

**Some of Arab Advisors Group's Custom Research and Consulting Projects in the Arab World (Face to face surveys, Focus groups, online surveys, In-depth interviews, ETC.)**

Over our 19 years of history, the Arab Advisors Group completed many major consulting projects. Our consulting clients include to Kaspersky Lab UK Limited, Dubizzle (UAE), Application Technology Strategy, Inc., (USA) , AICO (Saudi Arabia), Association of Banks in Jordan (ABJ), Al Aan TV (UAE), Al Riyadh Newspaper (Saudi Arabia), Al Rajhi Cement (Saudi Arabia), Batelco (Jordan), Batelco (Bahrain), Cisco Systems, CITC (Saudi Arabia), Dajani Consulting Group (Jordan), DevoTeam Consulting (Saudi Arabia), Durub Telecom (Jordan), Etisalat (UAE), Globitel (Jordan), int@j (Jordan), ictQATAR (Qatar), Insurance Commission (Jordan), Jawwal (Palestine), Jordan Telecom (Jordan), LINKdotNET (Egypt), Mirsal (Jordan), Motorola, NAFES (Jordan), NASCO (Saudi), Nordic Cooperation Council, Orascom Telecom (Egypt), OTE (Greece), PTC/BRAVO (Saudi Arabia), Ritsumeikan Asia Pacific University, Saudi Oger (Saudi Arabia), Smile communications (South Africa), Vodafone (UK), VTEL (Jordan), Xpress (Jordan), Zain Group (Kuwait), Application Technology Strategy (USA), Cheil (Jordan), Hikma Pharmaceuticals (Saudi Arabia) investment banking companies and venture capital companies. To date, our consulting work includes:

Following is a brief description of some of our consulting and custom research engagements:

**Qatar Digitization Survey**

In June 2020, Arab Advisors Group released Qatar Digitization Survey. The survey measure the awareness and usage of digitized services offered by cellular operators in Qatar. The survey further provides an overview of respondents satisfaction with the digitized services offered. Arab Advisors Group's survey provides an overview of 5G awareness and usage, adoption of 5G-compatible handsets, respondents willingness to purchase similar handsets, and the perceived benefits of 5G connectivity. The survey further provides an overview of eSIM awareness and usage among cellular users in Qatar. Furthermore, Arab Advisors Group's survey provides a measure of cellular handsets penetration and Internet usage, overviews Internet connection types, corresponding Internet providers, and methods for accessing the Internet among Qatar residents. Arab Advisors Group's survey sheds the light on virtual reality (VR) usage and VR devices adoption among cellular

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users. The survey provides a measure of the awareness of smart home solutions. Additionally, the survey provides an overview of smart home solutions penetration in Qatar. The Digitization Survey in Qatar yields a confidence level of 99% with a margin of error of less than 8%. The survey targeted respondents residing in Qatar. The total sample of 297 respondents was contacted through the phone. All respondents passed rigorous quality control checks. Quality control was conducted by Arab Advisors Group's team.

### **Qatar Media Survey**

In June 2020, Arab Advisors Group released Qatar Media Survey. The survey provides an overview of free-to-air ("FTA") satellite TV viewership, equipment used and location to watch these channels. Arab Advisors Group provides a measure of respondents' satisfaction with FTA satellite TV content in terms of novelty, variety, and entertainment. Furthermore, the survey provides an overview of the types of FTA satellite TV channels watched (HD/SD) and respondents awareness of different types of satellite receivers. On the pay TV front, Arab Advisors Group's survey provides an overview of pay TV penetration, viewership patterns, and methods used to access pay TV content in Qatar. Furthermore, the survey provides insights into Internet Protocol TV ("IPTV") usage. Arab Advisors Group provides a measure of respondents' satisfaction with pay TV and IPTV providers customer care, content, subscription fees, number and languages of available channels. The survey provides an overview of subscription-based video on demand ("SVOD") awareness and usage as well as pirated content consumption among Qatar residents. The survey focuses on other methods used to watch FTA satellite content such as online streaming, applications, and prerecorded content through DVDs/CDs. The survey offers insights on radio listening habits and respondents preferences for radio programs genres and languages. Furthermore, Arab Advisors Group's survey provides an overview of cellular handsets adoption, Internet usage, Internet connection types, corresponding Internet providers, and methods for accessing the Internet. The survey further provides an overview of social media platform adoption and consumption among Qatar residents. Arab Advisors Group measures online gaming usage in Qatar. The survey provides a measure of the spending habits of respondents who play online games. Additionally, the survey overviews game console adoption among residents in Qatar. Qatar Media Survey yields a confidence level of 99% with a margin of error of less than 8%. The survey targeted respondents residing in Qatar. The total sample of 297 respondents was contacted through the phone. All respondents passed rigorous quality control checks. Quality control was conducted by Arab Advisors Group's team.

### **The Impact of COVID-19 on the Jordanian Economy**

In April 2020, Arab Advisors Group was commissioned to conduct a study on the impact of COVID-19 on the Jordanian Economy. The study involved in-depth interviews with active participants of different sectors of the Jordanian economy and answering a set of questions provided by the client. The study provides qualitative and quantitative insights from small, medium, and large enterprises on

how the pandemic affected industries manpower, hiring processes, organizational capabilities to cope with the pandemic, organizational sustainability, entities financial performance before and during the pandemic, how organizations can overcome and prepare against global and local crisis, the needed governmental support, and the aftermath of the pandemic on the economy in Jordan. As an addendum, the study outcomes are compared to the recent findings about public opinion in Jordan.

### **Antihypertensive Patient Journey Survey**

In January 2020, Arab Advisors Group was commissioned to prepare an analysis report on the antihypertensive patient journey. The report was based on quantitative insights from physicians in Saudi Arabia.

### **An Overview of the Electricity Sector in Jordan 2019**

In November 2019, Arab Advisors Group released a report covering the electricity market in Jordan. The report overviews the trends, challenges, and conditions of the market. It further provides key indicators on the electricity industry in the Kingdom. Additionally, Arab Advisors Group overviewed smart grids initiatives and highlighted use cases on entering the electricity value chain in Jordan.

### **The State of Cryptocurrency and National Digital Currency in the Arab World**

In April 2018, September 2018 and February 2019, Arab Advisors Group released 3 surveys in Jordan, the UAE and Saudi Arabia, respectively. The surveys measure the awareness of cryptocurrency in the three countries. The surveys further provide the familiarity of cryptocurrency types. They also provide insights on the willingness to buy cryptocurrency. The Cryptocurrency Awareness Survey in Jordan yields a confidence level of 99% with a margin of error of less than 6%. The survey targeted respondents residing in Jordan. The total sample of 514 respondents was contacted through the phone. The Cryptocurrency Awareness Survey in Saudi Arabia yields a confidence level of 99% with a margin of error of less than 4%. The survey targeted respondents residing in Saudi Arabia. The total sample of 1,113 respondents was contacted through the phone. The Cryptocurrency awareness survey in the UAE yields a confidence level of 99% with a margin of error of less than 6%. The survey targeted respondents residing in the UAE. The total sample of 502 respondents was contacted through the phone. All respondents passed rigorous quality control checks. Quality control was conducted by Arab Advisors Group's team.

### **Employees' Weekend Face-to-face Survey in Amman**

In March and April 2019, Arab Advisors Group released a Face-to-face survey in Jordan. The survey provides an overview of the employees' working hours, workdays and weekends. The survey probes the respondents' satisfaction levels with number of workdays, working hours and weekends. The survey results encompass answers

from 556 respondents above 22 years old. The survey yields a confidence level of 99% with a margin of error of 5%.

### **Hybrid, Electric, Connected, and Autonomous Cars Survey in Saudi Arabia**

In February 2019, Arab Advisors Group released a major comprehensive survey in Saudi Arabia. The survey probed the awareness of hybrid, electric, connected, and autonomous cars in Saudi Arabia. The survey provides insights about the market of cars in KSA including the status of the cars by type. The survey targeted 1,113 respondents and targeted driving license holders. The survey yields a confidence level of 99% with a margin of error of less than 4%.

### **A Quantitative Study of a Free-to-Air (FTA) Channel in 5 MENA Countries**

In January 2019, Arab Advisors Group completed a consulting survey-based project conducted in Algeria, Egypt, Jordan, Morocco, and Saudi Arabia. The project provided the results of a major comprehensive Computer Assisted Telephone Interviews (CATI) surveys in these 5 countries. The aim of the surveys were to measure the awareness of the FTA channel in the countries understudy, provide an overview of its reputation among TV viewers, and perception of the viewers on the channel's content, programs, and airing timing of program. The surveys further provided insights on video content viewing habits, methods used for watching video content, and preferred genres of video content watched in the 5 MENA countries understudy.

### **Electric Cars Survey in the UAE**

In September 2018, Arab Advisors Group released a major comprehensive survey in the UAE. The survey probed the awareness of electric, connected, and autonomous cars in the UAE. The survey provides insights about the market of cars in Jordan including the status of the cars by type. The survey results encompass answers from 502 respondents and targeted driving license holders. The survey yields a confidence level of 99% with a margin of error of less than 6%.

### **Market Sizing and Projections in six of the Arab countries**

In May 2018, Arab Advisors Group concluded a research project commissioned by a regional telecommunication operator. The research project provided an overview of the key market indicators in: Saudi Arabia, Kuwait, Bahrain, Jordan, Iraq and Sudan. The project provided historical and projections of the required key market indicators.

### **Electric Cars Survey in Jordan**

In April 2018, Arab Advisors Group released a major comprehensive survey in Jordan. The survey probed the awareness of electric, connected, and autonomous cars in Jordan. The survey provides insights about the market of cars in Jordan including the status of the cars by type. The survey results encompass answers from 514

respondents and targeted driving license holders. The survey yields a confidence level of 99% with a margin of error of less than 6%.

### **TV viewing patterns surveys in Damascus, Beirut and Baghdad**

In February 2018, Arab Advisors Group completed a consulting survey-based project conducted in Damascus, Beirut and Baghdad. The aim of the project was to analyze the TV viewing patterns in the cities covered. The project included analysis of satellite TV viewing patterns for the respondents and the members of their households, TV channels perception and viewership, TV sets and equipment analysis, Pay TV viewing patterns, and interactivity with satellite TV channels patterns and perception, among others.

### **Jordan Retail Banking Market Survey**

In December 2017, Arab Advisors Group released a major comprehensive survey in Jordan. The Survey provides insights towards the usage of financial services such as mobile banking, online banking, credit cards, ATMs, branches and call centers among banked respondents, in addition to the factors that encourage or deter individuals from having bank accounts. The survey provides deep insights about the Jordanian market for banks, and gives an overview of banks' market position in Jordan. The survey results encompass answers from 925 respondents. The survey was conducted based on the demographic breakdown in Jordan for the population above 21 years old.

### **A Survey Analysis of Transportation Habits in Jordan**

In April 2017, Arab Advisors Group released a major comprehensive survey in Jordan. The survey probes the respondents' adoption and habits of using transportation methods including public transportation (taxis, buses, and serveces), personal cars, and online ride-hailing applications. The survey results encompass answers from 791 respondents and yields a confidence level of 99% with a margin of error of less than 5%.

### **Private Company Valuation**

In August 2017, the Arab Advisors Group conducted a company valuation for a privately held company in Saudi. One of the shareholders was looking to sell his share in the company and was seeking a fair value for his shares. The Arab Advisors Group conducted the company valuation based on a discounted cash flow model as well as a comparable model.

### **Qualitative and Quantitative Insights Regarding the Premium Smartphones Market**

In April 2017, Arab Advisors Group conducted qualitative and quantitative research regarding the smartphone market in the Levant specifically in Jordan, Lebanon and Iraq.

Arab Advisors Group conducted focus groups in Lebanon and Jordan and a survey in Iraq.

### **TV viewing patterns surveys in Cairo, Beirut and Baghdad**

In February 2017, the Arab Advisors Group completed a consulting survey-based project conducted in Cairo, Beirut and Baghdad. The aim of the project was to analyze the TV viewing patterns in the cities covered. The project included analysis of satellite TV viewing patterns for the respondents and the members of their households, TV channels perception and viewership, TV sets and equipment analysis, Pay TV viewing patterns, and interactivity with satellite TV channels patterns and perception, among others.

#### **Customer Satisfaction Survey for an information technology solutions and services provider**

In January 2017, the Arab Advisors Group concluded a research project delivered to a local information technology solutions and services provider. The study was based on a survey with the provider's clients. The study aimed to probe the clients' satisfaction with the providers' services, products, different departments and teams.

#### **Study of the Importance of the Tobacco Market in Jordan**

In July 2016, the Arab Advisors Group conducted a project for the leading cigarettes producer in Jordan. The Arab Advisors Group quantified the effect of illicit cigarettes on the Jordanian economy. In addition, the Arab Advisors Group calculated the amount of revenues the Jordanian government collected from the cigarettes market.

#### **A Qualitative Study of a Marketing Campaign for a leading Pay TV provider**

In April 2016, the Arab Advisors group conducted focus groups for a pay TV provider. The focus groups were conducted with different age groups in the Jordanian market. The topics discussed in the focused group include TV watching habits and advertisements preferences, it also includes showing 2 storyboards to the participants to probe their opinions and input on them.

#### **An analysis of a leading Pay TV provider, marketing methodologies and service offerings**

In March 2016, the Arab Advisors Group completed a consulting focus group-based project for a leading Pay TV provider. The project aimed at probing the demographics, lifestyle and behaviors, media exposure, viewership patterns and Pay TV awareness and perceptions of people with an annual income of US\$ 45,000 and above in Jordan. The study analyzed focus group insights, and provided recommendations in the arena of operator perception, marketing campaigns and service offerings.

#### **Brand Equity Research on Jordanian Radio Stations**

In June 2015, the Arab Advisors Group conducted a brand equity consulting project for three of the radio stations broadcasting in Jordan. The study was based on a survey conducted with 750 respondents in addition to 6 focus groups with the stations' audience in order to better understand their perception about the stations.

#### **Analysis of the provision of telecom services by non-telecom sector entities**

In March 2015, the Arab Advisors concluded a research project delivered to an Internet Service Provider (ISP) in Palestine. The report provided an overview of electricity utilities with telecom subsidiaries in order to analyse the costs of deploying fiber-optic network alongside utility (Electricity) lines. The report also profiled a number of electricity companies with telecom subsidiaries across Europe and the Americas in addition to an overview of the electricity and telecom markets in Palestine.

### **Internet service provider in Palestine: Internet market landscape and Internet survey in Palestine 2015**

During February 2015, The Arab Advisors Group concluded a comprehensive research on the communications landscape along with a thorough analysis of the Internet market status in Palestine, and the major ISP's in both West Bank and Gaza. In addition to an overview of the Internet market in Palestine, the Arab Advisors Group conducted projection analysis for the Internet market in Palestine, studying the effect of the launch of 3G services on the dynamics of individuals' Internet usage patterns.

### **In-depth interviews with telecom and media experts in the MENA region**

In January 2015, the Arab Advisors Group conducted a major study on the state of convergence in the MENA region. The study was based on In-Depth Interviews (IDI) with key players in the media and telecom industries in the region. The study illustrates the readiness for convergence in the region and has detail analysis for each country.

### **Study of Saudi Users of a Live Video Broadcasting Application**

In December 2014, the Arab Advisors Group conducted a consulting project for a New York based start-up that aims to democratize live video broadcasting. The study consisted of 20 in-depth interviews (IDIs) that aimed to help the application owners better understand the Saudi consumers' behavior and usage patterns. The study included respondents of both genders and all age groups.

### **An Analysis of Amman's children extracurricular activities market**

In July 2014, Arab Advisors Group concluded a research project delivered to a local cultural and arts center. The study was based on a survey with 500 parents and three focus groups, each representing a socio-economic status. The study aimed to probe parents' preferences regarding their children's engagement with extra circular activities, willingness to engage with specialized centers, influence of advertising on decision making, perception of local cultural and art centers, in addition to preferred packaging of market offers, among others.

### **Current and historical pay TV trends in the Arab region**

In July 2014, Arab Advisors Group concluded a research project delivered to a global corporate finance advisory firm. The study

provides the results of a major comprehensive Computer Assisted Telephone Interviews (CATI) media survey in Egypt, Saudi Arabia, Morocco, and Algeria. The survey results encompass answers from 1,184 respondents, in the aforementioned countries, above 18 years of age. The study aimed to probe pay TV trends, reasons for subscribing (or not subscribing) to pay TV, willingness to subscribe to additional pay TV content, among others.

### **Fixed regulation developments in the Arab world**

In February 2014, the Arab Advisors Group concluded a comprehensive study commissioned by an incumbent operator. The study covered fixed telecommunications regulations in ten Arab markets; namely, Algeria, Egypt, Iraq, Jordan, Lebanon, Morocco, Saudi Arabia, Sudan, Tunisia, and the UAE. The study analyzed the developments in fixed voice and data regulations, including licensing scope, Bit Stream Access, Local Loop Unbundling, upfront and annual license fees, frequency allocations, public DID allocations, quality of services imposed, among others.

### **In-depth interviews with ICT and media experts in the Arab region**

In January 2014, the Arab Advisors Group concluded in-depth interviews with thirty ICT and media experts in Saudi Arabia, Egypt and Jordan. The interviews focused on reliability of media sources, social media, smartphone trends, and advertising perceptions.

### **Fixed broadband strategies in the Arab world**

In February 2014, the Arab Advisors Group concluded a consulting project and study commissioned by an incumbent operator. The consultancy offered recommendations to the operator's broadband strategy in its respective market. Moreover, the project included analysis of broadband strategies in twelve Arab markets; namely, Bahrain, Egypt, Kuwait, Lebanon, Jordan, Morocco, Oman, Qatar, Palestine, Saudi Arabia, Tunisia, and the UAE.

### **ICT maturity and the triple bottom line effects/benefits of ICT in major cities**

In October 2013, the Arab Advisors Group and a global ICT vendor concluded a major comprehensive study of ICT maturity and its benefits on the city, citizens and businesses in a number of major cities in the region. Results of the study were represented through a number of indexes that helped compare the region's cities, in addition to providing an overview to where these cities rank globally.

### **Egypt Media Survey 2013**

In September 2013, the Arab Advisors Group concluded a major comprehensive survey in Egypt. The survey probed the media consumption habits in Egypt, and provided insights into the broadcast and online media consumption in the country. The survey results encompass answers from 749 respondents, and was conducted based on the demographic breakdown in Egypt for the Egyptian population above 18 years of age. The survey yields a confidence level of 99% with a margin of error of less than 5%.



### **UAE Media Survey 2013**

In August 2013, the Arab Advisors Group concluded a major comprehensive survey in the UAE. The survey probed the media consumption habits in the UAE, and provided insights into the broadcast and online media consumption in the country. The survey results encompass answers from 750 respondents, and was conducted based on the demographic breakdown in the UAE for the Emirati population above 18 years of age. The survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Study on the e-commerce markets, online software distributors and security software products in the region**

In July 2013, the Arab Advisors Group concluded a comprehensive study for a global security software vendor. The report included an analysis of the e-commerce and online software distributors in the region, in addition to an overview of the drivers and enablers of e-commerce. The study also provided insights into the security software market.

### **Iraq media survey 2013**

In July 2013, The Arab Advisors Group concluded a major comprehensive Computer Assisted Telephone Interviews (CATI) survey in Iraq. Arab Advisors Groups major analytical survey of Iraq was scientifically done. The survey results encompass answers from 741 respondents randomly selected based on the demographic breakdown in Iraq for the Iraqi population above 18 years old. The age group and governorate breakdown of the sample were pre-defined by the Arab Advisors Group according to the official demographics breakdown in Iraq.

This survey provides deep insights into television, radio, Internet, online gaming and specialized gaming devices usage patterns in Iraq. The survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Jordan's tobacco market; A study of the illicit tobacco market's effect on government tax revenues**

During June 2013, The Arab Advisors Group concluded a comprehensive research report on the Jordanian tobacco market entitled "Jordan's tobacco market:

A study of the illicit market's effect on the government's tax revenues". The report content was based on a model, developed by the Arab Advisors Group, sizing the Jordanian tobacco market (consumption and revenues) and analyzing the total government tax revenue of the Jordanian tobacco market, and how it has been affected by the illicit trade dynamics. The Arab Advisors Group concluded the report with highlights and recommendations, addressing vital issues to maintain a healthy ecosystem for industry players and the Jordanian government.

### **UAE e-commerce market adoption and trends**

In May 2013, the Arab Advisors Group concluded a major comprehensive study of UAE's ecommerce market supply and demand. The survey involved phone interviews with more than 800 end users in the UAE, in addition to 300 retail stores. The survey provides details on the e-commerce adoption, usage patterns, payment methods and preferences, in addition to detailed analysis of reasons for not adopting e-commerce.

### **Smartphone survey in Morocco 2013**

During the first half of 2013, the Arab Advisors Group concluded a major comprehensive CATI survey of cellular users in Morocco. The survey involved phone interviews with 750 respondents from the cellular population in Morocco. The respondents include both genders and all age groups in the country. The survey provides details on the smartphones adoption and usage patterns; and it also probed general cellular usage habits, smartphone awareness in addition to tablets availability among cellular users in Morocco. The survey yields a confidence level of 99% with a margin of error of less than 5%.

### **TV viewing patterns surveys in Jakarta, Beirut and Tunis**

In January 2013, the Arab Advisors Group completed a consulting survey-based project conducted in Jakarta, Beirut and Tunis. The aim of the project was to analyze the TV viewing patterns in the cities covered. The project included analysis of satellite TV viewing patterns for the respondents and the members of their households, TV channels perception and viewership, TV sets and equipment analysis, Pay TV viewing patterns, and interactivity with satellite TV channels patterns and perception, among others.

### **Huawei corporate image survey**

In November 2012, Huawei, the global ICT provider, commissioned the Arab Advisors Group to conduct a comprehensive survey-based project. The research project aimed to deduce market insights concerning Huawei's corporate image among companies, government institutions and end users in GCC countries. The project encompassed surveying 600 companies and government institutions in addition to 100 end users in GCC countries. The survey interviews were performed through a CATI (Computer-Assisted Telephone Interviewing) platform, and the field work was conducted during January and February 2013. The final survey report presented results from the surveys, insightful analysis and concluded with highlights and recommendations based on the surveys' findings.

### **Building a Smart Program for Saving Water & Energy through Design and Construction.**

In September 2012, the Arab Advisors Group completed a consulting survey-based project conducted in Amman, Jordan. The aim of the project was to gauge the usage and perception of water and energy saving techniques, in addition to identifying factors related to the construction of such techniques. The project covered both housing companies with projects in Amman, in addition to individuals living in the city.

### **Smartphone surveys in Egypt 2012**

During September 2012, the Arab Advisors Group concluded a major comprehensive CATI survey of cellular users in Egypt. The survey involved phone interviews with 765 respondents from the cellular population in Egypt. The respondents include both genders and all age groups across the country. The survey provided details on the smartphones adoption and usage patterns; and also probed general cellular usage habits, smartphones awareness in addition to tablets availability among cellular users in Egypt. The survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Cellular growth opportunities in sub-Saharan Africa**

In August 2012, the Arab Advisors Group published a multi-client report, "Untapped Potential: Africa's Remaining Growth Markets in Focus". The Arab Advisors Group analyzed the sub-Saharan Africa cellular landscape, with special focuses on ten of the African markets with ample room for growth. These countries are the Democratic Republic of Congo, Ethiopia, Ghana, Ivory Coast, Madagascar, Mozambique, Senegal, Tanzania, Zambia, and Zimbabwe. The report starts with a general overview of these markets, digs deeper into the specific market dynamics on a country level, profiles and analyzes the pan-African mobile players operating in these markets, identifies the emerging trends in Sub-Saharan Africa. Finally, the report concludes by identifying the main investment opportunities found in sub-Saharan Africa's cellular markets.

### **DATA CENTRES: TRENDS AND CHALLENGES IN THE GCC REGION**

In May 2012, Arab Advisors Group completed a consulting survey-based project conducted across the GCC countries. The aim of the project was to identify key trends and challenges of Data Centers across these countries. Respondents of the survey were key IT decision makers which included CTOs, CIO, top management and IT managers of large and medium enterprises and public organisations in the GCC countries.

### **Smartphone surveys in Kuwait and Lebanon 2012**

During the first half of 2012, the Arab Advisors Group concluded two major comprehensive CATI surveys of cellular users in Kuwait and Lebanon. The survey involved phone interviews with 750 respondents from the cellular population in each of Kuwait and Lebanon. The respondents include both genders and all age groups across the two countries. These surveys provide details on the smartphones adoption and usage patterns; they also probed general cellular usage habits, smartphones awareness in addition to tablets availability among cellular users in Kuwait and Lebanon. The surveys yield a confidence level of 99% with a margin of error of less than 5%.

### **TV viewing patterns surveys in Cairo, Tehran and Sana'a**

In February 2012, the Arab Advisors Group completed a consulting survey-based project conducted in Cairo, Tehran and Sana'a. The

aim of the project was to analyze the TV viewing patterns in the cities covered. The project included analysis of satellite TV viewing patterns for the respondents and the members of their households, TV channels perception and viewership, TV sets and equipment analysis, Pay TV viewing patterns, and interactivity with satellite TV channels patterns and perception, among others.

### **Egypt Internet Users and e-commerce Survey 2012**

In February 2012, The Arab Advisors Group concluded a major comprehensive online survey of Internet usage patterns and habits of the Internet users in Egypt. The survey involved online interviews with 856 respondents from the general Internet population, including both genders and all age groups across Egypt. This survey provides deep insights into the Internet and e-commerce usage patterns in Egypt. The online survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Jordan Internet Users and e-commerce Survey 2012**

In February 2012, The Arab Advisors Group concluded a major comprehensive online survey of Internet usage patterns and habits of the Internet users in Jordan. The survey involved online interviews with 900 respondents from the general Internet population, including both genders and all age groups across Jordan. This survey covered several areas including: Online and video gaming, Internet usage through cellular handset, e-commerce, online banking (e-banking) and e-government. The online survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Jordan Media Survey of Internet Users 2012**

In February 2012, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Jordan. The survey involved online interviews with 639 respondents from the general Internet population, including both genders and all age groups across Jordan. This survey provides deep insights into television viewing, Pay TV, radio listening, newspaper and book reading habits, in addition to DVD consumption in Jordan. The online survey yields a confidence level of 99% with a margin of error of less than 6%.

### **Development and deployment of new technologies in the Arab regions**

In December 2011, the Arab Advisors Group complemented a background paper on access and infrastructure provided by the ITU with information about the status, development and deployment of the following technologies: WiMAX, 3G, LTE, Internet Exchange Points (IXPs), backbone, Submarine and Terrestrial fiber optic cables, Mobile TV, IPTV, the transition from analogue to digital terrestrial television broadcasting and the planned analogue switch-off (ASO) date. In addition, the Arab Advisors Group provided an overview about the ICT regulatory environment in the Arab Region.

### **ICT Trends, Developments and Prospects in the Arab Region**

During the fourth quarter of 2011, the Arab Advisors Group prepared a comprehensive research report for the ITU. The report included

detailed regional and country level analysis of ICT developments concerning broadband access networks, digital broadcasting, open source software, Arabic digital content, and cyber security in the Arab region. The final submitted report highlighted regional drivers and inhibitors regarding the aforementioned ICT fronts, which was the basis for the needs assessment presented in the report. Moreover, the report concluded recommendations to regional market constituents, especially governments, in order to enhance ICT development in the Arab world.

### **Smartphone surveys in Jordan, UAE and Saudi Arabia 2011**

During the second quarter of 2011, the Arab Advisors Group concluded three major comprehensive CATI surveys of cellular users in Jordan, UAE and Saudi Arabia. Arab Advisors Group's major analytical surveys were scientifically done. The survey involved phone interviews with 750 respondents from the cellular population in Jordan and the UAE each and 770 cellular users from Saudi Arabia. The respondents include both genders and all age groups across the three countries. These surveys provide details on the smartphones adoption and usage patterns; they also probed general cellular usage habits, smartphones awareness in addition to tablets availability among cellular users in Jordan, UAE and Saudi Arabia. The surveys yield a confidence level of 99% with a margin of error of less than 5%.

### **An analysis of Jordanian Mobile operators' services, marketing campaigns and Value Added Services**

In August 2011, the Arab Advisors Group completed a consulting focus group-based project conducted with middle to high class youth for a global content provider. The aim of the project was to gauge the potential of Jordan's telecommunications markets for a recently launched Value Added Service, targeting the youth, offered by one of the market players. The project included analysis of cellular operators' perception, perception of operators' marketing campaigns, mobile usage patterns, and loyalty to cellular operators, among others.

The final submitted presentation analyzed focus group insights, and provided recommendations in the arena of operator perception, marketing campaigns and service offerings.

### **Saudi Arabia Internet Users and e-commerce Survey 2011**

In January 2011, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Saudi Arabia. Arab Advisors Groups major analytical survey of Saudi Arabia was scientifically done. The survey involved online interviews with 1,021 respondents from the general Internet population, including both genders and all age groups across Saudi Arabia. This survey provides deep insights into the Internet and e-commerce usage patterns in Saudi Arabia. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

### **Saudi Arabia Media Survey of Internet Users 2011**

In August 2010, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Saudi Arabia. Arab

Advisors Groups major analytical survey of Saudi Arabia was scientifically done. The survey involved online interviews with 773 respondents from the general Internet population, including both genders and all age groups across Saudi Arabia. This survey provides deep insights into television viewing, Pay TV, radio listening, newspaper and book reading habits, in addition to DVD consumption in Saudi Arabia. The online survey yields a confidence level of 99% with a margin of error of less than 5%.

### **Tunisia Media and Internet Survey 2010**

In October 2010, The Arab Advisors Group concluded a major comprehensive Computer Assisted Telephone Interviews (CATI) survey in Tunisia. Arab Advisors Groups major analytical survey of Tunisia was scientifically done. The survey results encompass answers from 800 respondents selected from different households across Tunisia's cities according to the Tunisian population breakdown in Tunisia. The gender, age group and governorate breakdown of the sample were pre-defined by the Arab Advisors Group according to the demographics published by the National Statistics Institute figures by end of 2009.

This survey provides deep insights into television viewing, Pay TV, radio listening, newspaper in addition to Internet and gaming habits consumption in Tunisia. The survey yields a confidence level of 99% with a margin of error of less than 4%.

### **Jordan Internet Users and e-commerce Survey 2010**

In August 2010, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Jordan. Arab Advisors Groups major analytical survey of Jordan was scientifically done. The survey involved online interviews with 1,021 respondents from the general Internet population, including both genders and all age groups across Jordan. This survey provides deep insights into the Internet and e-commerce usage patterns in Jordan. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

### **Jordan Media Survey of Internet Users 2010**

In August 2010, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Jordan. Arab Advisors Groups major analytical survey of Jordan was scientifically done. The survey involved online interviews with 1,033 respondents from the general Internet population, including both genders and all age groups across Jordan. This survey provides deep insights into television viewing, Pay TV, radio listening, newspaper and book reading habits, in addition to DVD consumption in Jordan. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

### **Satellite TV Surveys 2010**

Between April and June 2010, the Arab Advisors Group completed a survey based project. The project included comprehensive analysis of some satellite media habits in three main capitals in the Middle East

and North Africa. The work included surveying 250 respondents in each city. The Arab Advisors Group presented detailed findings and analysis of the surveys' results.

### **Mobile Advertising status in the MENA region**

In June 2010, the Arab Advisors Group completed a consulting survey-based project conducted with the telecom operators for a global vendor. The aim of the project was to gauge the potential Middle East telecommunications markets for mobile advertising and to assess our client's potential for expansion into these markets. Under this project, the Arab Advisors Group conducted interviews with telecom operators and groups.

The final submitted report summarized the status of the mobile advertising in the operators covered in terms of the phase of mobile advertising deployment and the selection of vendors. It also shows the operators' preferred business model with the mobile advertising vendor.

### **ITU's Questionnaire on Information and Communication Technology (ICT) Access and Use by Households and Individuals in Qatar**

In May 2010, the Arab Advisors Group conducted a major comprehensive survey of the ICT access and usage patterns of households and individuals in Qatar. The survey was conducted across Qatar's major cities of: Doha (the capital), Al Shamal, Al Khor, Al Daayen, Um Slal, Al Rayyan and Al Wakra.

Arab Advisors Group's major analytical survey of Qatar's major cities was scientifically done. Respondents from different households in these cities, were selected randomly in a manner proportionate to the estimated population size of these areas. Respondents were 18 years old and above and were representative of the actual population breakdown in Qatar (nationals and expatriates, age groups and gender). This survey provides insights to the ICT access and usage patterns of households and individuals in Qatar. The random survey has a 95% confidence level with a 4% margin of error.

In order to comply with the ITU questionnaire standards, the Arab Advisors Group divided the survey questionnaire into two main sections which provide a balanced focus on the following areas: ICT access in households and ICT usage by individuals.

### **E-commerce portals in the MENA region**

In May 2010, the Arab Advisors Group conducted a research for a global software company. The project tackled the major e-commerce portals in the MENA region. It included each portal's profile in terms of ownership and stakeholders, the nature of the items sold online, the methods on online payment, and the brands its sells online.

The project also categorized the portals according to their traffic statistics. The Arab Advisors Group used Alexa's traffic ranking as an

indication to the portal's traffic. We also referred to the traffic statistics as indicated by whoismark.com. (Mainly the number of visitors per day and the number of visitors per month).

### **Egypt Internet Users and e-commerce Survey 2010**

In April 2010, The Arab Advisors Group concluded a major comprehensive online survey of Internet users in Egypt. Arab Advisors Groups major analytical survey of Egypt was scientifically done. The survey involved online interviews with 1,321 respondents from the general Internet population, including both genders and all age groups across Egypt. This survey provides deep insights into the Internet and e-commerce usage patterns in Egypt. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

### **A Study of the Video Games market in the Arab World – Nordic Council**

In January 2010, The Arab Advisors Group conducted a study of the video games market in the MENA region for the Nordic Game Program of the Nordic Cooperation Council. The study encompassed primary research with all major game developers, publishers and distributors and covered all major game segments (packaged PC/console games, online games and mobile games).

### **Islamic Banking Survey- Ritsumeikan Asia Pacific University**

In December 2009, the Arab Advisors Group conducted survey for Ritsumeikan Asia Pacific University in Japan about Islamic Banking views among Jordanian individuals and Jordanian companies. The study tackled the perception of Jordanian individuals of commercial banks vs. Islamic Banks.

### **A study of the opportunities for entering the online markets in the Middle East & North Africa region for a global player**

Between September and October 2009, the Arab Advisors Group undertook a major study of the opportunities for entering the online markets in the Middle East & North Africa region. The research was aimed at analyzing 27 regional online portals/websites. The study encompassed an overview of the major regional online portals/websites in the Arab World. The analysis included business models, services, advertising rates and an analysis of the usability of these portals/websites.

### **A Survey of Internet Use and Online Advertising Consumption and Effectiveness in Egypt**

In August 2009, the Arab Advisors Group concluded a comprehensive online survey of the Internet usage patterns and habits of the Internet users in Egypt.

The survey received online replies from 3,348 respondents who answered the survey questions online. The survey was conducted of the general Internet population. The online survey yields a confidence level of 99% with a margin of error of less than 3%.



The Arab Advisors Group divided the survey questionnaire into two main sections: Online habits and trends and Online marketing. The sections provide a balanced focus on the following areas: Internet usage, Online activities, Online shopping, Email use, Browsing patterns and preferences, Chatting websites and/or software used, Internet search use patterns and preferences, Frequency of reading blogs, Membership in forums, Awareness of the different online advertising tools: ad banners, sponsored links, ad emails and pop-up banners and Perception of online advertising.

### **A Survey of Internet Use and Online Advertising Consumption and Effectiveness in Jordan**

In June 2009, the Arab Advisors Group concluded a comprehensive online survey of the Internet usage patterns and habits of the Internet users in Jordan.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 555 respondents who answered the survey questions online. The survey was conducted of the general Internet population. The online survey yields a confidence level of 99% with a margin of error of less than 6%.

The Arab Advisors Group divided the survey questionnaire into two main sections: Online habits and trends and Online marketing. The sections provide a balanced focus on the following areas: Internet usage, Online activities, Online shopping, Email use, Browsing patterns and preferences, Chatting websites and/or software used, Internet search use patterns and preferences, Frequency of reading blogs, Membership in forums, Awareness of the different online advertising tools: ad banners, sponsored links, ad emails and pop-up banners and Perception of online advertising.

### **A study of the opportunities for entering the region of Middle East & North Africa (Bahrain, Kuwait, Oman, Qatar, KSA, U.A.E. and Egypt) markets for a global player**

Between April and July 2009, the Arab Advisors Group undertook a major study of the opportunities for entering the region of Middle East & North Africa (Bahrain, Kuwait, Oman, Qatar, KSA, U.A.E and Egypt) markets. The research was aimed to analyze Internet business environment and industry in the 7 selected countries, in addition to probing potential investment opportunities in these countries. The study encompassed comprehensive telecom key indicators as well as the regulations of the cellular, Internet and fixed markets in each country. Moreover, the study included an overview of the IT market status in the selected countries. The main indicators of the telecommunication markets included ARPU levels, penetration rates, revenues and growth potential. Moreover, the study included an outline of the footprint of the international portals in the Arabic region, in addition to a summary of the top 20 websites in each country.

**A study of the telecommunication markets in the AMENA region, covering 16 countries, in addition to probing potential investment opportunities for a global player**

Between March and May 2009, the Arab Advisors Group undertook a major study of the telecommunication markets in the AMENA region, covering 16 countries, in addition to probing potential investment opportunities. The study encompassed comprehensive telecom key indicators, in addition to the regulations of the cellular, Internet and fixed markets, in each country. The main indicators of the telecommunication markets included ARPU levels, penetration rates, revenues and growth potential. Moreover, the study included an outline of the footprint of the international portals in the Arabic region, in addition to an overview of the regional social networking, dating and matrimonial websites as well as a summary of the top 20 websites in each country. The study also included the spending on mobile added services, the regional advertising expenditure dynamics and an overview of e-commerce trends in the UAE and Saudi Arabia.

**UAE Media Survey of Internet Users 2009**

In March 2009, the Arab Advisors Group concluded a comprehensive online survey of the media usage habits of Internet users UAE.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 460 respondents who answered the survey questions online. The survey was conducted of the general Internet population. The online survey yields a confidence level of 99% with a margin of error of less than 6%.

The Arab Advisors Group divided the survey questionnaire into five main sections: Television, Radio, Movie Theatres, Newspaper and Book Readership, and Most effective types of Ads.

**A Survey of Internet Use and Online Advertising Consumption and Effectiveness in Saudi Arabia and the UAE**

In April 2009, the Arab Advisors Group concluded a comprehensive online survey of the Internet usage patterns and habits of the Internet users in Saudi Arabia and the UAE.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 655 respondents who answered the survey questions online. The survey was conducted of the general Internet population. The online survey yields a confidence level of 99% with a margin of error of less than 6%.

The Arab Advisors Group divided the survey questionnaire into two main sections: Online habits and trends and Online marketing. The sections provide a balanced focus on the following areas: Internet usage, Online activities, Online shopping, Email use, Browsing patterns and preferences, Chatting websites and/or software used, Internet search use patterns and preferences, Frequency of reading blogs, Membership in forums, Awareness of the different online

advertising tools: ad banners, sponsored links, ad emails and pop-up banners and Perception of online advertising.

### **Oman Internet users and e-commerce survey 2009**

During January 2009, the Arab Advisors Group team conducted a major comprehensive online survey of Internet users in Oman. The survey covered the Internet usage, e-commerce and cellular usage and habits of the Internet users in Oman.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 696 respondents who answered the survey questions online. The survey was conducted of the general Internet population, including both genders and all age groups above 18 across Oman. The online survey yields a confidence level of 99% with a margin of error of less than 5%.

The Arab Advisors Group divided the survey questionnaire into three main sections: Telecommunications, Internet and Pay TV. The sections provide a balanced focus on the following areas: Cellular subscriptions, 3G Cellular services, Internet usage trends, Internet subscription, Internet usage, Internet access methods and costs, e-commerce, e-Banking and e-Government services, Pay TV subscriptions and Satellite receivers that can be connected to the Internet (such as Dream Box) usage.

### **ictQATAR e-government portal (Hukoomi) Survey 2008**

In November and December 2008, the Arab Advisors Group conducted a major comprehensive survey of the awareness and usage patterns of Qatar's online e-government portal (Hukoomi) across Qatar's major cities: Doha capital, Al Shamal, Al Khor, Al Daayen, Um Slal, Al Rayyan and Al Wakra.

Arab Advisors Group's major analytical survey of Qatar's major cities was scientifically done. The survey involved phone interviews with 1037 respondents from different households in these cities, selected at random. Respondents were 16 years old and above. This survey provides insights into the awareness and usage patterns of Qatar's online e-government portal (Hukoomi). The random survey has a 99% confidence level with a 4% margin of error.

Arab Advisors Group divided the survey questionnaire into two main sections: Communication methods and information about public services in Qatar and Qatar's e-government portal (Hukoomi). The sections provide a balanced focus on the following areas: Communication methods used, Information on public services in Qatar, Awareness of the e-government portal (Hukoomi), Respondents who use the e-government portal (Hukoomi) services, Qatar's e-government portal (Hukoomi) services, Respondents who do not use the e-government portal (Hukoomi).

### **Jordan Internet users and e-commerce survey 2008**

Between October and November 2008, the Arab Advisors Group team conducted a major comprehensive online survey of Internet

users in Jordan. The survey covered the Internet usage, e-commerce and cellular usage and habits of the Internet users in Jordan.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 931 respondents who answered the survey questions online. The survey was conducted of the general Internet population, including both genders and all age groups above 18 across Jordan. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

The Arab Advisors Group divided the survey questionnaire into three main sections: Telecommunications, Internet and Pay TV. The sections provide a balanced focus on the following areas: Cellular subscriptions, 3G Cellular services, Internet usage trends, Internet subscription, Internet usage, Internet access methods and costs, e-commerce, e-Banking and e-Government services, Pay TV subscriptions and Dream Box usage.

### **Bahrain Cellular Users Survey 2008**

In August 2008, the Arab Advisors Group conducted a major comprehensive survey of the cellular usage patterns and habits of the population across Bahrain's main governorates.

Arab Advisors Group's major analytical survey of Bahrain's main governorates' population was scientifically done. The survey involved face-to-face interviews with 550 respondents from different households in these governorates, selected randomly in a manner proportionate to the estimated population size of these areas. Respondents were 15 years old and above, and were cellular service users.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on collecting data.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, cellular data services, Handsets, e-commerce, Satellite TV, Pay TV, Terrestrial TV and Radio. Respondents lived in Al Manamah the capital, Al Janubiyah, Al Muharraq, Al Wusta and Al Shamaliyah. The survey provided statistical analysis of the results and insightful detailed cross tabulations.

### **Tunisia Internet users and e-commerce survey 2008**

Between May and July 2008, the Arab Advisors Group team conducted a major comprehensive online survey of Internet users in Tunisia. The survey covered the Internet usage, e-commerce and cellular usage and habits of the Internet users in Tunisia.

Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 1,093 respondents who answered the survey questions online. The survey was conducted of the general Internet population, including both genders and all age groups across Tunisia. The online survey yields a confidence level of 99% with a margin of error of less than 4%.

The Arab Advisors Group divided the survey questionnaire into two main sections: Telecommunications and Internet. The sections provide a balanced focus on the following areas: Cellular subscriptions, 3G Cellular services, Internet usage trends, Internet subscription, Internet usage, Internet access methods and costs, e-commerce, e-Banking and e-Government services.

### **Operators' survey study for a new satellite company in the MENA region**

Between April and June 2008, the Arab Advisors Group team conducted a survey of potential demand for a planned satellite operator focusing on telecommunications and IP connectivity.

Arab Advisors Group team conducted a structured phone and email survey of decision makers at 30 major operators using satellite capacity in the MENA region. The work included full analysis of the results of the survey with conclusions on expected demand for the capacity as well as price ranges.

### **Jordan Retail Banking Use and Perceptions Survey**

During July 2008, the Arab Advisors Group released the results of its groundbreaking survey on the Jordanian Retail Banking market. The survey, which is the first of its kind to be conducted in the Jordanian market, covered all major retail banking products on offer by licensed banks including credit cards, personal loans, auto loans and housing loans. The survey field work (consisting of a 111-question questionnaire) was conducted during April and May 2008 and covered Jordan's main urban centers of Amman, Zarqa and Irbid. This survey provides deep insights into the retail banking usage and perceptions in Jordan. The random survey has a 99% confidence level with a less than 5% margin of error. In surveying individuals for their retail banking usage and perception patterns, the Arab Advisors Group always relies on the personal face to face interviews as it guarantees optimal representation and accuracy.

### **A Comprehensive Analytical and Comparative Study of the Banking Industries in Jordan, Lebanon, Egypt and the UAE – Association of Banks Jordan**

Between June and July 2008, Commissioned by the Association of Banks in Jordan (ABJ), Arab Advisors Group undertook a major comprehensive analytical and comparative study of the Banking Industries in four key regional markets; Jordan, Lebanon, Egypt and the UAE. The study covered a vast array of topics including the following: A macroeconomic overview of the four countries included in the study, performance of the Banking Industry in each of the four countries in terms of:

- The Banking Industry structure
- Key performance, profitability and financial soundness indicators
- Ratings received by the banks from the leading rating institutions
- Interest rate trends in the Banking Industry

- Key financial products on offer
- Technical and e-readiness of the Banking Industry
- Employee turnover
- Banks' adherence to local and international regulatory guidelines
- Regulatory framework governing the banking industry
- Banking Industry' challenging conditions

The study, which was carried out during June and July 2008, also addressed issues concerning Foreign Banks, Islamic Banks and the main challenges and constraints facing banks in the four countries under study.

### **Egypt Households Telecoms and Media Survey 2008**

Between March and July 2008, The Arab Advisors Group conducted a major comprehensive survey of Egyptian households. Arab Advisors Groups major analytical survey of Egypt was scientifically done. The survey involved face-to-face interviews with 700 respondents from different urban households across Egypt's main governorates. Respondents were 15 years old and above. This survey provides deep insights into the telecom and media usage patterns in Egypt. The random survey has a 99% confidence level with a less than 5% margin of error. The survey included 148 questions.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on the collected data

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, e-commerce, Satellite TV, Terrestrial TV and Radio. Respondents lived in Greater Cairo, Alexandria, Dakahlia, Gharbia, Sohaj and Minya. The survey provided statistical analysis of the results and insightful detailed cross tabulations.

### **1948 Arabs (Arab Israelis) Media and Internet Use Survey**

Between mid-February and April 2008, the Arab Advisors Group conducted a major comprehensive survey of the media, Internet, e-commerce and international calls usage patterns and habits among Arab Israelis (Palestinians who remained in Israel after the 1948 war). Arab Advisors Group's major analytical survey of Arab Israelis main areas' population was scientifically done. The survey involved face-to-face interviews with 500 respondents from different households selected randomly in a manner proportionate to their estimated population size of the areas the survey covered. Respondents were Arabs with an Israeli citizenship and were older than 15 years. This survey report provides deep insights into the media, Internet, e-commerce and international calls usage patterns of Arab Israelis. The random survey has a 99% confidence level with a less than 6% margin of error.

Arab Advisors Group divided the survey questionnaire into main sections: General Information of respondents, Media Section, Computer and Internet Section, E-commerce Section, International

Calls Section. The sections provided a balanced focus on collecting data. The Arab Advisors Group contracted New Brand –a local Arab-owned business in Nazareth- to do the field work.

### **Insurance Commission (Jordan) insurance awareness survey**

In March 2008, the Insurance Commission contracted the Arab Advisors Group to conduct a ground-breaking comprehensive study and survey measuring the level of insurance awareness of the segments targeted by the Insurance Commission' awareness campaign. The survey sample included 1,082 individuals encompassing all age and gender groups across all governorates on the Kingdom, in addition to 200 companies representing all main economic sectors in the country. The objective of this project was to conduct a survey and a study - based on the results of the survey – aimed at providing the required information for laying down and implementing a strategic insurance awareness plan. The resulting strategic plan seeks to a.) Familiarize citizens with the principles and products of the insurance industry and develop their understanding of its role in protecting the life and assets of individuals and institutions, and b.) Introduce the Insurance Commission and make known its role in regulating and developing the insurance sector and protecting the rights of the insured.

### **Saudi Arabia Internet users and e-commerce survey 2007**

Between November and December 2007, the Arab Advisors Group team conducted a major comprehensive online survey of Internet users in the Saudi Arabia. The survey covered the Internet usage, e commerce and cellular usage and habits of the Internet users in Saudi Arabia. Respondents received an email shot in their inbox asking them to fill the survey either in Arabic or in English. The survey was conducted on the general Internet population, including both genders and all age groups across Saudi Arabia. The request to fill the survey was sent randomly through cooperation with popular portals in Saudi Arabia and the email shots were sent to more than 250,000 Internet users in Saudi Arabia registered with the cooperating portals. The survey received 2,761 responses in total.

The responses were subjected to extensive quality checks in the form of cross checking answers to built-in quality control questions. Any discrepancy in the quality control questions resulted in removing the respondents' answer from the sample: 752 responses (28.2%) were removed from the survey sample reducing the final sample size to 1,919 responses. Furthermore, a random double checking of 9% of the remaining sample was undertaken whereby Arab Advisors team sent the respondents confirmation emails requesting them to confirm their participation and prompting them to answer three questions to validate their responses. The online survey yields a confidence level of 99% with a margin of error of less than 2%.

The Arab Advisors Group divided the survey questionnaire into two main sections: Telecommunications and Internet. The sections provide a balanced focus on the following areas Cellular subscriptions, 3G Cellular services, Internet usage trends, Internet subscription, Internet usage, Internet access methods and costs,

Internet user's use of social networking, e-commerce, e-Banking and e-Government services.

### **Lebanon Cellular Users Survey 2007**

Between November and December 2007, the Arab Advisors Group conducted a major comprehensive survey of Lebanon's cellular users. Arab Advisors Group's major analytical survey of Lebanon's main cities was scientifically done. The survey involved face-to-face interviews with 600 respondents from different households selected randomly in a manner proportionate to their estimated share of total GSM users according to official estimates. Respondents were 15 years old and above, and were cellular service users. This random survey is of current GSM users in Lebanon and not the total population of the country. This survey provides deep insights into the telecom usage patterns in Lebanon. The random survey has a 99% confidence level with a less than 6% margin of error.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on collecting data.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, e-commerce, Satellite TV, Terrestrial TV and Radio. Respondents lived in Greater Beirut, Tripoli, Jabal Lobnan, Al Biq'a, and the South. The survey provided statistical analysis of the results and insightful detailed cross tabulations.

### **Kuwait Cellular Users Survey 2007**

Between August and September 2007, the Arab Advisors Group conducted a major comprehensive survey of Kuwait's cellular users. Arab Advisors Group's major analytical survey of Kuwait's main governorates' population was scientifically done. The survey involved face-to-face interviews with 605 respondents from different households, selected randomly in a manner proportionate to the estimated population size of these areas. Respondents were 15 years old and above, and were cellular service users. This random survey is of current GSM users in Kuwait, yet may as well be of the total population of the country given the high GSM penetration in the country: Kuwait's GSM penetration stood at 82.0% by end of H1 2007 according to reported figures from the two operators serving the market, MTC and Wataniya. This survey provides deep insights into the telecom usage patterns in Kuwait. The random survey has a 99% confidence level with a less than 6% margin of error.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on collecting data.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, e-commerce, Satellite TV, Terrestrial TV and Radio. Respondents lived in Kuwait the Capital, Hawalli, Al Jahra, Al Ahmadi, Al Farwaniyah, and Mubarak Al Kabeer. The survey



provided statistical analysis of the results and insightful detailed cross tabulations.

### **UAE Internet users and e-commerce survey 2007**

In August 2007, the Arab Advisors Group team conducted a major comprehensive online survey of Internet users in the UAE. The survey covered the Internet usage, e-commerce and cellular usage and habits of the Internet users in the United Arab Emirates. Respondents received an email shot in their inbox to ask them to fill the survey. The survey received online replies from 1,108 respondents who answered the survey questions online. The survey was conducted of the general Internet population, including both genders and all age groups across the UAE. The online survey yields a confidence level of 99% with a margin of error of less than 3%.

The Arab Advisors Group divided the survey questionnaire into two main sections: Telecommunications and Internet. The sections provide a balanced focus on the following areas Cellular subscriptions, 3G Cellular services, Internet usage trends, Internet subscription, Internet usage, Internet access methods and costs, Internet user's use of social networking, e-commerce, e-Banking and e-Government services.

### **A comprehensive study of the WIMAX-based operators/licensees in the Arab World**

In August 2007, the Arab Advisors Group undertook a major study of the WIMAX-based operators and licensees in the Arab World in addition to probing the potential investment opportunities for a regional company. The study encompassed studying the liberalization and privatization status of Arab fixed and cellular markets, the regulations on fixed wireless and fixed wireless licensees, in addition to the main indicators of fixed and cellular markets including ARPU levels, penetration rates, revenues and growth potential. The Arab Advisors Group moreover advised on the possible ways to enter the Arab World markets, as well as analyzing the strengths, weaknesses, opportunities and threats for a potential WIMAX operator start-up.

### **Jordan Cellular Users Survey 2007**

Between May 2007 and July 2007, the Arab Advisors Group conducted a major comprehensive survey of Jordan's cellular users. Arab Advisors Group's major analytical survey of Jordan was scientifically done. The survey involved face to face interviews with 509 respondents from different households across Jordan's major cities. Respondents were 15 years old and above, and were cellular service users. This random survey is of the current cellular users in Jordan, and not the total population of the country. This survey provides deep insights into the telecom usage patterns in Jordan. The random survey has a 99% confidence level with a less than 6% margin of error. The survey included 130 detailed questions.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on collecting data.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, Satellite TV, Terrestrial TV and Radio. Respondents lived in Amman, Zarka and Irbid. The survey provided statistical analysis of the results and insightful detailed cross tabulations.

### **Qatar Cellular Users Survey 2007**

Between May 2007 and June 2007, the Arab Advisors Group conducted a major comprehensive survey of Qatar's cellular users. Arab Advisors Group's major analytical survey of Qatar was scientifically done. The survey involved face to face interviews with 530 respondents from different households across Qatar. Respondents were 15 years old and above, and were cellular service users. This random survey was of the current cellular users in Qatar, and not the total population of the country. Qatar's GSM penetration stood at 109.8% by end of 2006. This survey provided deep insights into the telecom usage patterns in Qatar. The random survey had a 99% confidence level with a less than 6% margin of error. The survey included 130 detailed questions.

Arab Advisors Group divided the survey questionnaire into main sections Telecommunications and Media. The sections provided a balanced focus on collecting data.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, Satellite TV, Terrestrial TV and Radio. Respondents lived in Doha (74%) and Al Rayyan (26%). The survey's fieldwork was conducted in May 2007. The survey provided statistical analysis of the results and insightful detailed cross tabulations.

### **A Comprehensive Study of the Jordanian Cellular & Data Markets**

Between January 2007 and April 2007, the Arab Advisors Group undertook a major study of the Jordanian Cellular and Data markets for a regional operator. The study constituted of a supply side and demand side parts. For the supply side research the Arab Advisors Group conducted research with all relevant governmental and semi governmental bodies to get updated statistics related to the population sizes, businesses including their numbers, economic and business profiles, numbers of employees, households income levels, breakdown, etc. Moreover, the Arab Advisors Group analyzed the current demand for telecommunications services (cellular, fixed and data) in these areas based on interviews and research with the various operating companies in the country (cellular, broadband, ILD, etc.).

### **A study of the telecom market trends in Bahrain and Jordan**

Between January 2007 and March 2007, the Arab Advisors Group undertook an analytical study of the competitive market trends in Bahrain and Jordan. As part of the primary research for this project the Arab Advisors Group conducted research with all relevant

stakeholders in each market. These included the regulatory bodies, the operational operators and the licensed operators.

### **Saudi Arabia Cellular Users Focus Groups Project for a Global Operator**

In December 2006, the Arab Advisors Group undertook the full tasks needed for eight focus groups of different consumer segments in Saudi Arabia to test their attitudes towards cellular service in Saudi Arabia. The tasks included recruiting, translation, transcribing, recording and analyzing the feedback in a final project report.

### **Saudi Arabia Cellular Users Multi Client Survey 2006**

Between October and November 2006, the Arab Advisors Group conducted a major comprehensive survey of cellular users across Saudi Arabia's main cities. Arab Advisors Group's major analytical survey of Saudi Arabia's main cities' population was scientifically done. The survey involved face to face interviews with 674 respondents from different households in the Western district (Makkah, Jeddah, Madinah), Riyadh City, Dammam and Dharan, selected randomly in a manner proportionate to the estimated population size of the different areas. Respondents were 15 years old and above, and were cellular service users. This random survey is of the current cellular users in Saudi Arabia, and not the total population of the country. Saudi Arabia's GSM penetration stood at 60.5% by end of 2005. This survey provides deep insights into the telecom usage patterns in Saudi Arabia. The random survey has a 99% confidence level with a less than 5% margin of error. The survey included 130 detailed questions.

The major survey probed each household's telecom and media consumption habits and patterns related to Cellular, Internet, Fixed Telephony, VAS, Handsets, Satellite TV, Terrestrial TV and Radio. A 164-pages report, which has 217 detailed exhibits, provides the results of the comprehensive survey of Saudi Arabia.

### **ICONS' detailed study and survey of West Amman's Broadband Internet Market**

Commissioned by Jordan-based International Communication Networks Services, LLC, during August and September 2006, the Arab Advisors Group conducted extensive research related to the city of Amman's broadband Internet market. The study included collecting and analyzing demographic data from relevant governmental and semi governmental bodies on the population sizes, businesses including their numbers, economic and business profiles, numbers of employees, and households' income levels in the city.

Based on specifications provided by ICONS, the Arab Advisors Group team also designed and conducted a survey of 200 companies and 100 households in Amman. The survey work included conducting the survey, performing the needed quality control and analyzing and cross tabulating the results. The survey relied on face-to-face interviews.

The project's deliverables included the survey results in MS Excel and a final project presentation in power point format.

### **Al Iskan Co. for Tourist and Hotel Investments – Business and Asset Valuation**

In July 2006, In collaboration with the Investment Banking team at the Arab Jordan Investment Bank, the Arab Advisors Group Financial Markets Research Division undertook an active role in the business and asset valuation of Al Iskan Co. for Tourist and Hotel Investments' (ITHI) key venture; the Meridian Hotel and the adjacent Housing Bank commercial complex in Shmeisani, one of Amman's prime commercial districts. The project was aimed at providing a fair market value of both assets (for the purpose of sale consideration) and involved in-depth analysis of the real estate value of both assets (buildings and land) based on consultation with leading experts in the market and structured assessment against other comparable properties. Following this, we set out to measure the assets' ability at generating cash flows and their viability as on going interest which we then used to assign a fair value based on a customized Discounted Cash Flow model that took into consideration external macroeconomic factors and the existing synergies of the business. The valuation results were then presented to ITHI's Board of Directors and included our own insights and recommendations on the best strategy to move forward.

### **Morocco GSM Users Multi Client Survey 2006**

Between April and June 2006, the Arab Advisors Group conducted a major comprehensive survey of GSM users across Morocco. Arab Advisors Group's major analytical survey of Morocco's population was scientifically done. The survey involved face to face interviews with 700 respondents from different households in Grand Casablanca, Rabat/Sale, Agadir, Marrakech, Tangir/Tetouan, and Fass, selected randomly in a manner proportionate to the population size of the different areas. Respondents were above 15 years old, and were GSM service users. This random survey is of the current GSM users in Morocco, and not the total population of the country. Morocco's GSM penetration stood at 40.8% by end of 2005.

A 115-pages report, which has 187 detailed exhibits, provides the results of the comprehensive survey of the GSM services usage patterns and habits of GSM subscribers across Morocco's areas.

### **Egypt GSM Users Multi Client Survey 2006**

Between January and February 2006, the Arab Advisors Group conducted a major comprehensive survey of GSM users across Egypt. Arab Advisors Group's major analytical survey of Egypt's main cities' population was scientifically done. The survey involved face to face interviews with 700 Egyptian nationals from different households in Cairo, Alexandria, Delta and Upper Egypt, selected randomly in a manner proportionate to the population size of the different areas. Respondents were above 15 years old and were GSM service users. This random survey is of the current GSM users in Egypt, and not the total population of the country.

The survey sample was geographically distributed as follows: Greater Cairo (42%), Alexandria (15%), Delta (25%) and Upper Egypt (18%). The random survey has a 99% confidence level with a less than 5% margin of error.

A 103-pages report, which has 174 detailed exhibits, provides the results of the comprehensive survey of the GSM services usage patterns and habits of GSM subscribers across Egypt's areas.

### **CITC (Saudi Arabia) Qualitative and Quantitative Market Study and Analysis Project.**

Between February 2005 and June 2005, the Arab Advisors Group undertook a major project for Saudi Arabia's telecom regulator, the Communications and Information Technology Commission. The Arab Advisors Group was the project team leader and contractual party with the CITC. Part of the work was done in association with Connexcus Consulting in Lebanon.

The project encompassed major tasks to provide the CITC with a comprehensive Qualitative and Quantitative Market Study and Analysis of the Saudi Arabian telecom and data markets.

The work included full market analysis and research of the supply structure in the Saudi Arabian market in addition to major demand side surveys of residential and corporate users. The survey work included surveying 1037 households across the major urban centers of the Kingdom and 500 businesses in different economic sectors. The team fully analyzed the supply side research and the survey results to provide market projections and a comprehensive market model for the Saudi ICT market. These were fed into a decision-support system to avail the CITC analysis and projections related to different market liberalization scenarios.

### **Cellular Competitive Moves Analysis for Jawwal – Palestine**

Between January and March 2005, the Arab Advisors Group analyzed eight major Arab cellular markets in terms of effect of competition and competitive strategies. The project intended to draw lessons and trends from regional experiences on competition and its effects on the markets. The markets analyzed were Algeria, Bahrain, Egypt, Jordan, Morocco, Tunisia, Kuwait and Yemen.

The analysis of the markets included economic indicators, cellular market metrics before and after competition including subscribers, revenues, ARPUs, traffic, number of packages. The exercise also included an analysis of the competitive moves done by incumbents and new entrants and their effect on the market.

### **Batelco-Jordan analysis of the Jordanian ICT markets**

Between August and October 2004, the Arab Advisors Group was contracted by Batelco – Jordan to undertake a comprehensive study and analysis of the current use of communications services (Fixed, Cellular, Internet and datacomm) and information technology in Jordan. The work included an assessment of the residential and

corporate sectors' future needs and the challenges facing the adoption of advanced communications services these markets.

The project encompassed assessing the demand for the communications services amongst individuals and businesses in Jordan through a primary research and survey-based approach. The project provided a comprehensive report on the communications products and services provided in the Jordanian market as well as the level of usage of these products and services by individuals and businesses in Jordan. The work also included an analysis of the level of satisfaction by individuals and businesses with these products and services. In total 295 households and businesses were surveyed. The results were fully analyzed and cross tabulated by the Arab Advisors team.

### **Saudi Arabia Sat TV and Radio Multi-Client Survey**

Between August and September 2004, the Arab Advisors Group conducted a survey of households in Saudi Arabia that use and view Arabic and Non-Arabic Satellite TV channels. With a sample size of 134 households, the random sample survey has a 95% confidence level with a less than 9% margin of error.

The survey probed the brand name recognition of Sat TV channels in Saudi Arabia as well as the extent to which these channels are viewed. It covered the brand name recognition and viewer ship patterns the general entertainment channels, the music channels, religious programming channels, sports channels and news channels.

The survey covers individuals from different households in Jeddah, Riyadh, Dammam and Dhahran. The 119 respondents that are Satellite TV viewers are divided into 67 males and 52 females. The sample is further divided into 93 Saudis and 41 non-Saudi but Arabic Speaking nationals. To mirror the demographic situation fully, the sample also corresponds to the age distribution of the Saudi population.

### **Saudi Arabia GSM Multi-Client Survey**

The Arab Advisors Group conducted a major survey of GSM users in Saudi Arabia; this was between the start of May and early June 2004. The major survey of 202 households in Saudi Arabia provides deep insights into the usage pattern in the Arab World's largest GSM market. The random survey, which was concluded on June 4 2004 and has a 99% confidence level with a 9% margin of error.

The survey covered 202 individuals from different households in Jeddah, Riyadh, Dammam and Dhahran. The respondents were all GSM users and are divided into 112 males and 88 females. The sample is further divided into 141 Saudis and 61 non-Saudis. To mirror the demographic situation fully, the sample also corresponds to the age distribution of the Saudi population. The survey had 50 detailed questions that address the following matters.

Areas covered in the survey included perceptions of Saudi Telecom services and offers, level of Satisfaction with Saudi Telecom,

propensity to use a second GSM operator when one is available in Saudi Arabia, handset choices and brands, features and technologies supported by handsets, handset replacement cycles, use of SMS and Value added services, voice Usage levels, types of packages subscribed to, effective Media channels for consumer choices and information on households of respondents.

The survey report statistically analyzed and cross-tabulated all the questions. The analysis included Arab Advisors Group's insights and expertise on the Saudi Arabian market, the Arab World's largest telecom market.

Over 10 major regional and global companies that are interested in the Saudi Arabia market bought the results of the survey.

### **Vodafone Custom Survey of GSM users in Saudi Arabia**

In May and June 2004, the Arab Advisors Group conducted a major survey of GSM users in Saudi Arabia for Vodafone PLC. The major survey covered GSM users across Saudi Arabia's major cities and population centers. The survey results were fully analyzed and cross-tabulated. Areas covered in the survey included perceptions of Saudi Telecom services and offers, level of Satisfaction with Saudi Telecom, propensity to use a second GSM operator when one is available in Saudi Arabia, handset choices and brands, features and technologies supported by handsets, handset replacement cycles, use of SMS and Value added services, voice Usage levels, types of packages subscribed to, effective Media channels for consumer choices and information on households of respondents.

### **A study of the Saudi Datacomm and Internet market for Batelco**

Between May and June 2004, the Arab Advisors Group was engaged by Batelco to do a major survey and study of the Saudi Internet and Datacomm market. The study encompassed benchmarking the Saudi data communications market with regional and global markets to foresee the potential addressable market for data communications services.

In addition, the Arab Advisors Group, in conjunction with Batelco, developed a comprehensive survey questionnaire to assess the attractiveness and potential demand for datacomm services in the Kingdom. This survey included questions to categorize the potential users of datacomm services by business profile, user profile and service usage patterns as well as to test users reaction to the different service aspects.

The Arab Advisors Group conducted the survey, based on face-to-face and phone interviews, with 140 companies in Saudi Arabia. The sample was selected randomly to fit the geographic and sector distribution of the businesses in Saudi Arabia.

The Arab Advisors Group fully analyzed the survey results and cross-tabulated the results. The deliverables included market positioning advice and forecasts for market growth.

### **Financing needs of Jordanian ICT companies Survey**

In May 2004, the Arab Advisors Group built, developed, and conducted an in-depth survey to assess the financial/ investment needs of Jordanian ICT-SME's. The study was commissioned by The Information Technology Association - Jordan (int@j). The objective of this survey assess analyzed the capital/financing needs of IT companies in Jordan, types of required financing, uses of any funds provided, key challenges and obstacles in fulfilling funding needs of companies and current financing options for ICT SME's. The project included in depth face to face interview with 50 ICT companies in Jordan that was fully statically analyzed with relevant cross tabulations by the Arab Advisors Group team.

### **A market entry study for a group of new services by Jordan Radio Paging "Mirsal"**

Between November and December 2003, the Arab Advisors Group undertook a detailed market entry study for a slew of new services by Jordan's radio paging operator. The services are based on a new a technology platform that avails services beyond traditional paging.

The Arab Advisors Group analyzed and surveyed the market to offer recommendations on how best to market and promote these new solutions. The project included a full analysis of the potential uses of Mirsal's technology platforms as well as devising sellable solutions of Mirsal's technology platforms and detailing their revenue models. The solutions were tested in the market through a face-to-face survey of a sample of the targeted segments. The Arab Advisors Group fully analyzed the survey results and recommended modifications to the solutions based on the survey and study results.

### **Business Plan for a prospective GSM handset agency in Iraq**

In September 2003, the Arab Advisors Group undertook and completed a business plan for a Kuwait-based company seeking to be a GSM handsets agency in Iraq for a major global GSM vendor. The Arab Advisors Group team capitalized on its knowledge base and databases on the Iraqi and regional GSM markets in order to prepare a comprehensive business plan and market entry strategy. Arab Advisors Group work included availing best practice advice to the prospective agency.

The delivered tasks included a market entry strategy, a marketing plan, the organizational structure as well as a detailed business plan with Demand and Revenue Forecasts, Capital and Expense Estimates, Cash Flows and Economic and Accounting Indicators.

### **Market segmentation and rates study for New Generation Telecommunications Company in Jordan (XPRESS)**

Between March and September 2003, the Arab Advisors Group completed a major market study and analysis project for Jordan's Radio Trunking licensee, New Generation Telecom Company. This follows on the earlier studies conducted by the Arab Advisors Group whereby a comprehensive study, of the market potential in Jordan as well as the operator's business plan were completed.



The first phase of the work included the collection and assembly of extensive demographic information on the businesses in the various major economic sectors in Jordan. These included tourism, trade, finance, insurance, real-estate, construction, manufacturing, transportation, agriculture, the professionals, and the mass market (residential, students). The data was compiled from various reliable sources into one user-friendly electronic database for use by New Generation Telecommunications Company.

The second phase of the project included a major survey a major survey process that encompassed 226 companies, employing over 10% of Jordan's total workforce, in ten cities across fifteen different sectors and groups in Jordan. To assess the prevailing communications usage patterns in the country. The work included full statistical analysis and cross tabulations of the survey which gave valuable insights on the market segments, their usage patterns and preferences. The Arab Advisors Group analyzed the results in the context of the Jordanian communications sector and gave recommendations accordingly.

#### **Business Plan and market study for a prospective VSAT Service provider in Saudi Arabia**

Between April and June 2003, the Arab Advisors Group undertook and completed detailed studies for a prospective VSAT operator in Saudi Arabia. The Arab Advisors Group team capitalized on its knowledge base and databases on VSAT services across the region in order to prepare a comprehensive business plan and market entry strategy. Arab Advisors Group work included availing best practice advice to the prospective operator.

The delivered tasks included a market entry strategy, a marketing plan, the organizational structure as well as a detailed business plan with Demand and Revenue Forecasts, Capital and Expense Estimates, Cash Flows and Economic and Accounting Indicators.

#### **Public Telecommunications Company's Radio Trunking Study in Saudi Arabia**

Between February and April 2003, The Arab Advisors Group undertook a consulting project for the Public Telecommunications Company (PTC) in Saudi Arabia. PTC will setup a nationwide radio trunking system in Saudi Arabia using Motorola's iDEN technology.

The Arab Advisors Group completed a comprehensive study of the mobile market in Saudi Arabia to quantify the potential for Motorola's iDEN system for Public Access Mobile Radio (PAMR or Radio Trunking) in the country. The Arab Advisors Group also designed and executed a detailed, face-to-face survey of 108 major companies in Saudi to assess the corporate demand. The results of the study were statistically analyzed and cross tabulated and fed into a market model to assist in the forecasts and projections. The Arab Advisors Group presented detailed findings and analysis of the market and projected possible subscriber uptake for five years in the future.

### **Jordanian SMEs' Technology Adoption Study**

Between December 2002 and February 2003, the Arab Advisors Group conducted a comprehensive study and survey of the technology and Internet adoption amongst small and medium enterprises (SMEs) in Jordan.

The National Fund for Enterprise Support (NAFES) provided the bulk of the funding for the study, which was coordinated by the Information Technology Association of Jordan (int@j). Seven companies and organizations participated in the study and partially financed it. These are Batelco – Jordan, Bidaya Ventures, Global One – Jordan, Jordan Telecom, LINKdotNET, the Ministry of Information and Communications Technology and STS.

On the supply side, the analysis encompassed the vendors and operators for technology, Internet and software products in the market. On the demand side, the study included conducting extensive interviews with 247 small and medium enterprises across the major economic sectors in the country in Jordan's four main cities of Amman, Zarqa, Irbid and Aqaba. SMEs were defined as companies employing 5 to 100 people. The sample was randomly selected and proportionately represented the SMEs in the four cities and across the major economic sectors. The economic sectors covered were tourism (restaurants and hotels), trade, finance, insurance, real estate, construction, manufacturing, transportation, and agriculture.

Arab Advisors Group analysis was wholly based on a primary research and survey-based approach. The Arab Advisors team provided a comprehensive report on the Internet and datacomm products and services available in the Jordanian market as well as the level of usage of these products and services by Jordanian SMEs.

The project's deliverables included a report detailing the services and products available in the market, a report analyzing the results and highlighting the major findings, the full survey results (raw data). The deliverables also included an excel sheet with further analysis of the raw data, and a power point presentation.

### **Jordan Telecom Outsourced Call Center Study**

In May 2002, Jordan Telecom commissioned the Arab Advisors Group to conduct a market research study to fully assess the potential for an outsourced call center that Jordan Telecom intends to launch and the regional competitive landscape for outsourced call centers. The study examined nine countries in the region, which are Jordan, Lebanon, UAE, Saudi Arabia, Egypt, Cyprus, Morocco, Tunisia and Bahrain.

The Arab Advisors Group presented a detailed profile of the call centers identified and researched by our team, a SWOT analysis of

each call center, a summary of the regional situation, and the existing and potential demand for the call center services in the region. The Arab Advisors team worked closely with Jordan Telecom team and managed to survey 245 companies and 23 call centers across the selected region. The Arab Advisors Group analyzed the survey results by our specialized survey package with cross tabs, filters and full statistical analysis.

The project's deliverables included a report analyzing the results and highlighting the major findings, the full survey results (raw data) for the call centers and the enterprises, an excel sheet with further analysis of the data, and a power point presentation.

### **Cisco Systems Arab World IT CAPEX Survey**

In April 2002, Cisco Systems retained the Arab Advisors Group to conduct a CAPEX survey in the Arab World to have a reliable indication of the allocation of CAPEX budgets across the region and across economic and business sectors. The countries covered included Saudi Arabia, UAE, Egypt, Kuwait, The Arab Maghreb (Morocco, Tunisia and Algeria), The Levant (Jordan, Lebanon and Syria), Oman, Qatar and Bahrain.

The CAPEX survey covered both the service provider and the enterprise markets. Enterprises were targeted with a focus on Government and public sector, Financial, industrial, oil and gas and military. On the service provide side, the survey focused on PSTN operators, GSM operators and major ISPs and Datacomm service providers. The Arab Advisors Team conducted extensive contact with enterprises and service providers across the designated region. The team completed 70 enterprise surveys and 25 service provider surveys with a total count of 95.

The projects deliverables included a report analyzing the results and highlighting the major findings, the full survey results (raw data) for Service Providers and Enterprises, An excel sheet with further analysis of the raw data, and a power point presentation.

### **AICO and Motorola's Radio Trunking Study in Jordan**

In April 2002, The Arab Advisors Group completed a consulting project for Motorola, NASCO- Saudi Arabia and AICO - Saudi Arabia. The project included a comprehensive study of the mobile market in Jordan to quantify the potential for Public Access Mobile Radio (PAMR or Radio Trunking) in Jordan. The work included surveying 90 major companies in the country. The Arab Advisors Group presented detailed findings and analysis of the market and projected possible subscriber uptake for 10 years in the future.

Between July and October 2002, the Arab Advisors Group actively participated in authoring the business plan of the iDEN operator in Jordan whose tentative license was announced in October 2002. The work was done in partnership with Deloitte & Touche. The business plan work included conducting further analysis of the market and regional benchmarking as well as a survey for possible rates and packages and the ARPU level for the new operator.

### **The study of regional data communications markets for a Gulf-based regional player**

A major consulting assignment involved delivering a number of reports to gauge the potential Middle East telecommunications markets and to assess the potential for expansion into these markets. The focus involved eight countries. Within each of these markets, the client needed to assess demand from multinational corporations (MNCs), Regional Corporations, National Corporations and Small and Medium Sized Enterprises (SMEs) in the economic sectors of Banking and Finance, Information Technology, Oil and Gas, Travel, Transport and Tourism, Manufacturing, Construction, Trade and other sectors. The client needed an assessment of the demand for the market for Internet, Messaging, Data communications, Voice and other data services.

The interim deliverables included primary research schedule for each of the markets under study and the format of the semi-structured interviews were put in place as well as an identification of the principal parties and companies to be interviewed to meet the required results. They also included market-based models to capture the results of the research on every market. These modules had built in them fully explained forecasting models, for users, demand, revenues and equipment infrastructure spending.

The final deliverables included a report with a chapter on each market studied. For every country, the Arab Advisors Group included a conclusion on the market potential and recommendation on what sectors are open for investments, their attractiveness, the forecast market size, and practical steps to enter the market (including suggestions on possible local partners). The analysis included what-if scenarios that take into account the possibility of potential changing circumstances and policies in every country.

### **Other Projects**

Other consulting projects encompassed a fact collection and analysis report on the potential for Communications and Information Technology investment fund for a venture capital firm, and a report on the SMS and franchised fast food retail industries in the Arab World for an investment banking firm. Moreover, our team has been helping our clients and subscribers collect and analyze market information and trends through the analyst interaction time component of our Strategic Research Service.