https://www.zawya.com/mena/en/companies/story/Qatars_Ooredoo_is_worlds_fastest_fibre_operator_Report-ZAWYA20161123140212/

²⁷ https://www.zawya.com/mena/en/companies/story/qatars_commercial_bank_and_ooredoo_partner_to_offer_unique_bulk_bill_payment_service-zawya20170211094010/

²⁸ https://www.zawya.com/mena/en/press-releases/story/Qatars_Ooredoo_builds_position_as_regional_internet_of_things_leader-ZAWYA20170302104043/

²⁹ https://www.zawya.com/mena/en/business/story/Vodafone_invests_2745mln_in_2_years_to_boost_network_in_Qatar-ZAWYA20170429051505/

with 1GBPS fibre network by accessing so-called ‘triple play’ services. The service will provide access to a wide range of enterprise services including smart solutions and new applications such as smart security, asset tracking and smart metering. According to the company’s statement to the Qatar Stock Exchange, this step makes headway towards turning Qatar into one of the most connected and technologically advanced countries in the world³⁰.

Later in September, Vodafone Qatar deployed Tetra and Mobile network in Msheireb Downtown Doha at a value of more than QAR 100 Million³¹. Vodafone Qatar also boosted the 5G network in six key locations in Qatar by mid October 2018. The locations included Abu Hamour, Al Azizya, Al Mamoura, Al Rayyan, Salwa Road, and Umm Salal Muhammed. The new service allowed all businesses across all sectors to monitor their operations in real time³².

Year 2019: In January 2019, Vodafone Qatar signed an agreement to provide state-of-the-art mobile coverage infrastructure and network across all Economic Zones Company’s (Manateq) projects. The 10-year deal will provide businesses and customers operating in the logistics parks and industrial zones with high speed connectivity to Vodafone’s network, including 5G services³³.

Vodafone also renewed partnership deal with Meeza for 10 years. Under the renewed deal, MEEZA will continue to host the telecom operator’s information technology (IT) infrastructure in its data centres. According to the service provider, this partnership enables them to deliver the widespread benefits of high-speed connectivity to Qatar’s businesses and consumers³⁴.

In the same month, Ooredoo Group announced first international 5g call in the Arab region. Ooredoo Qatar became the first operator in the world to launch a live, commercially available 5G network in May 2018. 5G is set to revolutionise mobile and fixed connectivity, with super-fast internet speeds, extreme throughput and low latency³⁵.

³⁰ https://www.zawya.com/mena/en/business/story/Vodafone_Qatar_supplies_2_areas_with_1Gbps_fibre_network-SNG_116066860/

³¹ https://www.zawya.com/mena/en/markets/story/BRIEF_Vodafone_Qatar_Deploys_Tetra_And_Mobile_Network_In_Msheireb_Downtown_Doha-TR20180930nFWN1WE14AX3/

³² https://www.zawya.com/mena/en/business/story/Vodafone_Qatar_boosts_5G_network_in_6_key_locations-SNG_128580329/

³³ <https://english.mubasher.info/news/3402229/Vodafone-Qatar-signs-mobile-coverage-deal-with-Manateq>

³⁴ <https://english.mubasher.info/news/3405329/MEEZA-Vodafone-Qatar-renew-partnership-deal-for-10-yrs>

³⁵ https://www.zawya.com/mena/en/companies/story/Ooredoo_Group_announces_first_international_5G_call_in_the_Arab_region-ZAWYA20190123081839/

In February 2019, Vodafone Qatar signed an agreement with The Group Securities to provide business solutions including high-speed corporate internet and SMS services to more than 400,000 investors of Qatar's largest brokerage firm³⁶.

In March 2019, Vodafone Qatar completed its Giganet fibre roll-out in and around Aspire Zone sports complex. This fibre connectivity, capable of handling speeds of up to 1 Gigabit per second, coupled with Vodafone's live 5G network, now provides the Zone with a world-class communications infrastructure that allows its facilities to optimise, automate and innovate³⁷. In April 2019, Vodafone Qatar and Huawei entered into a strategic agreement to significantly expand and enhance Vodafone Qatar's entire wireless network infrastructure including a large scale 5G technology roll-out. This agreement will see two industry leaders at the forefront of digital innovation come together to accelerate the digital transformation of Qatar to meet the country's economic growth targets and national agenda³⁸.

In July 2019, Vodafone Qatar reports 60% growth in half-yearly net profit. According to the service provider, an important aspect of the company's growth comes from expanding enterprise solutions including the IoT, Cloud Services and Big Data³⁹.

2.4.3. Communications Regulatory Authority (CRA)

As Qatar's independent communications regulator, the CRA strives to balance the obligations of telecommunication service providers with the rights of consumers, and to ensure the benefits of competition are passed on to consumers. The CRA's mission is to foster sustainable competition to promote a fair marketplace and improve customer experience through the ubiquitous availability of smart, innovative and high-quality services. The CRA is committed to ensure transparency and efficiency of the telecommunication consumer protection process in Qatar.

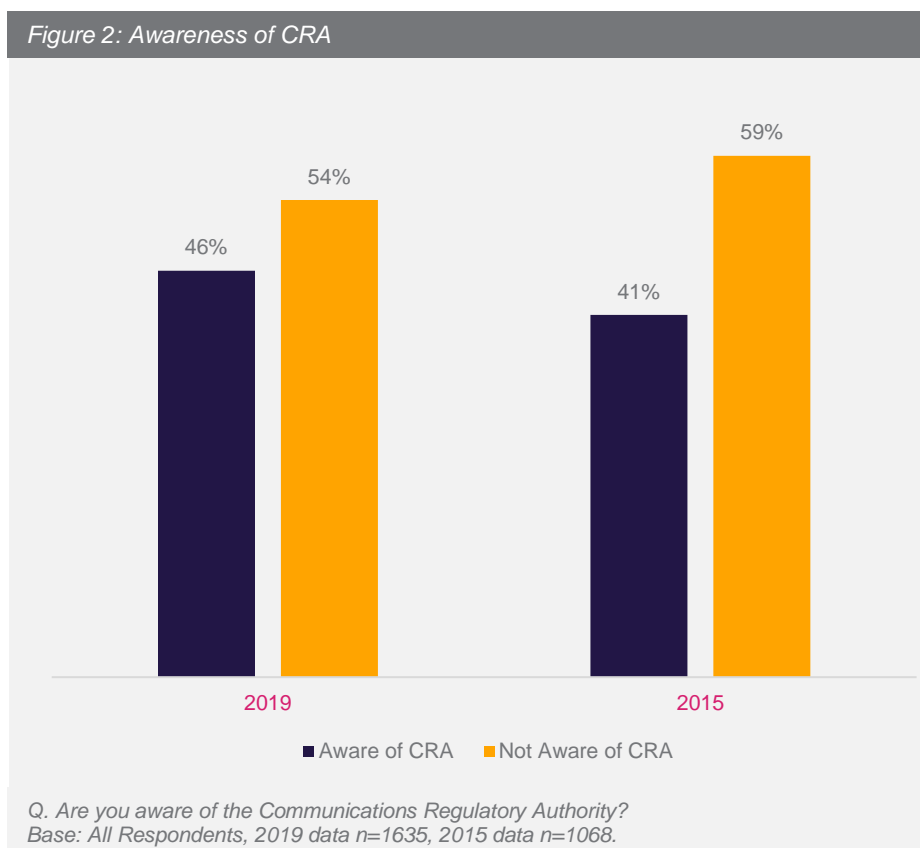
³⁶ <https://english.mubasher.info/news/3409424/Vodafone-Qatar-Group-Securities-ink-deal-to-boost-business-solutions/>

³⁷ <https://english.mubasher.info/news/3435298/VODAFONE-COMPLETES-ITS-GIGANET-FIBRE-ROLL-OUT-IN-AND-AROUND-ASPIRE-ZONE>

³⁸ <https://www.vodafone.qa/en/investor-relations/news/vodafone-qatar-continues-investing-in-its-wireless-network-through-a-strategic-partnership-with-huawei>

³⁹ <https://www.zawya.com/mena/en/press-releases/story/Vodafone-Qatar-reports-60-growth-in-half-yearly-net-profit-ZAWYA20190729130607/>

Business consumers were asked whether they are aware of the CRA. Awareness of the CRA among business consumers is relatively low with less than half of the respondents reporting to be aware of the telecommunication regulatory authority. Awareness of CRA has slightly increased from 41% in 2015 to 46% in 2019 (see Figure 2).



Business respondents who reported to be aware of the CRA were asked whether they are aware of the various roles and responsibilities of the Authority. There is high awareness among business consumers aware of the CRA that the Authority is responsible for protecting consumers from misleading and unfair practices and for regulating the telecommunications market and communications sector in Qatar (81% and 76% aware respectively). There is moderate awareness that the CRA is responsible for ensuring the efficient management and allocation of telecom resources (69%), that Qatar has a competitive and technologically advanced telecommunications market (67%), that CRA sets the quality of service standards and monitoring compliance (67%) and is responsible for the complaint escalation process (57%) (see Figure 3).

Figure 3: Scope of CRA



Awareness of the roles and responsibilities of the CRA have doubled since 2015. The largest increase is observed with awareness that the CRA is responsible for protecting consumers from misleading and unfair practices (41% in 2015 up to 81% in 2019). The results indicate that the CRA has actively engaged a larger business audience when compared to 2015 (see Table 1).

Table 1: Awareness of the Roles and Responsibilities of the CRA (2019 vs. 2015)

	2015	2019
Sample	439	745
Protecting consumers from misleading and unfair practices	41%	81%
Regulating the telecommunications market & communications sector in Qatar	37%	76%
Ensuring the efficient management and allocation of telecom resources	30%	69%
Ensuring Qatar has a competitive & technologically advanced telecommunications market	29%	67%
Setting the quality of service standards and monitoring compliance	29%	67%
The complaint escalation process at the Communications Regulatory Authority	24%	57%

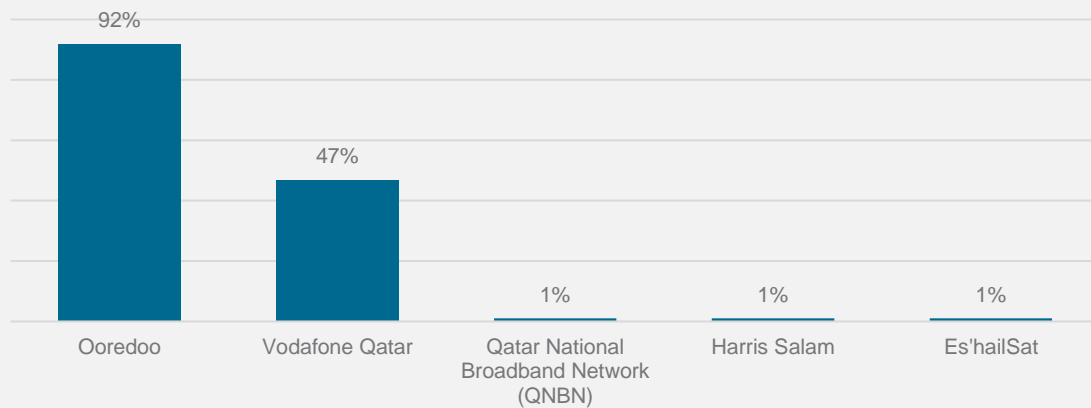
Q. I am going to read out some statements about the role and responsibilities of the Communications Regulatory Authority. Can you please tell if you are aware that the Authority is responsible for providing each of these services to consumers and businesses in Qatar?
Base: Respondents who are aware of the CRA, n=745

3. BUSINESS CUSTOMERS' PERCEPTIONS ON TELECOMMUNICATION SERVICES

3.1. Usage of Telecommunication Services

The majority of business respondents report that their organization's telecommunication services are provided by Ooredoo, nearly double the proportion of respondents that have services provided by Vodafone Qatar (92% Ooredoo and 47% Vodafone Qatar) (see Figure 4). Over a third of respondents (39%) report to have telecommunication services provided by both Ooredoo and Vodafone Qatar. These respondents were asked which service provider, Ooredoo or Vodafone Qatar, is the main service provider of telecommunication services to the company. Half of the respondents (55%) report Vodafone Qatar as the company's main service provider and 43% report Ooredoo as the main service provider (see Figure 5).

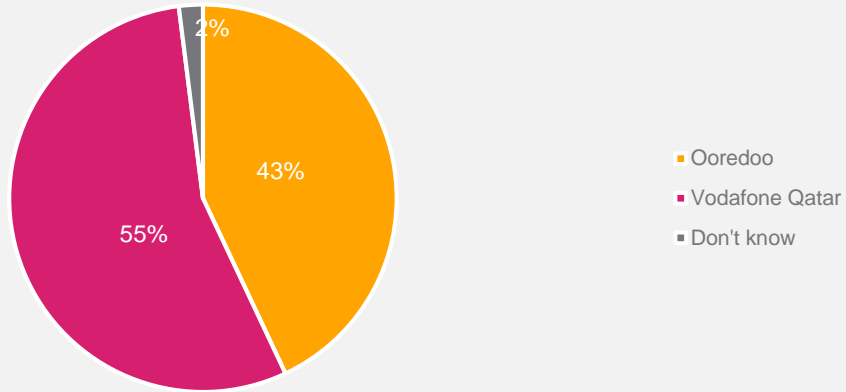
Figure 4: Telecommunications' Service Providers



Q. Can you please tell me which of these telecommunications' services providers handles the telecommunications services used by your company?

Base: All Respondents, n=1635.

Figure 5: Main Telecommunications' Service Provider



Q. Is Ooredoo or Vodafone your main service provider? Your main service provider is defined as the provider, which handles most of your company's telecommunications services.
Base: Respondents who use both Ooredoo and Vodafone Qatar services, n=638.

Table 2 shows the main telecommunications service provider by industry sector. In the main industry sectors operating in Qatar (according to 2015 Census data) which include Agriculture, forestry and fishing; Manufacturing; Construction; Wholesale and retail trade, repair of motor vehicles; Accommodation and food service activities, Vodafone Qatar is the dominant service provider. The only exception is the Construction industry which is primarily serviced by Ooredoo (58% Ooredoo users).

Ooredoo holds 100 percent share in the Electricity, gas, steam, air conditioning supply and Mining and quarrying sectors, and Vodafone Qatar is the exclusive provider to the Arts, entertainment, recreation and Human health and social services sectors (see Table 2).

Table 2: Main Telecommunications' Service Providers by Industry Sector

	Ooredoo Users	Vodafone Users
Agriculture, forestry and fishing	22%	75%
Mining and quarrying	100%	0%
Manufacturing	38%	60%
Electricity, gas, steam and air conditioning supply	100%	0%
Construction	58%	40%
Wholesale and retail trade; repair of motor vehicles	38%	60%
Information and communication	33%	67%
Transportation and storage	92%	8%
Accommodation and food service activities	31%	69%
Financial and insurance activities	57%	29%
Real estate activities	90%	10%
Professional, scientific and technical activities	75%	25%
Education	44%	56%
Arts, entertainment and recreation	0%	100%
Human health and social work activities	0%	100%
Other service activities	88%	13%
Administrative and support service activities	73%	27%

Q. Is Ooredoo or Vodafone your main service provider? Your main service provider is defined as the provider, which handles most of your company's telecommunications services.

Base: Those who use Ooredoo or Vodafone as main service providers (Agriculture, forestry and fishing: 81; Manufacturing: 65, Construction: 45; Wholesale, retail trade and repair of motor vehicles: 261; Accommodations and food service activities: 70)

Table 3 shows the main telecommunications service provider by size of business based on the number of employees. Ooredoo holds the majority market share in small, medium and large businesses in Qatar, whereas Vodafone Qatar is the main service provider to three in four micro businesses.

Table 3: Main Telecommunications' Service Providers by Business size

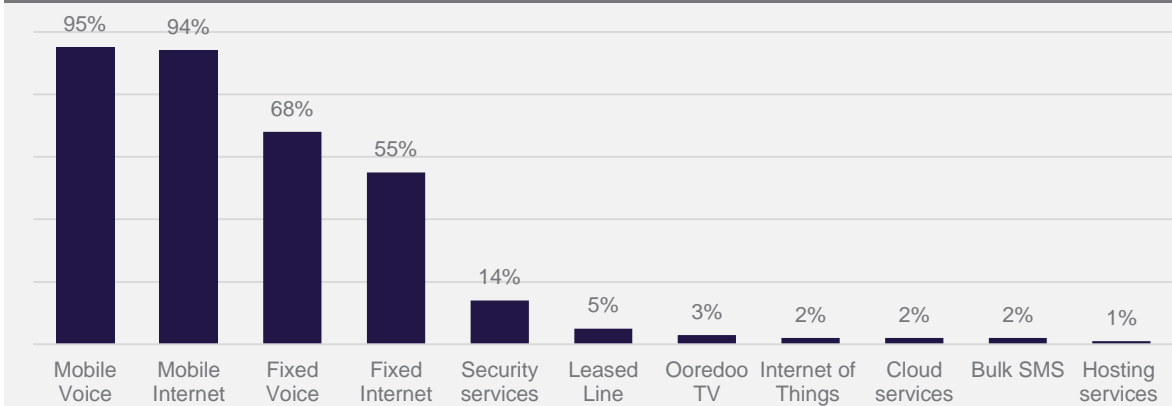
	Ooredoo Users	Vodafone Users
Micro Businesses	26%	74%
Small Businesses	82%	16%
Medium Businesses	68%	20%
Large Businesses	88%	13%

Q. Is Ooredoo or Vodafone your main service provider? Your main service provider is defined as the provider, which handles most of your company's telecommunications services.

Base: Those who use Ooredoo or Vodafone as main service providers (Micro, 428; Small: 134; Medium: 60; Large: 16).

Almost all businesses use Mobile Voice and Mobile Internet services (95% and 94% respectively). More than half of the respondents indicate that their company use Fixed Voice and Fixed Internet services (68% and 55% respectively) and only 5% use Leased Line services (MPLS, TDM, etc.). Few respondents report that their company utilizes security services (14%), Ooredoo TV (3%), IoT services (2%), Cloud services (2%), Bulk SMS (1%) and Hosting services (1%) (see Figure 6). Most companies that are connected to Fixed Internet services use Fiber to access the Internet (87%) and only 12% access the Internet via Cable (see Figure 7).

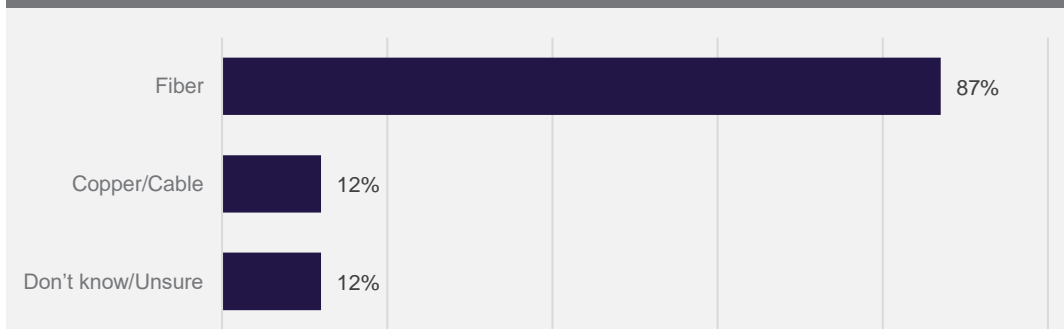
Figure 6: Usage of Telecommunication Services



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

Base: All Respondents, n=1635.

Figure 7: Access to Fixed Internet



Q. How does your organization access the Fixed Internet? Is it via ...?

Base: Respondents who use Fixed Internet services, n=895.

Table 4 shows the usage of Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet and Leased Line by industry sector. Overall, the usage of Mobile Voice and Mobile Internet services is very high, and the usage of Leased Line services is very low across all industry sectors. The proportion of businesses using Fixed Voice and Fixed Internet differs according to industry sector. Fixed Voice and Fixed Internet usage is lowest within the Accommodation and food services sector and the Wholesale, retail trade, repair of motor vehicles sector.

Table 4: Usage of Telecommunication Services by Industry Sector

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Agriculture, forestry and fishing	100%	97%	66%	49%	1%
Mining and quarrying	100%	100%	100%	100%	20%
Manufacturing	95%	96%	69%	63%	2%
Electricity, gas, steam and air conditioning supply	100%	100%	100%	100%	33%
Water supply, sewerage, waste management and remediation activities	100%	100%	100%	50%	0%
Construction	91%	89%	79%	61%	8%
Wholesale and retail trade; repair of motor vehicles	93%	93%	58%	47%	4%
Information and communication	96%	92%	72%	68%	12%
Transportation and storage	93%	93%	89%	86%	7%
Accommodation and food service activities	95%	91%	55%	37%	9%
Financial and insurance activities	90%	86%	90%	83%	14%
Real estate activities	100%	90%	90%	86%	10%
Professional, scientific and technical activities	97%	96%	87%	76%	8%
Education	100%	100%	78%	70%	4%
Arts, entertainment and recreation	88%	100%	63%	38%	0%
Human health and social work activities	100%	88%	88%	56%	0%
Other service activities	96%	95%	80%	62%	3%
Administrative and support service activities	95%	95%	80%	62%	5%

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

Base: All Respondents, n=1635 (Agriculture, forestry and fishing: 258; Manufacturing: 132; Construction: 165; Wholesale, retail trade and repair of motor vehicles: 598; Accommodation and food service activities: 112).

Table 5 shows the usage of Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet and Leased Line by size of business. The usage of Fixed Internet and Leased Line services increases with size of business. The penetration rate of the five telecommunication services is highest within large sized businesses.

Table 5: Usage of Telecommunication Services by Business Size

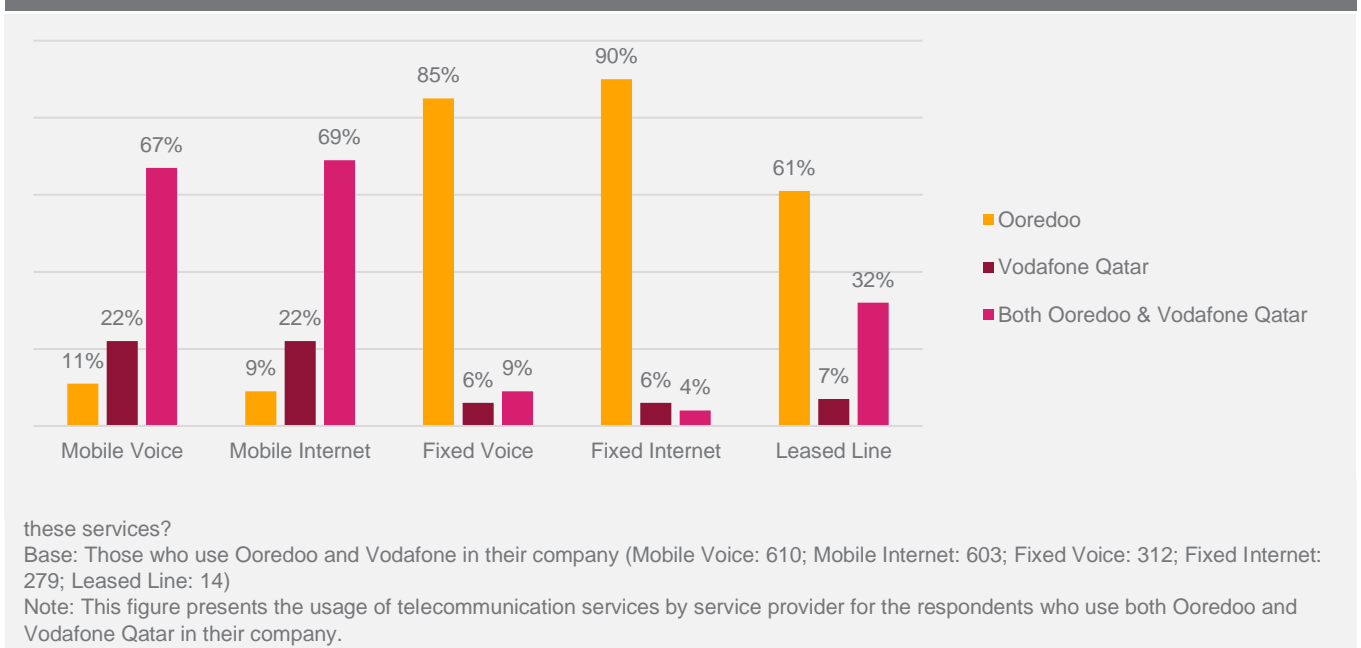
	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	96%	95%	56%	42%	2%
Small Businesses	93%	92%	89%	74%	6%
Medium Businesses	87%	89%	80%	79%	13%
Large Businesses	97%	100%	90%	90%	22%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

The respondents who reported that their company was serviced by both Ooredoo and Vodafone Qatar were asked to specify which service provider supplied each of the telecommunication services. Most of the respondents report to be dealing with Ooredoo for Fixed Voice, Fixed Internet and Leased Line services, whereas they use both Ooredoo and Vodafone Qatar for Mobile Voice and Mobile Internet services (see Figure 8).

Figure 8: Service Provider of Telecommunication Services



At a total sample level, Ooredoo is the service provider of Mobile Voice and Mobile Internet for more than half of the businesses, whilst Vodafone Qatar provides these services to only 16% of the surveyed users. A quarter of respondents report to be serviced by Ooredoo and Vodafone Qatar for Mobile Voice and Mobile Internet services (26% and 27% respectively). Ooredoo also provides Fixed Voice and Fixed Internet services to most businesses in Qatar (92% and 93% respectively). Ooredoo also holds the majority share for Leased Line services (76%) (see Table 6).

Table 6: Usage of Telecommunication Services by Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	58%	57%	92%	93%	76%
Vodafone Qatar	16%	16%	5%	6%	18%
Both Ooredoo and Vodafone Qatar	26%	27%	3%	1%	6%

Source: 2019 Survey Data.

Base: All Respondents, n=1635 (Mobile Voice: 1548; Mobile Internet: 1530; Fixed Voice: 1107; Fixed Internet: 895; Leased Line: 74).

Note: This table presents the percentages of respondents who use the telecommunication services from Ooredoo or Vodafone Qatar or Both at the same time. The figures presented in this table are the result of a computed variable created from the questions Q9, Q11 and Q16/20/24/28/33 on the questionnaire.

The majority of the businesses who are located in the municipalities of Doha and Al Wakra are serviced by Ooredoo for all their telecommunication services. Most of the respondents who work in a company located either in the north of Qatar including Al Khor, Al Thakhira or Al Sheehaniya, indicate that their company uses both Ooredoo and Vodafone Qatar for Mobile services and Ooredoo primarily for Fixed services. The large majority of businesses located in Al Rayyan use Ooredoo for Fixed services and Leased Lines, whereas a third of the businesses prefer to deal with both service providers, Ooredoo and Vodafone Qatar, for Mobile Voice and Mobile Internet services (see Table 7).

Table 7: Usage of Telecommunication Services by Geographic Location

	Mobile Voice			Mobile Internet			Fixed Voice			Fixed Internet			Leased Line		
	O	V	B	O	V	B	O	V	B	O	V	B	O	V	B
Doha	68%	19%	13%	68%	20%	12%	95%	4%	1%	95%	4%	1%	78%	20%	2%
Al Rayyan	53%	15%	32%	51%	16%	33%	86%	7%	6%	91%	8%	2%	71%	14%	14%
Al Wakra	74%	16%	10%	68%	24%	9%	90%	10%	0%	89%	11%	0%	75%	25%	0%
Umm Slal	46%	15%	39%	46%	15%	38%	78%	11%	11%	57%	33%	10%	0%	0%	100%
Al Khor, Al Thakhira	27%	4%	69%	28%	1%	71%	91%	0%	9%	95%	5%	0%	67%	0%	33%
Al Shamal	76%	0%	24%	76%	6%	18%	100%	0%	0%	100%	0%	0%	0%	0%	0%
Al Dayyen	0%	0%	100%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Al Sheehaniya	7%	5%	88%	6%	2%	92%	71%	0%	29%	60%	0%	40%	0%	0%	0%

Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

Note: This table presents the percentages of respondents who use the telecommunication services from Ooredoo or Vodafone Qatar or Both at the same time. The figures presented in this table are the result of a computed variable created from the questions Q9, Q11 and Q16/20/24/28/33 on the questionnaire.

O= Ooredoo; V= Vodafone; B=Both

Respondents were asked whether their companies use Over-The-Top (OTT) services. Close to three quarters (72%) report to be using OTT services (see Figure 9). The most common OTT services that are being used by businesses in Qatar are WhatsApp (99%), Imo (50%), followed by Skype (40%) and Viber (33%) (see Figure 10).

Figure 9: Usage of OTT services

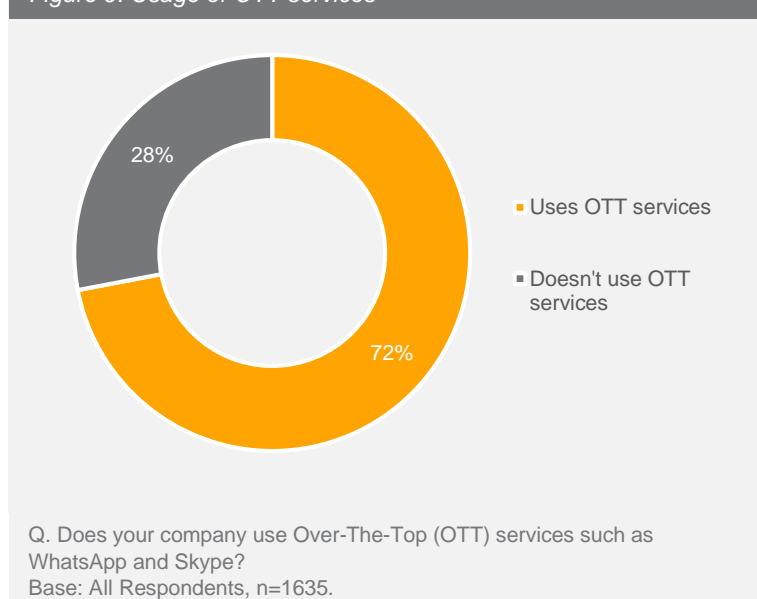
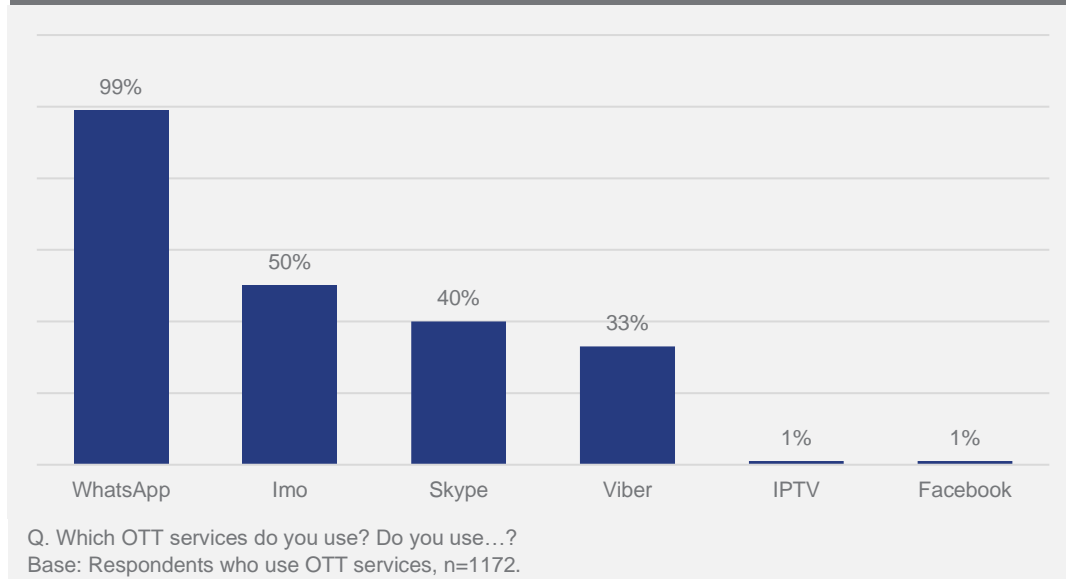
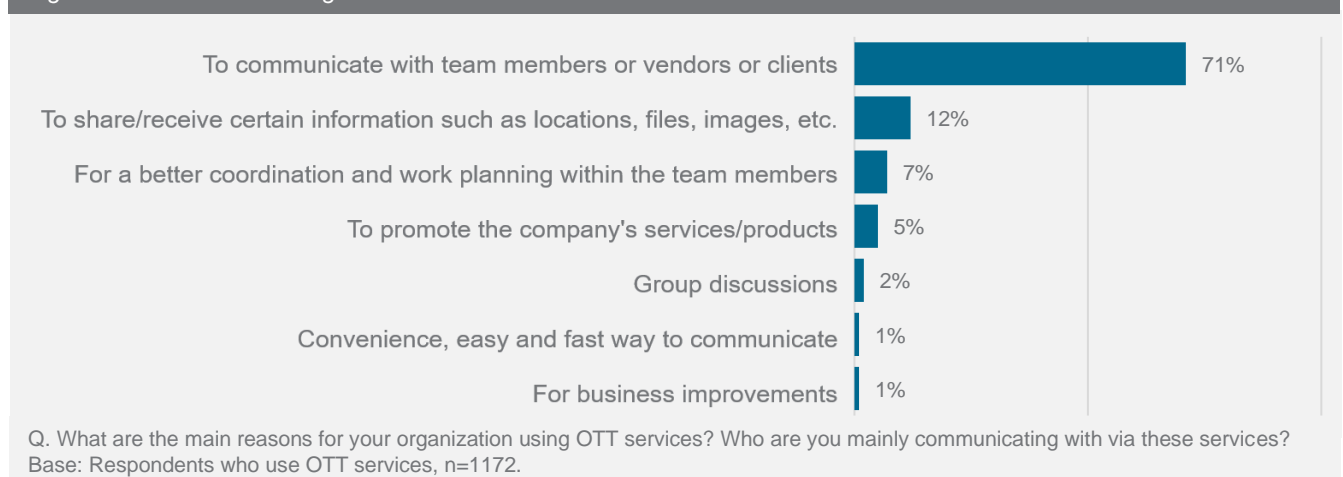


Figure 10: OTT services used by businesses



Most of the businesses use OTT services to communicate with their team members, vendors or clients. Some 12% of the respondents said that their business prefers to use OTT services because it is an easy and fast way to share or receive information such as locations, files and images. A few respondents (7%) mention that OTT services offer a better coordination and work planning system within the team, while 5% of respondent indicate that they mainly use it for promoting their brand, products and services. Others benefits that OTT services provide mentioned to a lesser extent by respondents include better facilitation of group discussions, easy and efficient way to communicate, and it helps with business improvements (see Figure 11).

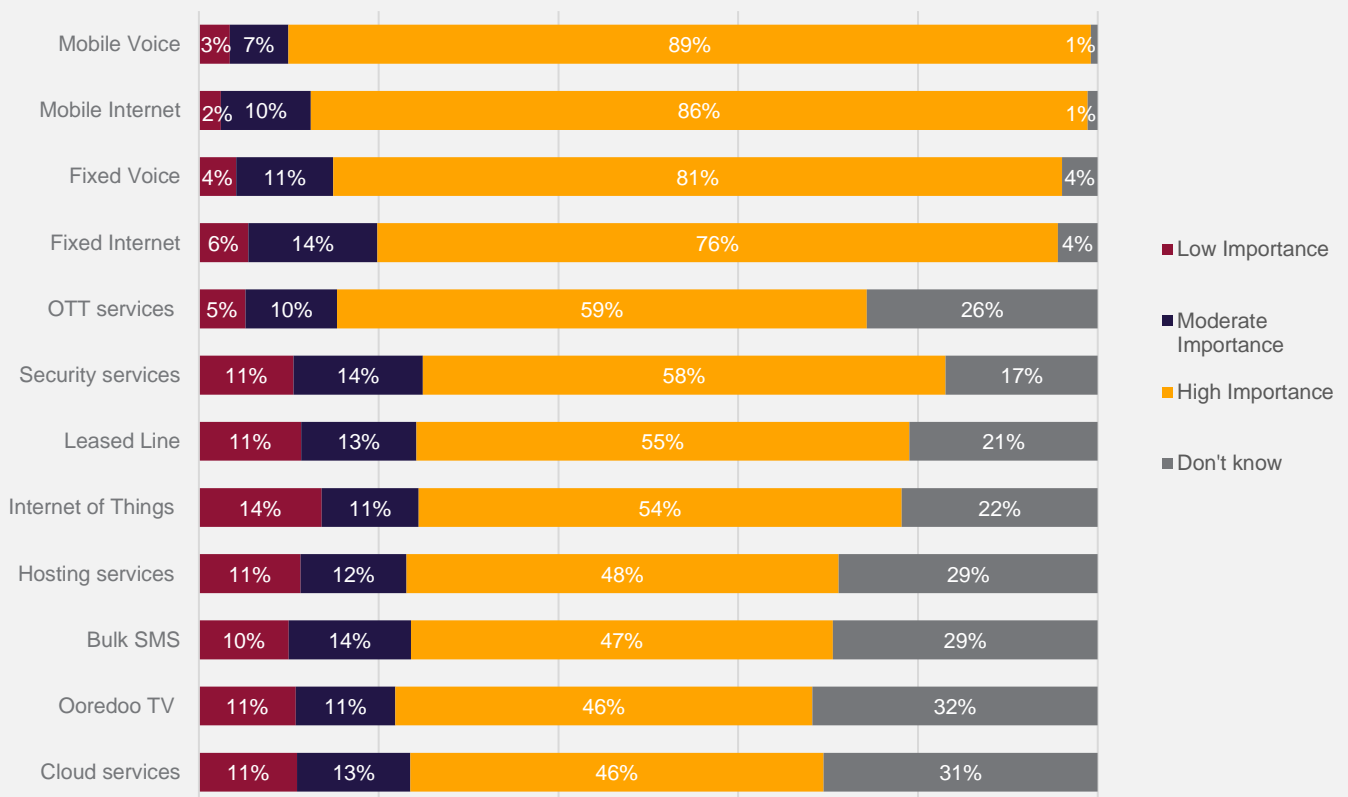
Figure 11: Reasons for using OTT services



3.2.Importance of Telecommunication Services

All respondents were asked to indicate the level of importance of telecommunication services to ensure their business runs effectively using a scale of '1 to 9', where '1' means 'not at all important' and '9' means 'extremely important'. For the analysis, the research team considers the answers of between '1 and 3' to be 'low importance', the answers between '4 and 6' to be of 'moderate importance' and the answers between '7 and 9' to be 'high importance'. Figure 12 shows that Mobile Voice, Mobile Internet and Fixed Voice services are the most important services to businesses with high importance rates of 89%, 86% and 81% respectively. The Fixed Internet services are also highly important to businesses but with a lower rating of 76%. Half of the business customers consider OTT services, Security services, Leased Lines and IoT services as highly important to ensure the company runs effectively.

Figure 12: Importance of Telecommunication Services



Q. For each of the telecommunication services I just read out, I am going to ask you how important each service is in ensuring your organization runs effectively. Even if you don't use the service, I will still ask you to rate the level of importance. Using a scale of 1 to 9, where 1 is 'not at all important' and 9 is 'extremely important', how important is (read out service) to your organization?
Base: All Respondents, n=1635.

The importance placed on mobile services to effectively run business operations has considerably increased over the past four years (increase of 37 percentage points for Mobile Voice and 34 for Mobile Internet from 2015 to 2019), whereas the level of importance placed on Fixed Voice and Internet services and Leased Lines has declined (decrease of 8 percentage points for Fixed Voice, 10 for Fixed Internet and 14 for Leased Lines from 2015 to 2019). In 2019, businesses in Qatar are looking for more convenient, easy and fast ways to communicate with their team members and clients (see Table 8).

Table 8: Importance of Telecommunication Services (2019 vs. 2015) (% High Importance)

	2015	2019
Sample	1096	1635
Mobile Voice	52%	89%
Mobile Internet	52%	86%
Fixed Voice	89%	81%
Fixed Internet	86%	76%
Leased Line	69%	55%

Q. For each of the telecommunication services I just read out, I am going to ask you how important each service is in ensuring your organization runs effectively. Even if you don't use the service, I will still ask you to rate the level of importance. Using a scale of 1 to 9, where 1 is 'not at all important' and 9 is 'extremely important', how important is (read out service) to your organization?
Base: All Respondents (2019: n=1635; 2015: n=1096).

Table 9 shows the level of importance placed on each telecommunication service by industry sector. Mobile Voice services are the most important services for companies operating within the main industries: Agriculture, forestry and fishing (92%); Manufacturing (92%); Construction (88%); Wholesale and retail trade, repair of motor vehicles (84%); and Accommodation and food service activities (92%). It also shows that the Agriculture, forestry and fishing and the Wholesale, trade and repair of motor vehicles industries are less likely than other industries to consider Fixed Internet services to be highly important to their business operations (see Table 9).

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

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Agriculture, forestry and fishing	92%	88%	80%	66%	63%
Mining and quarrying	100%	100%	100%	100%	78%
Manufacturing	92%	83%	85%	83%	60%
Electricity, gas, steam and air conditioning supply	100%	100%	100%	100%	0%
Water supply, sewerage, waste management and remediation activities	100%	100%	100%	100%	50%
Construction	88%	81%	85%	85%	57%
Wholesale and retail trade; repair of motor vehicles	84%	83%	72%	68%	46%
Information and communication	100%	100%	100%	86%	57%
Transportation and storage	94%	99%	93%	94%	55%
Accommodation and food service activities	92%	88%	90%	75%	59%
Financial and insurance activities	83%	84%	89%	94%	47%
Real estate activities	100%	89%	94%	89%	68%
Professional, scientific and technical activities	98%	96%	96%	92%	63%
Education	87%	87%	91%	91%	35%
Arts, entertainment and recreation	100%	88%	88%	75%	63%
Human health and social work activities	92%	85%	100%	92%	77%
Other service activities	99%	97%	84%	83%	56%
Administrative and support service activities	92%	92%	87%	83%	62%

Q. For each of the telecommunication services I just read out, I am going to ask you how important each service is in ensuring your organization runs effectively. Even if you don't use the service, I will still ask you to rate the level of importance. Using a scale of 1 to 9, where 1 is 'not at all important' and 9 is 'extremely important', how important is (read out service) to your organization?
Base: All Respondents, n=1635 (Agriculture, forestry and fishing: 258; Manufacturing: 132; Construction: 165; Wholesale, retail trade and repair of motor vehicles: 598; Accommodation and food service activities: 112).

Table 10 shows the level of importance placed on each telecommunication service by size of business. Micro businesses (1 to 9 employees) consider fixed services to be less important than mobile services. Whereas, Leased Line services are of higher importance to Large businesses than for companies with less than 250 employees.

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

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	88%	85%	76%	68%	54%
Small Businesses	92%	90%	90%	90%	56%
Medium Businesses	86%	82%	87%	84%	52%
Large Businesses	98%	95%	93%	93%	71%

Q. For each of the telecommunication services I just read out, I am going to ask you how important each service is in ensuring your organization runs effectively. Even if you don't use the service, I will still ask you to rate the level of importance. Using a scale of 1 to 9, where 1 is 'not at all important' and 9 is 'extremely important', how important is (read out service) to your organization?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

3.3. Overall Satisfaction with Telecommunication Services

Another indicator that is important to track for CRA is the level of satisfaction with telecommunication services among business consumers. Overall, there is high satisfaction among business consumers with the overall quality of telecommunication services provided to their company (90% of respondents are either 'extremely satisfied' or 'satisfied' with the services) (see Figure 13).

Figure 13: Overall Satisfaction with Telecommunication Services

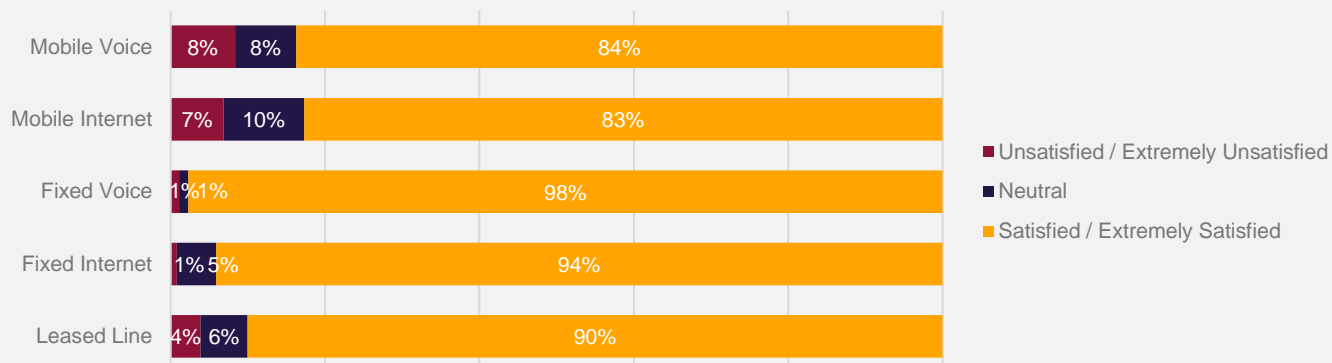


Score was calculated by taking the average score evaluated for all services

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Satisfaction levels remain high across the various service offerings, with Fixed Voice and Fixed Internet recording the highest levels of satisfaction (98% and 94% respectively) (see Figure 14). When comparing the results from 2015, satisfaction levels have increased for all telecommunication services. The highest increase in satisfaction is observed for Mobile Internet with an improvement of 14 percentage points from 69% satisfaction in 2015 up to 83% in 2019. There has been no shift in satisfaction levels between 2015 and 2019 for Mobile Voice (both at 84% satisfaction) (see Table 11).

Figure 14: Satisfaction with Telecommunication Services by Type of Service



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Table 11: Satisfaction with Telecommunication Services (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Overall	91%	90%
Mobile Voice	84%	84%
Mobile Internet	69%	83%
Fixed Voice	91%	98%
Fixed Internet	87%	94%
Leased Line	82%	90%

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

Base: All Respondents, 2019: n=1635; 2015: n=1096 (users of Mobile Voice, 2019: n=1548 / 2015: n=651; users of Mobile Internet, 2019: n=1530 / 2015: n=200; users of Fixed Voice, 2019: n=1107 / 2015: n=760; users of Fixed Internet, 2019: n=895 / 2015: n=540; users of Leased Line, 2019: n=74 / 2015: n=30).

Table 12 shows the proportion of business respondents that are either 'extremely satisfied' or 'satisfied' with each of the telecommunication services by industry sector. There is some variance in the level of satisfaction for quality of services across different industry sectors. The satisfaction level for Fixed Voice, Fixed Internet and Leased Line is consistently high across all industry sectors. The percentage of business customers satisfied with Mobile Voice and Mobile Internet is lower for those working in the Accommodation and food services, Wholesale and retail trade, and Manufacturing industry sectors (see Table 12). This could be due to the nature of the industry where the usage frequency may be higher and therefore there may have a higher probability of facing temporary failures for these specific services.

Table 12: Satisfaction with Telecommunication Services by Main Economic Activity (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Agriculture, forestry and fishing	86%	83%	100%	98%	100%
Mining and quarrying	100%	100%	100%	100%	100%
Manufacturing	80%	76%	99%	95%	100%
Electricity, gas, steam and air conditioning supply	100%	100%	100%	100%	-
Water supply, sewerage, waste management and remediation activities	100%	100%	100%	100%	-
Construction	87%	85%	98%	92%	92%
Wholesale and retail trade; repair of motor vehicles	78%	80%	95%	91%	88%
Information and communication	100%	86%	100%	100%	100%
Transportation and storage	98%	94%	100%	93%	100%
Accommodation and food service activities	70%	73%	98%	95%	78%
Financial and insurance activities	100%	100%	100%	100%	100%
Real estate activities	100%	100%	100%	100%	100%
Professional, scientific and technical activities	88%	79%	100%	95%	100%
Education	83%	78%	100%	100%	100%
Arts, entertainment and recreation	88%	89%	100%	100%	-
Human health and social work activities	100%	100%	100%	100%	-
Other service activities	97%	95%	95%	87%	50%
Administrative and support service activities	93%	94%	100%	98%	100%

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

Base: All Respondents, 2019: n=1635; 2015: n=1096 (Agriculture, forestry and fishing: 258; Manufacturing: 132; Construction: 165; Wholesale, retail trade and repair of motor vehicles: 598; Accommodation and food service activities: 112).

Table 13 shows the proportion of business respondents that are either 'extremely satisfied' or 'satisfied' with each of the telecommunication services by size of business. Overall satisfaction for the quality of services varies according to size of business. Among micro businesses (less than 10 employees), a lower percentage of respondents in this category are satisfied with Mobile Voices, Mobile Internet and Leased Line when compared to larger businesses with more than 10 employees (see Table 13).

Table 13: Satisfaction with Telecommunication Services by Size of Enterprise (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	76%	77%	96%	95%	78%
Small Businesses	96%	93%	99%	93%	96%
Medium Businesses	96%	91%	98%	92%	94%
Large Businesses	98%	98%	100%	100%	100%

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

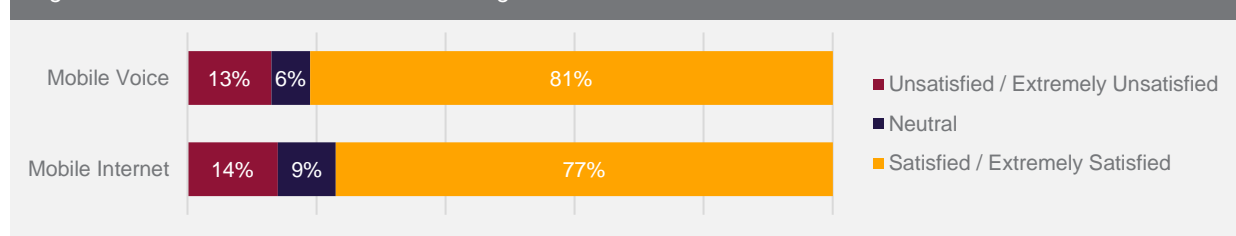
Base: All Respondents, 2019: n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

3.4. Customer Experience with Telecommunication Network

3.4.1. Network Coverage

Overall satisfaction with network coverage for Mobile Voice and Mobile Internet is high among business consumers with 81% of respondents either 'extremely satisfied' or 'satisfied' with Mobile Voice and 77% with Mobile Internet. One in seven respondents report to be either 'extremely dissatisfied' or 'dissatisfied' with the network coverage of Mobile Voice and Mobile Internet (13% and 14% respectively) (see Figure 15). There has been a significant increase in the level of satisfaction with Mobile Internet, with an increase of 18 percentage points from 59% extremely satisfied / satisfied in 2015 up to 77% in 2019. The level of satisfaction with Mobile Voice has remained consistent from 2015 to 2019 (see Table 14).

Figure 15: Satisfaction with Network Coverage



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530).

Table 14: Satisfaction with Network Coverage (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	81%	81%
Mobile Internet	59%	77%

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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530).

Satisfaction levels with network coverage vary accordingly to geographic location in Qatar. Business respondents working in Doha and Al Wakra record higher levels of satisfaction with Mobile Voice and Mobile Internet services when compared to other locations, with at least nine out of ten respondents satisfied with the network coverage provided by these services (see Table 15). In comparison, Umm Slal, Al Khor/Al Thakhira, Al Dayyen and Al Sheehaniya report to have relatively lower satisfaction scores for both Mobile Voice and Internet coverage with less than half of the respondents satisfied with the services. The level of satisfaction is particularly low in Al Sheehaniya with 29% of respondents either 'extremely satisfied' or 'satisfied' with Mobile Voice and only 19% satisfied with Mobile Internet. The results may indicate weaker signal points in this area which is driving dissatisfaction with the network coverage.

Table 15: Satisfaction with Network Coverage by Area (% Satisfied)

	2015	2019
Doha	95%	90%
Al Rayyan	76%	73%
Al Wakra	96%	98%
Umm Slal	61%	66%
Al Khor, Al Thakhira	43%	35%
Al Shamal	81%	75%
Al Dayyen	0%	44%
Al Sheehaniya	29%	19%

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

Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

3.4.2. Availability of Service

Ensuring the availability of a wide range of communication services across Qatar is an important responsibility of the CRA. Figure 16 shows the level of satisfaction with the availability of Fixed Voice, Fixed Internet and Leased Line services. Overall satisfaction with the availability of these services is high among business customers. At least nine out of ten respondents rate their satisfaction with the availability with these services as either 'extremely satisfied' or 'satisfied'. Business customers record the highest level of satisfaction with Fixed Voice services at 95%, followed by Fixed Internet (93%) and Leased Line services (91%). The level of satisfaction with the availability of these services has increased since 2015 across all three service categories. The largest increase in satisfaction is with the availability of Leased Line services, with satisfaction increasing 24 percentage points from 67% in 2015 up to 91% in 2019 (see Table 16).

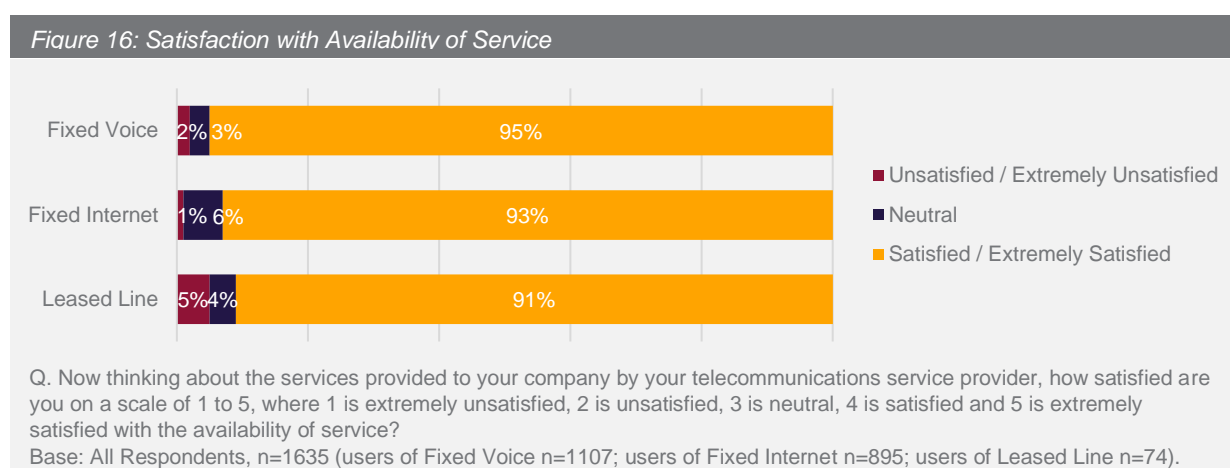


Table 16: Satisfaction with Availability of Service (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Fixed Voice	80%	95%
Fixed Internet	74%	93%
Leased Line	67%	91%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of service?

Base: All Respondents, n=1635 (users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

The level of satisfaction with the availability of Fixed Voice, Fixed Internet and Leased Line services is high across most geographic locations in Qatar. The only exception where there are reported to be lower levels of satisfaction is in Al Sheehaniya for Fixed Internet services (60% extremely satisfied/satisfied) and Al Khor/Al Thakhira for Leased Line services (33% extremely satisfied/satisfied) (see Table 17).

Table 17: Satisfaction with Availability of Service by Area (% Satisfied)

	Fixed Voice	Fixed Internet	Leased Line
Doha	96%	91%	97%
Al Rayyan	92%	96%	88%
Al Wakra	100%	99%	100%
Umm Slal	89%	95%	-
Al Khor, Al Thakhira	94%	91%	33%
Al Shamal	100%	100%	-
Al Dayyen	-	-	-
Al Sheehaniya	86%	60%	-

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of service?
Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

There are no significant differences recorded in the level of satisfaction with the availability of these services provided by Ooredoo and Vodafone Qatar. All respondents report high levels of satisfaction with the service providers with regards to Fixed Voice, Fixed Internet and Leased Line services (see Table 18).

Table 18: Satisfaction with Availability of Service by Service Provider (% Satisfied)

	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	98%	93%	95%
Vodafone Qatar	93%	98%	100%

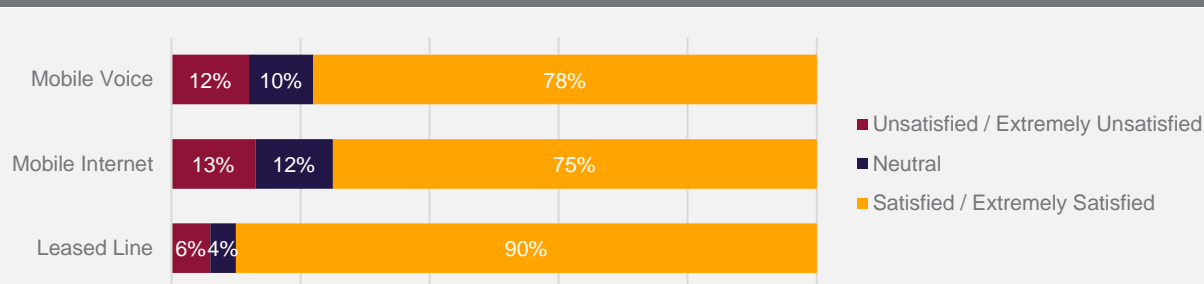
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the availability of service?
Base: All Respondents, n=1635 (users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

3.4.3. Network Reliability

Figure 17 shows the level of satisfaction with the network reliability of Fixed Voice, Fixed Internet and Leased Line services. The level of satisfaction with network reliability varies according to the service. Overall, business customers report high levels of satisfaction with the network reliability of all services.

The level of satisfaction is highest for Leased Line services (90% 'extremely satisfied/satisfied'), followed by Mobile Voice (78%) and Mobile Internet (75%). One in eight respondents are 'extremely dissatisfied or dissatisfied' with the network reliability of Mobile Voice and Mobile Internet services (12% and 13% respectively). In 2019, all three services have shown a noticeable improvement in satisfaction when compared to 2015. The largest increase in satisfaction is recorded for the network reliability of Leased Line services, with satisfaction increasing 37 percentage points from 53% in 2015 up to 90% in 2019 (see Table 19).

Figure 17: Satisfaction with Network Reliability



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Leased Line n=74).

Table 19: Satisfaction with Network Reliability (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	66%	78%
Mobile Internet	49%	75%
Leased Line	53%	90%

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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Leased Line n=74).

Satisfaction with network reliability of Fixed Voice, Fixed Internet and Leased Line services varies according to geographic location in Qatar. There is high satisfaction with the network reliability of the services in Doha and Al Wakra. There are moderate levels of satisfaction with network reliability in Al Rayyan (Mobile Voice & Mobile Internet), Umm Slal and Al Shamal (Mobile Internet). Satisfaction with network reliability is comparatively lower in Al Khor/Al Thakhira, Al Dayyen and Al Sheehaniya (see Table 20).

Table 20: Satisfaction with Network Reliability by Area (% Satisfied)

	Mobile Voice	Mobile Internet	Leased Line
Doha	92%	88%	95%
Al Rayyan	74%	68%	88%
Al Wakra	96%	96%	100%
Umm Slal	71%	59%	-
Al Khor, Al Thakhira	28%	35%	33%
Al Shamal	76%	71%	-
Al Dayyen	-	11%	-
Al Sheehaniya	21%	21%	-

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are with the network reliability?
Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

Table 21 shows the level of satisfaction with network reliability by service provider. Satisfaction with the network reliability of services provided by Ooredoo and Vodafone Qatar is high across all three service categories. Satisfaction with Ooredoo is slightly higher than Vodafone Qatar for Mobile Voice and Internet, whereas satisfaction with Vodafone Qatar is higher for Leased Line services (see Table 21).

Table 21: Satisfaction with Network Reliability by Service Provider (% Satisfied)

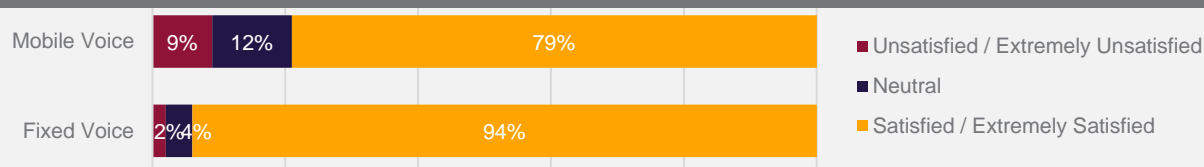
	Mobile Voice	Mobile Internet	Leased Line
Ooredoo	95%	91%	93%
Vodafone Qatar	91%	88%	100%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are with the network reliability?
Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Leased Line n=74).

3.4.4. Voice Quality & Clarity

Figure 18 shows the level of satisfaction with voice quality and clarity for Fixed Voice and Mobile Voice services. Ninety-four percent of business customers are either 'extremely satisfied' or 'satisfied' with the voice quality and clarity provided by Fixed Voice services, and a lower 79% are satisfied with Mobile Voice services. The lower level of satisfaction with Mobile Voice is due to the higher percentage of respondents who use the service, who report to be 'neutral' regarding the quality and clarity of this service (see Figure 18).

Figure 18: Satisfaction with Voice Quality & Clarity



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Fixed Voice n=1107).

The level of satisfaction with voice quality and clarity provided by Mobile Voice and Fixed Voice services has increased from 2015 levels. The largest increase in satisfaction is recorded for Fixed Voice services, with satisfaction rising 27 percentage points from 67% in 2015 up to 94% in 2019 (see Table 22).

Table 22: Satisfaction with Voice Quality & Clarity (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	66%	79%
Fixed Voice	67%	94%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the voice clarity?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Fixed Voice n=1107).

In line with satisfaction with network reliability, low satisfaction scores are observed in Al Khor/Al Thakhira and Al Sheehaniya areas in terms of voice quality and clarity. Business customers in Al Rayyan and Umm Slal are also comparatively less satisfied with the quality and clarity of Mobile Voice services when compared to users in other areas of Qatar (76% and 67% satisfied respectively) (see Table 23).

Table 23: Satisfaction with Voice Quality & Clarity by Area (% Satisfied)

	Mobile Voice	Fixed Voice
Doha	91%	95%
Al Rayyan	76%	90%
Al Wakra	95%	100%
Umm Slal	67%	89%
Al Khor, Al Thakhira	31%	85%
Al Shamal	82%	100%
Al Dayyen	-	-
Al Sheehaniya	19%	75%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the voice clarity?

Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

Ooredoo and Vodafone Qatar both provide high quality voice services to their business customers which is reflected in satisfaction scores of 90% and above (see Table 24).

Table 24: Satisfaction with Voice Quality & Clarity by Service Provider (% Satisfied)

	Mobile Voice	Fixed Voice
Ooredoo	95%	96%
Vodafone Qatar	90%	97%

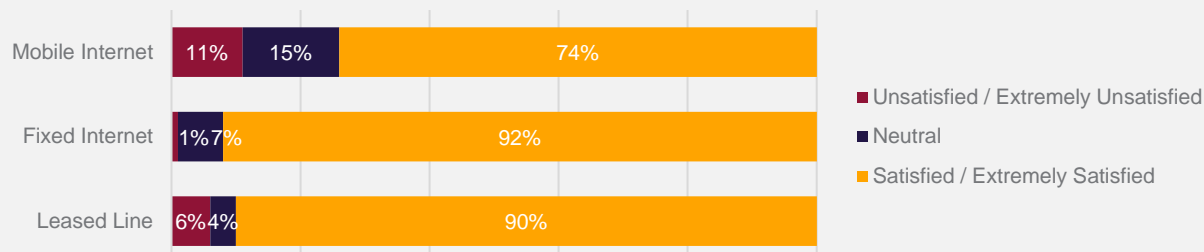
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the voice clarity?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Fixed Voice n=1107).

3.4.5. Speed of Data

Figure 19 shows the level of satisfaction with speed of data for Mobile Internet, Fixed Internet and Leased Line services. Overall, business customers report high levels of satisfaction with the speed of data provided by Fixed Internet and Leased Line services (92% and 90% respectively 'extremely satisfied/satisfied'). In comparison, business customers are moderately satisfied with the speed of data provided by Mobile Internet services (74% satisfied). One in nine respondents (11%) are 'extremely dissatisfied' or 'dissatisfied' with the speed of Mobile Internet services.

Figure 19: Satisfaction with Speed of Data



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

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895; users of Leased Line n=74).

The level of satisfaction with the speed of data provided by all three services has increased from 2015 levels. The largest increase in satisfaction is recorded for Leased Line services, with satisfaction increasing 38 percentage points from 52% in 2015 up to 90% in 2019 (see Table 25).

Table 25: Satisfaction with Speed of Data (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Internet	51%	74%
Fixed Internet	61%	92%
Leased Line	52%	90%

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

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895; users of Leased Line n=74).

The highest level of satisfaction with speed of data is shown within the municipalities of Doha and Al Wakra, whereas the lowest level of satisfaction is in Al Khor/Al Thakhira, Al Dayyen and Al Sheehaniya (see Table 26).

Table 26: Satisfaction with Speed of Data by Area (% Satisfied)

	Mobile Internet	Fixed Internet	Leased Line
Doha	87%	91%	97%
Al Rayyan	70%	92%	88%
Al Wakra	93%	100%	75%
Umm Slal	66%	90%	-
Al Khor, Al Thakhira	31%	95%	33%
Al Shamal	76%	100%	-
Al Dayyen	13%	-	-
Al Sheehaniya	11%	83%	-

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

Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

Vodafone Qatar has slightly higher satisfaction levels compared to Ooredoo on speed of data for Fixed Internet and Leased Line services (see Table 27).

Table 27: Satisfaction with Speed of Data by Service Provider (% Satisfied)

	Mobile Internet	Fixed Internet	Leased Line
Ooredoo	90%	92%	93%
Vodafone Qatar	90%	100%	100%

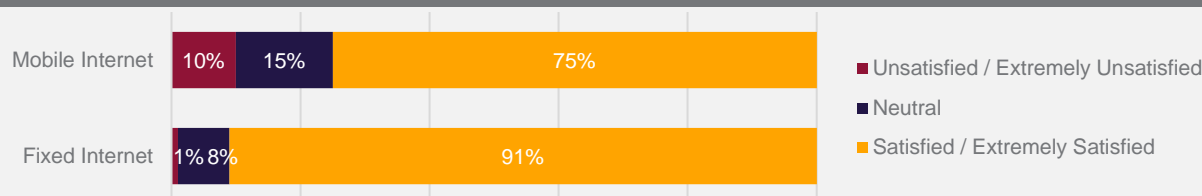
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the speed of data?

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895; users of Leased Line n=74).

3.4.6. Quality of Video Access / Streaming

Figure 20 shows the level of satisfaction with quality of video access and streaming for Mobile Internet and Fixed Internet services. Fixed Internet users are generally more satisfied with the quality of video access and streaming than Mobile Internet users (91% and 75% respectively extremely satisfied/satisfied).

Figure 20: Satisfaction with Quality of Video Access/Streaming



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

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895).

Satisfaction levels with the quality of video access and streaming for Fixed Internet have almost doubled since 2015 (55% up to 91% in 2019). Satisfaction levels have also increased for Mobile Internet by 18 percentage points from 57% in 2015 up to 75% in 2019 (see Table 28).

Table 28: Satisfaction with Quality of Video Access/Streaming (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Internet	57%	75%
Fixed Internet	55%	91%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the quality of video access/streaming?

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895).

Consistent with previous findings, there are low levels of satisfaction for quality of video access and streaming for Mobile Internet services in Al Khor/Al Thakhira, Al Dayyen and Al Sheehaniya. Furthermore, despite consistently high levels of satisfaction for telecommunication services among business customers in Al Rayyan, users in this area only have moderate satisfaction with video access and streaming quality via Mobile Internet (69% extremely satisfied/satisfied) (see Table 29).

Table 29: Satisfaction with Quality of Video Access/Streaming by Area (% Satisfied)

	Mobile Internet	Fixed Internet
Doha	85%	89%
Al Rayyan	69%	90%
Al Wakra	95%	98%
Umm Slal	82%	95%
Al Khor, Al Thakhira	39%	100%
Al Shamal	76%	100%
Al Dayyen	22%	0%
Al Sheehaniya	23%	83%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the quality of video access/streaming?

Base: All Respondents, n=1635 (Doha: 832; Al Rayyan: 426; Al Wakra: 112; Umm Slal: 43; Al Khor/Al Thakhira: 99; Al Shamal: 17; Al Dayyen: 8; Al Sheehaniya: 98).

Vodafone Qatar has slightly higher satisfaction levels compared to Ooredoo on quality of video access and streaming for Mobile Internet and Fixed Internet services (see Table 30).

Table 30: Satisfaction with Quality of Video Access/Streaming by Service Provider (% Satisfied)

	Mobile Internet	Fixed Internet
Ooredoo	87%	91%
Vodafone Qatar	88%	100%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you with the quality of video access/streaming?

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895).

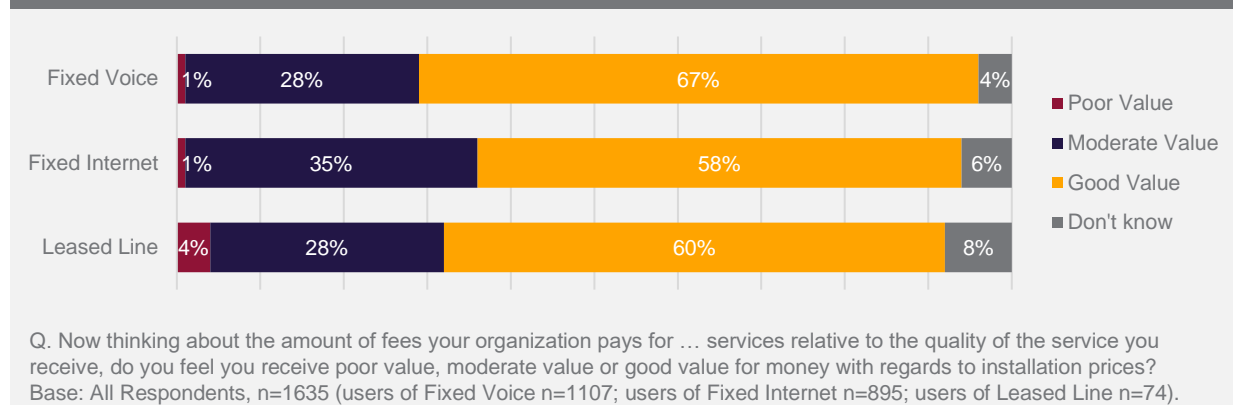
3.5. Business Customers' Value Perceptions

3.5.1. Value Perceptions on Installation Prices

According to the CRA mandate, business customers should be able to access affordable communication services at reasonable prices. Therefore, it is important for the CRA to understand customers perceptions on the pricing of communication services in Qatar and take necessary steps to ensure businesses have access to affordable and high-quality communication services to make them competitive globally.

When asked about the value for money on installation prices for communication services, 67% of business customers report Fixed Voice services to be of good value, followed by Lease Line (60%) and Fixed Internet (58%) (see Figure 21). It is also important to note that the proportion of users who perceive the installation prices to be of poor value is miniscule; 1%, 4% and 1% respectively.

Figure 21: Value Perception on Installation Prices



According to the study results, micro and small enterprises are more likely to perceive the services to be good value regarding installation prices when compared to larger businesses (see Table 31).

Table 31: Value Perception on Installation Prices by Size of Enterprise (% Good Value)

	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	68%	58%	74%
Small Businesses	68%	59%	56%
Medium Businesses	61%	55%	56%
Large Businesses	65%	51%	44%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to installation prices?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

When reviewing the results by service providers, Vodafone Qatar users are more likely to rate the Fixed Voice, Fixed Internet and Leased Line services as good value for money than Ooredoo users (see Table 32).

Table 32: Value Perception on Installation Prices by Service Provider (% Good Value)

	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	68%	57%	59%
Vodafone Qatar	70%	65%	77%

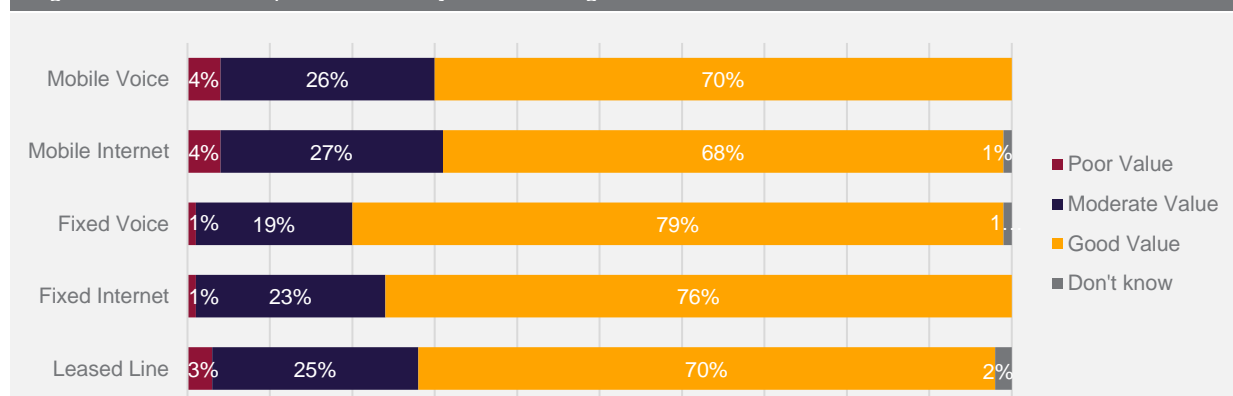
Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to installation prices?

Base: All Respondents, n=1635 (users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

3.5.2. Value Perceptions on Monthly Rental Charges

Figure 22 shows the value for money perceptions on monthly rental charges among business customers for Mobile Voice, Mobile Internet, Fixed Voice, Fixed Internet and Leased Line services. Overall, Fixed Voice and Fixed Internet services are more likely to be considered good value for monthly rental charges when compared to the other services (79% and 76% respectively). At least a quarter of business customers rate Mobile Internet, Mobile Voice and Leased Line services as moderate value (27%, 26% and 25% respectively). The percentage of users who perceive the services to be poor value is low at 4% or less.

Figure 22: Value Perception on Monthly Rental Charges



Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to monthly rental charges?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

When reviewing the results by size of enterprise, the value perception for monthly rental charges is higher among large businesses for Mobile Voice, Mobile Internet, Fixed Voice and Leased Line

services. This finding differs from the installation prices, where smaller sized organizations are more likely to perceive the services to be better value than the larger sized organizations. This better value for money perception among large businesses may be due to special offers or discounted rates provided by the service providers for a larger spend by the bigger enterprises. Micro businesses are more likely to perceive Mobile Voice and Mobile Internet to be moderate value when compared to larger businesses (see Table 33).

Table 33: Value Perception on Monthly Rental Charges by Size of Enterprise (% Good Value)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	68%	65%	80%	78%	74%
Small Businesses	74%	73%	78%	75%	71%
Medium Businesses	73%	75%	74%	75%	61%
Large Businesses	75%	78%	81%	62%	78%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to monthly rental charges?

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Ooredoo users are more likely to perceive most of the services to be good value for the monthly rental charges when compared to Vodafone Qatar users. The only exception is Leased Line services where Vodafone users have a higher value for money perception (see Table 34).

Table 34: Value Perception on Monthly Rental Charges by Service Provider (% Good Value)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	81%	78%	81%	76%	70%
Vodafone Qatar	69%	68%	75%	71%	79%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to monthly rental charges?

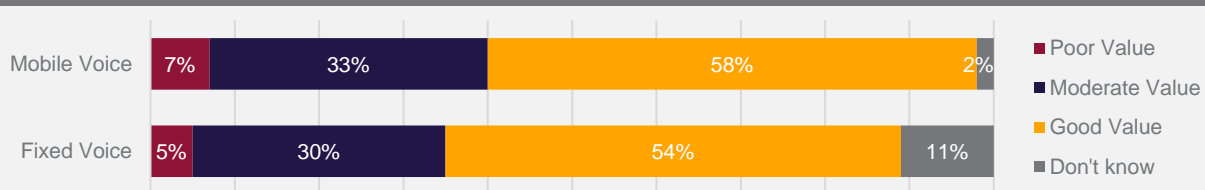
Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

3.5.3. Value Perceptions on International Call Charges

Figure 23 shows the value for money perceptions on international call charges among business customers for Mobile Voice and Fixed Voice services. Just over half of business customers perceive the international call charges of both Mobile Voice and Fixed Voice to be good value (58% and 54% respectively). Around a third of the users of international call charges rate Mobile Voice and Fixed Voice

as moderate value (33% and 30% respectively). A slightly higher 7% of users rate Mobile Voice as poor value compared to 5% of Fixed Voice users.

Figure 23: Value Perception on International Call Charges



Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to international call charges?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Fixed Voice n=1107).

Just over half of micro businesses rate international call charges for Mobile Voice and Fixed Voice as good value (53% and 52% respectively). A slightly higher six in ten respondents from small, medium and large businesses rate Mobile Voice international calls as good value. Medium sized businesses are least likely to rate Fixed Voice international calls as good value when compared to other sized organizations (48%) (see Table 35).

Table 35: Value Perception on International Call Charges by Size of Enterprise (% Good Value)

	Mobile Voice	Fixed Voice
Micro Businesses	53%	52%
Small Businesses	66%	57%
Medium Businesses	61%	48%
Large Businesses	65%	58%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to international call charges?

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Ooredoo users are more likely to perceive Mobile Voice international calls to be good value when compared to Vodafone Qatar users (64% and 55% respectively). However, Vodafone Qatar users are more likely to rate Fixed Voice international calls as good value when compared to Ooredoo users (62% and 54% respectively) (see Table 36).

Table 36: Value Perception on International Call Charges by Service Provider (% Good Value)

	Mobile Voice	Fixed Voice
Ooredoo	64%	54%
Vodafone Qatar	55%	62%

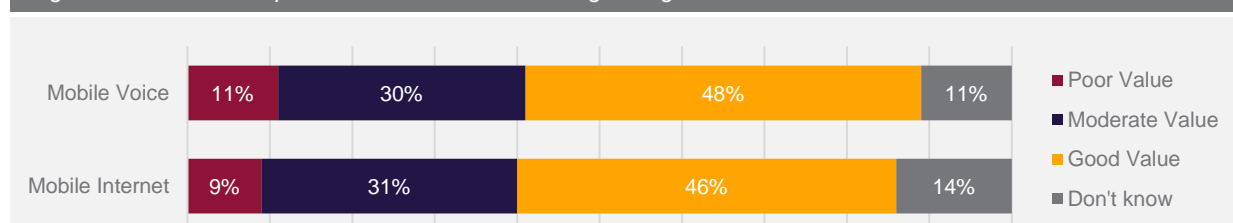
Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to international call charges?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Fixed Voice n=1107).

3.5.4. Value Perceptions on International Roaming Charges

Figure 24 shows the value for money perceptions on international roaming charges among business customers for Mobile Voice and Mobile Internet services. Less than half of business customers perceive the international roaming charges of both Mobile Voice and Mobile Internet to be good value (48% and 46% respectively). Compared to other value for money perceptions, business customers are more likely to perceive international roaming charges to be moderate or poor value. Around a third of the users of international roaming rate Mobile Voice and Mobile Internet as moderate value (30% and 31% respectively) and around one in ten rate them as poor value.

Figure 24: Value Perception on International Roaming Charges



Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530).

Consistent with the value for money perceptions of international call charges, large businesses are more likely to perceive international roaming charges to be good value when compared to smaller sized enterprises. Medium-sized businesses are least likely to rate the Mobile Voice and Internet roaming charges as good value (41% and 44% respectively) (see Table 37).

Table 37: Value Perception on International Roaming Charges by Size of Enterprise (% Good Value)

	Mobile Voice	Mobile Internet
Micro Businesses	46%	44%
Small Businesses	52%	51%
Medium Businesses	41%	44%
Large Businesses	53%	61%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Ooredoo users are more likely to perceive Mobile Voice and Internet international roaming charges as good value when compared to Vodafone Qatar users. Just over a third of Vodafone Qatar users rate the roaming charges as good value (36% Mobile Voice and 39% Mobile Internet) (see Table 38).

Table 38: Value Perception on International Roaming Charges by Service Provider (% Good Value)

	Mobile Voice	Mobile Internet
Ooredoo	55%	54%
Vodafone Qatar	36%	39%

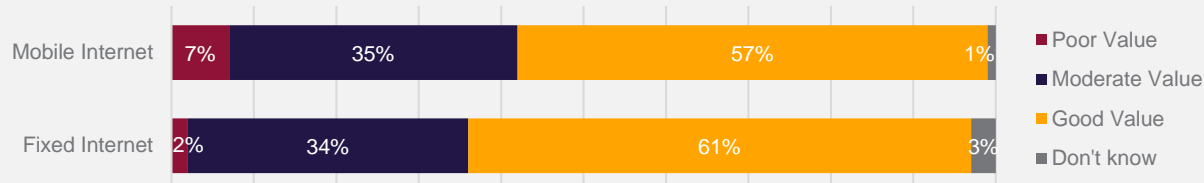
Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530).

3.5.5. Value Perceptions on Data Charges

Figure 25 shows the value for money perceptions on data charges among business customers for Mobile Internet and Fixed Internet services. A third of the users of data rate Mobile and Fixed Internet data charges as moderate value (35% and 34% respectively). A higher proportion of business customers rate Mobile Internet data charges as poor value when compared to Fixed Internet fees (7% and 2% respectively).

Figure 25: Value Perception on Data Charges



Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895).

Consistent with the value for money perceptions of international call and roaming charges, large businesses are more likely to perceive internet data charges to be good value when compared to smaller sized enterprises (see Table 39).

Table 39: Value Perception on Data Charges by Size of Enterprise (% Good Value)

	Mobile Internet	Fixed Internet
Micro Businesses	52%	61%
Small Businesses	66%	62%
Medium Businesses	61%	60%
Large Businesses	68%	60%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530).

Ooredoo users are slightly more likely to perceive Mobile Internet data charges as good value when compared to Vodafone Qatar users (63% and 61% respectively). Two thirds of Vodafone Qatar users (67%) rate the Fixed Internet data charges as good value, a slightly higher proportion than Ooredoo users (61%) (see Table 40).

Table 40: Value Perception on Data Charges by Service Provider (% Good Value)

	Mobile Internet	Fixed Internet
Ooredoo	63%	61%
Vodafone Qatar	61%	67%

Q. Now thinking about the amount of fees your organization pays for ... services relative to the quality of the service you receive, do you feel you receive poor value, moderate value or good value for money with regards to?

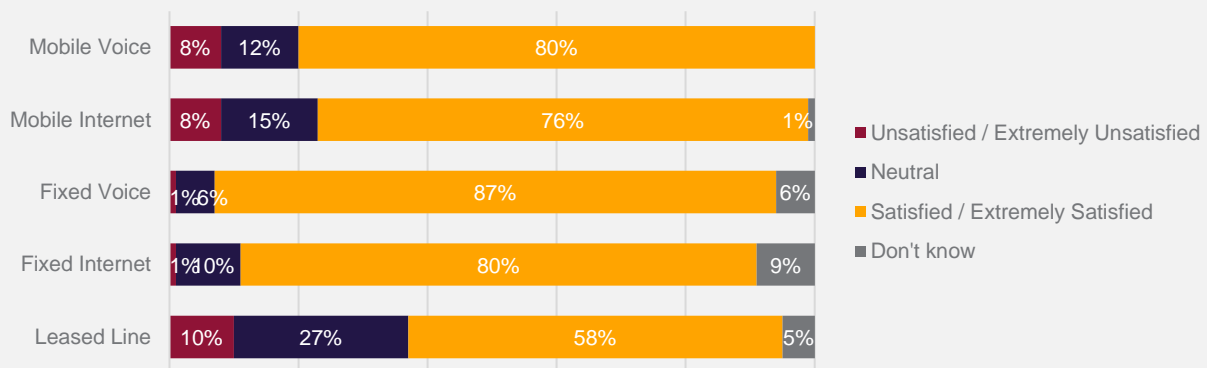
Base: All Respondents, n=1635 (users of Mobile Internet n=1530; users of Fixed Internet n=895).

3.6. Business Customers' Perceptions on Rate Plans / Tariffs

3.6.1. Variety of Rate Plans

The respondents were asked to rate their level of satisfaction with the variety of rate plans for the telecommunication services that are provided to them. The highest satisfaction level reported by users is for Fixed Voice services, with 87% of Fixed Voice users being either 'extremely satisfied' or 'satisfied' with the variety of the rate plans. More than three-quarters of Mobile Voice (80%), Fixed Internet (80%) and Mobile Internet users (76%) are either 'extremely satisfied' or 'satisfied' with the variety of rate plans. Leased Lines services users report the lowest satisfaction levels in comparison to other users, with just over half of the respondents (58%) being either 'extremely satisfied' or 'satisfied' with the variety of the rate plans (see Figure 26).

Figure 26: Satisfaction with the Variety of Rate Plans



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

There are some observed differences in the satisfaction levels with the variety of rate plans for services provided when comparing by the size of the business. For example, micro businesses are most likely to be satisfied with the variety of rate plans if they are Fixed Voice users (88%) while small, medium and large businesses are more likely to be satisfied with the variety of rate plans if they are Mobile Voice (91%, 89% and 100% respectively) (see Table 41).

Table 41: Satisfaction with the Variety of Rate Plans by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	72%	71%	88%	82%	48%
Small Businesses	91%	86%	84%	77%	50%
Medium Businesses	89%	79%	85%	80%	61%
Large Businesses	100%	88%	82%	95%	100%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with variety of rate plans?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Overall, respondents who are provided their services through Ooredoo have a higher satisfaction rating, with the variety of the rate plans than those who are subscribed to Vodafone Qatar. While the differences in satisfaction are not drastically different for Mobile Voice (91% for Ooredoo, 88% for Vodafone) and Mobile Internet users (88% for Ooredoo, 85% for Vodafone), there is a considerable difference in satisfaction with the variety of rate plans for Fixed Voice, Fixed internet and Leased Line users (see Table 42).

Table 42: Satisfaction with the Variety of Rate Plans by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	91%	88%	89%	82%	68%
Vodafone Qatar	88%	85%	65%	70%	23%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with variety of rate plans?
Base: All Respondents, n=1635.

Generally, there has been an increase in the satisfaction levels with the variety plans for various service users in 2019 compared to 2015 (Table 43). Mobile Internet users' satisfaction with the variety of rate plan has the highest increase, with a 76% satisfaction score in 2019 compared to 52% in 2015.

Table 43: Satisfaction with the Variety of Rate Plans (2019 vs. 2015) (% Satisfied)

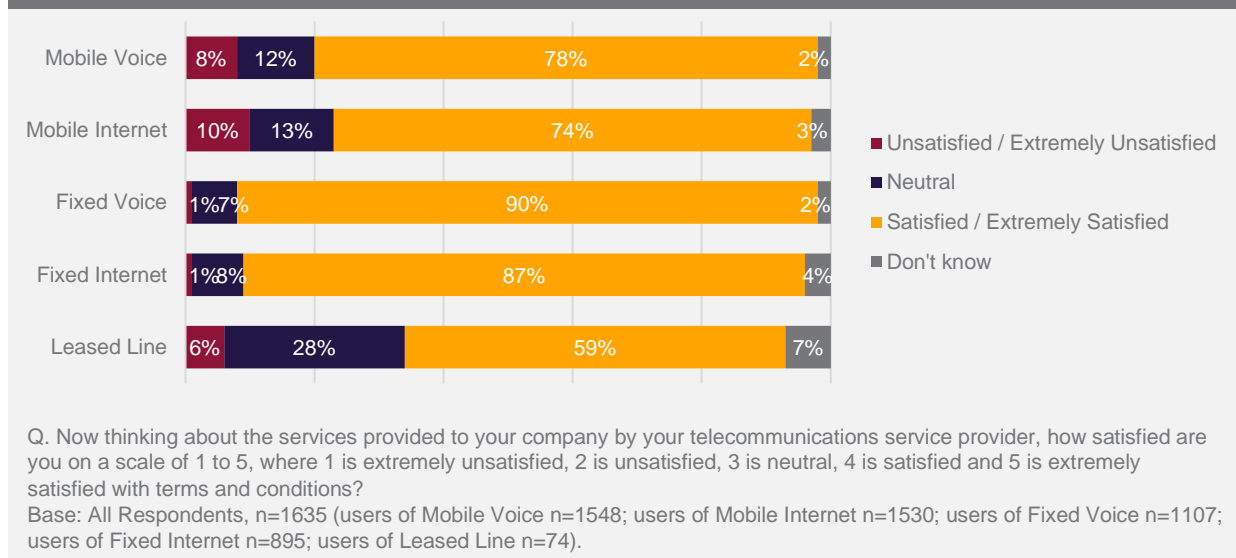
	2015	2019
Sample	1096	1635
Mobile Voice	68%	80%
Mobile Internet	52%	76%
Fixed Voice	66%	87%
Fixed Internet	64%	80%
Leased Line	51%	58%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with variety of rate plans?
Base: All Respondents, n=1635.

3.6.2. Clear Terms and Conditions

The respondents were asked to indicate their level of satisfaction with the terms and conditions for the services that are provided to them. Most users of Fixed Voice (90%) and Fixed Internet (87%) are either 'satisfied' or 'extremely satisfied' with the terms and conditions. Mobile Voice and Mobile Internet users have similar satisfaction levels, with around three-quarters of respondents satisfied with the terms and conditions (78% and 74% respectively). More than half of Leased Line users (59%) are either 'satisfied' or 'extremely satisfied' with the terms and conditions (see Figure 27).

Figure 27: Satisfaction with the Clear Terms and Conditions



Overall, large business service users are more likely to be satisfied with the terms and conditions provided when compared to micro, small and medium businesses. However, large businesses are least likely to be satisfied if they are Mobile Internet users compared to other services. Micro and small businesses who use Fixed Voice, Fixed Internet and Leased Line services have similar satisfaction levels (see Table 44).

Table 44: Satisfaction with the Clear Terms and Conditions by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	73%	70%	89%	87%	50%
Small Businesses	88%	83%	92%	87%	52%
Medium Businesses	87%	80%	84%	83%	67%
Large Businesses	93%	83%	97%	92%	100%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with terms and conditions?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Overall, respondents who are provided their services through Ooredoo have a similar satisfaction rating, with the terms and conditions, to respondents who are subscribed to Vodafone Qatar, specifically Mobile Voice and Mobile Internet users. Leased Line users are more likely to be satisfied with the terms and conditions if they are subscribed to Ooredoo (see Table 45).

Table 45: Satisfaction with the Clear Terms and Conditions by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	91%	86%	92%	88%	68%
Vodafone Qatar	89%	86%	83%	82%	31%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with terms and conditions?
Base: All Respondents, n=1635.

The satisfaction levels with the terms and conditions for all services provided by both service providers increased in 2019 since 2015. The most noticeable increase in satisfaction is for Fixed Voice users, which increased from 70% in 2015 to 90% in 2019 (see Table 46).

Table 46: Satisfaction with the Clear Terms and Conditions (2019 vs. 2015) (% Satisfied)

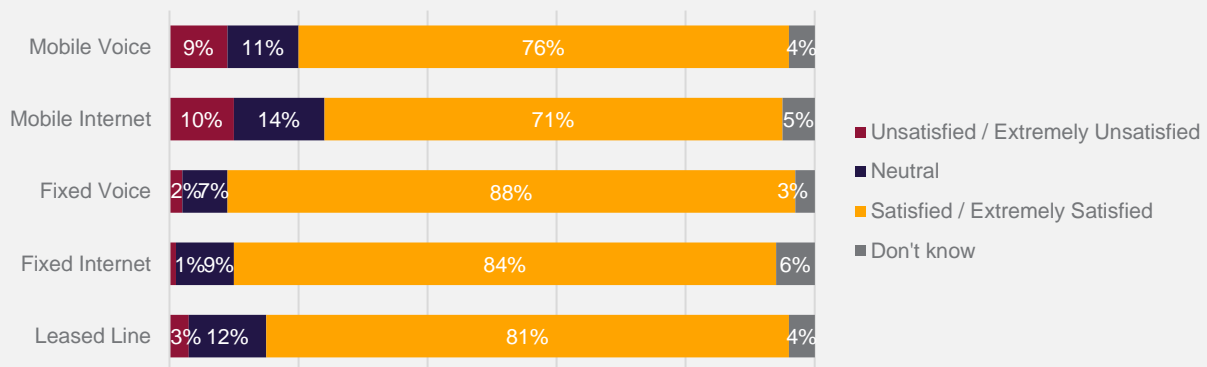
	2015	2019
Sample	1096	1635
Mobile Voice	72%	78%
Mobile Internet	50%	74%
Fixed Voice	70%	90%
Fixed Internet	66%	87%
Leased Line	52%	59%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with terms and conditions?
Base: All Respondents, n=1635.

3.6.3. Transparency of Prices

Another aspect of users' satisfaction with services provided to them, is their satisfaction with the transparency of prices. Respondents were asked to indicate how satisfied they are with the transparency of prices for the different services they are provided. More than four out of five of Fixed Voice (88%), Fixed Internet (84%) and Leased Line (81%) users are either satisfied or extremely satisfied with the transparency of prices. More than three-quarters (76%) of Mobile Voice and 71% of Mobile Internet users are satisfied with the transparency of prices (see Figure 28).

Figure 28: Satisfaction with the Transparency of Prices



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

When comparing satisfaction with transparency of prices across the businesses by size, all users are more likely to be satisfied if they are a large business. Mobile Voice and Mobile Internet users are least likely to be satisfied if they are a micro business, with satisfaction levels of 71% and 66% respectively. Fixed Voice users are least likely to be satisfied with the transparency of prices if they are a medium business, while Fixed Internet users are least likely to be satisfied if they are a small business (see Table 47).

Table 47: Satisfaction with the Transparency of Prices by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	71%	66%	89%	85%	78%
Small Businesses	83%	80%	88%	81%	84%
Medium Businesses	82%	76%	83%	82%	78%
Large Businesses	88%	85%	92%	97%	89%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with transparency of prices?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Similar to results from other aspects rated, users of all services provided by Ooredoo have a higher satisfaction level with the transparency of prices than those who are subscribed to Vodafone Qatar. The most significant difference is noticed in the Fixed Voice users with 91% satisfaction rate for Ooredoo subscribers, compared to 75% satisfaction rate for Vodafone subscribers (see Table 48).

Table 48 Satisfaction with the Transparency of Prices by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	88%	82%	91%	85%	86%
Vodafone Qatar	83%	80%	75%	75%	79%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with transparency of prices?
Base: All Respondents, n=1635.

Overall, satisfaction levels with the transparency of prices increased in 2019 from 2015. Mobile Internet users' satisfaction saw the most noticeable increase of 15% (from 56% in 2015 to 71% in 2019), followed by Fixed Voice and Fixed Internet both increasing by 13% (see Table 49).

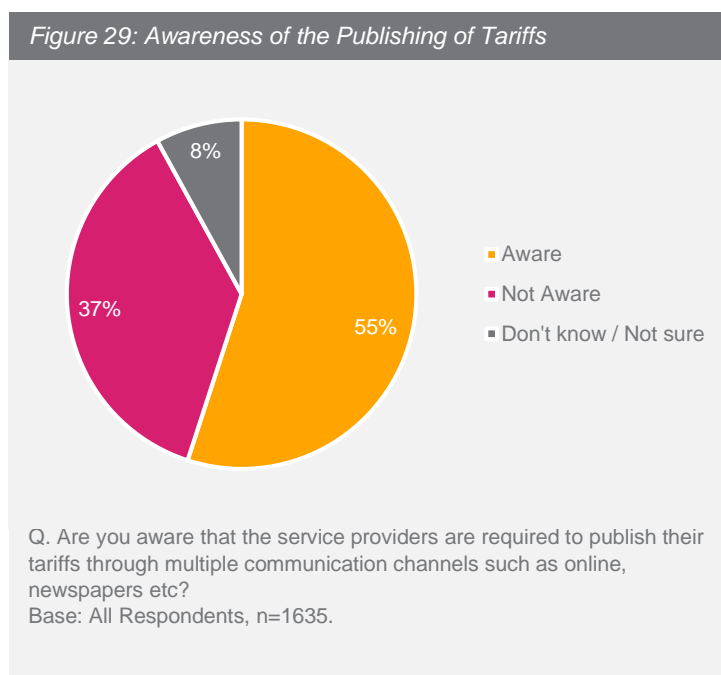
Table 49: Satisfaction with the Transparency of Prices (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	73%	76%
Mobile Internet	56%	71%
Fixed Voice	75%	88%
Fixed Internet	71%	84%
Leased Line	76%	81%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with transparency of prices?
Base: All Respondents, n=1635.

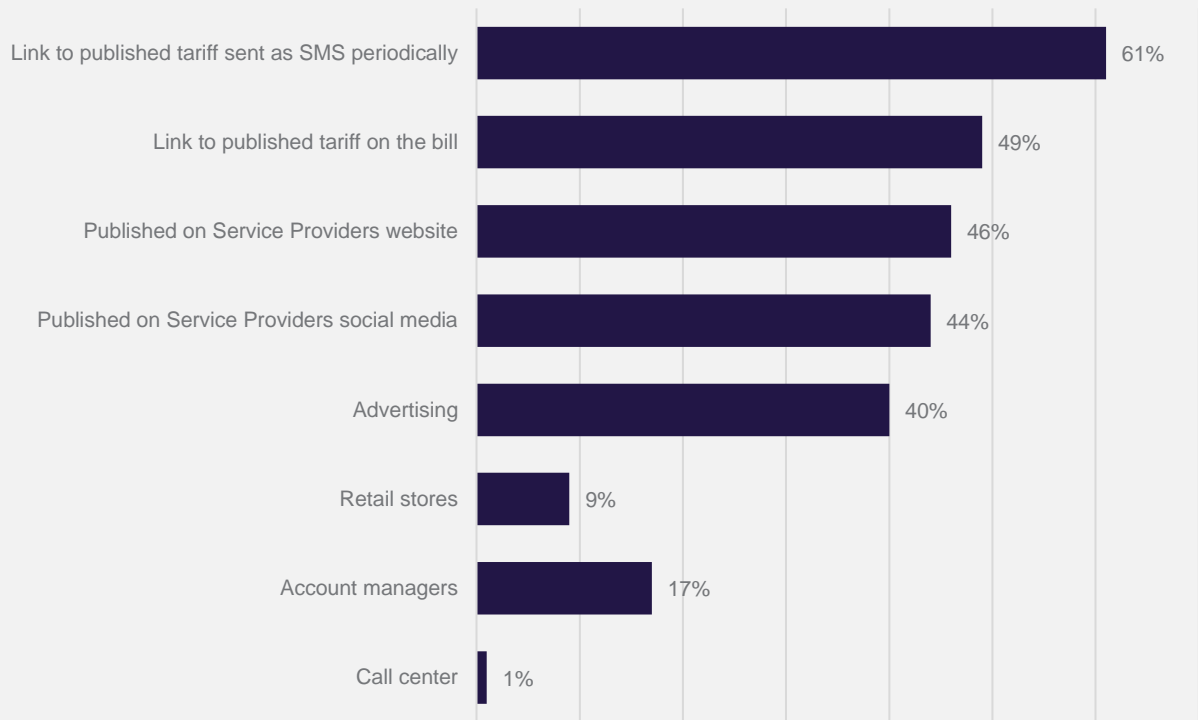
3.6.4. Publishing of Tariffs

The respondents were asked whether they are aware that service providers are required by CRA to publish their tariffs, and which channels they prefer to access information on their tariff plan. More than half of the respondents (55%) are aware that service providers are required to publish their tariffs through multiple communication channels, which is a significant increase from 2015 where the awareness was only at 30% (see Figure 29).



The most preferred method of accessing information on tariff plans is through a link sent via SMS on a periodical basis (mentioned by 61% of respondents). Other popular methods selected by close to half of the respondents is through a link to the tariff on the bill (49%) or via the service providers' website (46%) or social media site (44%). Some respondents mention alternative ways of accessing the plans such as through account managers (17%) and retail stores (9%) (see Figure 30).

Figure 30: Accessing Information on Tariff Plans



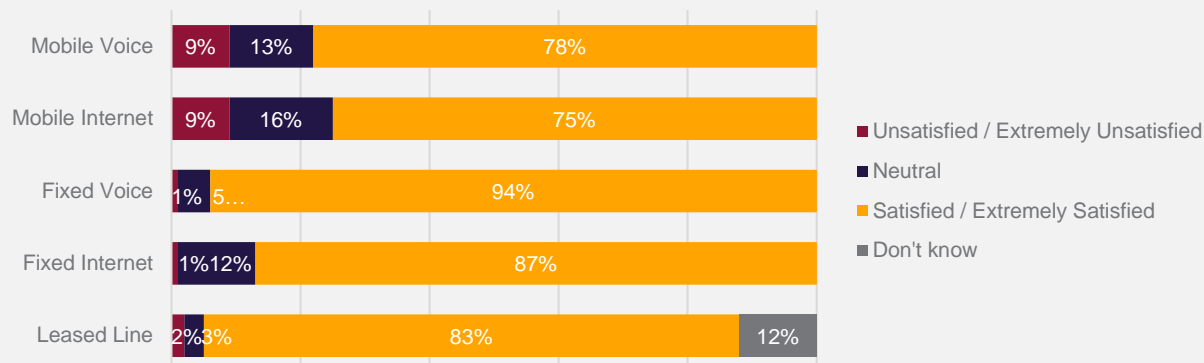
Q. How would like to access information on the tariff plans?
Base: All Respondents, n=1635.

3.7. Business Customers' Perceptions on Provisioning

3.7.1. Ease of Purchasing Services

To understand business customers' perceptions on provisioning, respondents were asked to rate their satisfaction with the ease of purchasing services for each service that their company uses. Almost all Fixed Voice users (94%) are satisfied with the ease of purchasing services, followed by Fixed Internet users (87%) and Leased Line users (83%). Around three-quarters of Mobile Voice and Mobile Internet users (78% and 75% respectively) are either 'satisfied' or 'extremely satisfied' with the ease of purchasing their service (see Figure 31).

Figure 31: Satisfaction with the Ease of Purchasing Services



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Similar to other customer perceptions, when compared by size, large business users of all services are generally more satisfied with the services provided to them. Micro businesses who are Mobile Voice, Mobile Internet, Fixed Voice or Fixed Internet users have the lowest satisfaction rating when compared to larger businesses, with just over two-thirds being 'satisfied' or 'extremely satisfied' (70%, 68%, 92% and 84% respectively). Leased Line users are least likely to be satisfied if they are a small business with a 67% satisfaction rating (see Table 50).

Table 50: Satisfaction with the Ease of Purchasing Services by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	70%	68%	92%	84%	73%
Small Businesses	90%	87%	94%	87%	67%
Medium Businesses	90%	80%	93%	91%	72%
Large Businesses	95%	98%	97%	97%	78%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Satisfaction levels of various service users differ based on their service provider as shown in Table 51. For example, Mobile Voice and Fixed Internet users who are subscribed to Vodafone Qatar as a service provider, are more likely to be satisfied with the ease of purchasing services than those subscribed to Ooredoo. On the other hand, Mobile Internet, Fixed Voice and Leased Line users who are subscribed to Ooredoo are more likely to be satisfied with the ease of purchasing services.

Table 51: Satisfaction with the Ease of Purchasing Services by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	89%	87%	95%	87%	79%
Vodafone Qatar	90%	83%	93%	95%	50%

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

Base: All Respondents, n=1635.

Overall, satisfaction levels with the ease of purchasing a service increased in 2019 from 2015 for all services. Mobile Internet users' satisfaction saw the most noticeable increase of 21% (from 54% in 2015 to 75% in 2019) (see Table 52).

Table 52: Satisfaction with the Ease of Purchasing Services (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	75%	78%
Mobile Internet	54%	75%
Fixed Voice	74%	94%
Fixed Internet	71%	87%
Leased Line	67%	83%

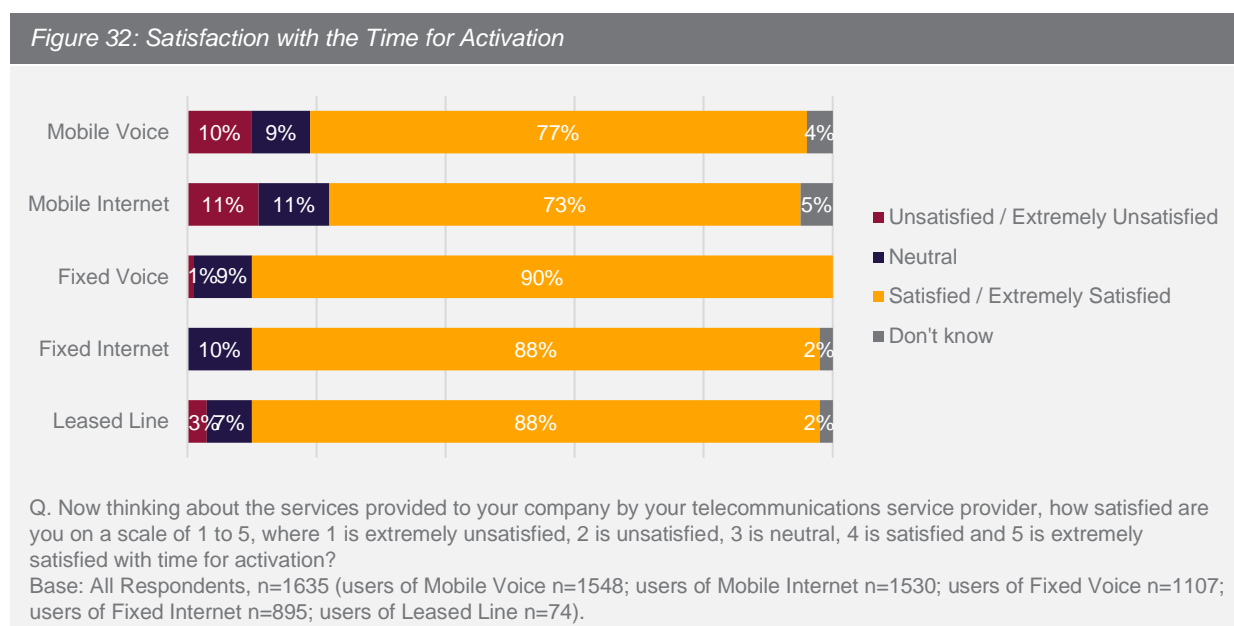
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with ease of purchasing services?

Base: All Respondents, n=1635.

3.7.2. Time for Service Activation

Another attribute which is included in measuring business customers' perceptions on provisioning is their satisfaction with the activation time of services. Satisfaction levels with this attribute are generally very similar to satisfaction with ease of purchasing services. A high percentage of Fixed Voice users (90%) are satisfied with the time it takes to activate the service, followed by Fixed Internet users and

Leased Line users (88%). Around three-quarters of Mobile Voice and Mobile Internet users (77% and 73% respectively) are either 'satisfied' or 'extremely satisfied' with the time taken to activate the mobile services (see Figure 32).



Satisfaction levels with time for activation differ considerably when compared by business size across all services used (see Table 53). For example, Mobile Voice users are more likely to be satisfied with the activation time if they are a medium or large business, while they are least likely to be satisfied if they are a micro business. However, Fixed Internet users are more likely to be satisfied with the activation time if they are micro or small business (88%) compared with medium (84%) and large businesses (86%).

Table 53: Satisfaction with the Time for Activation by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	72%	69%	88%	88%	91%
Small Businesses	83%	78%	92%	88%	88%
Medium Businesses	87%	83%	89%	84%	94%
Large Businesses	87%	85%	97%	86%	75%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with time for activation?
Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Although differences are not substantial, users of all services except for Fixed Internet and Leased Lines services are more likely to have a higher satisfaction rate with the time for activation if their service provider is Ooredoo (see Table 54).

Table 54: Satisfaction with the Time for Activation by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	88%	85%	91%	88%	87%
Vodafone Qatar	87%	80%	88%	89%	100%

Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with time for activation?
Base: All Respondents, n=1635.

Overall, satisfaction levels with the time for activation for a service increased in 2019 from 2015 for all services. Leased Line users' satisfaction increased drastically by 36% (from 52% in 2015 to 88% in 2019) (see Table 55).

Table 55: Satisfaction with the Time for Activation (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	69%	77%
Mobile Internet	61%	73%
Fixed Voice	65%	90%
Fixed Internet	63%	88%
Leased Line	52%	88%

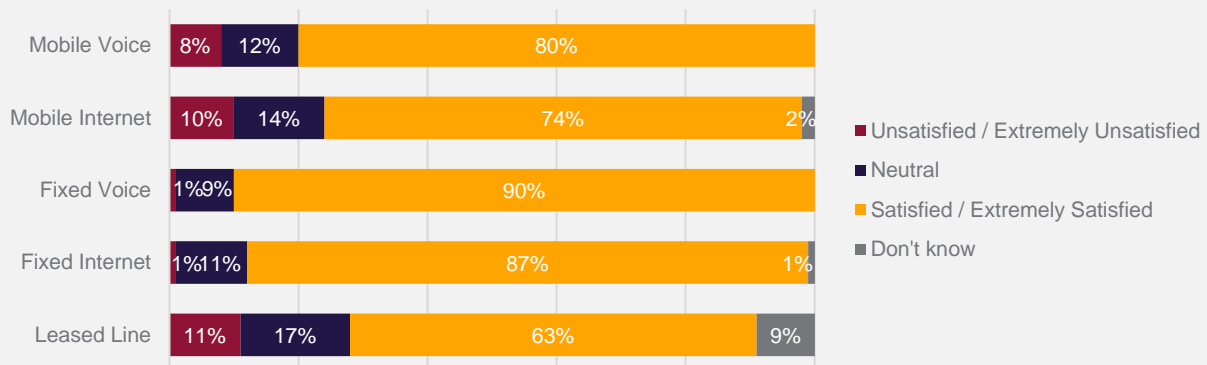
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with time for activation?
Base: All Respondents, n=1635.

3.7.3. Choice of Contract Length and Duration

The respondents were also asked to rate their satisfaction levels with the choices available for contract length and their duration. Satisfaction levels vary depending on the type of services, with Fixed Voice users being the most satisfied with choice of contract length and duration (90%), followed closely by Fixed Internet users (87%). Approximately three-quarters of Mobile Voice and Mobile Internet users are either 'extremely satisfied' or 'satisfied' with contract length and duration choices available to them

(80% and 74% respectively). The service with lowest satisfaction rating is Leased Line, with just under two-thirds of respondents (64%) saying they are either extremely satisfied or satisfied (see Figure 33).

Figure 33: Satisfaction with the Contract Choice & Duration



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Consistent with satisfaction levels with ease of purchasing services and time for service activation, satisfaction with time choice of contract length and duration, larger businesses are more likely to be satisfied when comparing them to micro, small and medium businesses. Mobile Voice users are least likely to be satisfied with contract length and duration choices available if they are a micro business, while Leased Line users are least likely to be satisfied if they are a small business. Fixed Internet users are least likely to be satisfied if they are from a medium sized business (86%) (see Table 56).

Table 56: Satisfaction with the Contract Choice & Duration by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	74%	68%	85%	86%	57%
Small Businesses	89%	83%	94%	89%	56%
Medium Businesses	86%	78%	96%	85%	67%
Large Businesses	95%	85%	97%	97%	100%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Ooredoo and Vodafone Qatar subscribers are both as likely to be satisfied with the contract length and duration offered. However, when it comes to mobile services and Leased Line users, Ooredoo subscribers are more likely to be satisfied than those subscribed to Vodafone Qatar. As for Fixed Voice, Vodafone subscribers are more likely to be satisfied with the choice of contract length and duration offered to them (see Table 57).

Table 57: Satisfaction with the Contract Choice & Duration by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	91%	86%	91%	88%	68%
Vodafone Qatar	86%	81%	93%	88%	54%

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

Base: All Respondents, n=1635.

When comparing satisfaction levels for the year 2015 to 2019, Leased Line user satisfaction significantly dropped from 85% to 63%, while all other users' satisfaction increased (see Table 58).

Table 58: Satisfaction with the Contract Choice & Duration (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	69%	80%
Mobile Internet	53%	74%
Fixed Voice	72%	90%
Fixed Internet	65%	87%
Leased Line	85%	63%

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

Base: All Respondents, n=1635.

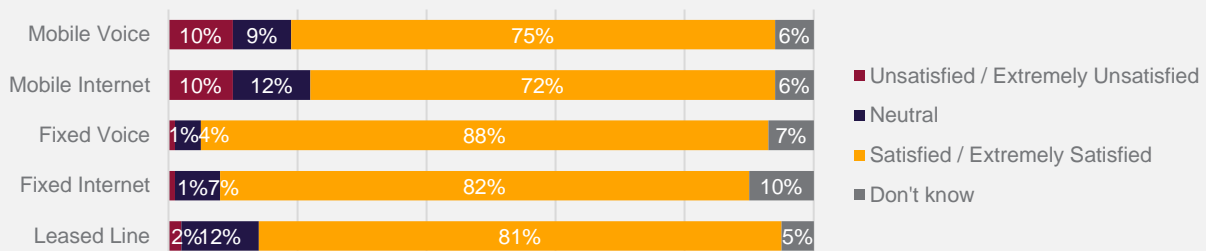
3.8. Business Customers' Perceptions on Billing and Payment

3.8.1. Options Available for Bill Payments

Business customers were also asked about their perceptions on the bill payment options of telecommunication companies. Highest satisfaction on the bill payment options is noted on Fixed Voice (88%) followed by Fixed Internet (82%) and Leased Line (81%).

Lower satisfaction levels are observed on the Mobile Voice and Mobile Internet services (75% and 72% consecutively). Each of these services also garnered a 10% total dissatisfaction rating for their bill payment options. Meanwhile, 12% of business customers have neutral perceptions on the bill payment options of Mobile Internet and Leased Line (see Figure 34).

Figure 34: Satisfaction with the Options Available for Bill Payments



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

By business size, micro businesses are the least satisfied with the bill payment options of Mobile Voice services (71%) while the highest satisfaction score is noted among large businesses at 85% followed by medium businesses at 84% and small businesses at 82%. Similarly, Mobile Internet gets the lowest satisfaction among micro businesses (68%) whilst the highest satisfaction among large businesses (88%). Meanwhile, across business sizes, satisfaction scores on the bill payment options for Fixed Voice, Fixed Internet and Leased Line are within parity levels except among large businesses for Leased Line where satisfaction dipped at 79% (see Table 59).

Table 59: Satisfaction with the Options Available for Bill Payments by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	71%	68%	89%	83%	83%
Small Businesses	82%	79%	86%	80%	83%
Medium Businesses	84%	77%	88%	84%	82%
Large Businesses	85%	88%	89%	86%	75%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Table 60 shows the options available for bill payments by service provider. Highest satisfaction is noted for Ooredoo on Fixed Voice (90%) followed by Mobile Voice (86%), Mobile Internet and Fixed Internet at 84% respectively. However, business customers do not seem as satisfied with the bill payment options of Ooredoo for Leased Line at 80%. In contrast, Vodafone Qatar earns higher satisfaction on Leased Line at 100% but scores low on Fixed Voice (68%) and Fixed Internet (66%). Meanwhile, satisfaction with Vodafone's Mobile Voice (84%) and Mobile Internet (82%) remains slightly lower than Ooredoo.

Table 60: Satisfaction with the Options Available for Bill Payments by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	86%	84%	90%	84%	80%
Vodafone Qatar	84%	82%	68%	66%	100%

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

Base: All Respondents, n=1635.

When comparing 2019 satisfaction levels versus 2015, satisfaction scores on the bill payment options across all services have seen improvements since 2015. Biggest improvements are noted in Fixed Voice, 88% (+12% vs. 2015), Fixed Internet, 82% (+10% vs. 2015) and Leased Line, 81% (+9% vs. 2015) (see Table 61).

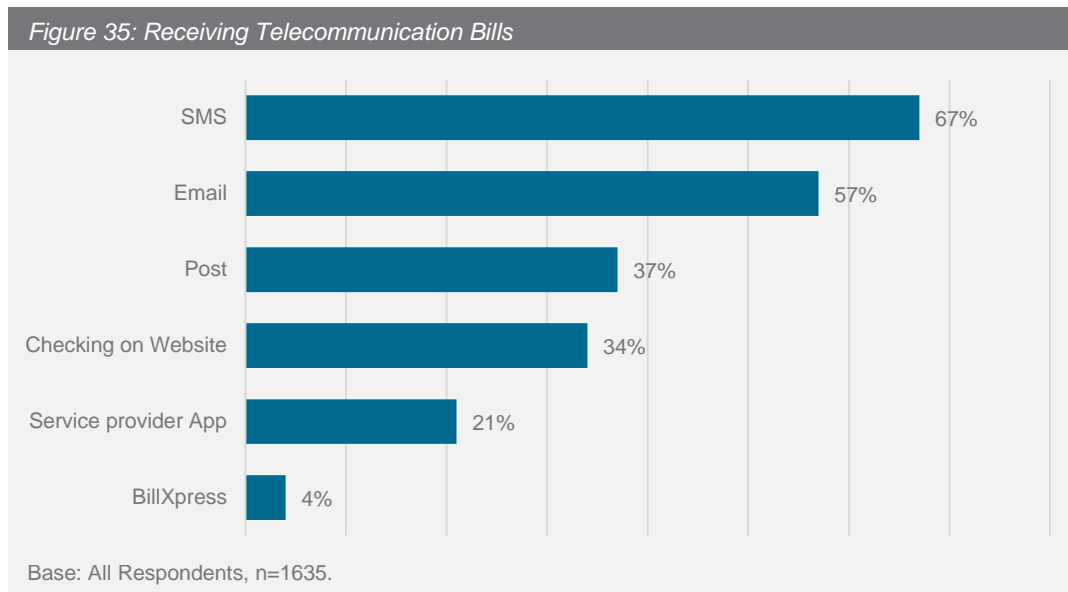
Table 61: Satisfaction with the Options Available for Bill Payments (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	70%	75%
Mobile Internet	64%	72%
Fixed Voice	72%	88%
Fixed Internet	72%	82%
Leased Line	72%	81%

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

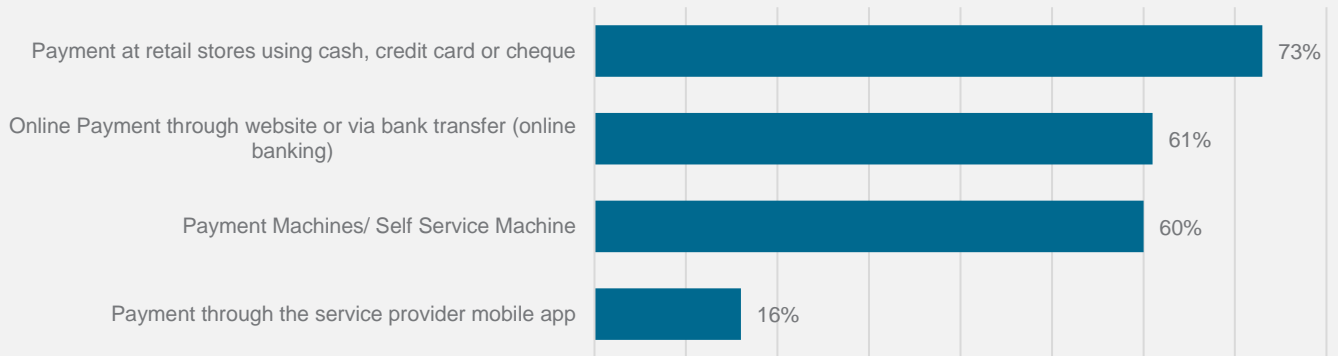
Base: All Respondents, n=1635.

Business customers were asked about their preferred manner of receiving telecommunication bills and method of payment. The majority of business customers prefer to receive paperless telecommunication bills via SMS (67%) and email (57%). Meanwhile, more than a third still prefer the post (37%) or checking on the website (34%). About a fifth (21%) prefer receiving bills through service provider apps while only 4% are inclined to receive via the service BillXpress of Ooredoo (4%) (see Figure 35).



The most common method of paying telecommunication bills among business customers is through retail stores using cash, credit card or cheque (73% of business customers use this method). While, 61% pay online through the website or via bank transfer and another 60% pay through payment machines or self-service machines. Only 16% pay through service provider mobile apps (see Figure 36).

Figure 36: Paying Telecommunication Bills

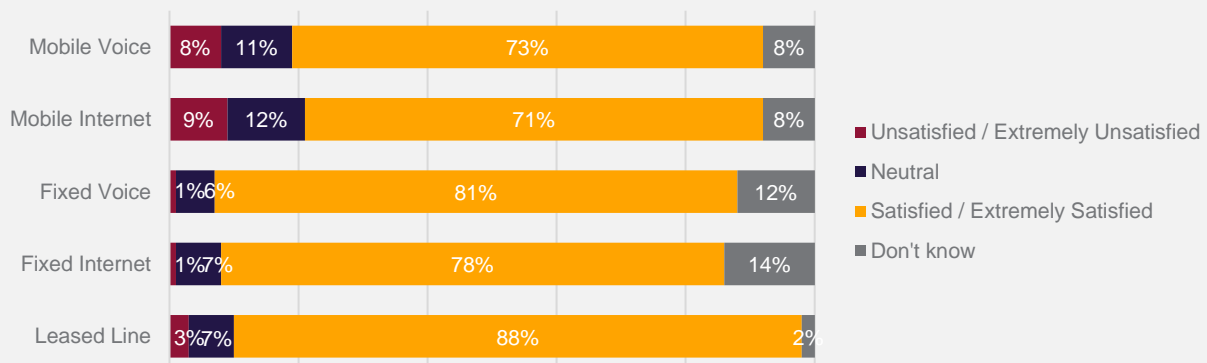


Q. What method do you prefer to pay the bills?
Base: All Respondents, n=1635.

3.8.2. Regularity of Receiving Bills

Respondents were asked about their satisfaction on the regularity of receiving bills for services. Figure 37 shows satisfaction on the regularity of receiving bills for the service. Highest satisfaction is noted on Leased Line at 88% with Fixed Voice and Fixed Internet trailing behind at 81% and 78% respectively. Meanwhile, the lowest satisfaction scores can be observed for Mobile Voice (73%) and Mobile Internet (71%). Higher dissatisfied scores can also be noted on these services (Mobile Voice 8% and Mobile Internet 9%).

Figure 37: Satisfaction with the Regularity of Receiving Bills



Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the regularity of receiving bills for the service?
Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

In terms of regularity of receiving bills by business size, micro-businesses show the lowest satisfaction ratings in most services with Mobile Internet having only 65% of business customers claiming to be satisfied. This is followed by Mobile Voice (67%), Fixed Internet (77%), Fixed Voice (78%) and Leased Line (82%). Among small businesses, the regularity of receiving bills for Leased Line is highly satisfactory at 92%. Satisfaction ratings on Fixed Voice (84%), Mobile Voice (83%), Mobile Internet (80%), and Fixed Internet (77%) are still trailing behind. Meanwhile, satisfaction among medium businesses is highest on the Leased Line (89%) followed by Fixed Voice (87%), Mobile Internet (84%), Fixed Internet (84%) and Mobile Voice (82%). Large businesses have a 100% satisfaction on the regularity of receiving bills on their Leased Line. However, their satisfaction levels on Fixed Voice (86%), Mobile Internet (83%), Mobile Voice (83%) and Fixed Internet (76%) remain lower (see Table 62).

Table 62: Satisfaction with the Regularity of Receiving Bills by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	67%	65%	78%	77%	82%
Small Businesses	83%	80%	84%	77%	92%
Medium Businesses	82%	84%	87%	84%	89%
Large Businesses	83%	83%	86%	76%	100%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Comparing by service providers, Ooredoo gains higher satisfaction on regularity of receiving bills than Vodafone Qatar on Fixed Voice (85% vs. 53%) and Fixed Internet (80% vs. 57%). On the other hand, Vodafone Qatar edges against Ooredoo on Leased Line (100% vs. 91%). Meanwhile, Ooredoo and Vodafone Qatar are on par when it comes to the satisfaction of business customers on services like Mobile Voice (83% vs. 84%) and Mobile Internet (82% vs. 81%) (see Table 63).

Table 63: Satisfaction with the Regularity of Receiving Bills by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	83%	82%	85%	80%	91%
Vodafone Qatar	84%	81%	53%	57%	100%

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

Base: All Respondents, n=1635.

Satisfaction on the regularity of receiving bills in 2019 sees improvement on Leased Lines (88% in 2019 vs. 72% in 2015) and Fixed Voice (81% in 2019 vs. 76% in 2015). However, slight declines can be noted on services like Fixed Internet (78% in 2019 vs. 79% in 2015), Mobile Voice (73% in 2019 vs. 74% in 2015) and Mobile Internet (71% in 2019 vs. 72% in 2015) (see Table 64).

Table 64: Satisfaction with the Regularity of Receiving Bills (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	74%	73%
Mobile Internet	72%	71%
Fixed Voice	76%	81%
Fixed Internet	79%	78%
Leased Line	72%	88%

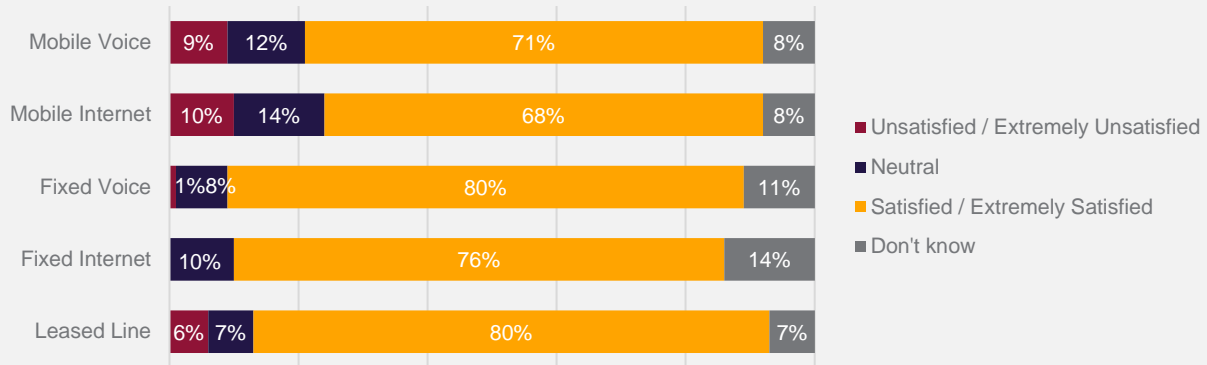
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the regularity of receiving bills for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

Base: All Respondents, n=1635.

3.8.3. Accuracy of the Bills

Business customers were also asked to rate their satisfaction on the accuracy of bills for services. Highest satisfaction can be noted on the Fixed Voice (80%) and Leased Line (80%). This is followed by Fixed Internet at 76% and Mobile Voice at 71%. Satisfaction on the accuracy of bills on the Mobile Internet is the lowest at only 68%. Meanwhile, some remain highly neutral with services like the Mobile Internet (14%), Mobile Voice (12%) and Fixed Internet (10%). Higher dissatisfaction scores can be noted, meanwhile, on Mobile Internet (10%) and Mobile Voice (9%) (see Figure 38).

Figure 38: Satisfaction with the Accuracy of the Bills



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Satisfaction on the accuracy of bills for service is highest among the Leased Line at 100%, particularly, among large businesses. Overall, large businesses show the highest satisfaction rating across business size. However, lowest satisfaction levels can be noted on Mobile Internet (64%) and Mobile Voice (68%) among the micro businesses. Among small businesses, Fixed Voice is rated the highest at 79% while the lowest is Fixed Internet at 74%. Meanwhile, among medium businesses, they are most satisfied with the Leased Line (83%) and are least satisfied with Mobile Internet (70%) (see Table 65).

Table 65: Satisfaction with the Accuracy of the Bills by Business Size (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	68%	64%	81%	77%	77%
Small Businesses	78%	75%	79%	74%	76%
Medium Businesses	77%	70%	80%	76%	83%
Large Businesses	83%	80%	81%	83%	100%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

On the other hand, Ooredoo shows higher satisfaction levels on most services than Vodafone Qatar: Leased Line (86% vs. 77%); Fixed Voice (82% vs. 52%); Mobile Internet (79% vs. 73%) and Fixed Internet (78% vs. 53%). Largest gaps between Ooredoo and Vodafone Qatar can be noted on Fixed Voice (+30%) and Fixed Internet (+25%) (see Table 66).

Table 66: Satisfaction with the Accuracy of the Bills by Service Provider (% Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	81%	79%	82%	78%	86%
Vodafone Qatar	81%	73%	52%	53%	77%

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

Base: All Respondents, n=1635.

Comparing 2019 from 2015, satisfaction on the accuracy of bills for service has greatly improved on all services. Improvements are most apparent on the Fixed Internet (76% vs. 60%), Fixed Voice (80% vs. 65%), Mobile Voice (71% vs. 59%) and Mobile Internet (68% vs. 58%) (see Table 67).

Table 67: Satisfaction with the Accuracy of the Bills (2019 vs. 2015) (% Satisfied)

	2015	2019
Sample	1096	1635
Mobile Voice	59%	71%
Mobile Internet	58%	68%
Fixed Voice	65%	80%
Fixed Internet	60%	76%
Leased Line	78%	80%

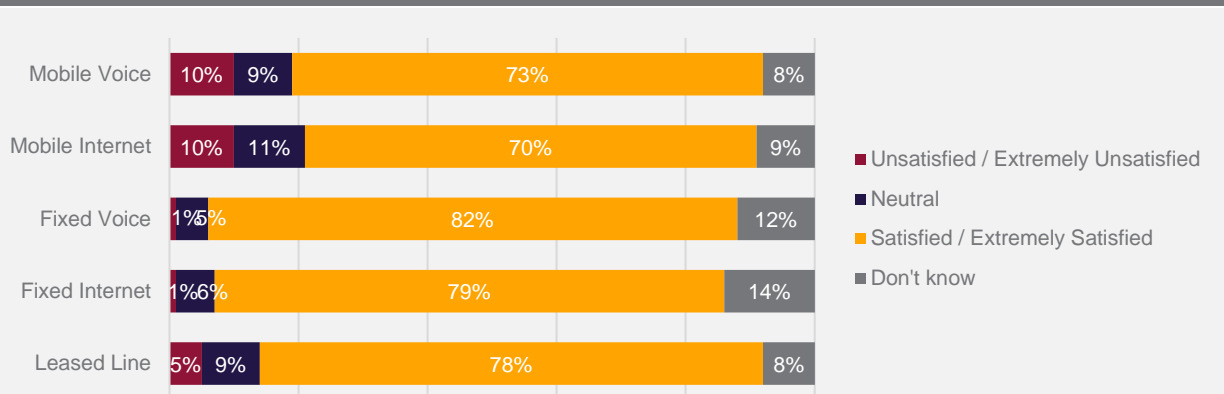
Q. Now thinking about the services provided to your company by your telecommunications service provider, how satisfied are you on a scale of 1 to 5, where 1 is extremely unsatisfied, 2 is unsatisfied, 3 is neutral, 4 is satisfied and 5 is extremely satisfied with the accuracy of the bills?

Base: All Respondents, n=1635.

3.8.4. Ease of Understanding the Bills

Business customers were also asked to rate their satisfaction on the ease of understanding their bills for each service. A high 82% of respondents are ‘extremely satisfied’ or ‘satisfied’ with how easy it is to understand their Fixed Voice bill. This is closely followed by Fixed Internet (79%) and Lease Line (78%). Satisfaction levels on Mobile Voice (73%) and Mobile Internet (70%) are slightly lower. Mobile Voice and Internet also record the highest unsatisfied scores – with each having 10% of their business customers unsatisfied (see Figure 39).

Figure 39: Satisfaction with the Ease of Understanding the Bills



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

Base: All Respondents, n=1635 (users of Mobile Voice n=1548; users of Mobile Internet n=1530; users of Fixed Voice n=1107; users of Fixed Internet n=895; users of Leased Line n=74).

Similarly, large businesses show higher satisfaction ratings on most services. Large businesses are most satisfied with the ease of understanding the bills of their Leased Line at 100% followed by the Mobile Voice (87%). Medium businesses are also most satisfied with their Lease Line at 89% and Fixed Internet at 86%. Meanwhile, small businesses give their highest satisfaction on Mobile Voice at 83% but seem to be struggling with Leased Line given the lower satisfaction score of 69%. Micro-businesses are highly satisfied with their Fixed Voice (81%) but are least satisfied with their Mobile Internet (65%) (see Table 68).

Table 68: Satisfaction with the Ease of Understanding the Bills by Business Size (%Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Micro Businesses	67%	65%	81%	77%	74%
Small Businesses	83%	78%	81%	78%	69%
Medium Businesses	81%	79%	83%	86%	89%
Large Businesses	87%	83%	83%	84%	100%

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

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

By service provider, Ooredoo scores higher than Vodafone Qatar on most services except for Leased Line (81% vs. 85%). Ooredoo shows its dominance against Vodafone in services like Fixed Voice (85% vs. 53%) and Fixed Internet (81% vs. 55%) (see Table 69).

Table 69: Satisfaction with the Ease of Understanding the Bills by Service Provider (%Satisfied)

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet	Leased Line
Ooredoo	84%	81%	85%	81%	81%
Vodafone Qatar	83%	78%	53%	55%	85%

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

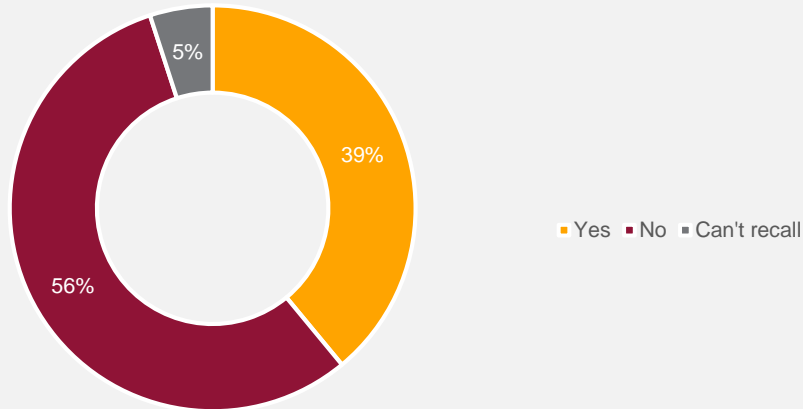
Base: All Respondents, n=1635.

3.9. Business Customers' Perceptions on Customer Services

3.9.1. Customer Service Team

Thirty-nine percent of the surveyed sample have contacted the customer service team of their main telecommunications service provider in the past three months in relation to a business enquiry (see Figure 40). Overall, the majority of those who contacted the customer service team (62%) report to be either 'satisfied' or 'extremely satisfied' with the service provided by the customer service team. A lower 17% of the respondents indicate they are dissatisfied with the service provided by the customer service team (see Figure 41).

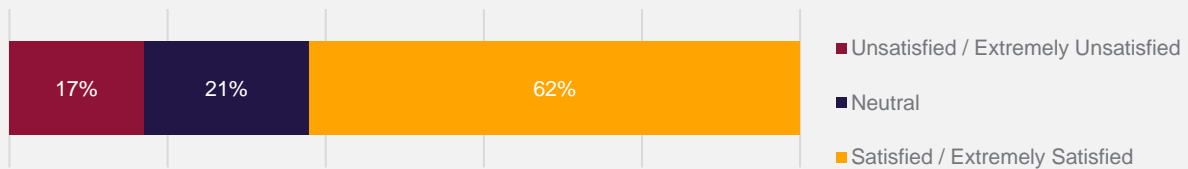
Figure 40: Dealing with the Customer Service Team



Q. Have you contacted the customer service team of your main telecommunications service provider in the past three months in relation to a business enquiry? This may have either via the telephone, online or at a retail store?

Base: All Respondents, n=1635.

Figure 41: Overall Satisfaction with the Customer Service Team

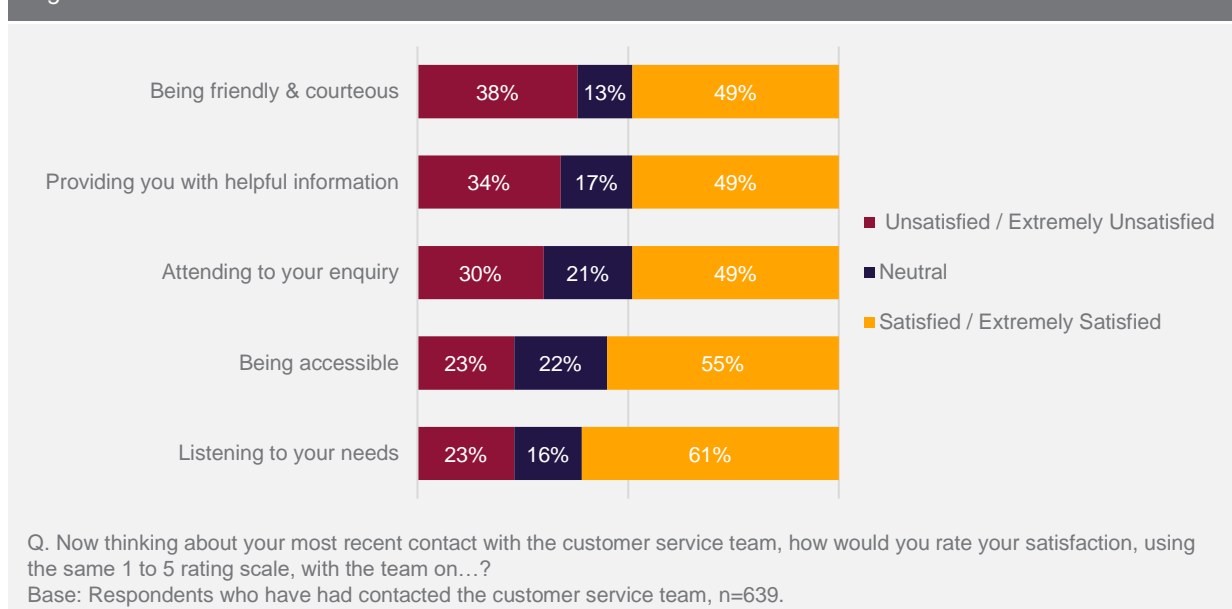


Q. Now, taking everything into consideration the service provided by the customer service team, how would you rate your level of satisfaction on the overall? Please rate your satisfaction on the same 1 to 5 scale.

Base: Respondents who have had contacted the customer service team, n=639.

Most of the respondents who contacted the customer service team are satisfied with them listening to their needs (61%) and being accessible (55%), and close to half (49%) are satisfied with the customer service team being friendly and courteous, providing them with helpful information and attending to their enquiry. Almost four in ten respondents are dissatisfied with the friendliness and courteousness of the customer service team and a third of the respondents are dissatisfied with the provision of helpful information. Three in ten respondents are dissatisfied with how the customer service team attended to their enquiry (see Figure 42).

Figure 42: Satisfaction with Attributes related to the Customer Service Team



The majority of respondents who contacted the Ooredoo customer services team (89%) are either extremely satisfied or satisfied with the customer service provided to their organization. This compares to a lower 34% of respondents who are satisfied with the customer service team at Vodafone Qatar. Table 70 shows the percentage of respondents who are satisfied with the services provided by the customer service team by main service provider. It is found that the majority of Ooredoo users are satisfied with all factors related to customer service. In the opposite, the level of satisfaction of Vodafone Qatar users is very low for some factors including customer services being friendly and courteous (12%); customer services attending to their enquiry (12%); and the customer services team providing helpful information (13%).

Table 70: Satisfaction with Attributes related to the Customer Service Team (% Satisfied)

	Ooredoo	Vodafone Qatar
Overall	89%	34%
Being friendly & courteous	82%	12%
Providing you with helpful information	84%	13%
Attending to your enquiry	84%	12%
Being accessible	82%	24%
Listening to your needs	82%	34%

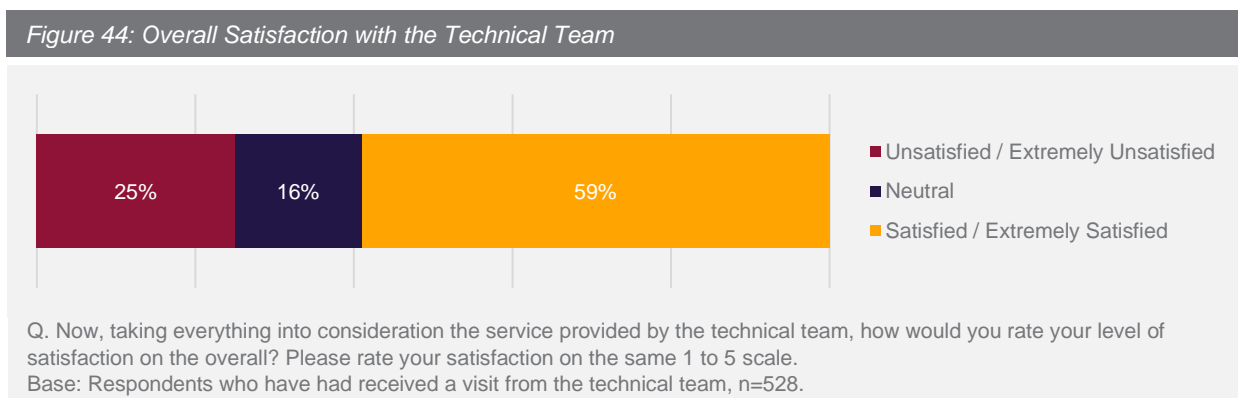
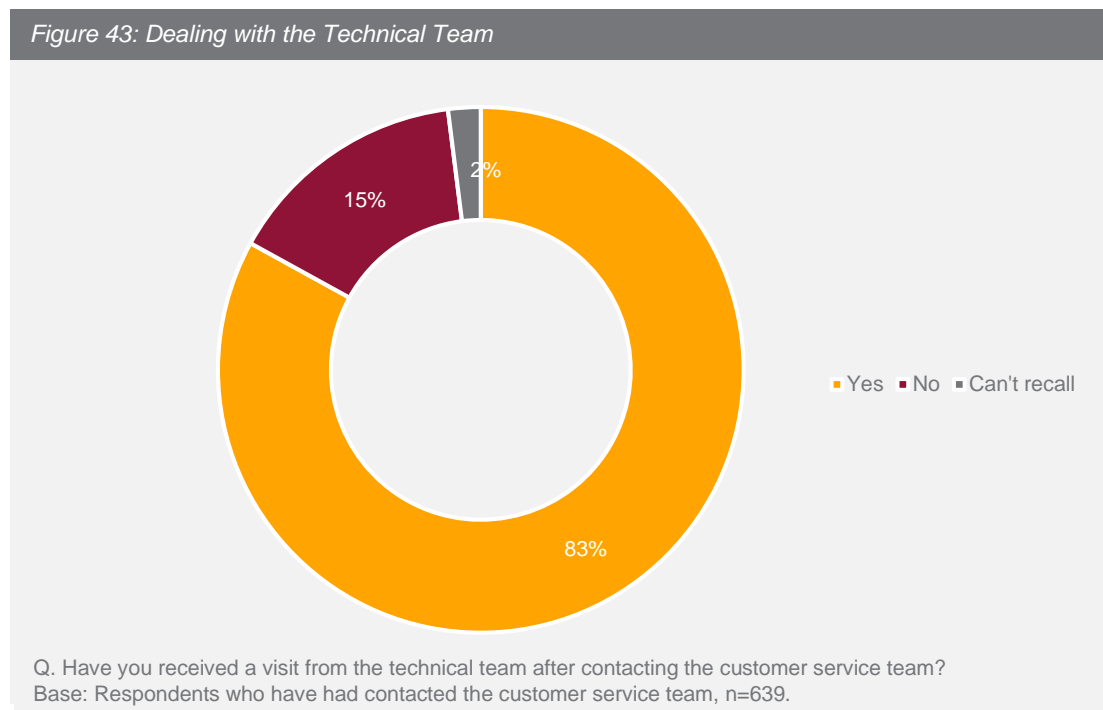
Q. Now, taking everything into consideration the service provided by the customer service team, how would you rate your level of satisfaction on the overall? Please rate your satisfaction on the same 1 to 5 scale.

Q. Now thinking about your most recent contact with the customer service team, how would you rate your satisfaction, using the same 1 to 5 rating scale, with the team on...?

Base: Respondents who have had contacted the customer service team, n=639.

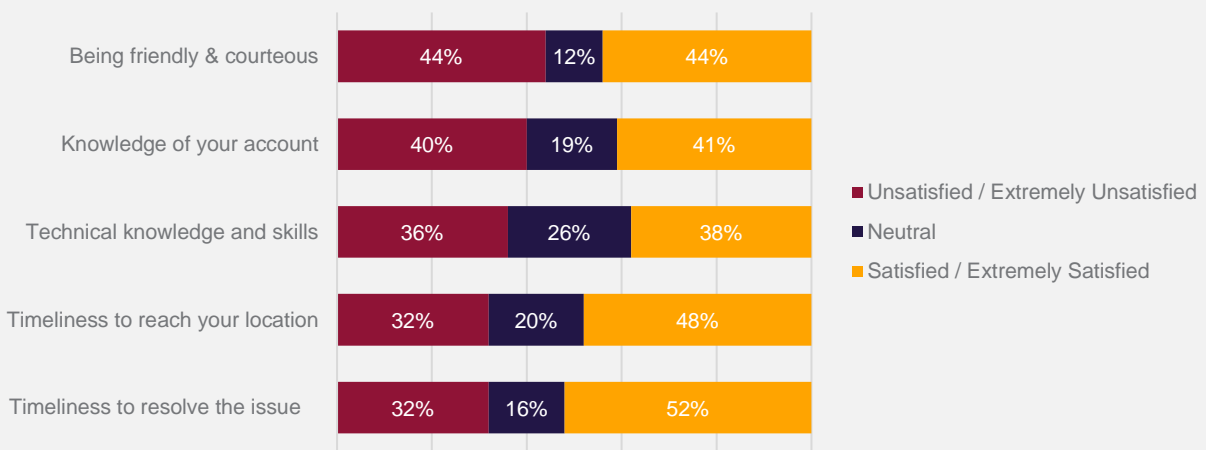
3.9.2. Technical Team

The businesses who contacted the customer service team were asked whether they received a visit from the technical team to resolve any technical issues. Eighty-three percent of the respondents affirmed they did receive a visit from a technician in relation to their enquiry (see Figure 43). Just over half of the respondents (59%) are either extremely satisfied or satisfied with the service provided by the technical team. A quarter of the respondents are either unsatisfied or extremely unsatisfied with the service provided by the technical team (see Figure 44).



Half of the respondents (52%) are satisfied with the timeliness to resolve the technical issue, whereas three in ten respondents are dissatisfied. Three in ten respondents are also dissatisfied with the technical knowledge and skills (36%) and the timeliness to reach the company’s location (32%). An equal proportion of respondents are both satisfied and dissatisfied with the technical team being friendly and courteous and having knowledge of the company’s account (see Figure 45).

Figure 45: Satisfaction with Attributes related to the Technical Team



Q. Now thinking about your most recent contact with the technical team, how would you rate your satisfaction, using the same 1 to 5 rating scale, with the team on...?

Base: Respondents who have had received a visit from the technical team, n=528.

Ninety-four percent of the businesses who deal with Ooredoo as the main service provider for telecommunication services are satisfied with the service provided by the technical team compared to 39% for Vodafone Qatar users. Ooredoo users are most satisfied with the technical team in terms of the timeliness to reach the company’s location (91%), being friendly and courteous (88%) and having technical knowledge and skills (85%). Ooredoo users are less satisfied with the timeliness to resolve the issue (78%), whereas Vodafone Qatar users are most satisfied with this aspect although satisfaction remains low at 31% (see Table 71).

Table 71: Satisfaction with Attributes related to the Technical Team (% Satisfied)

	Ooredoo	Vodafone Qatar
Overall	94%	39%
Being friendly & courteous	88%	17%
Knowledge of your account	81%	13%
Technical knowledge and skills	85%	8%
Timeliness to reach your location	91%	22%
Timeliness to resolve the issue	78%	31%

Q. Now, taking everything into consideration the service provided by the technical team, how would you rate your level of satisfaction on the overall? Please rate your satisfaction on the same 1 to 5 scale.

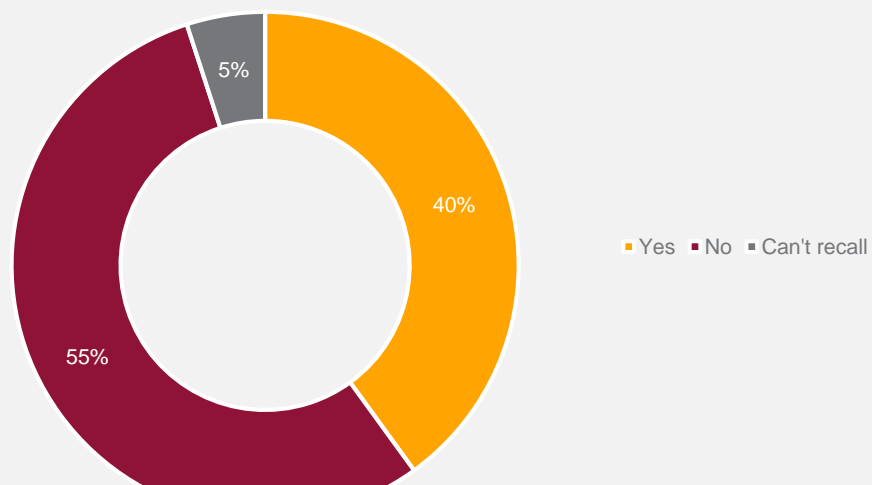
Q. Now thinking about your most recent contact with the technical team, how would you rate your satisfaction, using the same 1 to 5 rating scale, with the team on...?

Base: Respondents who have had received a visit from the technical team, n=528.

3.9.3. Account Managers

Four in ten respondents report to have an account manager assigned to their organization by their main service provider (see Figure 46). Overall, most respondents with an account manager (70%) are extremely satisfied or satisfied with the service provided, whilst two in ten respondents are extremely unsatisfied or unsatisfied with the service (see Figure 47).

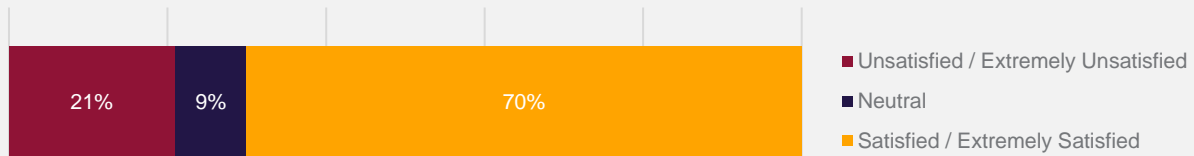
Figure 46: Dealing with the Account Manager



Q. Do you have an account manager assigned to your organization from your main telecommunications service provider?

Base: All Respondents, n=1635.

Figure 47: Overall Satisfaction with the Account Manager

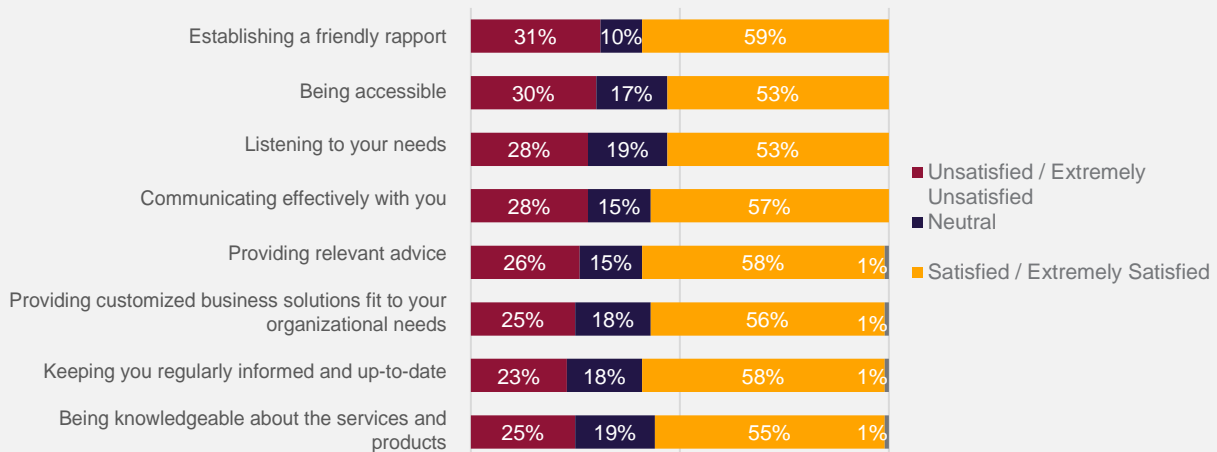


Q. Now, taking everything into consideration about your Account Manager, overall how would you rate your level of satisfaction on the overall? Please rate your satisfaction on the same 1 to 5 scale.

Base: Respondents who have an account manager assigned to their organization, n=655.

Most of the respondents are satisfied with the service provided to them by their account manager regarding the following factors: establishing a friendly rapport (59%); being accessible (53%); listening to their needs (53%); communicating effectively with them (57%); providing relevant advice (58%); providing customized business solutions fit to their organizational needs (56%); keeping them regularly informed and up-to-date (58%); and being knowledgeable about the services and products (55%). Almost three in ten respondents are unsatisfied with some criteria including: establishing a friendly rapport (31%); being accessible (30%); listening to their needs (28%); and communicating effectively with them (28%) (see Figure 48).

Figure 48: Satisfaction with Attributes related to the Account Manager



Q. Now thinking about the service provided by your account manager, how would you rate your satisfaction, using the same 1 to 5 rating scale, with your account manager on...?

Base: Respondents who have an account manager assigned to their organization, n=655.

Whilst 95% of the businesses who mainly subscribe to Ooredoo for telecommunication services are extremely satisfied or satisfied with the services provided by their account manager, 46% of the users of Vodafone Qatar are satisfied with the performance of their account manager (see Table 72). The research findings show that the majority of Ooredoo users are satisfied with all the aspects related to the services provided by the account manager. In the opposite, the percentage of the Vodafone Qatar users who are satisfied with the services provided by their account manager differs from one aspect to another. The satisfaction scores related to the account manager being accessible and listening to their needs are quite low compared to other factors' scores such as keeping them regularly informed and up to date.

Table 72: Satisfaction with Attributes related to the Account Manager (% Satisfied)

	Ooredoo	Vodafone Qatar
Overall	95%	46%
Establishing a friendly rapport	97%	26%
Being accessible	90%	17%
Listening to your needs	90%	17%
Communicating effectively with you	90%	24%
Providing relevant advice	91%	25%
Providing customized business solutions fit to your organizational needs	88%	25%
Keeping you regularly informed and up to date	81%	29%
Being knowledgeable about the services and products	88%	22%

Q. Now, taking everything into consideration about your Account Manager, overall how would you rate your level of satisfaction on the overall? Please rate your satisfaction on the same 1 to 5 scale.

Q. Now thinking about the service provided by your account manager, how would you rate your satisfaction, using the same 1 to 5 rating scale, with your account manager on...?

Base: Respondents who have an account manager assigned to their organization, n=655.

Overall, companies who use mainly Ooredoo services are more satisfied with the services provided to them by the account manager and the technical team than with the services provided by the customer service team. Companies who use mainly Vodafone Qatar services are more satisfied with the services provided by their account manager than with the services provided by the customer service or technical teams.

3.10. Complaint Resolution Mechanism

3.10.1. Complaint to Service Provider

Three in ten business consumers have raised a complaint to their telecommunication service provider in the past twelve months (see Figure 49). Most complaints were related to mobile services (48% Mobile Internet and 25% Mobile Voice), and to a lesser extent fixed services (Fixed Internet 15%, Fixed Voice 11%, Leased Line 1%) (see Figure 50).

Figure 49: Raising a Complaint to the Service Provider

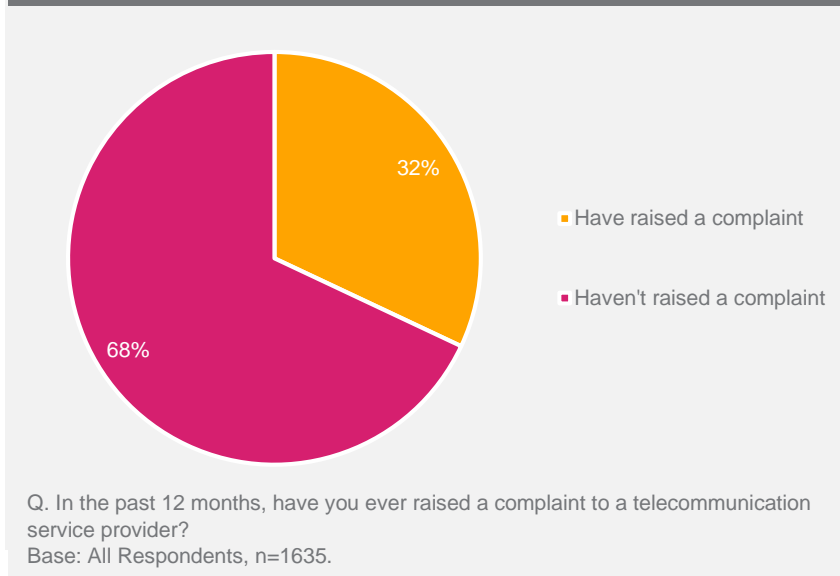
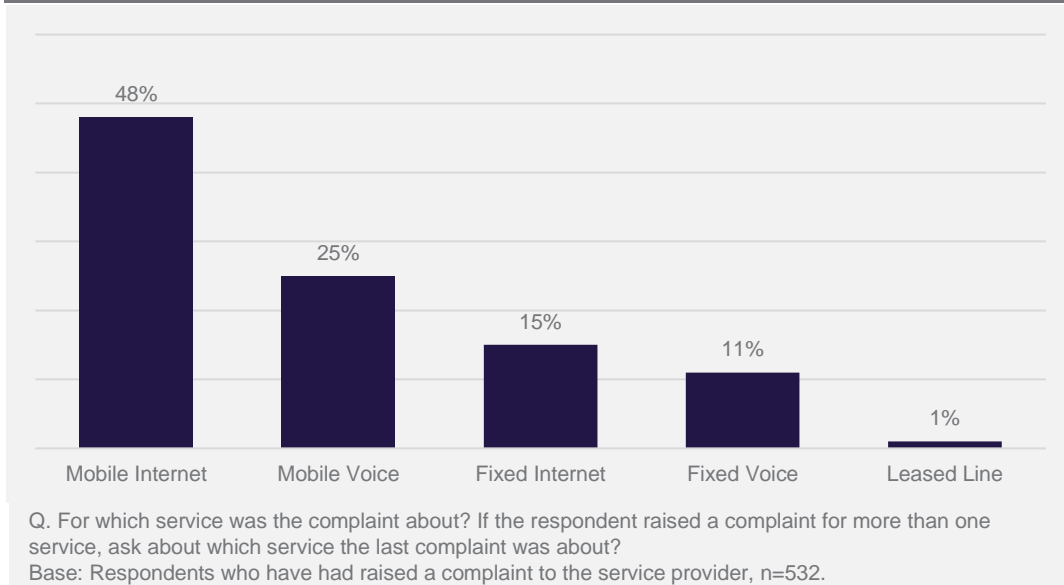


Figure 50: Services that Respondents Complained About



The research findings show that the percentage of complaints related to mobile services increased from 13% in 2015 to 25% in 2019 for Mobile Voice and from 41% in 2015 to 48% in 2019 for Mobile Internet. The percentage of businesses who complain about fixed services and Leased Lines has declined in 2019 from 2015 levels. Complaints related to Fixed Voice services decreased from 16% in 2015 to 11% in 2019, Fixed Voice complaints from 33% in 2015 to 15% in 2019 and Leased Lines complaints from 31% to 1% (see Table 73).

Table 73: Services that Respondents Complained About (2019 vs. 2015)

	2015	2019
Mobile Voice	13%	25%
Mobile Internet	41%	48%
Fixed Voice	16%	11%
Fixed Internet	33%	15%
Leased Line	31%	1%

Q. For which service was the complaint about? If the respondent raised a complaint for more than one service, ask about which service the last complaint was about?
Base: Respondents who have had raised a complaint to the service provider, n=532 (Mobile Voice: 135; Mobile Internet: 255; Fixed Voice: 60; Fixed Internet: 79; Leased Line: 4).

Table 74 shows the percentages of complaints for each type of telecommunication service by service provider. Amongst the businesses who complained about Mobile Voice services, 60% are users of both Ooredoo and Vodafone Qatar and a third of them are users of Ooredoo only. The majority of businesses that complained about the Mobile Internet services are users of both Ooredoo and Vodafone Qatar (82%). More than half of those who complained about Fixed Voice services are users of Ooredoo whilst 42% are users of both service providers. And businesses who made a complaint about Fixed Internet and Leased Line services are subscribed to Ooredoo as the service provider of these two telecommunication services.

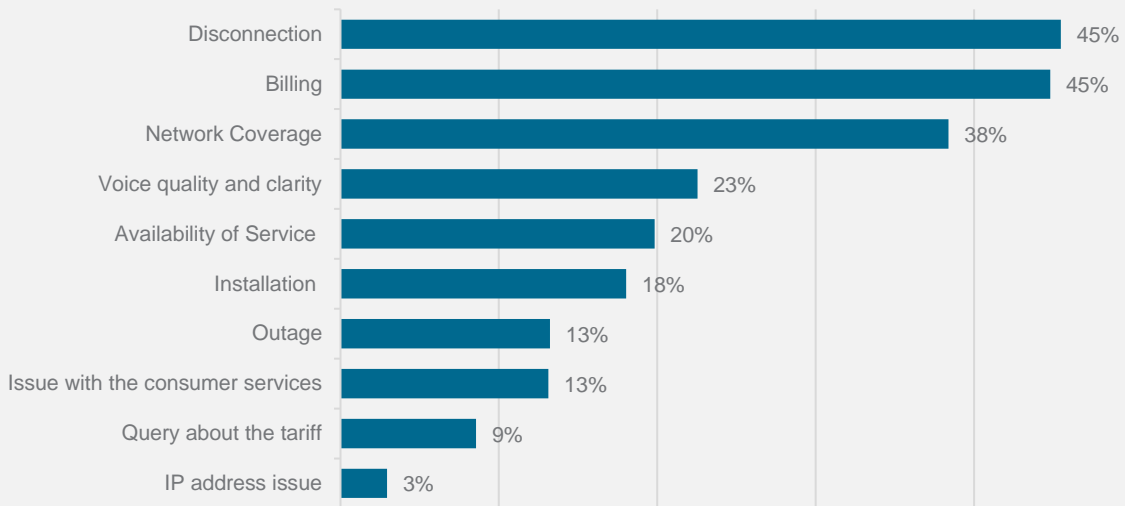
Table 74: Services that Respondents Complained About by Service Provider

	Ooredoo Users	Vodafone Users	Users of both Ooredoo and Vodafone
Mobile Voice	33%	7%	60%
Mobile Internet	15%	4%	82%
Fixed Voice	58%	0%	42%
Fixed Internet	100%	0%	0%
Leased Line	100%	0%	0%

Q. For which service was the complaint about? If the respondent raised a complaint for more than one service, ask about which service the last complaint was about?
Base: Respondents who have had raised a complaint to the service provider, n=532 (Mobile Voice: 135; Mobile Internet: 255; Fixed Voice: 60; Fixed Internet: 79; Leased Line: 4).

Business consumers who raised a complaint to their service provider in the past 12 months were asked for the reason for their enquiry. Those who raised a complaint about Mobile Voice services mentioned the following reasons: disconnection (45%); billing issues (45%); network coverage (38%); voice quality and clarity (23%); availability of service (20%); installation (18%); outage (13%); issues with consumer services (13%); query about the tariff (9%); and IP address issue (3%) (see Figure 51).

Figure 51: Reasons for Complaining About Mobile Voice Services

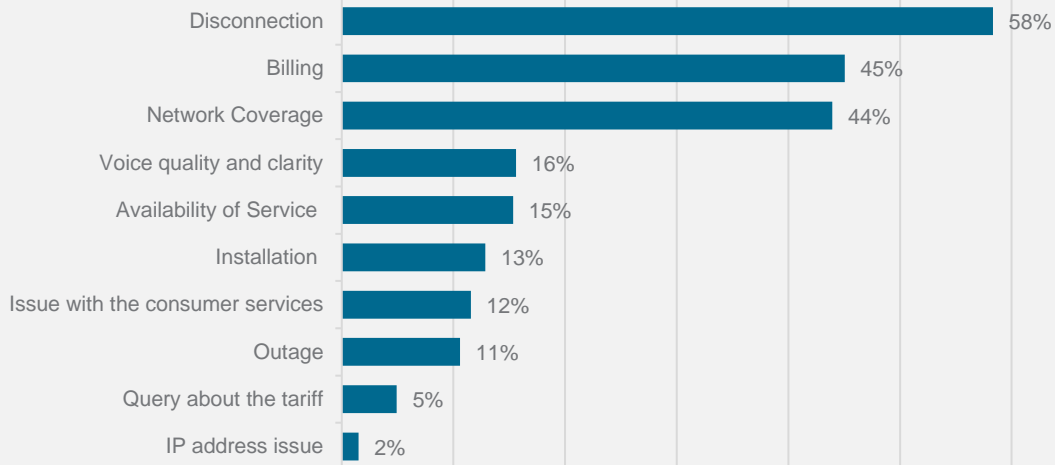


Q. What was the reasons why you raised a complaint?

Base: Respondents who have had raised a complaint about the Mobile Voice to the service provider, n=135.

Half of the businesses who raised a complaint about Mobile Internet services did so because they experienced disconnections. Other reasons also mentioned by respondents include: billing issues (45%); network coverage (44%); voice quality and clarity (16%); availability of service (15%); installation (13%); issues with consumer services (12%); outage (11%); query about the tariff (5%); and IP address issue (2%) (see Figure 52).

Figure 52: Reasons for Complaining About Mobile Internet Services

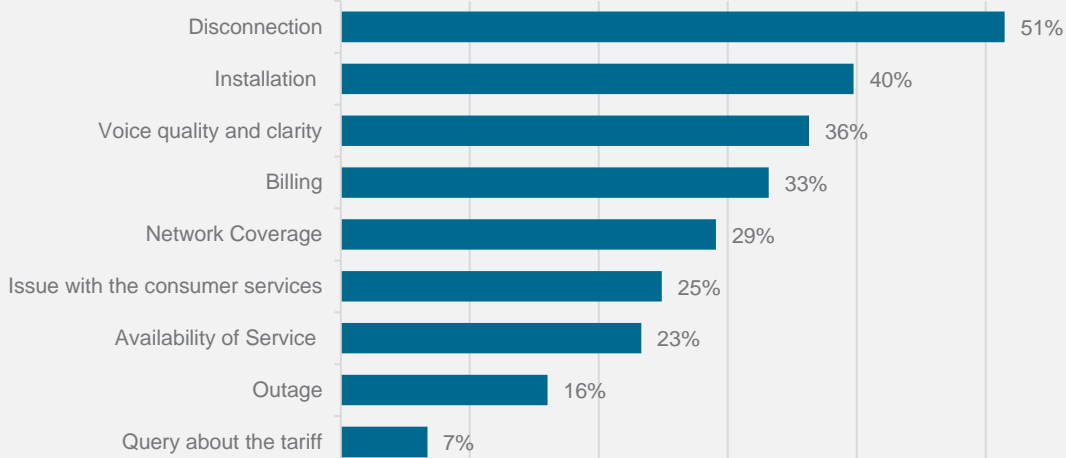


Q. What was the reasons why you raised a complaint?

Base: Respondents who have had raised a complaint about the Mobile Internet to the service provider, n=255.

Businesses who raised a complaint about Fixed Voice services within the past 12 months mention the following reasons for the enquiry: disconnection (51%); installation (40%); voice quality and clarity (36%); billing (33%); network coverage (29%); issue with consumer services (25%); availability of service (23%); outage (16%); and query about the tariff (7%) (see Figure 53).

Figure 53: Reasons for Complaining About Fixed Voice Services

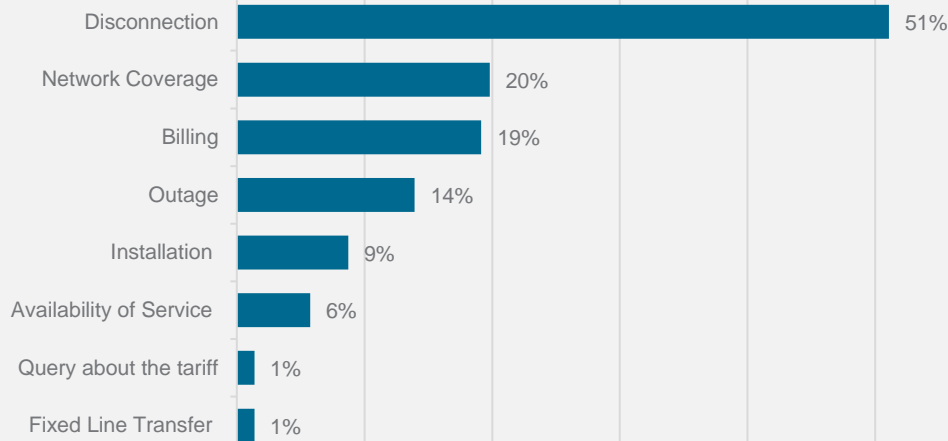


Q. What was the reasons why you raised a complaint?

Base: Respondents who have had raised a complaint about the Fixed Voice to the service provider, n=60.

Figure 54 below shows the reasons why business consumers raised a complaint about Fixed Internet services.

Figure 54: Reasons for Complaining About Fixed Internet Services

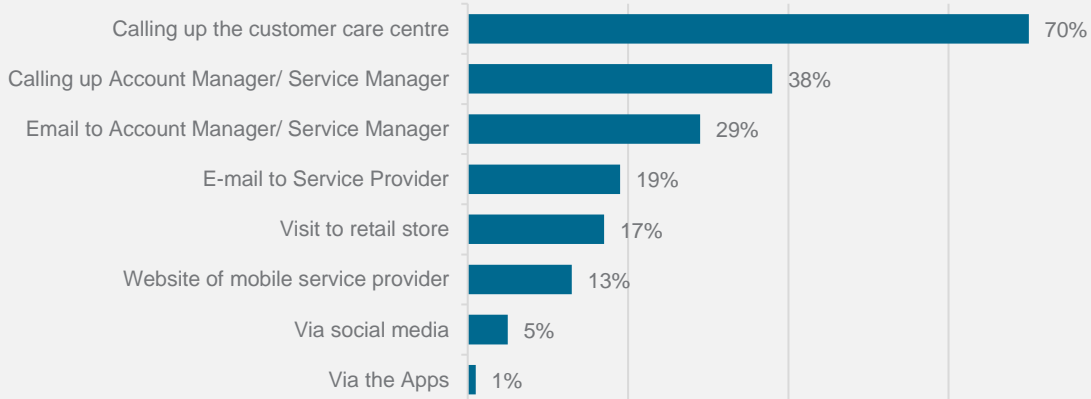


Q. What was the reasons why you raised a complaint?

Base: Respondents who have had raised a complaint about the Fixed Internet to the service provider, n=79.

The respondents who report to have raised a complaint to the service provider mostly prefer to submit their complaint through the customer care center (70%). Almost four in ten respondents (38%) prefer contacting the account manager and almost three in ten respondents (29%) prefer emailing their account manager. Other respondents prefer sending an email to the service provider (19%), visiting the retail store (17%), submitting the complaint via the service provider website (13%), via social media (5%) or via the mobile applications (1%) (see Figure 55).

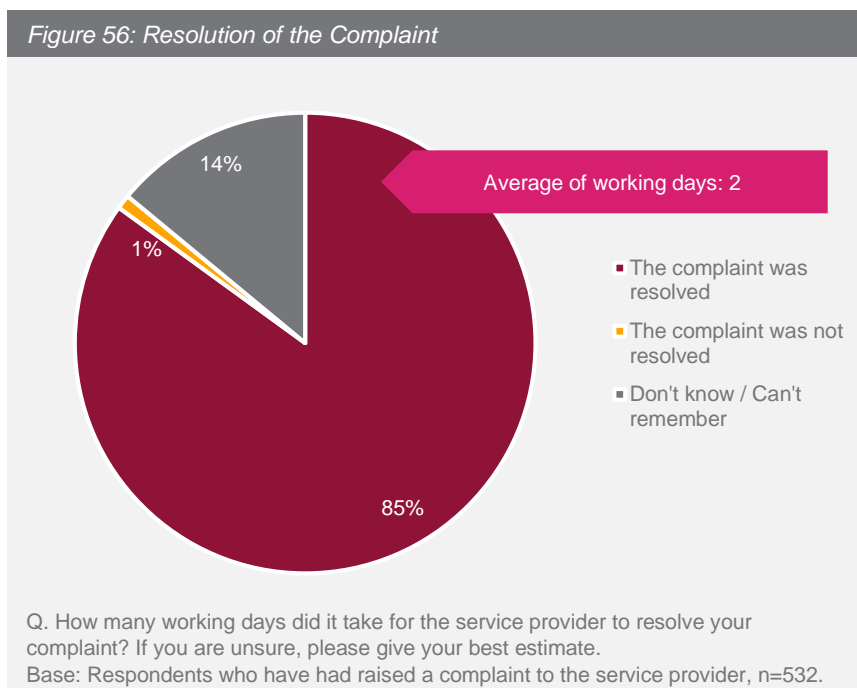
Figure 55: Ways of Submitting A Complaint to the Service Provider



Q. How do you prefer to submit your complaint or query to the service provider?

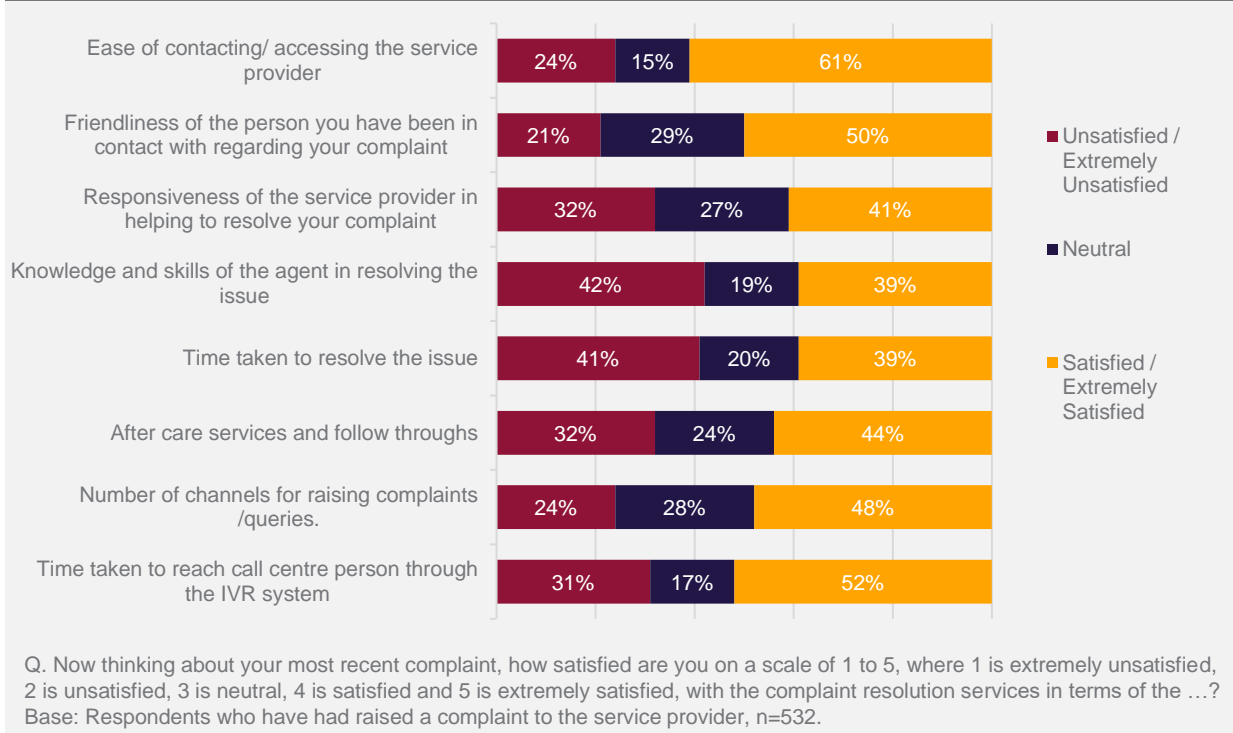
Base: Respondents who have had raised a complaint to the service provider, n=532

Overall, 85% of the respondents who raised a complaint reported that their enquiry was resolved within an average of two working days. Some respondents are unsure as to whether the complaint was resolved mainly because they are not responsible for following up with the service provider on the matter and very few respondents state the complaint was not resolved by the service provider (see Figure 56).



Respondents were asked to indicate their level of satisfaction with different criteria related to the complaint resolution services. Respondents are most satisfied with the ease of contacting/accessing the service provider (61%), the time taken to reach the call center through the IVR system (52%) and the friendliness of the staff (50%). Four in ten respondents are extremely unsatisfied or unsatisfied with the knowledge and skills of the agent in resolving the issue (42%) and the time taken to resolve the issue (41%) (see Figure 57).

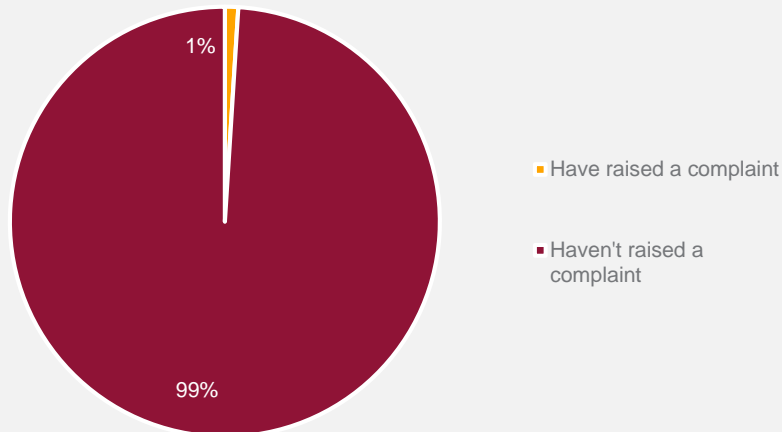
Figure 57: Satisfaction with Attributes Related to the Complaint Resolution Services



3.10.2. Complaint to CRA

The CRA assists business consumers who are unable to reach an acceptable solution to their complaint by finding a mutually acceptable resolution. When a complaint is raised to the CRA, an investigation usually takes place to resolve the issue. The respondents who are aware of the CRA's complaint resolution process were asked whether they have raised a complaint to the CRA. Among the 422 respondents aware of the CRA's complaint escalation process, only 1% (n=3) have raised a complaint to the Authority which was about Ooredoo billing (see Figure 58). All three representatives state they are satisfied with the complaint resolution services provided by the CRA.

Figure 58: Raising A Complaint to the CRA



Q. Have you raised any complaint to the Communications Regulatory Authority?
Base: Respondents who are aware of the complaint escalation process at the CRA, n=422.

3.11. Consumer Rights Protection

Two thirds of surveyed business consumers (64%) believe there are not any misleading advertisements related to telecommunication services in Qatar. One in five respondents (21%) do however believe there are misleading advertisements related to telecommunication services (see Figure 59).

Amongst those who believe there are misleading advertisements related to telecommunication services, 74% mention that the service or product purchased absolutely did not reflect the promised quality, 41% believe the service or product purchased absolutely did not reflect the quality indicated by the price, 39% state that the offer was misleadingly and described as free, 38% said that the description of the service was misleading, 20% indicate that the price was not displayed and 10% stipulate that the advertising falsely claimed that the offer would be available for an unlimited time (see Figure 60).

Figure 59: Misleading Advertisements

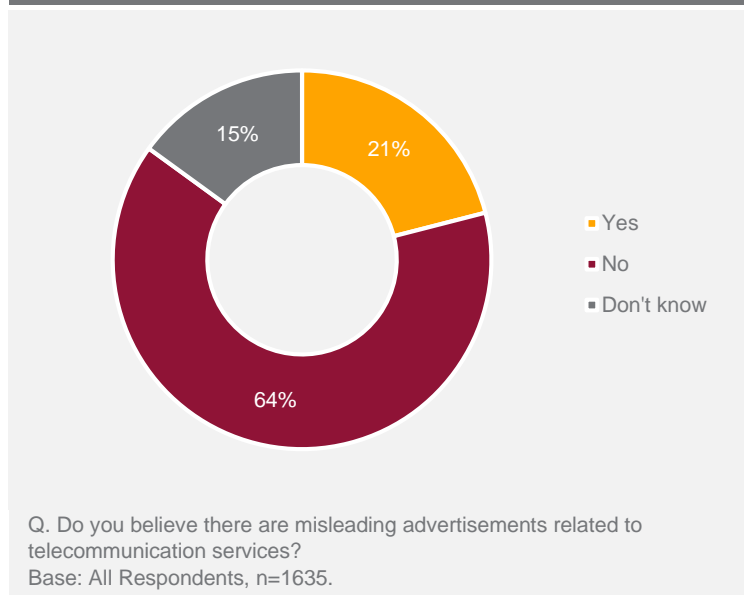
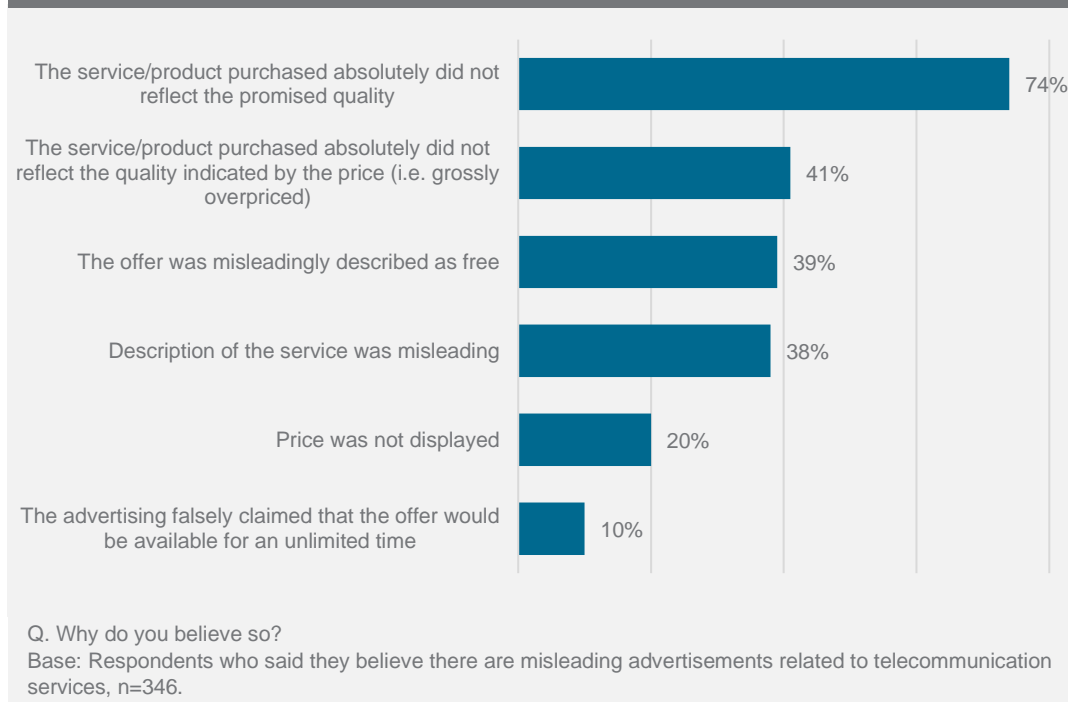
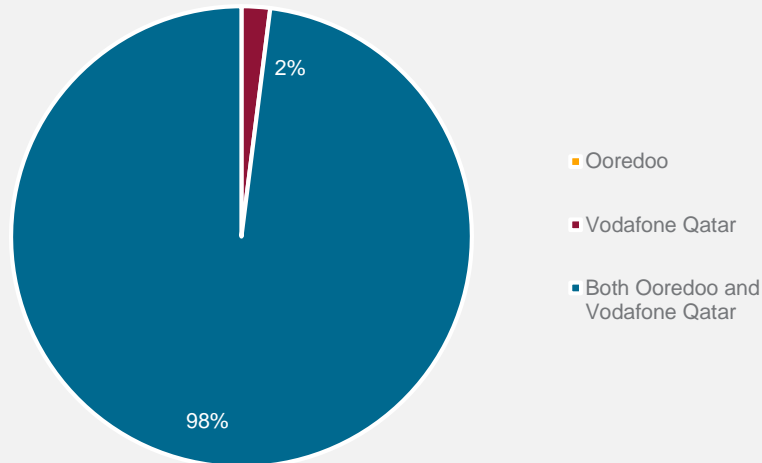


Figure 60: Reasons to Believe there are Misleading Advertisements



Almost all respondents (98%) who believe there are misleading advertisements related to telecommunication services mention that both Ooredoo and Vodafone Qatar have misleading advertisements (see Figure 61). When asked about the latest advertisement that they believe is misleading, almost all respondents refuse to answer the question.

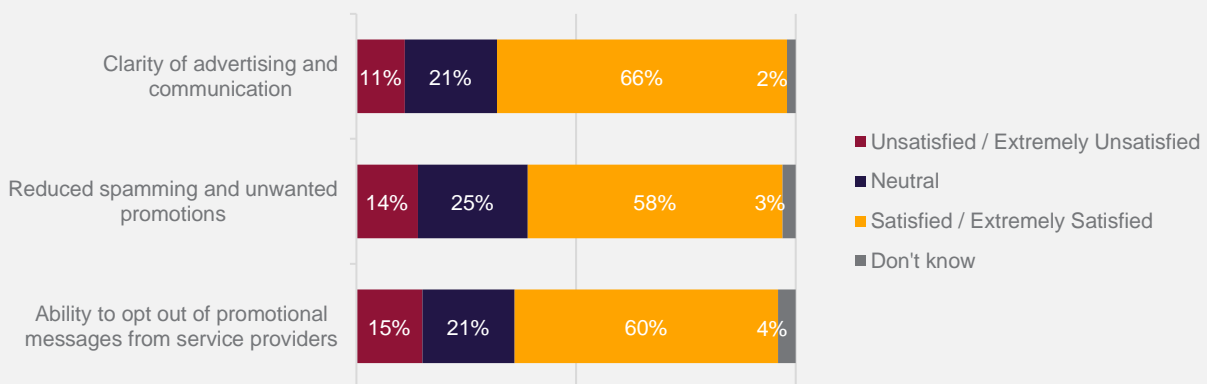
Figure 61: Service Providers Having Misleading Advertisements



Q. Which service provider has misleading advertisements?
Base: Respondents who said they believe there are misleading advertisements related to telecommunication services, n=346.

Business consumers were asked to indicate their level of satisfaction with factors related to telecommunication advertising. Two thirds of respondents indicate being either satisfied or extremely satisfied with the clarity of advertising and communication, six in ten respondents are satisfied with the ability to opt out of promotional messages from service providers and 58% are satisfied with the reduced spamming and unwanted promotions (see Figure 62).

Figure 62: Satisfaction with Attributes Related to Telecommunication Advertising

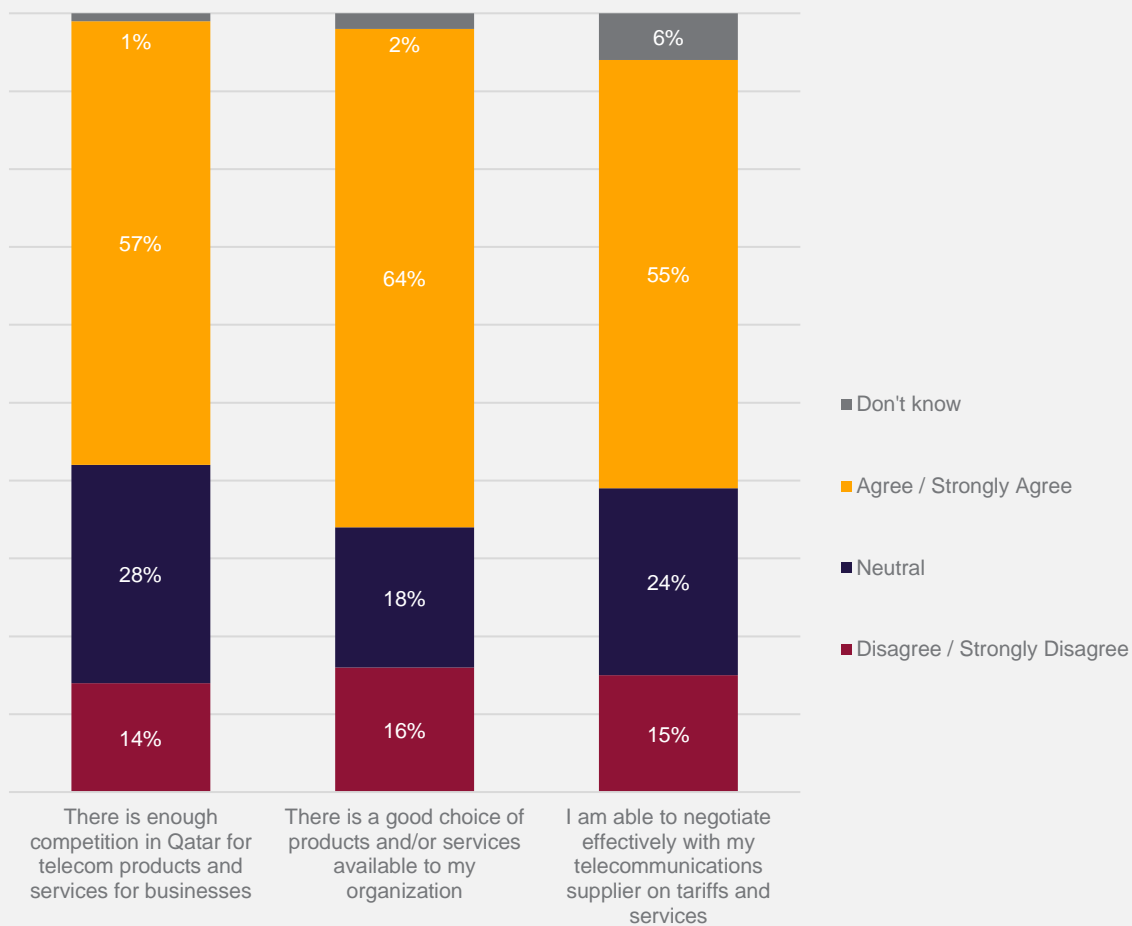


Q. How satisfied are you with each of the following factors related to telecommunication advertising? Please give a number between 1 and 5, where 1 is Extremely unsatisfied, 2 is Unsatisfied, 3 is Neutral, 4 is Satisfied and 5 is Extremely satisfied.
Base: All Respondents, n=1635.

3.12. Market Competitiveness

Two thirds of the respondents (64%) believe there is a good choice of products and/or services available to their organization and half of the respondents believe that there is enough competition in Qatar for telecom products and services for businesses (57%) and that they are able to negotiate effectively with their telecommunications supplier on tariffs and services (55%) (see Figure 63).

Figure 63: Competition Within the Telecommunication Market in Qatar



Q. I am going to read out some statements and I would like you to tell me whether you strongly disagree, disagree, neither agree or disagree, agree or strongly agree for each statement.

Base: All Respondents, n=1635.

The companies operating within the accommodation and food service activities and the agriculture, forestry and fishing sectors are less likely than others to think that there is enough competition in Qatar for telecommunication products and services for businesses (44% and 45% respectively) and that they are able to negotiate effectively with their telecommunications supplier on tariffs and services (43% and 48% respectively). The companies operating within the construction industry are more likely than others to believe that there is a good choice of products and services available to their organization (72%) (see Table 75).

Table 75: Competition Within the Telecommunication Market in Qatar by Industry Sector (% Agree)

	Enough competition for telecom products and services	Good choice of products and/or services	Ability to negotiate on tariffs and services
Agriculture, forestry and fishing	45%	61%	48%
Mining and quarrying	75%	75%	100%
Manufacturing	55%	62%	56%
Electricity, gas, steam and air conditioning supply	100%	100%	100%
Water supply, sewerage, waste management and remediation activities	50%	50%	100%
Construction	65%	72%	64%
Wholesale and retail trade; repair of motor vehicles	57%	60%	50%
Information and communication	67%	71%	57%
Transportation and storage	58%	87%	67%
Accommodation and food service activities	44%	46%	43%
Financial and insurance activities	72%	83%	61%
Real estate activities	100%	84%	83%
Professional, scientific and technical activities	63%	76%	76%
Education	30%	35%	39%
Arts, entertainment and recreation	50%	75%	38%
Human health and social work activities	69%	64%	54%
Other service activities	55%	67%	68%

Q. I am going to read out some statements and I would like you to tell me whether you strongly disagree, disagree, neither agree or disagree, agree or strongly agree for each statement.

Base: All Respondents, n=1635 (Agriculture, forestry and fishing: 258; Manufacturing: 132; Construction: 165; Wholesale, retail trade and repair of motor vehicles: 598; Accommodation and food service activities: 112).

Base: Those who use Ooredoo or Vodafone as main service providers (Agriculture, forestry and fishing: 81; Manufacturing: 65, Construction: 45; Wholesale, retail trade and repair of motor vehicles: 261; Accommodations and food service activities: 70)

Large businesses are most likely to agree that there is enough competition in Qatar for telecommunication products and services for businesses, there is a good choice of products and/or services available to their organization, and they can negotiate effectively with their telecommunications supplier on tariffs and services. Micro businesses are less likely to agree to these statements (see Table 76).

Table 76: Competition Within the Telecommunication Market in Qatar by Business Size (% Agree)

	Enough competition for telecom products and services	Good choice of products and/or services	Ability to negotiate on tariffs and services
Micro Businesses	47%	56%	47%
Small Businesses	71%	77%	67%
Medium Businesses	68%	72%	70%
Large Businesses	90%	88%	85%

Q. I am going to read out some statements and I would like you to tell me whether you strongly disagree, disagree, neither agree or disagree, agree or strongly agree for each statement.

Base: All Respondents, n=1635 (Micro: 1015; Small: 438; Medium: 141; Large: 41).

Only 1% of the interviewed sample state that their company has previously switched from a service provider to another because of the following reasons: the company received a better offer (24%), there were issues related to billing (19%), there were issues related to network (19%), there were issues related to tariffs (13%) and there were issues with customer service (see Figures 64 and 65).

Figure 64: Switching Service Providers

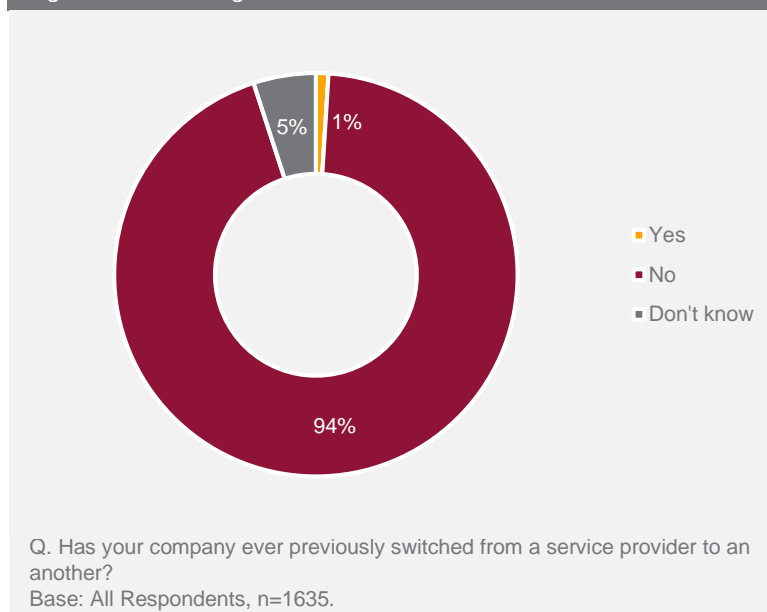
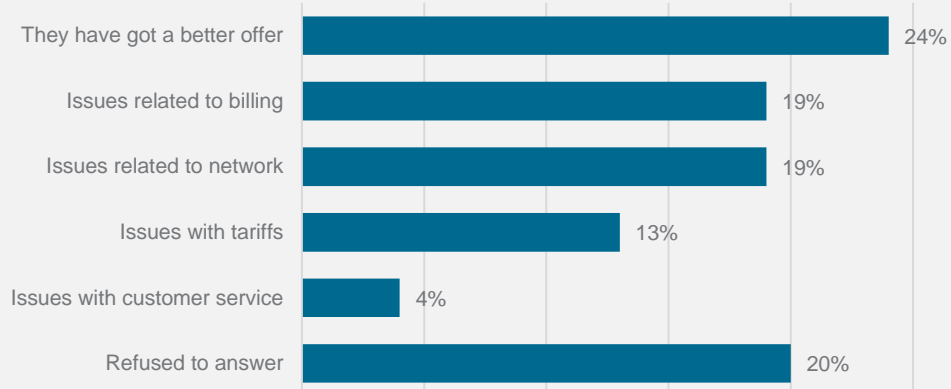


Figure 65: Reasons for Switching Service Providers



Q. Why is that?

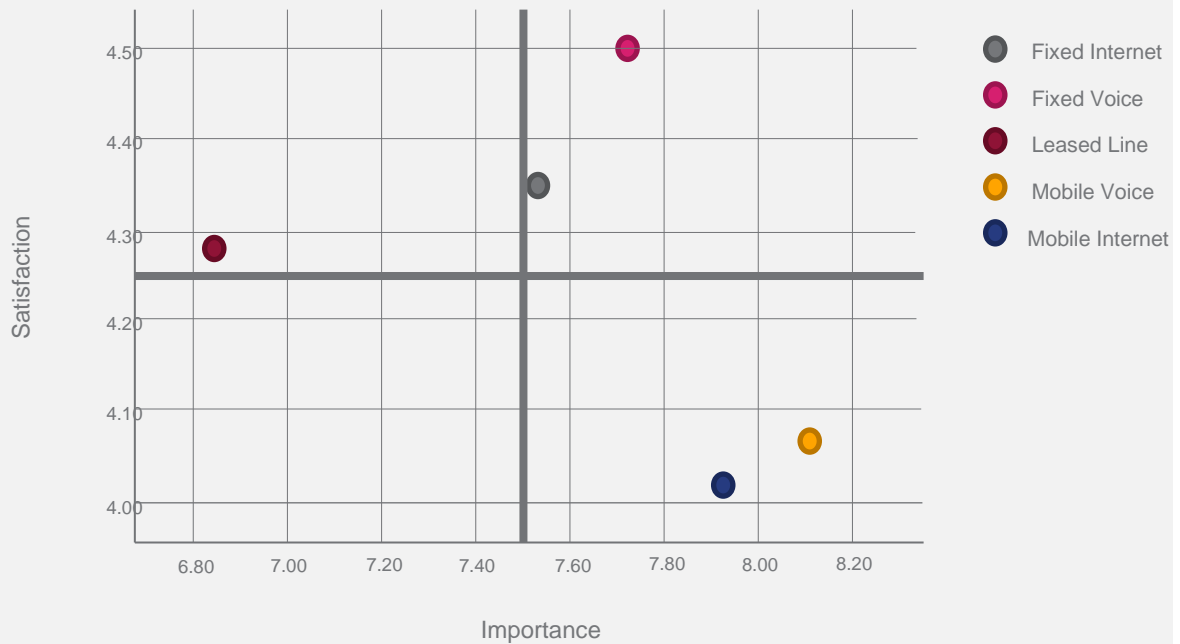
Base: Respondents who have switched from a service provider to an another, n=15.

4. KEY TAKE-OUTS FOR CRA

4.1. Importance-Satisfaction Analysis

An Importance-Satisfaction analysis was used to measure the level of customer satisfaction with the various services business consumers are using. The matrix shown below illustrates the importance of each of the five services and the corresponding level of satisfaction rated by respondents. While Mobile Voice and Mobile Internet are two of the most important services to users, they are also the services with the lowest satisfaction score, indicating an opportunity for providers to further improve their offerings to further satisfy users. Leased Line and fixed services (both Voice and Internet) have an adequate satisfaction rating compared to their perceived importance.

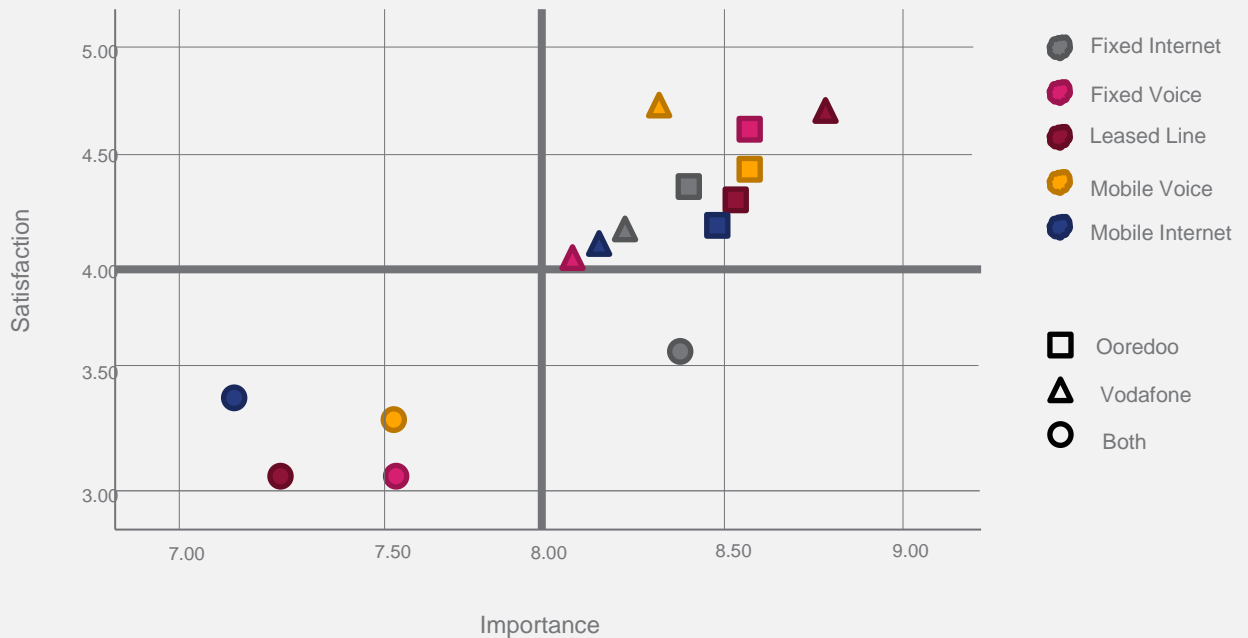
Figure 66: Importance-satisfaction matrix for each type of service



Base: All Respondents, n=1635

The figure below shows the Importance-Satisfaction matrix comparison by service providers, which helps in understanding any differences in levels of satisfaction depending on the provider of the service. Fixed Voice and Mobile Voice services both have equally high importance for respondents subscribed to Ooredoo. However, users are more satisfied with Fixed Voice than Mobile Voice services. While, Leased Line and Mobile Internet services are not as important to Ooredoo subscribers, respondents are less satisfied with these services than with Fixed Internet. When looking at Vodafone Qatar subscribers, Leased Line services have the highest importance, followed by Mobile Voice services, both services have equal satisfaction levels. Other services are less important to Vodafone Qatar subscribers and satisfaction with these services decreases as their importance decreases.

Figure 67: Importance-satisfaction matrix for each type of service by service provider



Base: All Respondents, n=1635

Users subscribed to both Vodafone Qatar and Ooredoo have the lowest satisfaction with all services than those who are just subscribed to one or the other exclusively. However, respondents subscribed to both providers do not place a high importance on Mobile Internet, Leased Line, Mobile Voice and Fixed Voice services. Respondents indicate a relatively higher importance for Fixed Internet services provided by both Vodafone Qatar and Ooredoo, however, their satisfaction with the services provided remains lower than those who are subscribed to one provider or the other exclusively.

4.2. Key Findings and Implications

Overall, the study results lead to three key observations as outlined below:

- 1- Fixed Services Generally Better than Mobile Services:** Business customers are generally more satisfied with how fixed services are delivered versus mobile services especially on critical aspects like voice quality and clarity, speed of data, and quality of video access and streaming.
- 2- Mobile Services Overshadowing the Importance of Fixed Services:** Despite the difference in quality of service, more business consumers still consider mobile services slightly more important than fixed services. Such imposes the need to further differentiate the two to enrich the market competition and prevent any potential market encroachment in the future.
- 3- Micro-Business Potentially Unable to Maximize Available Services:** Most micro-businesses do not operate on an enterprise level given that they consist of less than ten employees. Therefore, it is important to further understand how these businesses operate and how service providers can tailor their business products and services to meet the needs of these smaller scaled operations.

The table below presents the key findings of the research and the possible implications that it may involve.

Table 77: Key Findings and Implications

Findings	Implications
Qatar Enterprise Telecommunication Market	
<p>Qatar is poised as a business-friendly market with the country showing positive and really strong economic indicators.</p> <ul style="list-style-type: none"> - Qatar ranks 5th on GNI per capita - It is the highest amongst all benchmarked countries and has the highest gross national savings at 50.2% of its GDP - Based on the International Competitiveness Report in 2019, Qatar is ranked 30th in terms of economic performance - Businesses are growing unprecedentedly at 13.4% from 2016 to 2017. - Qatar's economic growth is set at 3% in 2019 as well as in 2020 <p>The telecommunications industry most likely to benefit the most from these developments.</p>	<p>Qatar is poised as a business-friendly market with the country showing positive and really strong economic indicators.</p> <ul style="list-style-type: none"> - Qatar ranks 5th on GNI per capita - It is the highest amongst all benchmarked countries and has the highest gross national savings at 50.2% of its GDP - Based on the International Competitiveness Report in 2019, Qatar is ranked 30th in terms of economic performance - Businesses are growing unprecedentedly at 13.4% from 2016 to 2017. - Qatar's economic growth is set at 3% in 2019 as well as in 2020 <p>The telecommunications industry most likely to benefit the most from these developments.</p>
CRA Awareness and Perceptions	
<ul style="list-style-type: none"> • Awareness of CRA has slightly increased at 46% (from 41% in 2015). • Amid higher awareness, familiarity with CRA's functions also improved: <ol style="list-style-type: none"> 1. Protection of consumers against misleading and unfair practices (81%, +40% from 2015); 2. Regulation of the telecommunications market and communications sector (76%, +39% from 2015) and; <p>Ensuring efficient management and allocation of telecommunication services (69%, +39% from 2015).</p>	<ul style="list-style-type: none"> ➤ CRA is still relatively unknown to a majority of business consumers (54%). As an Authority that can help empower business consumers, the CRA needs to create greater brand exposure than the two service providers in Qatar, Ooredoo and Vodafone Qatar. ➤ Appreciation of CRA's functions is still largely centered on the basic functions of the Authority. Business consumers have yet to become familiar with its other functions, namely: <ol style="list-style-type: none"> 1. Ensuring Qatar has a competitive and technologically advanced telecommunications market (67%, +38% from 2015); 2. Setting the quality standards and monitoring compliance (67%, +38% from 2015) and; 3. Complaint escalation process (57%, +33% from 2015). <p>Having better knowledge and understanding of the institution and its key functions is critical in protecting business consumers about fair practices in the telecommunications industry.</p>

Business Customers Usage

- The Qatar business market is still largely dominated by Ooredoo at 92% and only 47% are currently using Vodafone Qatar. There are 39% of business consumers who are dual users of Ooredoo and Vodafone Qatar.
- Of those with dual providers, 55% consider Vodafone Qatar as their main provider. Vodafone preferers are mainly micro-businesses under industries like arts, entertainment and recreation (100%), human health and social work (100%), agriculture, forestry and fishing (75%) and accommodation and food service (69%).
- On the other hand, Ooredoo is mainly considered by institutions related to electricity (100%), transportation (92%), real estate activities (90%), professional/technical activities (75%), administrative and support services (73%) and financial activities (57%).
- Usage of services of business consumers remain basic and mainly skewed towards Mobile Voice (95%), Mobile Internet (94%), Fixed Voice (68%) and Fixed Internet (55%). Other services like security services (14%) and Leased Lines (5%) are less popular.
- Perhaps, security services from telecommunication providers are less preferred as business customers might be engaged with separate IT companies. However, there may still be a large possibility that business consumers are not involved in any type of security services.
- Ooredoo is used more in services like Fixed Voice (85%), Fixed Internet (90%) and Leased Lines (61%) while both Ooredoo and Vodafone are considered in mobile services for voice (67%) and internet (69%).
- Apart from these services, the study has noted the popular use of OTT services at 72% with WhatsApp (99%) as the used most often OTT platform followed by IMO (50%), Skype (40%) and Viber (33%).

Business consumers prefer to use OTT services due to their ability to communicate with team members, vendors or clients (71%), efficiency in sharing information (12%), better coordination and work planning (7%) and ways of promoting business services and products (5%).

- Diversity of services are directly proportional to size of business. The use and relevance of services also tend to depend on the category and industry of the business.
 - Consequently, usage of services is still quite limited to basic services with most innovative products and services rarely being used on a business level.
 - The business market of Qatar seems to be shared well by the two telecommunication players in the country – Vodafone Qatar posing itself as a more micro-business friendly entity while Ooredoo as the brand for more specialized business solutions that are able to address needs of more established industries and bigger companies.
 - As a result, the competition tends to become limited across the different business sizes especially when having dual providers is still less common to the majority. This can limit the comparison points of business consumers especially on aspects that work better for their business or not.
 - Strengthening the competition between the two service providers is paramount to ensure that business customers have wider and better options across all service types.
 - Business consumers are taking advantage of free online platforms like OTT services in addressing simple business communications needs. OTT services in general are edging on convenience which is a big factor among businesses especially among micro-businesses.
- However, as the popularity of OTT services continue to rise, so do different opportunities and challenges which CRA may need to closely monitor in the future to avoid any potential form of abuse by both providers and consumers.

Importance of Services

- Higher importance is noted on basic services such as Mobile Voice (89%), Mobile Internet (86%), Fixed Voice (81%) and Fixed Internet (76%).
 - Nonetheless, certain industries use less services than the others like the following:
 - Financial and insurance use less mobile voice (83%)
 - Manufacturing use less mobile internet (83%)
 - Wholesale/retail trade use less fixed voice (72%)
 - Agriculture (66%) and wholesale/retail trade (68%) are less inclined to use fixed internet
 - Electricity (0%) and education (35%) use less leased lines
 - Meanwhile, top users of the following services by industry include:
 - Mobile Voice: Mining, Electricity, Water Supply and Waste Management, IT/Communication, Real Estate, and Arts and Recreation
 - Mobile Internet: Mining, Water Supply and Waste Management, and IT/ Communication
 - Fixed Voice: Mining, Electricity, Water Supply and Waste Management and IT/Communication
 - Fixed Internet: Mining, Electricity, and Water Supply and Waste Management
 - Leased Line: Mining (78%); and Human Health and Social Work (77%)
 - Overall, there is a shift towards the greater importance of mobile services: Mobile Voice (+37% from 2015), Mobile Internet (+34% from 2015) over fixed services: Fixed Voices (-8% from 2015), Fixed Internet (-10%) and Leased Lines (-14%).
- Business consumers still operate based on the fundamental needs of their company and according to the industry they are in.
 - With the diverse needs of each business size and industry, it is critical to understand which service types work best. This may help define the offerings of service providers to avoid any impression of services not fitting their business and providers not meeting their business requirements.
 - CRA may encourage the service providers to offer varied service packages that are more relevant and fitting to the operations of certain business.
- As business consumers are moving towards new technologies, the importance of fixed services is being overshadowed by mobile services which poses the challenge of ensuring that mobile services are delivered at the same level and quality as fixed services.

Overall Satisfaction

- Overall satisfaction slightly declined by 1% from 91% in 2015 to 90% in 2019. However, satisfaction has increased in most service types: mobile internet (+14%), fixed voice (+7%), fixed internet (+7%), and leased line (+8%).
- Overall satisfaction is generally stable. As overall satisfaction is already at a high level, it is important that the CRA continues to monitor the new offerings of the service providers in the market.
- Satisfaction on mobile services has more room to improve especially on issues like network reliability and value perceptions on international charges. See succeeding section. Likewise, mobile services have yet to match the service levels of fixed services which most business customers inevitably compare.

Mobile Voice

- It is the second most complained service at 25% following Mobile Internet. The lowest satisfaction score for this service is noted in network reliability specifically in Al Sheehaniya (21%).
- Meanwhile, the following areas also show lower satisfaction scores for Mobile Voice:
 - Value perceptions on international roaming charges (48%).
 - Value perceptions on international call charges (58%).
- These low scores are most apparent among micro-businesses – value perceptions for international call charges (53%) and international roaming charges (46%).
- Overall, while Mobile Voice has noted improvements in most performance areas, compared with other services, it still has lower increments in satisfaction from 2015:
 - Network coverage (+0%)
 - Transparency of prices (+3%)
 - Ease of purchasing services (+3%)
 - Options available for bill payments (+5%)
 - Clear terms and conditions (+6%)
 - Time for activation (+8%)
 - Network reliability (+12%)
 - Voice quality and clarity (13%)
- Nonetheless, only satisfaction on regularity of receiving bills for mobile voice declined (-1%) from 2015.
- Network reliability of mobile voice remains an issue to most business customers which somehow affects their value perceptions for international charges.
- Likewise, mobile voice is yet to shape up in many aspects involving network coverage, price transparency, clarity of terms and conditions and others to fully satisfy the requirements of business customers.
- Key Fixes: Satisfaction falling below 80%
 - Value perceptions on international charges
 - Network reliability
 - Voice quality and clarity
 - Clear terms and conditions

Mobile Internet

- It is most commonly complained service at 48%. Compared with other services, Mobile Internet has lower satisfaction scores on the following:
 - Value of perceptions on data charges (57%)
 - Accuracy of bills (68%)
 - Ease of understanding the bills (70%)
 - Transparency of prices (71%)
 - Regularity of receiving bills (71%)
 - Options available for bill payments (72%)
 - Time for activation (73%)
 - Speed of data (74%)
 - Network reliability (75%)
 - Quality of video access/streaming (75%)
 - Ease of purchasing services (75%)
 - Satisfaction issues on network reliability and speed of data are more apparent in Al Sheehaniya.
 - Meanwhile, Vodafone Qatar also suffer from lower satisfaction scores on their Mobile Internet service particularly on network reliability, value perceptions on monthly rental charges and data charges, variety of rate plans, clear terms and conditions, and time for activation.
 - By business size, satisfaction is generally low among micro-businesses for areas such as value perceptions on monthly rental charges (65%) and data charges (52%), transparency of prices (66%), ease of purchasing services (68%), time for activation (69%), options available for bill payments (68%), regularity of receiving bills (65%), accuracy of bills (64%), and ease of understanding the bills (65%).
- Mobile Internet is one of the key sources of dissatisfaction for business customers, when compared to other services.
 - The least satisfying aspects of Mobile Internet as a service are related to value and payment.
 - Focusing on simplifying the bills and increasing transparency of charges is likely to improve the overall satisfaction with Mobile Internet.
 - When comparing Mobile Internet by region we can identify specific issues facing certain municipalities in Qatar. Customers in Al Sheehaniya, for example, are least satisfied with network reliability.
 - Service providers concentrate on network reliability and speed of data in that region in order to improve business customers' satisfaction with their Mobile Internet services.
 - Vodafone Qatar business customers are more likely to have a lower satisfaction level with mobile services than Ooredoo customers. For Vodafone Qatar to improve the level of business customers satisfaction it needs to address issues related to payment such as billing, data charges and increase rate plan options.
 - Satisfaction is not significantly different for small to large businesses. However, micro-businesses have needs mostly related to billing and prices.
 - With this in mind, micro-businesses satisfaction with Mobile Internet is generally low, as well as their satisfaction with the purchasing process. This could indicate the potential for a specific approach to data charges and billing for smaller businesses that differ from the ones offered to the larger businesses.

Fixed Voice

- Fixed Voice has high satisfaction scores across the different performance areas. Highest scores are noted on:
 - Value perceptions on monthly rental charges (79%)
 - Accuracy of bills (80%)
 - Ease of understanding the bills (82%)
 - Variety of rate plans (87%)
 - Transparency of prices (88%)
 - Options available for bill payments (88%)
 - Clear terms and conditions (90%)
 - Time for activation (90%)
 - Choice of contract length and duration (90%)
 - Voice quality and clarity (94%)
 - Ease of purchasing services (94%)
 - Availability of service (95%)
 - Better satisfaction scores are more noticeable with Ooredoo especially on value perceptions on installation, monthly rental charges and international calls, variety of rate plans, clear terms and conditions, transparency of prices, ease of purchasing services, time for activation, choice of contract and duration, options available for bill payments, and ease of understanding the bills.
 - However Fixed Voice services have slightly lower scores on the following:
 - Value perceptions on international call charges (54%)
 - Value perceptions on installation prices (67%)
 - Issues on these aspects are more apparent among micro and SME (Small or Medium Enterprises) businesses.
- While high scores can be seen with Fixed Voice, value perceptions remain a key issue for this service. As such, business consumers may need to be more aware of how charges are made.
 - CRA may also need to look at how service providers charge business consumers and if pricing standards are followed or maintained accordingly.
 - CRA may investigate more competitive pricing packages for international charges.

Fixed Internet

- Fixed Internet like Fixed Voice gains high satisfaction scores, specifically on areas like:
 - Quality of video access and streaming (91%)
 - Speed of data (92%)
 - Availability of service (93%)
 - Meanwhile, slightly lower scores are noted on:
 - Value perceptions on installation prices (58%)
 - Value perceptions on data charges (61%)
 - Accuracy of bills (76%)
 - Options available for bill payments (82%)
- Fixed Internet shows superior performance vis-à-vis Mobile Internet specifically in the areas of quality of video access and streaming, speed of data and availability of service.
 - CRA may compel service providers to replicate the same level of service quality on their mobile services. This can help provide a healthy competition between these types of internet services.
 - Key Fixes: Satisfaction falling below 80%
 - Value perceptions on installation prices
 - Value perceptions on data charges

Leased Line

- Leased Lines is the least complained service. It shows high scores on availability of service, network reliability, speed of data, regularity of receiving bills, and accuracy of bills.
 - However, satisfaction on the service is quite low on the following aspects:
 - Choice of contract length and duration (63%)
 - Value perceptions on installation prices (60%)
 - Clear terms and conditions (59%)
 - Variety of rate plans (58%)
 - Low satisfactions scores vary across business size. Lower scores are mainly noted on:
 - Value perceptions on installation prices (small – 56%; large 44%)
 - Value perceptions on monthly rate charges (small – 71%; medium – 61%)
 - Variety of rate plans (micro – 48%; small – 50%)
 - Clear terms and conditions (micro – 50%; small – 52%)
 - Ease of purchasing services (small – 67%; medium – 72%)
 - Choice of contract length and duration (micro – 57%; small – 56%)
 - ease of understanding (small – 69%)
- Business customers' satisfaction with Leased Line services is relatively high and there are not many complaints regarding the services. However, service providers have an opportunity to further increase satisfaction if they focus on detailing their rate plans and providing options for contract length and duration.
 - As expected, smaller sized businesses tend to have lower satisfaction with aspects regarding the installation prices, rate charges and the rate plans variety.
 - Providing a variety of simple and detailed rate plans to micro, small and medium businesses can further improve their satisfaction with Leased Lines.

APPENDICES

A. Research Details

i. Sample Framework

According to the most recent Qatar Census (April 2015), there were 44,439 businesses establishments that were identified as operating at the time the Census was conducted. By operating, it means the business was routinely engaged in its daily operation with workers doing their work as usual.

Based on this business establishment population size, the survey was conducted with a total sample of n=1,635 business consumer participants.

Based on a business population size of 44,439, the sample size of n=1,635 allows a margin of error of $\pm 3\%$ on a 99% confidence level and a margin of error of $\pm 2\%$ on a 95% confidence level. Both margin of errors meet best practice standards of $\pm 5\%$.

The survey targeted two main profiles as follows:

- Decision makers for the telecommunications services' procurement and/or implementation within a business.
- End users of telecommunication services who are not decision makers for the telecommunications services' procurement and/or implementation within a business.

The eligible profiles have been determined by a screening question included in the first section of the survey questionnaire. An eligible respondent must have chosen one of the following profile descriptions:

- I am very aware of the telecommunications service usage within the business AND I am the decision maker for the telecommunications services' procurement and/or implementation.
- I am very aware of the telecommunications service usage within the business BUT I am not the decision maker for the telecommunications services' procurement and/or implementation.
- I am partially aware of the telecommunications service usage within the business BUT I am the decision maker for the telecommunications services' procurement and/or implementation.

Soft quotas have been applied during the data collection based on the 2015 Census data for business establishments. The quotas have been implemented based on the following:

- Industry sector
- Business sector
- Size of business (number of employees)
- Geographic Location (municipality)

ii. Survey Methodology

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

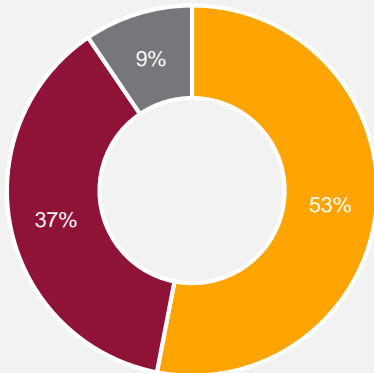
The surveys have been conducted at the respondent's place of work at a time that is convenient to the respondent. In most instances a pre-arranged time and day has been scheduled with the respondent for the interview. The interviewer had to obtain a sort of evidence from the organization that the interview took place and as a way to track survey completion. The evidence is either a Business Card from the respondent or another document such as a stamped form.

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

iii. Sample Distribution

A total of 1635 respondents were interviewed. Sixty-two percent of the interviews were conducted with the decision makers for the telecommunications services' procurement and/or implementation within a business and 37% were conducted with end-users who are not decision makers for procurement and/or implementation of telecommunications services within the business (see Figure 68).

Figure 68: Respondents' profile by level of awareness and decision making in relation to the telecommunications services

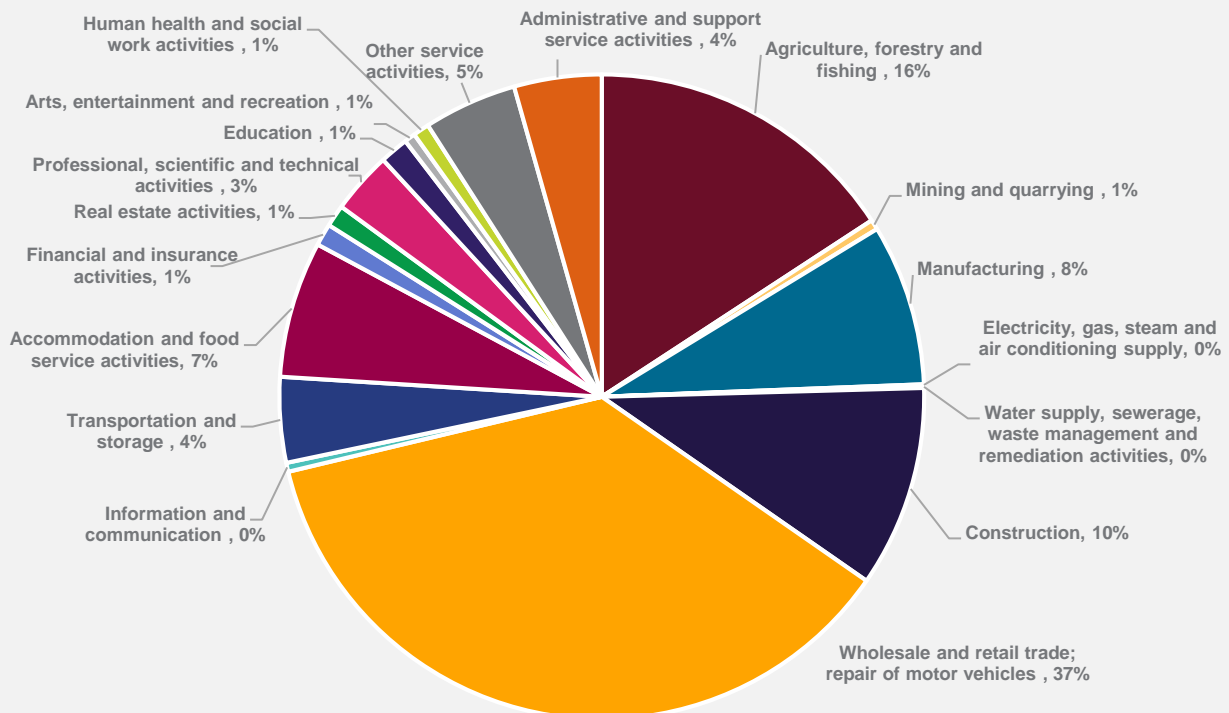


- I am very aware of the telecommunications service usage within the business AND I am the decision maker for the telecommunications services' procurement and/or implementation
- I am very aware of the telecommunications service usage within the business BUT I am not the decision maker for the telecommunications services' procurement and/or implementation
- I am partially aware of the telecommunications service usage within the business BUT I am the decision maker for the telecommunications services' procurement and/or implementation

Q. I am now going to read out some statements, please tell me which one describes you best?
Base: All Respondents, n=1635.

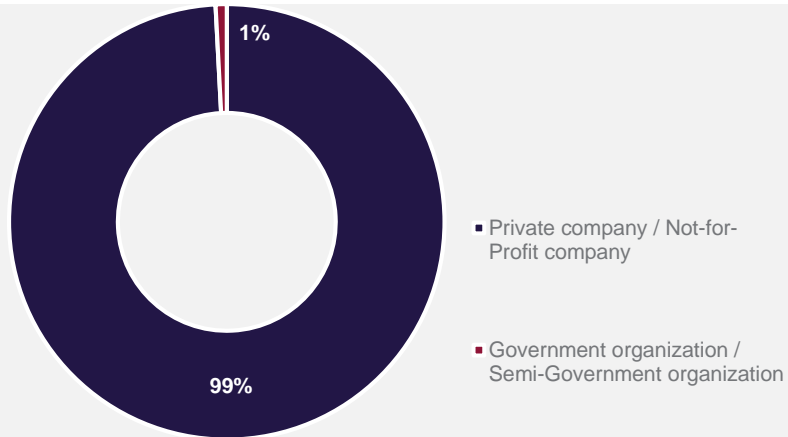
The figures 69 to 72 show the respondents profile by industry sector, business sector, business size and geographic location. As stated above, quotas have been applied so that the sample is representative of the target population of business consumers in Qatar.

Figure 69: Respondents' profile by Industry Sector



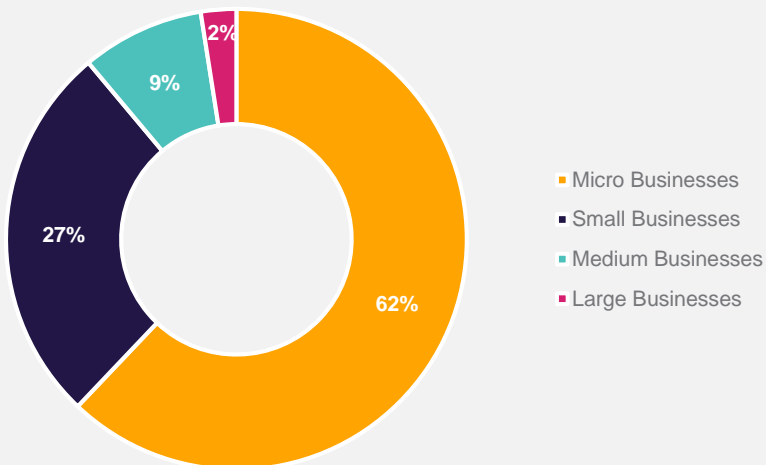
Q. What industry does your business operate within?
Base: All Respondents, n=1635.

Figure 70: Respondents Profile by Business Sector



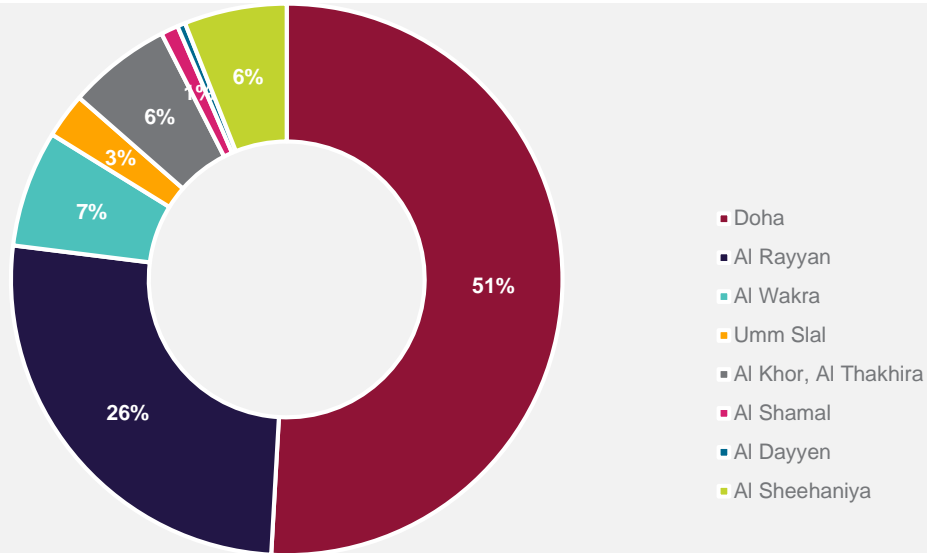
Q. Which of the following best describes your company? Is it a ...?
Base: All Respondents, n=1635.

Figure 71: Respondents Profile by Business Size



Q. Which of the following best describes the number of employees working in this company across all branches of the business? Is it ...?
Base: All Respondents, n=1635.

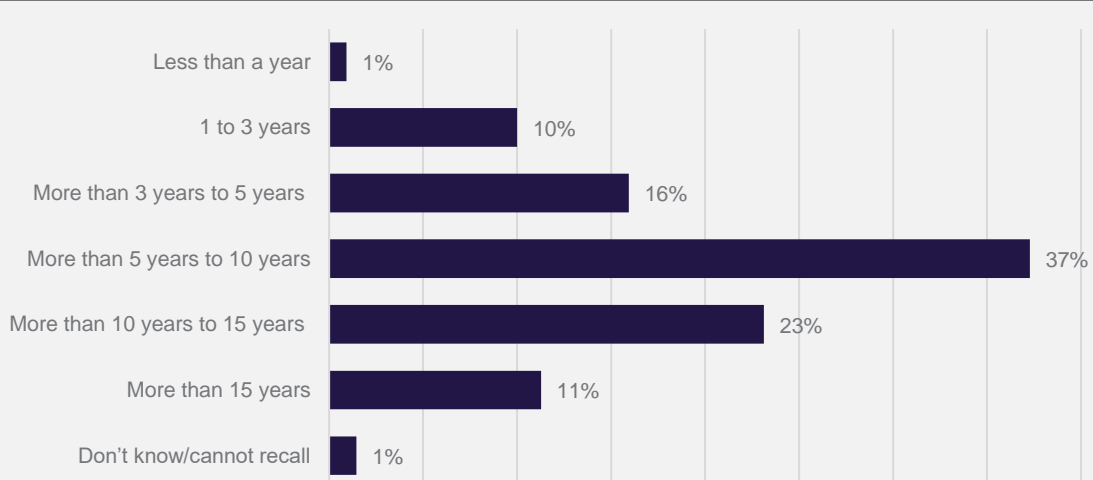
Figure 72: Respondents Profile by Geographic Location



Q. Interviewer to record the location of the surveyed organization.
Base: All Respondents, n=1635.

More than a third of the interviewed respondents (37%) work for a business that has been operating in Qatar for more than five years and up to ten years. And another third of the respondents (34%) work for a business that has been operating in Qatar for more than ten years (see Figure 73).

Figure 73: Respondents Profile by the Company's Operational Years in Qatar



Q. For how many years is your company operating in Qatar?
Base: All Respondents, n=1635.

Table 78 below shows the average number of branches that the interviewed companies have inside and outside Qatar.

Table 78: Average Number of Branches

	Average
Number of branches in Qatar	1.37
Number of branches outside Qatar	1.09
Total number of branches	2.46

Q. How many branches does your organization have in total (including this one), in Qatar and outside Qatar?
Base: All Respondents who have indicated the number of branches, n=1635.

The respondents who took part in the study are mainly Asian expatriates (86%) and individuals who have obtained a post graduate degree (68%). Figures 74 and 75 show the profile of the respondents by their nationality and by the highest level of education they have obtained.

Figure 74: Respondents Profile by Nationality

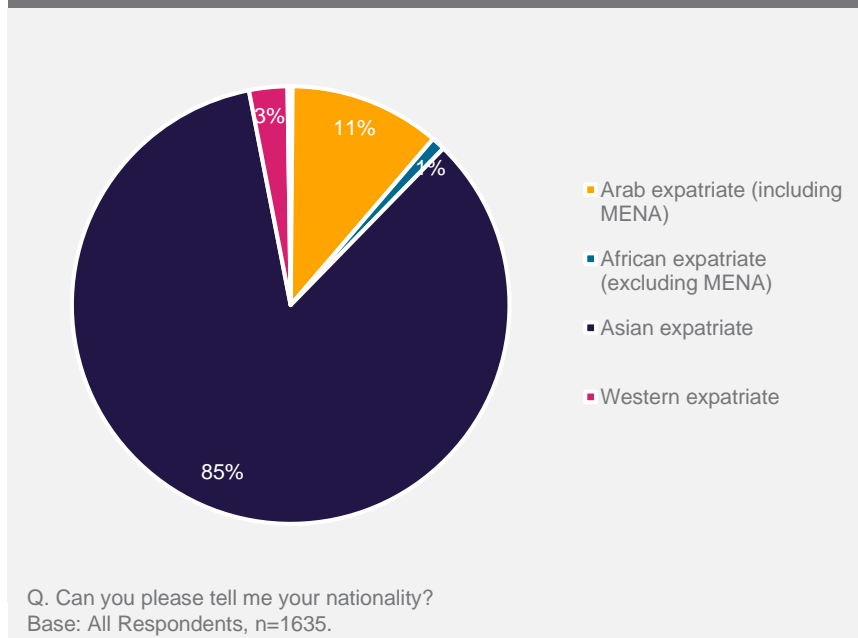
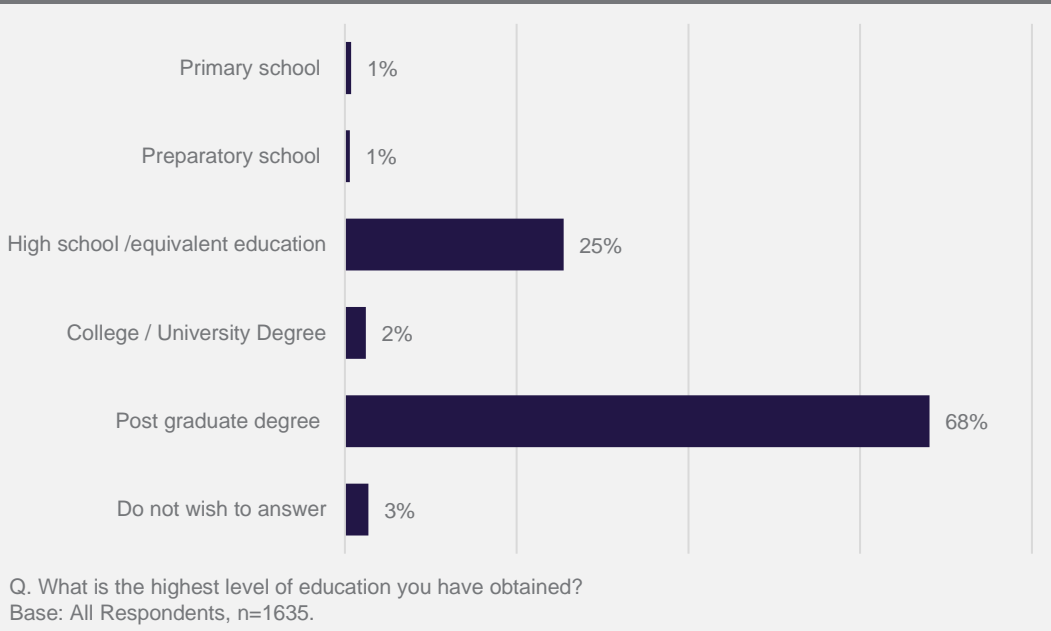


Figure 75: Respondents' Profile by Highest Level of Education



iv. Weighting Approach

In order to represent the population of the businesses in Qatar, the surveyed sample was weighted considering the industry sectors parameter. The weights have been calculated by dividing the theoretical or ideal weights (percentages within the population) by the real or achieved weights (percentages within the achieved sample). Table 79 below shows the weights that have been used to adjust the collected sample.

Table 79: Weights and Sample Adjustment

Industry Sectors	Population	Achieved Sample	Weight	Adjusted Sample
Agriculture, forestry and fishing	16%	10%	1.6131	16%
Mining and quarrying	1%	0%	1.6409	1%
Manufacturing	8%	8%	1.0503	8%
Electricity, gas, steam and air conditioning supply	0%	0%	0.3679	0%
Water supply, sewerage, waste management and remediation activities	0%	0%	0.9382	0%
Construction	10%	9%	1.0868	10%
Wholesale and retail trade; repair of motor vehicles	37%	38%	0.9574	37%
Information and communication	0%	2%	0.2929	0%
Transportation and storage	4%	4%	0.9861	4%
Accommodation and food service activities	7%	6%	1.0855	7%
Financial and insurance activities	1%	2%	0.6242	1%
Real estate activities	1%	1%	0.8532	1%
Professional, scientific and technical activities	3%	5%	0.6676	3%
Education	1%	1%	1.0206	1%
Arts, entertainment and recreation	1%	0%	1.1222	1%
Human health and social work activities	1%	1%	0.8278	1%
Other service activities	5%	5%	0.9687	5%
Administrative and support service activities	4%	7%	0.646	4%
Total	100%	100%	-	100%

B. List of Abbreviations

CRA	Communications Regulatory Authority
GNI	Gross National Income
GDP	Gross Domestic Product
IoT	Internet of Things
OTT	Over-The-Top
CAPI	Computer Assisted Personal Interview
IDD	International Direct Dialing
ICT	Information and Communication Technology
MPLS	Multi-Protocol Label Switching
IPVPN	Internet Protocol Virtual Private Network
M2M	Machine to Machine
IVR	Interactive Voice Response
SME	Small and Medium Enterprises

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E. References

1. Gross National Income (GNI), previously known as gross national product (GNP), is the total domestic and foreign output claimed by residents of a country, consisting of gross domestic product (GDP), plus factor incomes earned by foreign residents, minus income earned in the domestic economy by non-residents (Todaro & Smith, 2011: 44)
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