



**UNITED REPUBLIC OF TANZANIA  
MINISTRY OF ENERGY  
ENERGY AND WATER UTILITIES  
REGULATORY AUTHORITY  
(EWURA)**



## **EWURA CUSTOMER SATISFACTION SURVEY IN TANZANIA MAINLAND**

August 2023

**Study conducted by  
E-Link Consult Ltd**

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## GLOSSARY

**Satisfaction:** A measure of how well services offered by EWURA to its direct customers meet their expectations. These direct customers or entities are those operating into two sectors, namely energy sector and water sector. The energy sector is further divided into three subsectors, namely electricity, petroleum, and natural gas.

**Customers/entities:** Those whose operations are regulated directly by EWURA.

**Clients:** (a) Regulated service providers; (b) Consumers of regulated services; (c) Government Ministries, Departments and Agencies (MDAs) and Local Government Authorities (LGAs); (d) EWURA's service providers; (e) Regulators and Regulatory Associations, civil societies, academic and research institutions, development partners, politicians, investors and the general public

**Consumer:** A person who is in need of, is frequently using, or previously has used one or more of the EWURA regulated goods and services, especially one that acquires goods or services for direct use or ownership rather than for resale.

**Customer Satisfaction Index or Customer Satisfaction Score (CSAT):** Measures on average, how satisfied or unsatisfied customers are with the product, services, or customer success program.

# EXECUTIVE SUMMARY

## 1. Introduction

EWURA regulates energy subsectors of Electricity, Petroleum, Natural Gas, and the Water sector. The functions of EWURA include licensing, tariff review, monitoring performance, and standards with regard to quality, safety, health, and the environment. EWURA has continued promoting effective competition and economic efficiency, protecting the interests of consumers, and promoting the availability of regulated services to all consumers including low-income, rural, and disadvantaged consumers in the regulated sectors. EWURA deals with goods and services that are sensitive and crucial to the economy and is required as part of its duties to enhance public knowledge, awareness, and understanding of the services offered by regulated entities operating in energy subsectors of electricity, petroleum and natural gas and the water sector.

EWURA's regulated entities and their clients are the backbones of EWURA establishment. Thus, their opinions on how the Authority provides services are very important to assist the EWURA management to generate valid and consistent customer feedback on regulated services (i.e., to receive the voice of the customer) and obtain authentic data on the extent to which regulated entities and consumers of their services are satisfied with contents and processes of services offered by EWURA. Therefore, through its budget for the financial year 2020/21, EWURA allocated funds for conducting a Customer Satisfaction Survey (CSS) Study. The CSS study was conducted to establish baseline information on the level of customers' satisfaction with the authority's regulatory services and survey on the level of public awareness on the roles and functions of the Authority.

## 2. Key Findings

### a) Regulated Entities

#### (i) Awareness of consumers of regulated services and regulated entities on the role of EWURA

The study explored customer satisfaction by assessing how consumers of regulated services are aware of the role of EWURA in regulating the services in the energy subsectors of electricity, petroleum, natural gas, and the water sector. The findings show that public awareness on the role of EWURA was high and that clients place a high satisfaction level with EWURA. Some 73.3% of consumers of regulated services were aware of the role of EWURA and the satisfaction level of the quality of services and processes offered for regulated services was 80%. Diverse communication channels used by EWURA to engage stakeholders strengthened engagement with stakeholders at various scales and levels.

The study further found that 67.1% of regulated entities were not aware of the existence of the EWURA Client Service Charter. Entities operating particularly in the electricity (25.3%) and petroleum (34.1%) sub-sectors reported low awareness of the EWURA client service charter. The study noted that despite the majority of respondents mentioning that they were not aware of the client service charter, EWURA has been implementing most of its activities stipulated in the charter. It is important for EWURA to emphasize on raising awareness on the Client Service Charter (2020), when engaging stakeholders at various levels and scale.

## **(ii) Perception of regulated entities on EWURA's staff**

Assessment of the perception of regulated entities on EWURA's staff indicated that 92.3%, 92.4%, 91.8% and 89.9% considered EWURA staff to be honest, diligent, fair and respectful respectively. Despite these results, the study noted that there were issues that needed attention on staff attitude and behaviour, delays in responding to customer issues related to licensing, improper fuel marking procedures, use of improper and unprofessional language, abuse of power and inadequate customer care. Moreover, EWURA staff exhibit good relationship with clients (82.5%). The main concern from customers was accessibility of offices given the operation from zonal offices, highlighting the need to establish regional offices with appropriate number of staff to bring services closer to customers.

## **(iii) EWURA service delivery to regulated entities**

On average, 79% of entities' responses indicated that EWURA service delivery was satisfactory. Clarity, accuracy of information, response within time, response during emergencies, innovations, honouring of appointments and compliance to agreements were key attributes contributing to this satisfaction. Licensees emphasized the importance of strengthening the emergency response mechanisms within the Authority.

## **(iv) Monitoring the performance of regulated sectors**

Monitoring the performance of regulated sectors is essential to ensure that entities provide the required quality of services to their consumers. Some 77.66% of the clients were satisfied with the monitoring practices. Natural gas subsector was more satisfied with inspection and monitoring exercises followed by water sector, electricity subsector and finally petroleum subsector.

## **(v) Improved performance on the role and mandate of EWURA**

The study also noted that the performance of EWURA has improved due to various reasons, including advancement in sector information systems and regular monitoring of licensees. EWURA is using online applications and tracking of the processing status of clients' issues. This has facilitated application handling and processing. However, clients still view the response time by EWURA to clients as longer than expected. The study also noted the need to elevate the communication and public relations unit to a directorate for the purpose of strengthening EWURA's functions in addressing emerging issues and building trust when interacting with stakeholders, especially at the higher levels.

## **(vi) EWURA response time for issuance of licenses**

About 84.7% of the respondents consider the process of issuing license as efficient. Moreover, 88% of respondents noted that proper vetting was conducted before licensing, awarding licenses to those who meet criteria and the automatic system of acknowledging receipts of electronic application as factors that contributed to enhanced efficiency of this process. EWURA has been advised to deal with unlicensed individuals, especially electricity contractors, according to the regulations governing the sector.

With regard to this, the EWURA client service charter specifies response time for activities for processing license applications. The study findings show that the issuance of licenses exceeds the specified response time due to various reasons, such as incomplete applications that are submitted by clients and prolonged processing procedures required by other relevant authorities, such as the National Environment Management Council (NEMC), Occupational Safety and Health Authority (OSHA) and Fire and Rescue Forces.



## **b) Consumers of services offered by regulated entities**

Understanding the satisfaction of consumers of regulated entities on the quality of services they receive from their service providers (i.e., electricity, petroleum, natural gas and water) is vital for EWURA to focus its regulatory services. The study noted that on average, consumers' satisfaction on natural gas subsector was 88%, while electricity was 38.6%, petroleum subsector was 42.5% and water sector was 43.4%.

Further, consumers were generally satisfied with EWURA's performance in enforcing compliance with license terms (43.52%), regulating tariffs (39.87%), protecting consumer rights (38.34%), protecting access to and use of information (33.82%) and in promoting fair play among customers (24.83%). The majority of customers (71.15%) consider service pricing to be fair, good and very good. The study also revealed that more than 73.3% of consumers have heard about EWURA, mainly through TV, radio, social media, newspapers and during national exhibitions, such as Sabasaba and Nane Nane.

## **c) Complaints filed to EWURA**

The study reported that most of the complaints were from the electricity sub-sector (45.5%), followed by water sector (40.6%) and lastly petroleum sub-sector (14%). At the time of this study, there were no complaints filed from the natural gas sub-sector.

Consumers of services provided by the regulated entities lodged complaints to EWURA on unsatisfactory service quality and loss or damages caused by service utilisation. Main complaints related to electricity sub-sector entities included poor connections, wrong billing, service quality, damage and poor customer care. Complaints related to petroleum subsector included poor quality of the product, poor customer service, high prices and charges. For the water sector, consumers experienced problems related with poor service connection and infrastructure, wrong billing, poor quality of water and customer care.

Various channels were used to report complaints to EWURA. The study shows that 30% of respondents used telephone, 30% physically visited EWURA zonal offices, while 22% reported their complaints by using e-mails. Analysis shows that 58.2% of the consumers who reported complaints were satisfied with the way their disputes were handled. Sector wise, satisfaction of consumers who reported complaints was higher in the electricity subsector (63.7%) than consumers in the water sector (58.3%) and petroleum subsector (41.2%). Main reasons for dissatisfaction across sectors were delays in handling disputes and existence of unresolved disputes.

## **d) Overall Customer Satisfaction Index (CSI)**

In estimation of the overall customer satisfaction score, weights based on the importance of Authority and perceived level of interaction were used. The overall Customer Satisfactory Index (CSI) for EWURA was 80.4%. This indicates that customers in energy and water sectors were satisfied with services offered by EWURA by 80.4%.

The tables below present the summary comparisons on the data gathered in the EWURA Communication Policy 2019 and the current study findings. Significant improvements have been recorded in 2023 compared to 2019.



S/N	Category	2019	2023
1	Overall level of satisfaction on the service offered by EWURA	50.0%	80.4%
2	EWURA keeping abreast of the changes of the prices of services offered	37.8%	65.2%
3	EWURA disputes resolution mechanism	21.8%	54.5%
4	EWURA seeks opinions and views of citizens before making any changes on the services it regulates	45.4%	74.0%
5	EWURA's procedure in issuing licenses	41.6%	96.0%
6	Strongly required education to understand services regulated by EWURA*	54.5%	30.7%
7	Need for EWURA to improve the process of reviewing and approving tariffs and petroleum pricing formula	42.4%	64.8%

\*Meaning there is an improvement in education regarding services offered by EWURA

**Source:** EWURA CSS 2023 field data and EWURA Communication Policy 2019.

The CSS study also evaluated customer satisfaction with EWURA's efforts to communicate with customers. Results show that EWURA has improved in its communication as indicated in the table below.

S/N	Category	2019	2023
1	Overall level of satisfaction among customers	50.0%	80.4%
2	Licensing and other information	55.7%	89.2%
3	Education about its function to stakeholders	61.1%	84.8%
4	Communication efforts	50.4%	85.7%
5	Clients' complaints handling process	32.7%	50.2%
6	Feedback on tariff review	44.2%	50.3%

**Source:** EWURA CSS 2023 field data and EWURA Communication Policy 2019.

### 3. Recommendations

#### 3.1 Strengthen and promote public awareness-raising programs

Study results show that entities and consumers are less aware of some attributes and hence this constrains the ability of EWURA in implementing its regulatory activities. Dedicated efforts on education and sensitisation of regulated entities and consumers of regulated services are crucial. This will enable consumers to have adequate knowledge of the EWURA client service charter, complaints litigation procedures, issuance of licenses, fuel marking and pricing mechanism, rights, and recognise obligations of clients. For such results, the following activities are proposed:

- Conduct a tailor-made programme focusing on providing sector training on emerging issues to experts in respective sectors. Training to pump attendants and contractors on how to manage the sectors, and address challenges related to entities and consumers of regulated services.
- Conduct regular training to EWURA staff on regulated services and on how to interact with customers and address professional sector issues.
- Increase public awareness raising programmes on EWURA mandates and functions using various communication and media channels as identified in the EWURA communication strategy.
- Identify unlicensed individuals, especially electricity contractors according to the regulations governing the sector to reduce complaints among registered individuals.

### 3.2 Improve EWURA functions

Efficient service delivery and customer relations is vital for EWURA. The current set up where regional, and district offices are missing has constrained regular information flow and interaction between clients and the regulator. The following is proposed for smooth communication and information flow;

- a) Improvement of the existing online license application system to accommodate feedback mechanism that will inform the applicants when the applications have been complete; and the time EWURA will take to process and issue the license.
- b) Expansion of the existing system, that allows regulated entities to interact with EWURA and consumers of regulated services to interact directly with EWURA
- c) Establishment of a transparent electronic system that enables complainants to lodge and track their complaints litigation process.
- d) Increase physical accessibility to EWURA offices by splitting zones with a large coverage area and activities such as, the lake zone, so as to increase efficiency in service delivery as per EWURA's vision, mission and client service charter.
- e) Strengthening the emergency response mechanisms within the Authority.

### 3.3 Establishment of a Directorate of communications and public relations

The study noted that the performance of EWURA has improved due to various reasons, among them is implementation of the EWURA Communications Policy (2019) as indicated in the EWURA annual report for the year ended 30th June 2021. The communication and public relations unit has been the face of EWURA on this performance. However, the influence of EWURA in guiding clients' decisions on regulation aspects is impaired due to the current status of the unit. Given the high interaction and roles that the communication and public relations unit has in communicating with EWURA's clients of different status, it is important that the unit is elevated to be a directorate for the purpose of strengthening EWURA functions in addressing emerging issues and building trust when interacting with stakeholders and clients, thus improve the performance. Such experiences are also found in Uganda under the Electricity Regulatory Authority (ERA). Diversity of activities and services regulated and a multitude of organisations needed to ensure quality service delivery necessitate organisational management change and elevating the unit responsible for communication and public relations to a fully-fledged directorate, within the EWURA organisation chart.

## ACRONYMS

CSI	Customer Satisfaction Index
CSS	Customer Satisfaction Survey
EWURA	The Energy and Water Utilities Regulatory Authority
EWURA CCC	The EWURA Consumer Consultative Council
LGAs	Local Government Authorities
MDAs	Ministries, Departments and Agencies
NEMC	National Environment Management Council
ODK	Open Data Kit
OSHA	Occupational Safety and Health Authority
PPA	Power Purchase Agreements
QMS	Quality Management Systems
TBS	Tanzania Bureau of Standards
TDV	Tanzania Development Vision
TRA	Tanzania Revenue Authority
WSSA	Water Supply and Sanitation Authority
SPSS	Statistical Package for the Social Sciences

# CHAPTER ONE

## INTRODUCTION

### 1.1 Background

The Energy and Water Utilities Regulatory Authority (EWURA) is an autonomous multi-sectoral regulatory Authority established by the Energy and Water Utilities Regulatory Act, Cap 414 of the laws of Tanzania. EWURA regulates energy subsectors of Electricity, Petroleum, Natural Gas and the Water Sector. The functions of EWURA include licensing, tariff review, monitoring performance, and standards with regard to quality, safety, health, and the environment. EWURA is also responsible for promoting effective competition and economic efficiency, protecting the interests of consumers, and promoting the availability of regulated services to all consumers, including low-income, rural and disadvantaged consumers in the regulated sectors.

In line with the Tanzania Development Vision (TDV) 2025, which includes industrialisation agenda among others, EWURA's strategic objective is to ensure improved and affordable regulated services, including quality, availability, and affordability of energy and water utilities. The Authority is implementing various strategies for the effective delivery of technical and economic regulatory roles in the country. These strategies include the development and review of regulatory tools; monitoring and enforcing quality of service standards; promotion of commercial viability of regulated suppliers; development and implementation of measures to protect consumer interests; licensing and registration of regulated suppliers; promotion of facilitating investments for sustainable supply of energy and water utilities.

EWURA through its motto "Fair Regulation for Positive Impact" maintains Quality Management Systems (QMS) to enhance the Authority's operational procedures. It has been under ISO 9001:2015 standard certification since 2015. EWURA promotes effective competition and economic efficiency, protecting the interests of consumers and promoting the availability of regulated services to all consumers, including low income, rural and disadvantaged consumers in the regulated sectors.

EWURA deals with goods and services that are sensitive and crucial to the economy and is required as part of its duties to enhance public knowledge, awareness, and understanding of the services offered by regulated entities operating in energy sub-sectors of electricity, petroleum and natural gas and the water sector. EWURA's licensees and their clients are the reasons for EWURA establishment.

Thus, their opinion have on how the Authority provides services is very important to assist EWURA management generate valid and consistent customer feedback (i.e., to receive the voice of the customer) and obtain authentic data on the extent to which regulated entities and consumers of their services are satisfied with contents and processes of services offered by EWURA. Therefore, through its budget for the financial year 2020/21, EWURA allocated funds for conducting a Customer Satisfaction Survey (CSS) Study.

### 1.2 Need for Customer Satisfaction Survey

The customer satisfaction survey study was conducted to establish baseline information on the level of customers' satisfaction with the Authority's regulatory services and survey on the level of public awareness of the roles and functions of the Authority. It is important for EWURA to know how satisfied the regulated entities and their customers are with its services and the



attention they receive. The CSS survey was carried out to represent a modern approach to examine satisfaction of quality of services offered by EWURA and to enable EWURA to develop truly customer-focused management and culture. Moreover, to provide immediate, meaningful, and objective feedback about customers' preferences and expectations. In this way, EWURA's performance was evaluated in relation to a set of satisfaction dimensions that indicate the strong and weak points of EWURA.

The EWURA Five-Year Strategic Plan 2021/22 – 2025/26; EWURA Communications Policy 2019; and EWURA Client Service Charter 2020, provided the basis for the analysis of the customer satisfaction study. The objective of the service charter is to inform EWURA clients and stakeholders about the service offered, the standard of the service, and the way services are provided. The study followed the key issues indicated in the client service charter and then a systematic assessment was conducted. The study aligned the requirements as stipulated in the ToR to come up with findings useful for EWURA management in improving service delivery.

### **1.3 Objective, Scope, Expected Deliverables and Organisation of the Report**

#### **1.3.1 Specific Objectives of the Survey**

The customer satisfaction survey was conducted to assist EWURA generate valid and consistent customer feedback on regulated services (i.e., to receive the voice of the customer) and obtain authentic data on the extent consumers of regulated sectors are satisfied with services offered by EWURA. The outcome of the survey will enable the Authority to implement transformative actions and strategies geared toward improving services offered by regulated entities.

#### **1.3.2 Scope of Assignment**

The scope of the assignment was to:

- a) Develop a composite measure of customer satisfaction and using it to determine the overall rating of the current level of satisfaction countrywide;
- b) Determine the quality-of-service delivery as perceived by customers;
- c) Identify whether customers' expectations are being met or otherwise;
- d) Identify future intentions of participation by customers
- e) Identify gaps in service delivery;
- f) Identify the sources of customer complaints/dissatisfaction in regard to service delivery;
- g) Incorporate in the analysis, the results gathered from the internally-conducted customer satisfaction survey from different events;
- h) Propose service improvement measures;
- i) Prepare and deliver a comprehensive report detailing the methodology, findings; and recommendations from the assessment;
- j) Cover a minimum sample of four (4) districts for every region of Tanzania Mainland except for Dar es Salaam, Mwanza, Mbeya, Arusha, and Dodoma regions, which had five (5) districts each.



## CHAPTER TWO

### APPROACH AND METHODOLOGY

#### 2.1 Approach

The study approach adopted in this assignment was participatory and consultative. The process was guided by the survey objectives underlined in the Terms of References (ToR). Mixed methods of qualitative and quantitative were employed. In-depth interviews were used to get qualitative information from the target audience, which mainly consisted of regulated entities and their consumers. A quantitative approach was used to quantify data on satisfaction which was gathered through face-to-face interviews using semi-structured questionnaires. A mixed method approach was used so as to increase the validity, credibility and reliability of the data. Furthermore, combining the two methods improved data collection approaches and understanding of study findings. In addition, the study assessed the internal operations of EWURA, by evaluating how EWURA is conducting its duties focusing on core values – *impartiality, morality, professionalism, accountability, consistency, and transparency*.

#### 2.2 Study Sites, Sample Design and Sample Size

##### 2.2.1 Study Sites and sample design

The Survey was conducted in 109 out of 139 districts in 26 regions of Tanzania Mainland. These regions were grouped into five (5) zones, namely Lake, Northern, Southern Highlands, Eastern and Central zones. 25 districts were selected from Dar es Salaam, Arusha, Mbeya, Mwanza, and Dodoma regions where in each region, 5 districts were selected. Further 84 districts were selected from the remaining 21 regions, where 4 districts were selected from each region. Criteria for selecting sample districts, entities, consumers, and complainants included the following:

- a) Portfolio of EWURA regulated entities and consumers of the regulated services: At least two (2) districts which are most served (have large portfolio of clients) and two (2) districts which are least served. Districts with entities providing services in 3 up to 4 energy sub-sectors and water sector were selected. Districts having services offered by fewer entities which required complete enumeration (census) were also selected. This consideration was important to ensure that there was adequate representation of services and consumers of services offered by EWURA's regulated entities.
- b) Presence of consumers of the services from the regulated entities in energy sub-sectors of electricity, petroleum, and natural gas; and water sector.
- c) Updated list of individuals from EWURA zonal offices who lodged complaints against service provision by the regulated entities, to help understand their satisfaction with EWURA in dealing with complaints and disputes.

Systematic random sampling was adopted for inclusive, comprehensive, coherent, and consistent data on thematic issues of the study in all the regions and districts surveyed. Data analysis and triangulation of both quantitative and qualitative data was conducted, to help respond to the objectives of the survey.

##### 2.2.2 Sample Size

The study estimated the representative sample size by considering sectors and categories of respondents to have an objective opinion on the quality of services offered by EWURA and quality of service offered by regulated entities. The survey was conducted on entities that are directly

regulated by EWURA, consumers of regulated services, and consumers who lodged complaints to EWURA. Due to the heterogeneity of the population under study, the population of interest was divided into sub-populations (strata) to increase the precision of the estimates. Entities and consumers were divided into sub-groups based on the energy sub-sectors of electricity, petroleum and natural gas, and water sector. The study estimated the sample size for each sub-group by considering the error margin of  $\pm 5$  at 95% confidence level. Equation (1) adopted in Yamane (1967) was used to estimate sample size for each stratum.

Where  $n$  represents the sample size,  $N$  represents the total population of interest and  $\epsilon$  represents

$$n = \frac{N}{1 + N(\epsilon)^2} \dots\dots\dots (1)$$

the margin of error or level of precision. A total sample of 3,674 respondents was estimated and surveyed, of which 1,177 were regulated entities, 2,211 were consumers of regulated services and 286 were complainants.

## 2.3 Data Collection Techniques

Mixed research methods were used to carry out tasks delineated in the ToR using both qualitative and quantitative data collection tools. The data were collected from EWURA regulated entities, consumers of the regulated entities, complainants, and national level stakeholders. The main data collection techniques were:

- a) **Desk review of relevant documents:** This included review of the EWURA Act, Cap 414 of the laws of Tanzania; EWURA Five-year Strategic Plan 2021/22 – 2025/26; EWURA Communications Policy 2019; EWURA Client Service Charter 2020; EWURA Annual report for the year ended June 2021; Electricity Sub-Sector Regulatory Performance Report for the Financial Year 2020/2021; The Mid and Downstream Petroleum Subsector Performance Review Report For Year 2021; Natural Gas Sub Sector Performance Report for the Year ended June 2021; District and Township Water Supply and Sanitation Authority (WSSA) Performance Review Report for Financial Year (FY) 2020-21; Regional and National Projects Water Utilities Performance Review Report for FY 2020-21.
- b) **Interviews:** These were conducted to determine the extent to which regulated entities are satisfied with EWURA's operations as per section 7 of the EWURA Act, Cap.414 of the Laws of Tanzania and EWURA's Client Service Charter 2020. The study also determined the extent to which consumers are satisfied with the services offered by the regulated entities and how EWURA handles complaints lodged by consumers. Data were collected using structured and semi-structured online questionnaires (appendix 2,3&4) coded and administered using the Kobo Toolbox called Open Data Kit (ODK) form.
- c) **Key informants' interviews:** This was administered to key informants at the national level. It included representatives from EWURA staff, Tanzania Bureau of Standards (TBS) and EWURA Consumer Consultative Council (EWURA CCC). This was done with a purpose of validating, synergising, and complementing the initial data and key study findings from regulated entities and consumers of regulated entities.

## 2.4 Analysis and Compilation of Study Findings

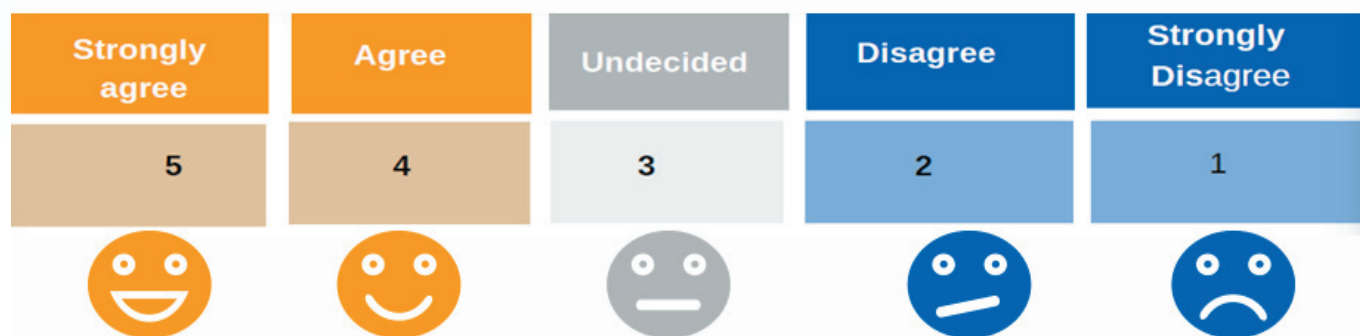
### 2.4.1 Data analysis

Quantitative data was analysed using computer software namely, Microsoft Excel, Statistical Package for the Social Sciences (SPSS) and STATA. Frequency tables and cross-tabulation was employed in order to measure and assess the coverage and attitudes towards the outcomes of interest across the entities in relation to customer satisfaction. The study prepared descriptive statistics from the results of the regulated entities' questionnaires to provide an overview of the perception of service delivery and quality by EWURA, and compared these with results reported in various EWURA reports including EWURA sectors' performance reports of 2021 as mentioned on section 2.3(a) of the ToR. T-tests and other non-parametric tests were carried out to provide more quantification of responses gathered using the questionnaire.

### 2.4.2 Development of Customer Satisfaction Index

Customer Satisfaction Index (CSI) as an indicator that measures customer satisfaction was developed. The index was used to measure how services supplied met or surpassed customer expectations. The study followed the basic structure of the CSI from the literature with well-established theories and approaches to consumer behaviour, customer satisfaction and product and service quality (Fornell, 1992; Fornell *et al.*, 1996).

For each respondent category, the rating of each variable was computed by grouping together the number of respondents who answered a specific statement under the variables measured. The assessment based on a 5-point scale where 1 means Strongly Disagree, 2 means Disagree, 3 means neither agree nor disagree, 4 means Agree and 5 means Strongly Agree (Figure 1).



**Figure 1: Customer satisfaction Likert scale**

The positive perception represented by a 4 or 5 rating was considered. All responses with score 4 or 5 for each variable or attribute were added and then divided by total responses to obtain scores (weighted index) to represent level of satisfaction by entities or consumers on the respective attribute (Equation 2).

$$\text{weighted index} = \frac{\sum_{i=1}^n (A_i 4 \text{ or } \sum A_i 5)}{N} \dots\dots\dots (2)$$

Where  $A_4$  and  $A_5$  represent

responses with a 4 or a 5;  $i=1, 2, \dots, n$  represents respondents and  $N$  represents total sample size.

### **2.4.3 Composite customer satisfaction index**

The Overall CSI was developed to measure customer satisfaction. The index was used to measure how services offered by EWURA-regulated entities and how their services meet expectations. The study developed the CSI from the constructs and weighted indices obtained from the positive responses defined in section 4.1. Constructs were formed based on EWURA's client service charter – a contract between EWURA and its clients who are the key stakeholders in all EWURA activities. The charter has specific service contents and processes necessary for implementing regulatory functions to ensure the quality delivery of services by regulated entities for economic benefits.

### **2.4.4 Factors influencing customer satisfaction**

In-depth analysis involving correlation and regression techniques were performed to establish an association and relationship between the entity's characteristics, and responses provided to gauge the satisfaction score. The score was further analysed to ascertain key messages important for recommending a way forward to EWURA on promoting the best quality service delivery to regulated entities. The study mapped the results on customer satisfaction score and presented spatially to indicate distribution of score by zones and by service category rated by the regulated entities.



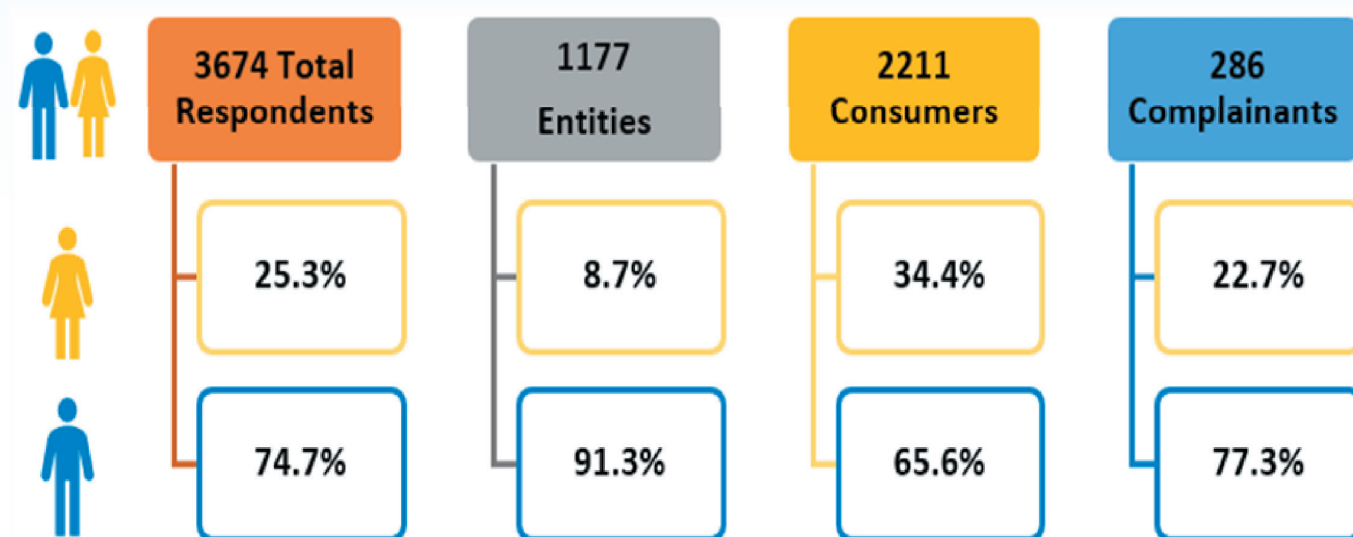
## CHAPTER THREE STUDY FINDINGS

### 3.1 Introduction

This section presents CSS study findings from EWURA-regulated entities, consumers of the services and complainants in four sections. At first, the chapter presents empirical information regarding the study variables, observations, and sample sizes by sector and by categories of respondents (entities, consumers, and complainants). Secondly, the chapter presents descriptive analyses of constructs and attributes or variables on the levels of satisfaction scores. Third, the chapter presents the comparative analysis of the satisfaction scores between the current study and results from previous studies done on EWURA. Fourth, the chapter presents key issues found to influence the level of satisfaction by category of respondents (entities, consumers, and complainants) by energy sub-sectors and the water sector.

### 3.2 Empirical information on study sample characteristics

A total of 3,674 respondents (Figure 2) from entities that are directly regulated by EWURA, consumers of services offered by regulated entities and complainants within the energy sub sectors (i.e., electricity, petroleum, and natural gas) and water sector were sampled through multistage sampling procedure, which involved selection of districts, regulated entities, consumers, and complainants. The study interviewed both male and female respondents and the representation was 75% and 25% respectively. The composition of gender by entities, consumers and complainants is indicated in Figure 2.



**Figure 2: Total number of respondents interviewed per category**

Source: EWURA CSS 2023 field data

### 3.3 Demographic characteristics of respondents

Respondents of the services from EWURA operating in energy sub-sectors of electricity, petroleum and natural gas and water sector were grouped into two categories. Respondents who are directly regulated by EWURA, also known as entities or customers, and respondents who use services that are regulated by EWURA also known as consumers. The complainants group features in the two main groups as it comprised of those who have lodged complaints to EWURA on the unsatisfactory service received from regulated entities.



### 3.3.1 Gender of respondents

The study surveyed a total of 3,674 respondents from 1,177 representing entities, 2,211 representing consumers and 286 representing complainants. For the respondents in the entity category, out of 1,177 respondents, 91% were males and 9% were females. For the category of consumers, out of 2,211 respondents, 66% were males and 34% were females. The proportion of respondents by gender for the category of complainants is 77% males and 23% females (Figure 2 and Table 1). In all these categories, the proportion of male respondents was higher than female respondents, due to the following reasons: The study used a list of regulated entities and complainants provided by EWURA. The list had more men compared to female counterparts. Furthermore, at the household level, the study interviewed the head of the household, as part of the consumers of regulated services. The number of male-headed households was relatively higher compared to female-headed households in the study districts.

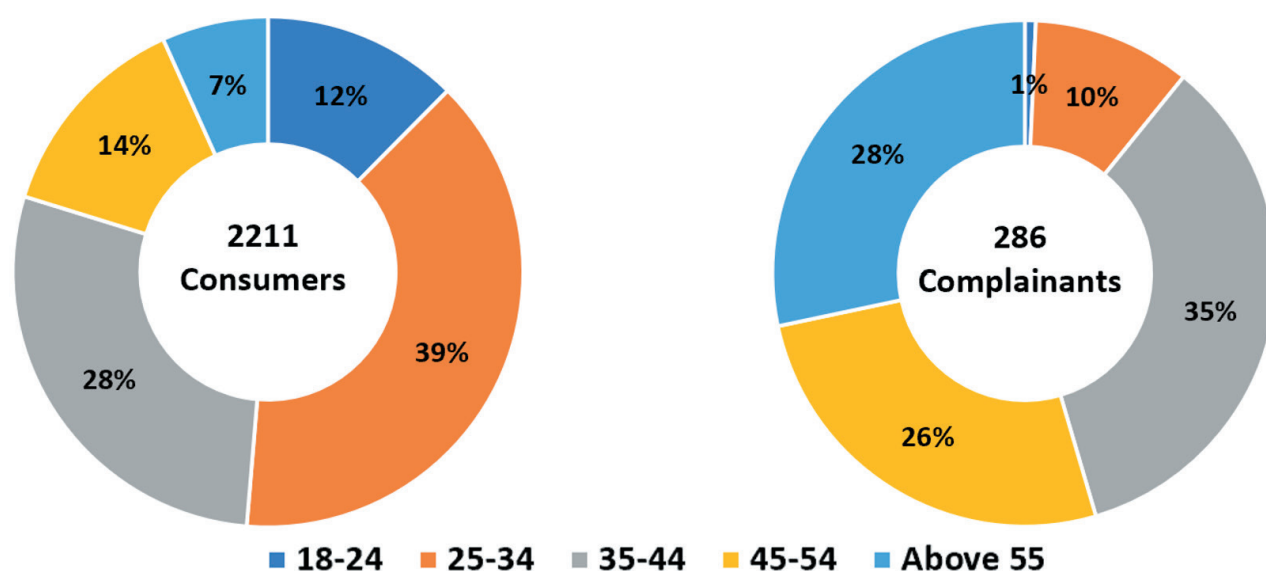
**Table 1: Type of respondents' category and gender**

Types of Respondents	Females		Males		All respondents	
	No.	%	No.	%	No.	%
Entities	102	8.7	1075	91.3	1,177	100
Consumers	761	34.4	1450	65.6	2,211	100
Complainants	65	22.7	221	77.3	286	100
<b>Grand Total</b>	<b>928</b>	<b>25.3</b>	<b>2746</b>	<b>74.7</b>	<b>3,674</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

### 3.3.2 Age of respondents

The average of respondents for consumers' category indicates that the majority of respondents were aged between 25 and 54 years (Figure 3 and Table 2 & 3). Respondents aged 55 years and above were relatively fewer. Unlike consumers, most of the complainants had an age of at least 35 years. Fewer complainants had an age ranging 18 to 24 years. Overall, the age range of respondents was within the expected age of respondents who may provide clear and concise information regarding the attributes for establishing the satisfaction levels on the service quality and delivery by the EWURA-regulated entities.



**Figure 3: Age of consumers and complainants**

Source: EWURA CSS 2023 field data.

**Table 2: Gender vs Age - Consumers**

Age	Male	Female	Grand Total	Grand Total (%)
18-24	172	103	275	12
25-34	618	242	860	39
35-44	401	228	629	28
45-54	179	119	298	14
Above 55	80	69	149	7
<b>Grand Total</b>	<b>1450</b>	<b>761</b>	<b>2211</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

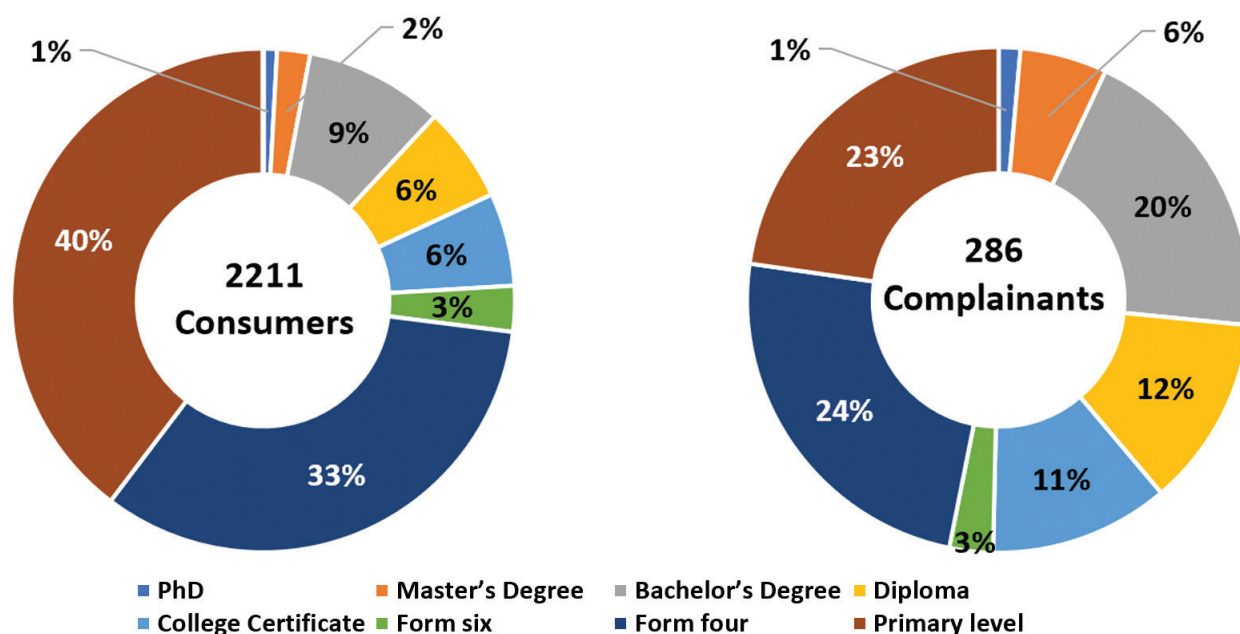
**Table 3: Gender vs Age - Complainants**

Age	Male	Female	Grand Total	Grant total (%)
18-24		2	2	1
25-34	22	7	29	10
35-44	72	27	99	35
45-54	57	18	75	26
Above 55	70	11	81	28
<b>Grand Total</b>	<b>221</b>	<b>65</b>	<b>286</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

### 3.3.3 Education level

The majority of respondents surveyed in both categories reported having primary education and ordinary secondary education level (form four). This is followed up by respondents with bachelor's degrees, diploma, and college certificates. Few respondents reported having a PhD, master's degree and advanced level secondary education (Figure 4 and Table 4&5). This implies that respondents with average education levels are likely to have ability to take forward matters regarding the quality and delivery of services offered by EWURA regulated entities. Education levels clearly determined the capacity of consumers to lodge complaints, understand and have the patience to follow litigation processes as required by the law.



**Figure 4: Education levels of consumers and complainants**

Source: EWURA CSS 2023 field data.

**Table 4: Gender vs Education – Consumers**

Education	Male	Female	Grand Total	Grand Total (%)
PhD	11	8	19	1
Master's Degree	26	21	47	2
Bachelor's Degree	131	67	198	9
Diploma	77	59	136	6
College Certificate	69	63	132	6
Form Six	52	13	65	3
Form Four	493	244	737	33
Primary Level	591	286	877	40
<b>Grand Total</b>	<b>1,450</b>	<b>761</b>	<b>2,211</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

**Table 5: Gender vs Education - Complainants**

Education	Male	Female	Grand Total	Grand Total (%)
PhD	4	0	4	1
Master's Degree	12	4	16	5
Bachelor's Degree	48	8	56	20
Diploma	28	7	35	12
College Certificate	21	12	33	12
Form Six	7	1	8	3
Form Four	52	17	69	24
Primary level	49	16	65	23
<b>Grand Total</b>	<b>221</b>	<b>65</b>	<b>286</b>	<b>100</b>





Source: EWURA CSS 2023 field data.

### 3.3.4 Description of respondents consulted

Respondents surveyed were from three main categories – regulated entities, consumers of regulated services and complainants who included regulated entities themselves and consumers of regulated services. The three categories have different operations and interactions with EWURA and their perceptions of the quality of services was also different. Therefore, the study established the satisfaction score by considering different sets of constructs and attributes by the respective categories.

## 3.4 Description of regulated entities

The study sampled a total of 1,177 EWURA-regulated entities in the energy sub-sectors, namely electricity, petroleum and natural gas and water sector. The surveyed entities in the electricity, petroleum, and natural gas sub-sector were 574 (48.8%), 522 (44.8%) and 6 (0.5%) respectively. The water sector was composed of 70 (5.9%) surveyed entities. Interviews with regulated entities across all sectors were conducted in all five EWURA zones (Figure 5). The results indicated that the Eastern zone and Lake zone had more respondents compared to other zones. This was mainly attributed to increased business growth and population in both zones.

Sector/Zone	Northern zone	Central zone	Eastern zone	Lake zone	Southern highland zone
 Electricity	36%	50%	55%	53%	38%
 Petroleum	55%	41%	42%	41%	51%
 Natural Gas	0%	0%	1%	0%	0%
 Water and sanitation	9%	9%	2%	6%	11%
<b>Total</b>	<b>15%</b>	<b>11%</b>	<b>38%</b>	<b>22%</b>	<b>15%</b>

**Figure 5: Study respondents by Zones and Sectors.**

Source: EWURA CSS 2023 field data.

### 3.4.1 Regulated entities and their interaction with EWURA

Customer satisfaction by EWURA regulated entities assessed by exploring the extent of interaction between EWURA and entities. The study established the frequency into which entities interact with EWURA during a year in which 21% reported interacting every month, 25.1% every three months, 24.4% twice per year and 24.5% reported interacting with EWURA once per year (Table 6). Entities in the water sector reported to have interacted more with EWURA on a monthly basis and entities in the electricity sub-sector interact once per year. On the other hand, natural gas entities interact with EWURA on a monthly basis, in a 3-month period and twice per year.

**Table 6: Interaction of entities with EWURA by sector.**

Time period	Respondents	Percent
Every month	244	20.6
Every 3 months	295	25.1
Once a year	288	24.5
Twice a year	287	24.4
More than a year	63	5.4
<b>Grand Total</b>	<b>1177</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

### 3.4.2 Interaction of zonal entities with EWURA departments

Table 7 shows interaction of zonal entities with EWURA departments. Relatively, entities in the Eastern zone and Lake zone interacted more with EWURA departments than entities in other zones. The study established that the presence of a high number of entities, large number of regulated activities, high profile businesses that are supported by the coastal ports in the Eastern zone and mining activities in the Lake zone, attract compliance with laws and regulation.



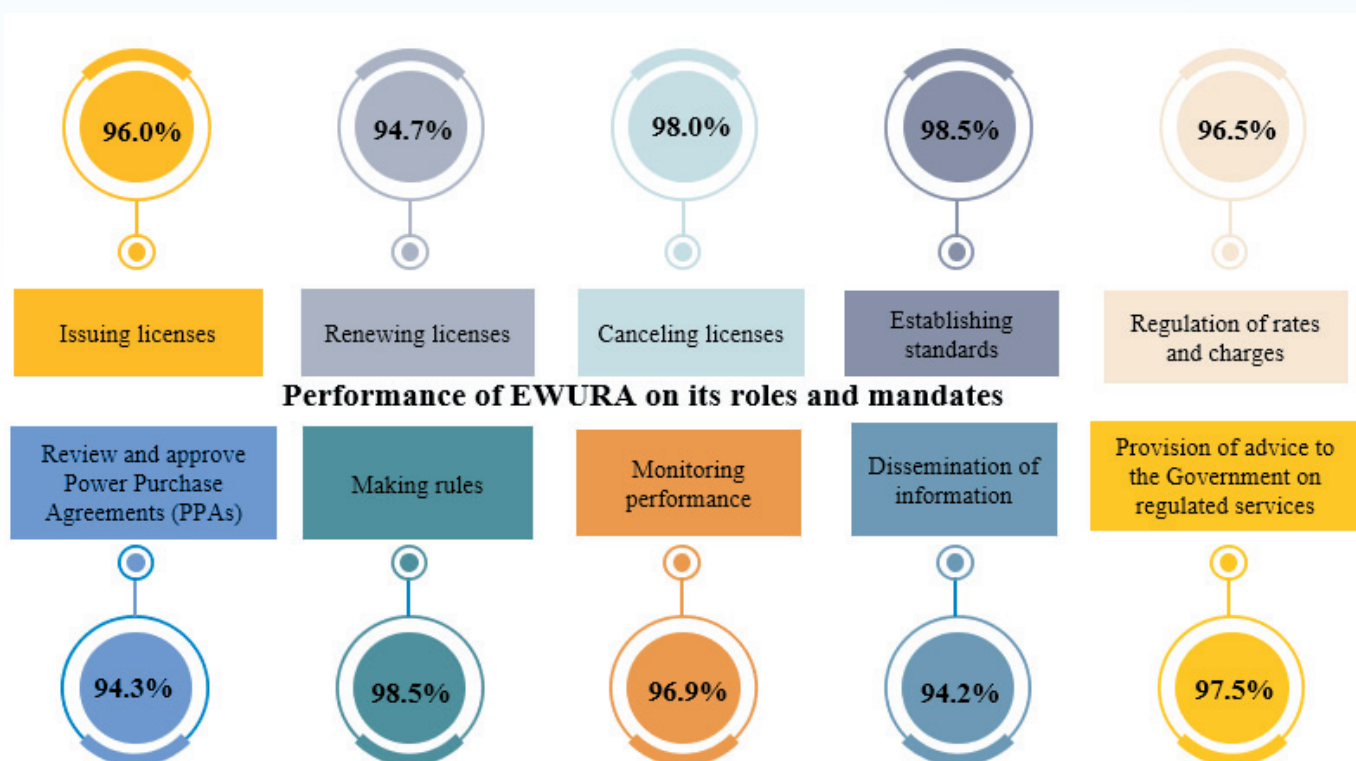
**Table 7: EWURA departments that entities interact with by zone.**

Name of the Department	Name of the zone				
	Northern zone (%)	Central zone (%)	Eastern zone (%)	Lake zone (%)	Southern Highland zone (%)
Licensing, Compliance and Standards	45.6	37.3	45.1	35.5	47.6
Competition, Tariffs and Market Analysis	24.7	27.6	16.9	16.1	15.5
Human Resources	0.3	2.4	0.8	0.7	1.5
Procurement	6.9	4.3	4.2	5.4	3.4
Internal Audit	16.2	20.6	13.6	12.6	26.2
Communications and Public Relations	4.9	4.5	9.9	12.4	3.4
Information Technology	0.3	1.2	5.2	8.9	0.9
Finance and Accounts	1.1	2.1	4.3	8.4	1.5
<b>Grand Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: EWURA CSS 2023 field data.

### 3.4.3 EWURA performance on its roles and mandates

The performance of EWURA on its role and mandate was assessed by considering 10 activities that EWURA is mandated as a regulatory authority (Figure 6). Overall, 94.5% of the respondents considered the performance of EWURA on its roles and mandate to be ‘fair, good and very good’.



**Figure 6: EWURA performance on its roles and mandates**

Source: EWURA CSS 2023 field data.

Analysis by sectors indicates that EWURA's performance on its role and mandate is excellent, as shown in Table 8. The average score for natural gas sub-sector entities is 100%, water sector is 98.6%, Petroleum sub-sector is 94.3% and electricity sub-sector is 94.3%. The recorded scores on the dissemination of information and renewing of licenses was 86.8% and 87.3% respectively in the electricity subsector (Table 8). The study noted that the performance of



EWURA has improved due to various reasons, including advancement in sector information systems, regular monitoring of entities and implementation of EWURA Communications Policy (2019) as indicated in the EWURA annual report for the year ended 30th June 2021. Stakeholders felt that the performance will further improve by strengthening the communication and public relations unit as the face of EWURA by elevating the communication and public relations unit to a directorate. Interaction of a directorate with clients is stronger than that of a unit, and this brings about firm decisions and trust. Such experiences are also found in neighbouring Uganda under the Electricity Regulatory Authority (ERA).


**Table 8: Performance of EWURA on its roles and mandates sector wise**





Category/sector	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
Issuing licenses	90.8	94.7	100	98.6
Renewing licenses	87.3	94.3	100	97.1
Cancelling licenses	97.9	97.0	100	97.1
Establishing standards	98.3	97.2	100	98.6
Regulation of rates and charges	94.6	94.1	100	97.1
Review and approve Power Purchase Agreements (PPAs)	94.3	-	-	-
Making rules	98.4	95.6	100	100
Monitoring performance	90.9	97.0	100	100
Dissemination of information	86.8	90.1	100	100
Provision of advice to the Government on regulated services	97.2	92.6	100	100

Source: EWURA CSS 2023 field data.

#### 3.4.4 Knowledge and awareness of EWURA Client Service Charter by regulated entities

The objective of the EWURA client service charter is to inform clients and stakeholders about the services offered, standards of services and the way those services are provided. The charter demonstrates the commitment of EWURA to meet expectations of clients and enable them to deliver quality services. To gauge customer satisfaction, the study developed constructs and attributes to ascertain knowledge and awareness of regulated entities about the EWURA client service charter. The results show that awareness on the EWURA client service charter was higher among the respondents from the gas sub-sector and water sector with 83% and 81% respectively, while respondents from electricity and petroleum sub-sectors had low awareness with 25% and 34% respectively (Figure 7). This suggests that EWURA needs to strengthen awareness raising programmes on its client service charter to regulated entities and the public at large.



Entities awareness of the EWURA client service charter		Yes	No
 <b>Electricity</b>		145(25.3%)	429(74.7%)
 <b>Petroleum</b>		180(34.1%)	347(65.9%)
 <b>Natural Gas</b>		5(83.3%)	1(16.7%)
 <b>Water</b>		57(81.4%)	13(18.6%)

**Figure 7: Regulated entities awareness on EWURA client service charter**

Source: EWURA CSS 2023 field data.

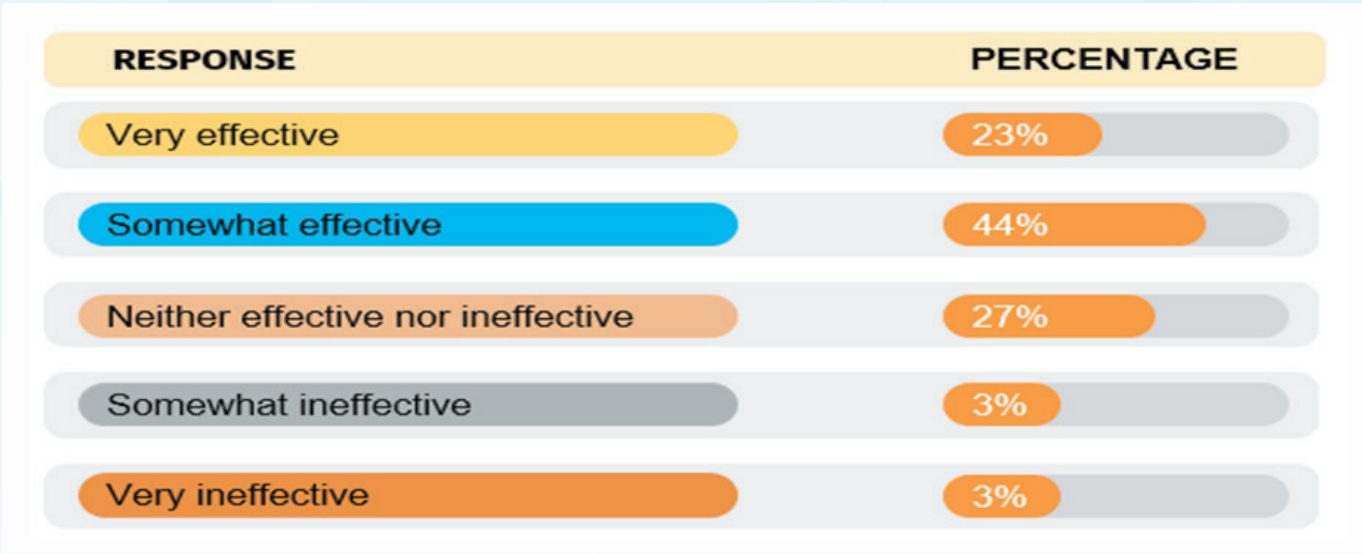
Figure 8 below indicates various communication channels mentioned by respondents as a source of information on the client service charter. EWURA's website was mentioned by the majority of respondents (80.6%).



**Figure 8: Channels of information on how respondents knew about EWURA client's charter.**

Source: EWURA CSS 2023 field data.

Further, the analysis was done on the effectiveness of the EWURA client service charter to delivery of service. The effectiveness of EWURA staff in implementing the promises laid out in their customer service charter was rated very effective and somewhat effective with 23% and 44% scores respectively as shown in Figure 9 below. Respondents mentioned that EWURA staff meet customers’ expectations in service delivery and assist customers in addressing emerging challenges.

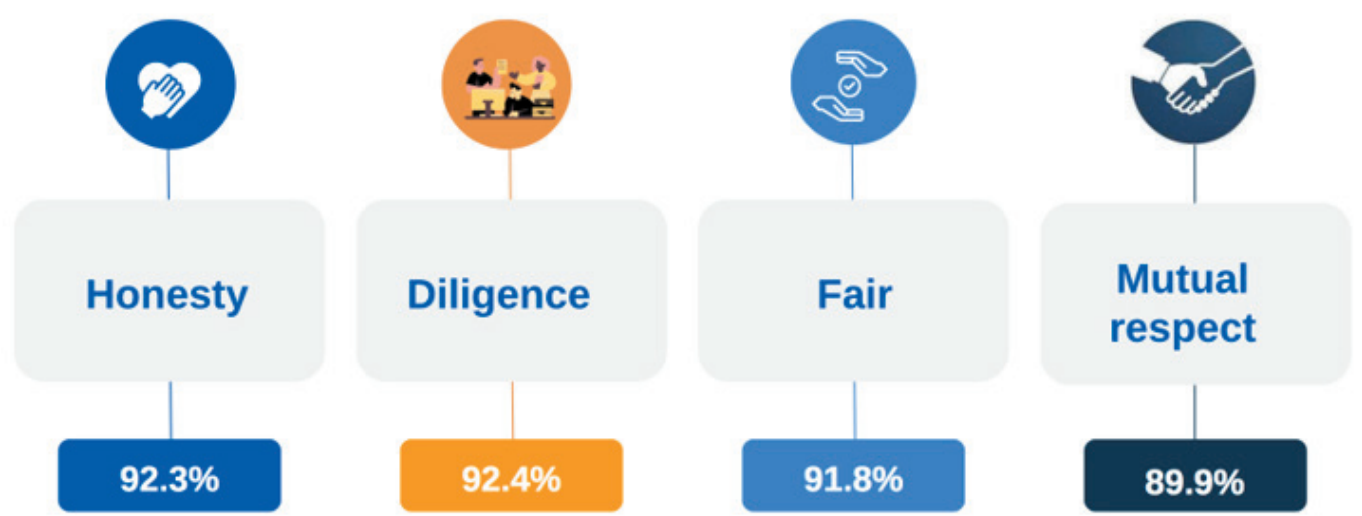


**Figure 9: Effectiveness of the EWURA employees in implementing the promises laid out in their service charter**

Source: EWURA CSS 2023 field data.

**3.4.5 EWURA staff attitude and behaviour while serving regulated entities**

Assessment of customer satisfaction was performed by exploring the perception of entities on EWURA staff. This was done by considering staff attitude and behaviour while performing their duties. The study used honesty, diligence, fair and mutual respect when serving and interacting with entities as criteria to show performance of EWURA staff attitude and behaviour on their duties. The results show that, 92.3%, 92.4%, 91.8% and 89.9% considered EWURA staff to be honest, diligent, fair and mutual respect respectively (Figure 10).



**Figure 10: EWURA Staff attitude and behaviour while performing their duties**

Source: EWURA CSS 2023 field data.

The review of EWURA's reports indicate that there have been various capacity building programmes for staff on regulatory, managerial, and operational competencies, with a total of 158 staff members attending local trainings (EWURA, 2021). The study also noted that some of the issues raised by respondents that need attention on attitude and behaviour include delays in responding to customer issues related to licensing, improper marking procedures, use of improper and unprofessional language, abuse of power and inadequate customer care. Such effort is associated with better performance indicated in the current survey.

Assessment by sectors indicate that entities in the petroleum sub-sector rate relatively lower staff fairness and honesty, respectively (Table 9). On average, 87% and 89% of respondents reported that EWURA staff are fair and honest respectively. This low rating is associated with sensitivity of the petroleum sub-sector, whereby regulations are stringent to ensure operations are properly done. The issue of fuel marking to control the possibility of tax evasion is not well accepted by some operators (mostly local investors) unlike foreign investors who consider fuel marking positively as it catalyses fair competition.

**Table 9: Staff attitude and behaviour while performing their duties by sector**

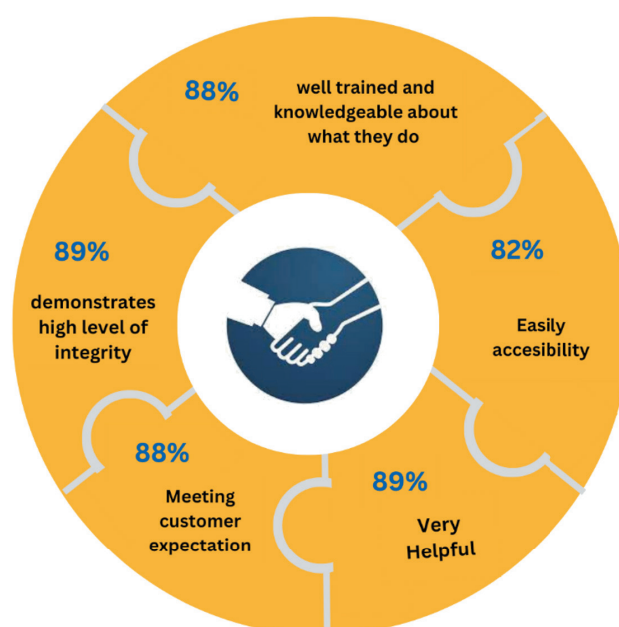
Response	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
EWURA staff serve and interact with its clients honestly.	95	89	100	97
EWURA staff serve and interact with its clients diligently.	92	90	100	99
EWURA staff serve and interact with its clients fairly.	92	87	100	96
EWURA staff serve and interact with its clients with mutual respect.	96	93	100	99

Source: EWURA CSS 2023 field data.

### 3.4.6 EWURA staff relationship with clients

The study explored relevant attributes to ascertain EWURA staff relationships with clients. The study focused on assessing how the regulated entities perceive EWURA staff on meeting client expectations, accessibility by clients, and helpfulness to clients. It also explored how well-trained and knowledgeable are the staff members about what they do and whether they demonstrated a high level of integrity. The results are as shown in Figure 11 below, whereby more than 82.5% of respondents agree that EWURA staff have a good relationship with their clients.

Assessment by sectors indicates that more than 82% of respondents agreed that EWURA staff are accessible. However, the study noted concerns on accessibility of EWURA zonal offices to be far, thus suggesting the possibility of having regional offices with technical staff and facilities.



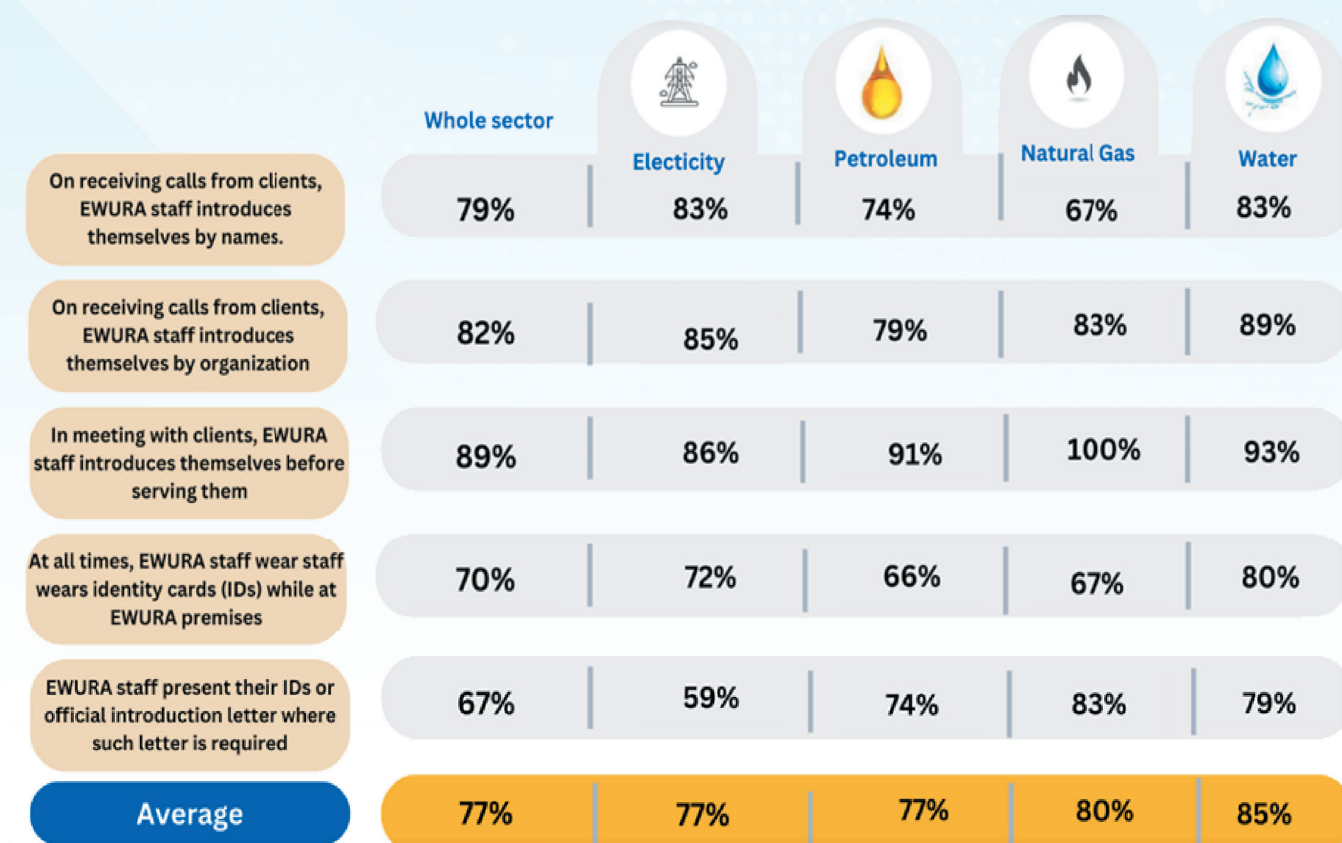
**Figure 11: Relationship of EWURA staff with Clients.**

Source: EWURA CSS 2023 field data.



### 3.4.7 Staff self-introduction while interacting with clients

Customer satisfaction was also gauged by exploring how EWURA staff members introduce themselves when serving clients. This is a sign of good customer care. The study developed constructs and attributes to be used to ascertain the respondents' levels of agreement on various statements about EWURA staff members' self-introduction. The results show that on average, 77.5% of respondents reported to be satisfied with the way EWURA staff members introduce themselves when serving clients. The lowest score was 67.1% which is on presenting their IDs or official introduction letter where such a letter is required, while the highest was 88.9% on introducing themselves before serving the clients. Other scores are as shown in Figure 12, which illustrates sector wise levels of agreements of respondents on the self-introduction statements.



**Figure 12: Respondents' levels of agreement on various statements about EWURA staff self-introduction**

Source: EWURA CSS 2023 field data.

### 3.4.8 EWURA office environment on interacting with clients

The EWURA office environment is key in facilitating delivery of services to clients. On this, the study assessed how EWURA office premises are rated by clients in terms of how they are satisfied with the environment. The results show that respondents from petroleum and electricity sub-sectors had a relatively lower rating of the environment of EWURA on facilitating interaction with clients, in which 72% and 89% of respondents reported adequate security and easy accessibility of EWURA offices. Also, 96% and 92% of respondents from the water sector and natural gas sub-sector respectively considered EWURA office premises to have adequate security and are easily accessible. (Table 10).

**Table 10: Rating of EWURA office environment by clients**

Office environment	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
There is adequate security within EWURA premises	88	73	83	96
EWURA offices are easily accessible	90	72	100	96
<b>Average</b>	<b>89</b>	<b>72</b>	<b>92</b>	<b>96</b>

Source: EWURA CSS 2023 field data.

### 3.4.9 Quality of service delivery

The study assessed the quality of services that EWURA delivers to its clients. Clients were asked to rate various attributes to ascertain quality of service delivery by EWURA. These attributes include clarity, accuracy of information, responsiveness within time, response during emergencies, innovations, honouring of appointments and compliance to agreements. Respondents' assessment on the quality of services received is shown in Table 11. Overall, 79% of respondents responded positively on variables mentioned to assess quality service delivery of EWURA. Analysis by sectors shows that entities in petroleum and electricity sub-sectors rated relatively low quality of service delivery compared with the rating by entities in water sectors and natural gas sub-sector (Table 11).

**Table 11: Respondents' levels of agreement on the quality of EWURA information and communication services**

Variables	Total (%)	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
There is efficient flow of information between EWURA & its stakeholders	80	77	82	83	97
The written procedures and requirements by EWURA are clear and unambiguous	87	88	86	100	93
The verbal procedures and requirements by EWURA are clear and unambiguous	88	91	85	100	93
EWURA provides correct and accurate information to its clients	95	96	92	100	99
EWURA provides timely information and feedback to its stakeholders	94	94	92	100	97
EWURA responds to enquiries within the appropriate response time	68	70	62	83	90
EWURA responds to all emergencies professionally	63	62	61	67	77
EWURA provides best services to its clients at all times	72	73	69	100	87
EWURA develops user-friendly tools and procedures.	66	64	66	100	90
EWURA honours appointments and ensures they are attended as scheduled except in the case of unforeseen circumstances	73	72	72	100	90
EWURA complies with terms and conditions consented in contracts signed with service providers	87	87	86	100	97
<b>Average</b>	<b>79</b>	<b>79</b>	<b>78</b>	<b>94</b>	<b>92</b>

Source: EWURA CSS 2023 field data.

### 3.4.10 EWURA communications with stakeholders

EWURA client service charter provides how EWURA ensures standard of service by indicating the responsiveness and response time. According to the client service charter, EWURA is committed to respond to enquiries within the response time. Responding to telephone calls, the response time is within the first five (5) ringing tones, acknowledging various correspondences, the response time is within five (5) days from date of receipt. EWURA acknowledge official electronic mails and social media within 24 hours during working days, EWURA respond to written enquiries from media houses within five (5) days from date of receipt. The charter also provides that, the response time for EWURA to respond to questions from stakeholders is within five (5) days from the date of receipt. Based on these attributes, entities surveyed were asked to report on how EWURA has timely communicated with clients (Table 12).

**Table 12: Communications of EWURA to stakeholders**

Response category	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)	Overall (%)
EWURA provides timely information and feedback to its stakeholders	74	72	83	92	80
EWURA responds to enquiries within the appropriate response time.	70	62	83	90	76
There is efficient flow of information between EWURA & its stakeholders	77	82	83	97	85
EWURA provides best services to its clients at all times	73	68	100	87	82
The written procedures and requirements by EWURA are clear and unambiguous	88	86	100	93	92
The verbal procedures and requirements by EWURA are clear and unambiguous	91	85	100	93	92
EWURA provides correct and accurate information to its clients	96	91	100	98	96
The information provided by EWURA to its stakeholders is clear and easy to understand	94	92	100	97	96
EWURA responds to all emergencies promptly	48	49	50	72	55
EWURA responds to all emergencies professionally	61	58	67	90	69
EWURA develops user-friendly tools and procedures	63	65	100	90	80
EWURA honours appointments and ensures they are attended as scheduled except in the case of unforeseen circumstances	71	72	100	90	83
EWURA complies with terms and conditions consented in contracts signed with service providers	85	86	100	97	92

**Source:** EWURA CSS 2023 field data.



### 3.4.11 Review and approval of tariffs

Satisfaction levels were also gauged from attributes related to review and approval of tariffs. One of EWURA's roles is to review and approve tariffs applied in services by regulated entities operating in energy and water sectors within a specified time period<sup>1</sup>. In this study, respondents were asked to provide their evaluation on how EWURA is fulfilling requirements on the review and approval of tariffs. Results as shown in Table 13 illustrate that only 43.9% of respondents were satisfied with the time EWURA took to provide written feedback of preliminary review of tariff application after submitting a complete application. This low rating was associated with the time difference considered by EWURA and clients. While EWURA considers time from the receipt of complete applications, clients consider time when the application was first submitted. From the focus group discussion, it came out clearly that some clients have incomplete submissions, which necessitated delays in decision making.

**Table 13: Satisfaction with review and approval of tariffs**

N	Attributes	Percent
1	Satisfaction with the time EWURA took to provide written feedback of preliminary review of tariff application	43.9
2	Satisfaction with the time EWURA took to issue tariff decision	98.1

Source: EWURA CSS 2023 field data.

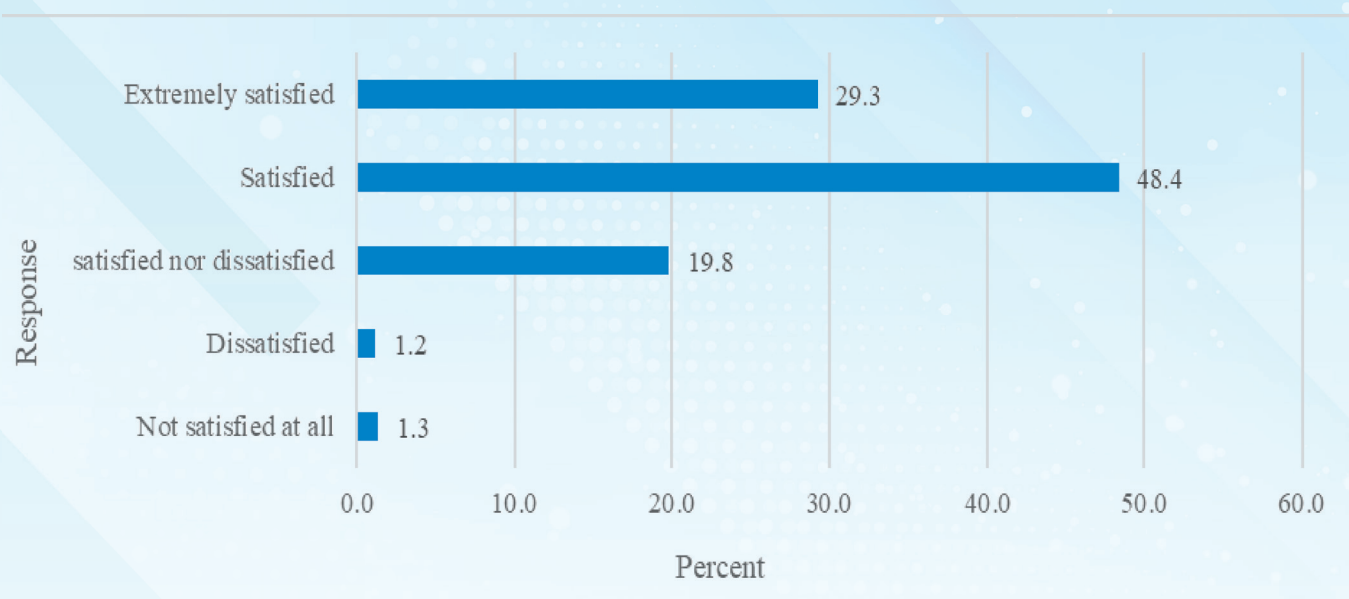
Results on response time that EWURA took to issue tariff decisions were rated higher. Table 13 above shows that 98% of respondents were satisfied with the time EWURA took to issue tariff decisions after the day of receiving/acceptance of complete submission. Respondents reported the average response time to be between 62 and 66 days to issue tariff decisions after the day of receiving/acceptance of complete submission for the energy sector and 56 and 59 days for the water sector. The time taken was within the response time of 90 days for the energy sector and 75 days for the water sector specified in EWURA's client service charter.

### 3.4.12 Issuance of License

Service providers apply for licenses to perform operations in the regulated energy and water sectors. There are procedures and response time for EWURA to work on the license applications. These include reviewing and issuing acceptance letters of application, preconstruction approval site inspection, construction approval, pre-licensing site inspection, processing and issuance of licenses. There are specified response times for each of the activities by sector. Also, EWURA has specified response time for activity related to processing transfer of licenses, site inspection and feedback. In this study, respondents were asked to rate how EWURA was meeting response time when issuing licenses. Figure 13 shows the EWURA licensing process, in which 84.7% of the respondents consider the process to be efficient. More than 88% of respondents agreed that proper vetting is conducted before licensing, licenses are awarded to those who meet criteria and the automatic system of acknowledgment of receipts of electronic application was efficient. Sector wise, a high level of agreement to the attributes was also observed in all sectors.

<sup>1</sup> EWURA's response time for review and issuance of written feedback to clients is specified. (i) The preliminary review and issuing written feedback are within five (5) days from the date of receipt of complete application (ii) Issuance of tariff decision for energy sector is 90 days from the date of acceptance of complete submission (iii) Approval of small Power Producer Tariffs (SPPTs) is two months after completion of TANESCO tariff application.





**Figure 13: Perception on EWURA licensing process**

Source: EWURA CSS 2023 field data.

### 3.4.13 Response time for license processing

On average, it takes EWURA 87 days to process and issue a license after the date of acceptance of a complete application (Table 14). The time allowed for various activities related to licensing is 65 for licenses in the electricity sector, 75 days for petroleum, 65 days for electricity, 35 days for wiremen, 120 days for natural gas and 35 days for the water sector. The current licensing process by EWURA is outside the response time specified in the client service charter.

From the survey, respondents highlighted the electronic system to be slow and not giving feedback of progress of the licensing process as expected. The response time for licensing was long and respondents requested EWURA to reduce the time in order to speed up business operations in these sectors.

#### Licenses to wiremen

While entities in the electricity sub-sector are satisfied with the response time for licenses and processes for licensing, individual wiremen contractors have different views. The satisfaction of wiremen with the response time regarding EWURA's license application process was 43.3%. On average, it takes EWURA 63 days to process and issue a license after the date of acceptance of a complete application. This time period is viewed as too long for individual contractors operating in the electricity sub-sector.

#### Operators generating less than one Megawatt (1MW)

Entities generating less than 1 MW of electricity indicated concerns on the license application and processing time by EWURA. The reported satisfaction on response time taken by EWURA to process and issue registration letters was 60%. It takes EWURA an average of 84 days to issue the registration certificate/letter after the date of acceptance of a complete request. The actual time taken for processing of electricity generation license is considered to be longer than the client expectation.

**Table 14: Response time for license processing**

Activity	Days (EWURA Charter)	Days (Survey)
Processing and Issuance of License	30	89
Processing and Issuance of Provisional Electricity Generation and Distribution Licenses	30	93
Issuance of Exemption Letter to Electricity Operators whose Activities are License-exempted	14	67
Registration of electricity operators generating less than one Megawatt (1MW)	7	84
Processing and issuance of electrical installation license to wiremen and contractors.	30	63

Source: EWURA CSS 2023 field data.

### Licensees in petroleum sub-sector

Entities in the petroleum sub-sector have different views on how EWURA undertakes license processing. The specific area of concern was on the response time that EWURA actually takes to complete issuance of licenses to petroleum facilities. Their satisfaction on the time EWURA takes to approve construction of petroleum facility, time to issue acceptance letter of license application and the process, and issuing of the license for petroleum products (i.e., diesel, petroleum) was 43.9%, 56.7% and 43.9% respectively. The EWURA client service charter specifies the number of days for various activities related to issuance of licenses. The survey noted further that in order for a facility to be granted a certificate, there are other government regulatory authorities such as the National Environment Management Council (NEMC), Occupational Safety and Health Authority (OSHA) and Fire and Rescue Force that are also involved. The application takes a longer period of time since it has to be approved by all these authorities. Thus, the reported long response time by respondents includes time for which other authorities use to scrutinise the clients' applications as shown in Table 15 below.

**Table 15: Response time for license processing in the petroleum sub-sector**

Activity	Days (EWURA Charter)	Days (Survey)
License application for petroleum products (i.e., diesel, petroleum)	40	53
Construction approval for petroleum facilities (retail)	30	82
Issuance of licenses	40	38

### Natural Gas Sub-sector

Six natural gas licensees were visited in this study, of which three started their operations before EWURA became operational in 2006. The other three entities, required natural gas facility pre-construction site inspection and construction approval. They were satisfied (100%) with the time EWURA took to provide feedback and approve after the date of acceptance of a complete application and the license issuance process. When asked about the last time they applied for a license renewal from EWURA, they had all applied between 2015 and 2021 which took an average of 40 days with a satisfaction score of 66.7% (Table 16). Those who were not satisfied considered the time taken to issue a license to be quite long.

**Table 16: Response time for license processing in the natural gas subsector**

Activity	Days (EWURA Charter)	Days (Survey)
Natural Gas Facility Construction Approval	30	51
Natural Gas Pre-Construction Approval Site Inspection	15	38
Pre-Licensing Site Inspection and Feedback for Natural Gas Facility License Application	20	33
Site Inspection for Natural Gas Facility Construction	20	34
Processing and Issuance of Natural Gas License	40	43

Source: EWURA CSS 2023 field data.

## Water Sector

Respondents who are satisfied with the time EWURA takes to process and issue water supply and sanitation license and application process were 70% and 81.4% respectively (Table 16). On average, it took EWURA 57 days to process and issue licenses for water supply and sanitation.

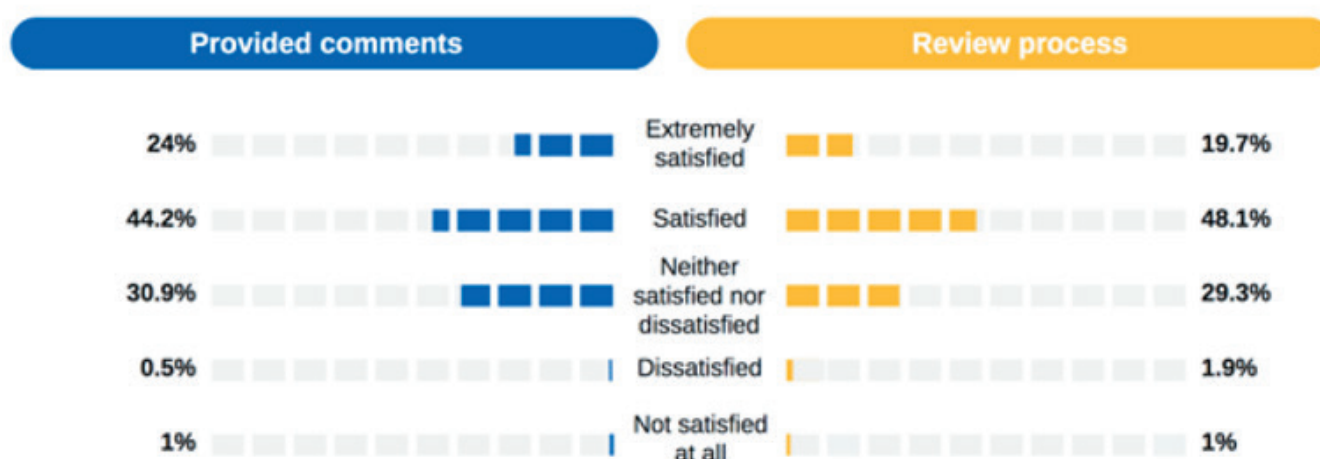
**Table 16: Response time for license processing in the water subsector**

Activity	Days (EWURA Charter)	Days (Survey)
Issuance of Tariff Decision for Water Sector	75	59
Processing and Issuance of Water Supply and Sanitation License	30	58

Source: EWURA CSS 2023 field data.

### 3.4.14 Monitoring the performance of regulated entities

Monitoring the performance of regulated sectors is essential to ensure regulated entities provide required and quality services to their consumers. As such, the study explored whether their performance is monitored by EWURA and their satisfaction. Regulated entities whose services had been monitored were 57.2% of 1,177 surveyed entities. Their satisfaction with EWURA's service performance monitoring is shown in Figure 14 below in which 77.7% were satisfied with the monitoring practices.

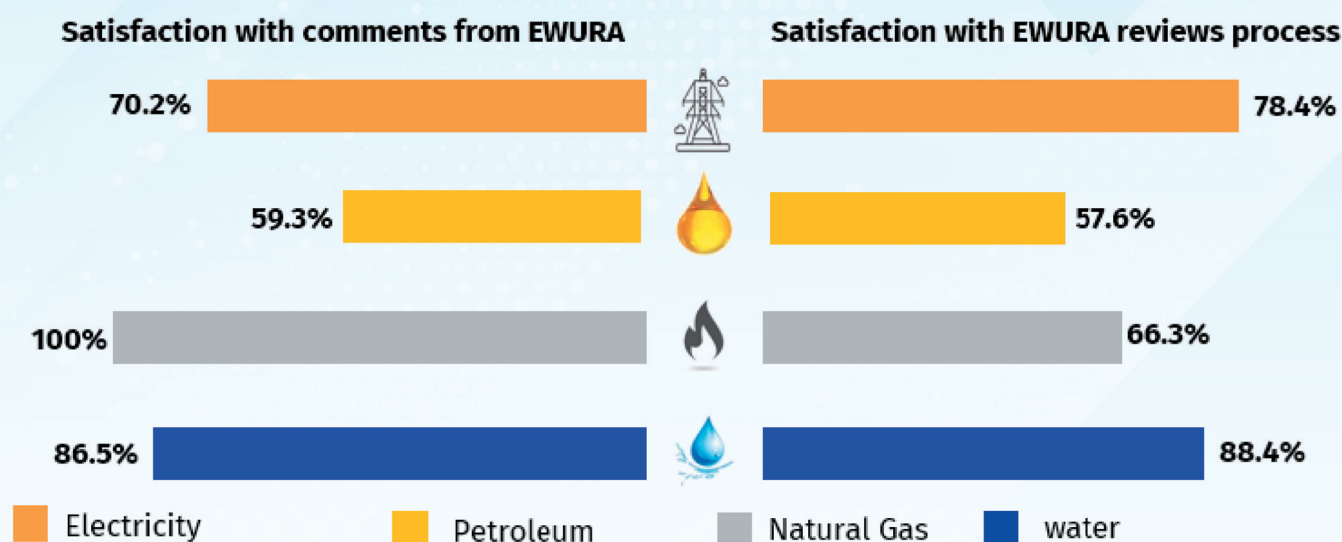


**Figure 14: Satisfaction of regulated entities with EWURA's service performance monitoring**

Source: EWURA CSS 2023 field data.

### 3.2.14.1 Satisfaction with EWURA's review of quarterly/annual reports and business plans

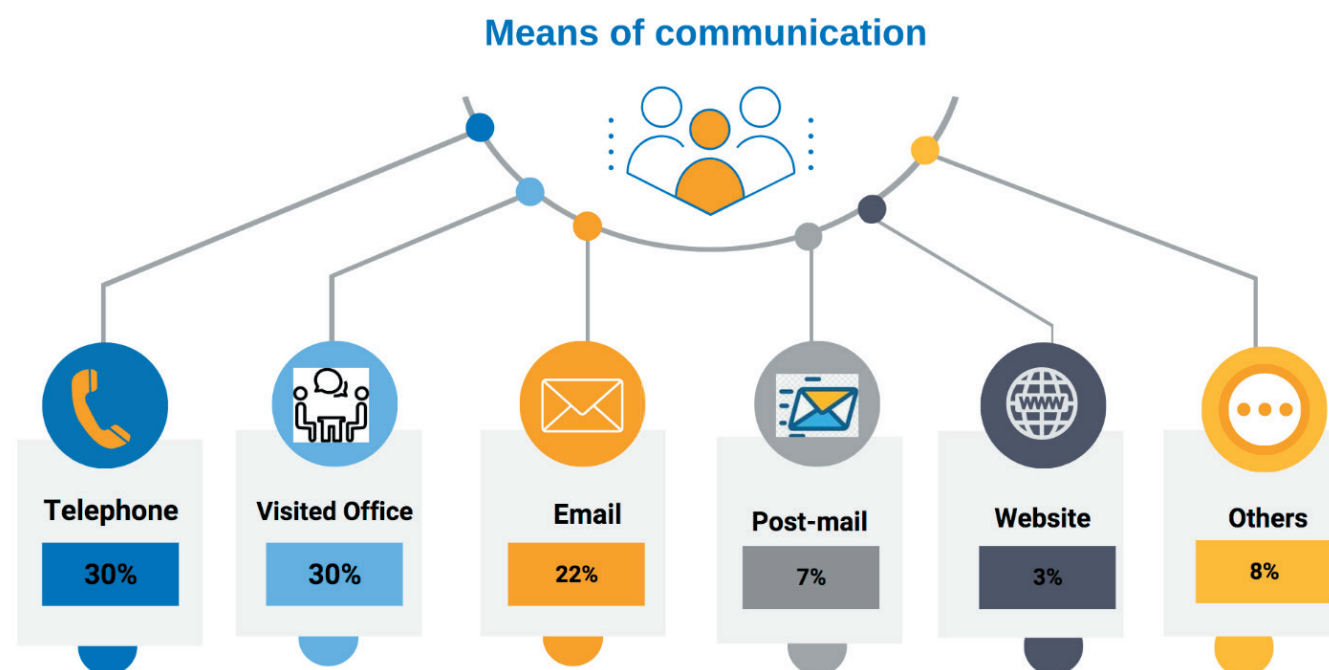
Satisfaction of regulated entities with EWURA's review of their quarterly/annual reports and business plans is shown in Figure 15 below in which 17.4% of 1,177 respondents had submitted their quarterly, annual reports and business reports to EWURA. Their satisfaction with the provided comments and the review process as shown in Figure 15 was 68.3% and 67.8% respectively.



**Figure 15: Regulated entities satisfaction with the comments and the review process by EWURA**

Source: EWURA CSS 2023 field data.

Sector wise comparison of satisfaction of regulated entities with the comments and the review process by EWURA is shown in Figure 16 below.



**Figure 16: Sector wise satisfaction of regulated entities with the comments and the review process by EWURA**

Source: EWURA CSS 2023 field data.



### 3.4.15 Resolution of complaints and disputes

Handling complaints correctly is an incredibly important part of the overall customer service experience. The study therefore sought to determine whether entities have ever experienced any problem with EWURA in the last one year and how fast their issues were resolved. As shown in Table 17 only 7.4% or 87 of 1,177 respondents had made formal complaints to EWURA in the past one year.

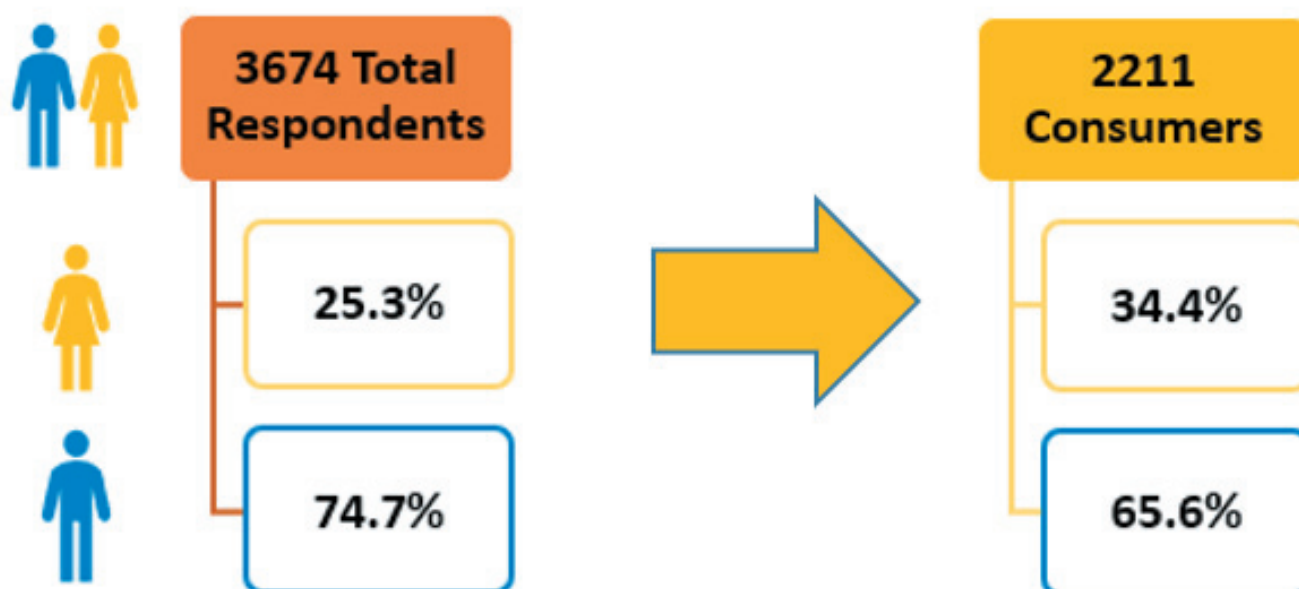
**Table 17: Respondents who had made complaints to EWURA in the past one year**

	Natural Gas	Petroleum	Water	Electricity	Total	Percent
Yes	0	31	13	43	87	7.4
No	6	496	57	531	1,090	92.6
Total	6	527	70	574	1,177	100

Source: EWURA CSS 2023 field data.

#### 3.4.15.1 Mechanism used to communicate complaints to EWURA

Entities that experienced problems with regard to service delivery, quality and other related problems reported their complaints to the Authority. Mechanisms that were used to communicate/report their complaints/problems to EWURA included telephone, emails and physically visiting EWURA's offices. The results show that 30% of respondents used telephone, 30% visited EWURA offices, while 22% reported the complaints by using e-mails. Others reported to have used postal office mails and websites (Figure 17).



**Figure 17: Mechanism used to communicate/report complaint/problems to EWURA**

Source: EWURA CSS 2023 field data.

#### 3.4.15.2 Time EWURA takes to resolve complaints from regulated entities

The EWURA client service charter specifies the response time for various actions undertaken by EWURA in the process of handling complaints lodged by regulated entities. The time for acknowledging a letter of receipt of complaints is five days. Also, the allowable time by EWURA for the issuance of a settlement award after conclusion of mediation is within 30 days. The response time of 60 days is earmarked for issuance of a hearing award.

Complainants reported the response time for which their complaints were resolved. As per Table 18 below, 64.4% of respondents reported that the complaints were resolved over three (3) weeks. Others indicated to have concluded mediation in a period of less than three weeks. Sector wise, the electricity sub-sector was leading with a complaints resolution period of over three (3) weeks, followed by the petroleum sub-sector.

**Table 18: Time taken by EWURA to resolve complaints**

Time taken	Respondent	Percent
Less than 24 hours	11	12.6
Within a week	12	13.8
Within 2 weeks	6	6.9
Within 3 weeks	2	2.3
Over 3 weeks	56	64.4
<b>Total</b>	<b>87</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

### 3.4.15.3 Satisfaction with the way complaints were resolved

Satisfaction of regulated entities with the way their complaints were resolved is shown in Table 19 below, in which 29.9% were satisfied and 70.1% were not satisfied; Issues raised included the cost of following up the case in terms of money and time, and complainants felt intimidated by the process.

**Table 19: Satisfaction with the way complaints were resolved by sector**

Response	Petroleum (%)	Water (%)	Electricity (%)	Overall (%)
<b>Satisfied</b>	22.6	61.5	25.6	29.9
<b>Not satisfied</b>	77.4	38.5	74.4	70.1

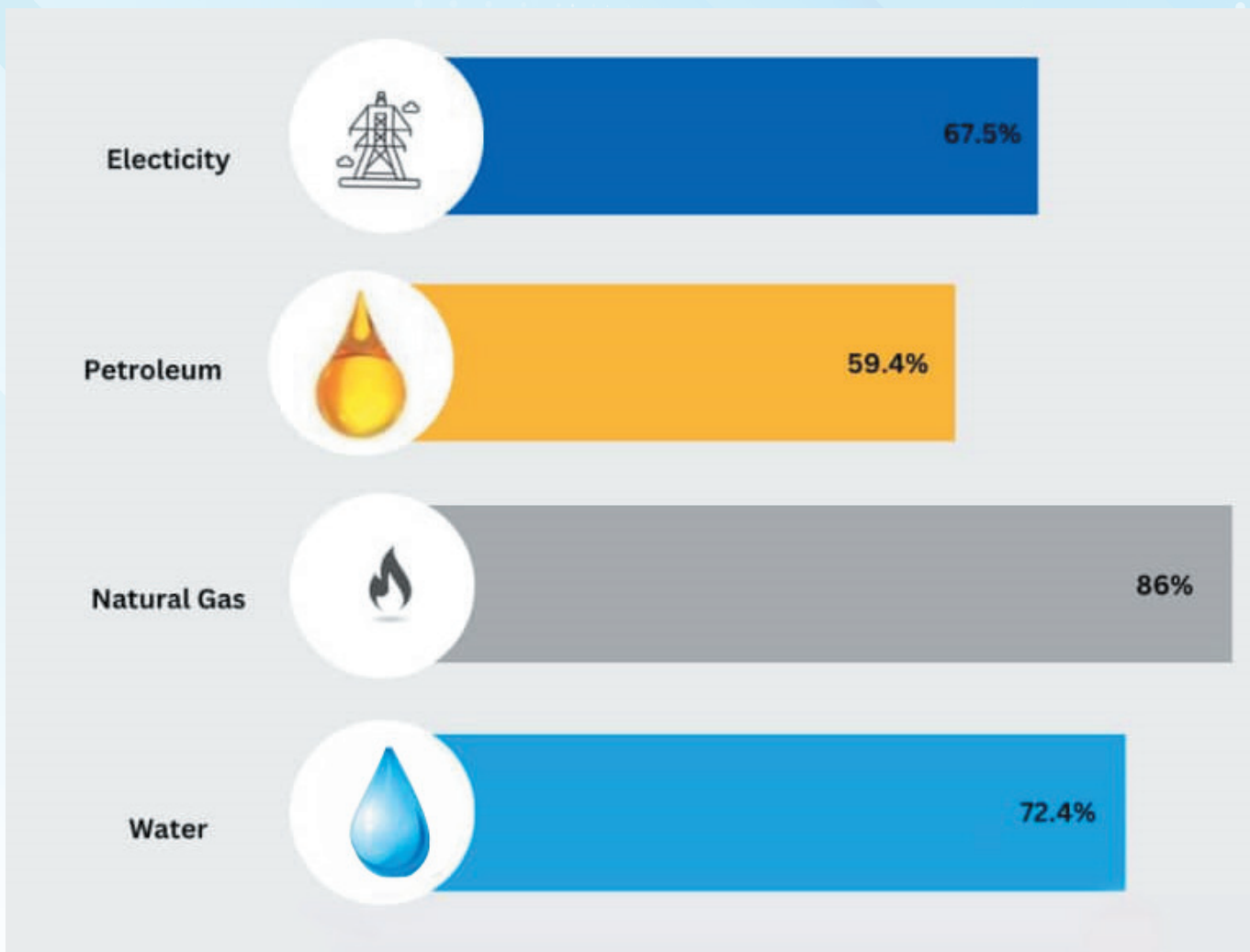
Source: EWURA CSS 2023 field data.

## 3.5 Consumers of services offered by EWURA-regulated entities

This section presents customer satisfaction information by focusing on the consumers of regulated services. The information on consumers of regulated services forms an important contribution to the overall customer satisfaction score to EWURA. Key issues presented include a brief description of consumers of regulated services, satisfaction levels on services by sector and perceived performance of EWURA on regulated services.

### Characteristics of consumers

Assessment of the extent to which consumers of regulated entities are satisfied with the service providers was conducted to 2,211 consumers. Gender distribution is shown in Figure 18 below, in which 65.6% were males and 34.4% were females.



**Figure 18: Distribution of consumers by gender**

Source: EWURA CSS 2023 field data.

### 3.5.1 Consumers' satisfaction on quality of services provided by regulated entities

Understanding the satisfaction of consumers on the quality of services provided by EWURA-regulated entities (i.e., electricity, petroleum, natural gas and water) is vital for EWURA to focus its regulatory services. This study established consumer satisfaction on the quality of services by considering different attributes and the results are as shown in Table 20 below. The overall average level of satisfaction by consumers was 53.3%. Sector wise, high satisfaction levels were reported by consumers of natural gas (88.2%), water (43.5%), petroleum (42.4%) and electricity (38.6%).

**Table 20 : Consumer satisfaction on the quality-of-service they receive from their service provider**

	Attributes	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
a)	Service is available as needed	39.85	82.51	86.96	52.50
b)	Quality is of acceptable standard	60.76	75.95	92.75	67.05
c)	Price is fair	50.23	24.05	91.30	54.49
d)	Education is provided on key attributes of the service	18.47	17.20	89.86	22.68
e)	The information provided by service providers is clear and easy to understand	40.15	45.34	93.24	40.51
f)	Education on proper use of the service is provided	21.98	23.47	93.72	27.53
g)	Responsiveness to customer feedback	38.93	28.86	69.57	40.37
	<b>Average</b>	<b>38.62</b>	<b>42.48</b>	<b>88.20</b>	<b>43.59</b>

Source: EWURA CSS 2023 field data.

### 3.5.2 Satisfaction of consumers on the performance of EWURA on regulating entities

Assessment of the extent to which EWURA regulates entities is vital for EWURA to improve its regulation activities. As such, consumers of services offered by EWURA-regulated entities were asked to rate the performance of EWURA in regulating their service providers. A 5-point scale where 5 means 'excellent' and 1 'very poor' was used to rate EWURA's performance on enforcing compliance with license terms, regulating tariffs, protecting consumer rights, promoting fair play among industry players and promoting access to and use of information. The overall satisfaction level was low as shown in Table 21 below. EWURA's performance in enforcing compliance with license terms (43.5%), regulating tariffs (39.9%), protecting consumer rights (38.3%), protecting access to and use of information (33.8%) and in promoting fair play among industry players (24.8%).

**Table 21: Satisfaction of consumers on the performance of EWURA on regulating entities by sector**

S/N	Attributes	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
1	Enforcing compliance with license terms	35.88	52.19	51.21	34.81
2	Regulating tariffs	35.88	40.52	47.83	35.24
3	Protecting consumer rights	28.85	42.57	47.83	34.09
4	Promoting fair play among industry players	18.17	49.27	13.04	18.83
5	Promoting access to and use of information	28.85	33.53	46.38	26.53
	<b>Average</b>	<b>29.53</b>	<b>43.62</b>	<b>41.26</b>	<b>29.9</b>

Source: EWURA CSS 2023 field data.



### 3.5.3 Consumers' opinion on the services pricing mechanism

Consumers' opinion on the pricing mechanism of energy services/products (electricity, petroleum, natural gas) and water service by EWURA is shown in Table 22 below. The majority of customers (71.15%) consider pricing to be fair, good and very good. By sector wise, results show satisfied consumers were from the natural gas, water, electricity and petroleum sub-sectors respectively (Figure 19).

**Table 22: Customers opinion on the pricing mechanism of EWURA regulated services**

Response	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
Very poor	5.9	4.0	2.4	5.1
Poor	26.6	36.5	11.6	22.6
Fair	51.6	43.8	50.2	52.0
Good	13.0	13.4	12.6	16.3
Very good	2.9	2.2	23.2	4.1
<b>Grand Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

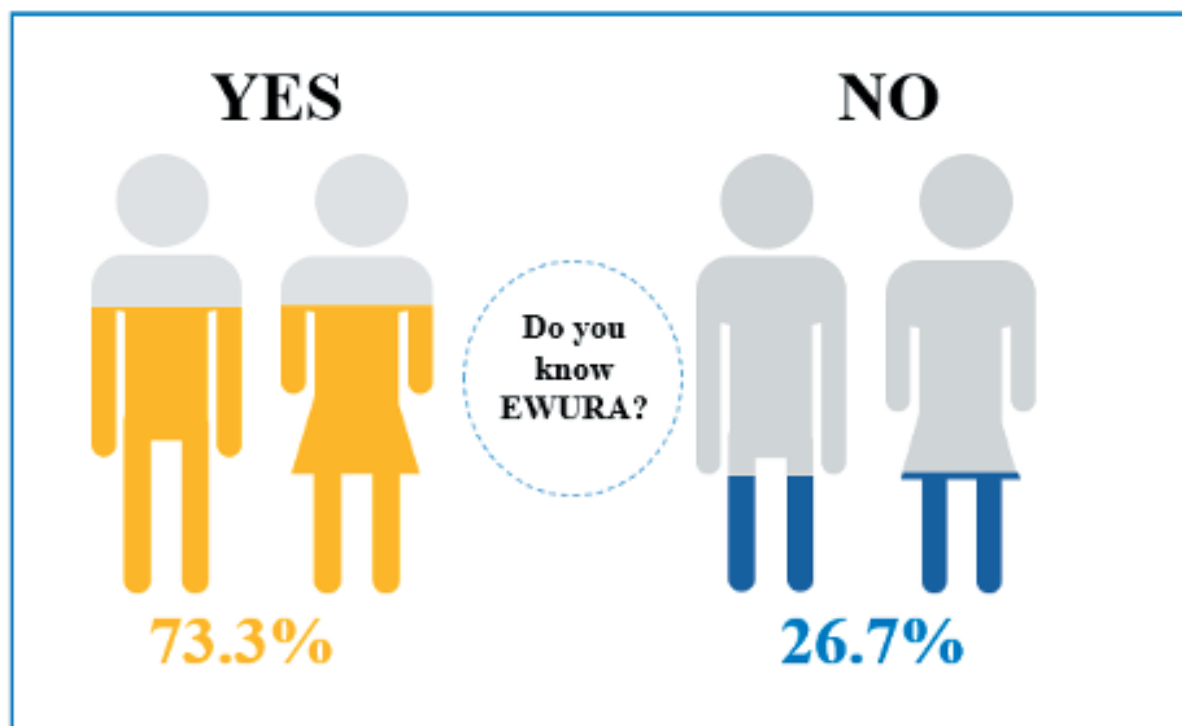
Source: EWURA CSS 2023 field data.

**Figure 19: Satisfied consumer on EWURA pricing mechanism.**

Source: EWURA CSS 2023 field data.

### 3.5.4 Awareness of consumers about EWURA

Customer satisfaction was also gauged by exploring the extent to which consumers of regulated services were aware about EWURA, which is the regulator of the services consumed. The information is important in building confidence on the opinions and perceptions provided by consumers on the role of EWURA as a regulator. The results show that 73.3% of respondents were aware about EWURA (Figure 20) below.



**Figure 20: Public awareness about EWURA.**

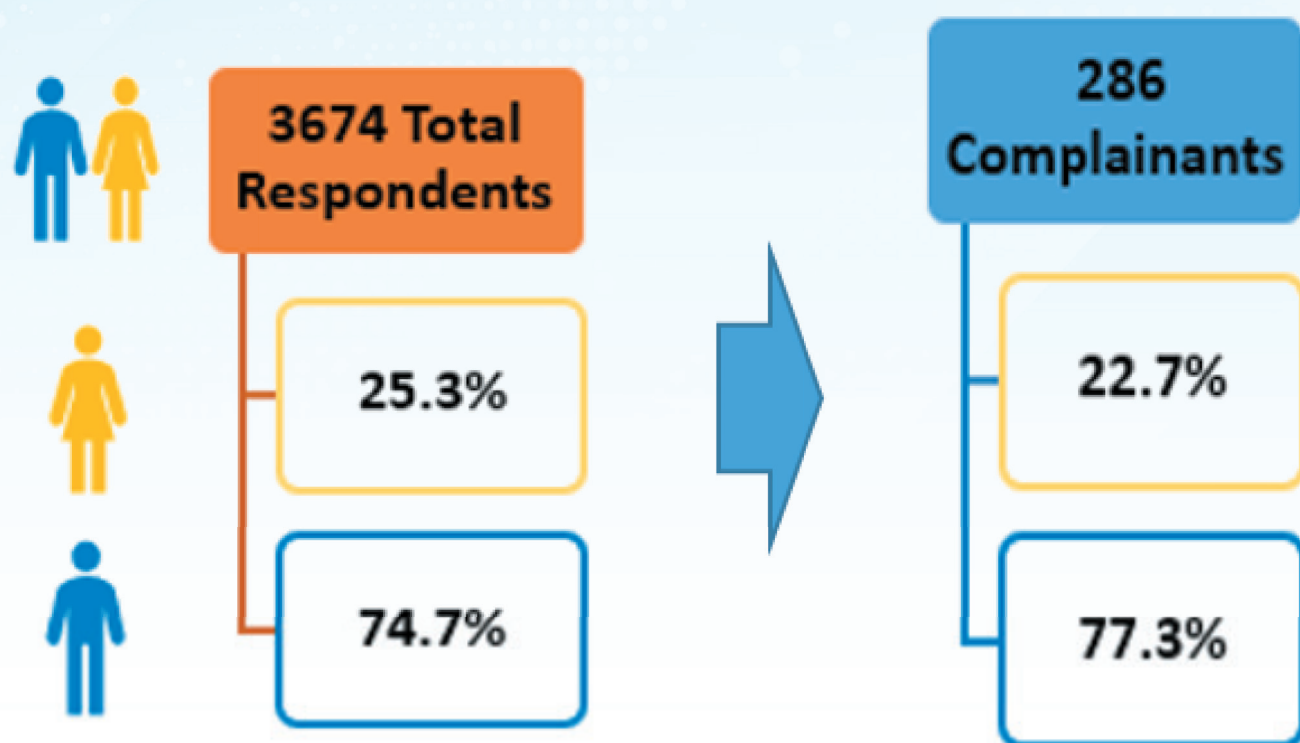
Source: EWURA CSS 2023 field data.

### 3.6 Consumers who had filed complaints to EWURA

Customer satisfaction was assessed by considering consumers with complaints on the unsatisfactory quality and quantity of services from regulated entities. The satisfaction levels of complainants were included in the development of the overall customer satisfaction index.

#### 3.6.1 Description of complainants

In assessing the consumers' satisfaction with the way their complaints were handled, a separate survey of 286 consumers who had filed complaints to EWURA was conducted. Gender wise, males were 77.3% and females 22.7% (Figure 21) below.



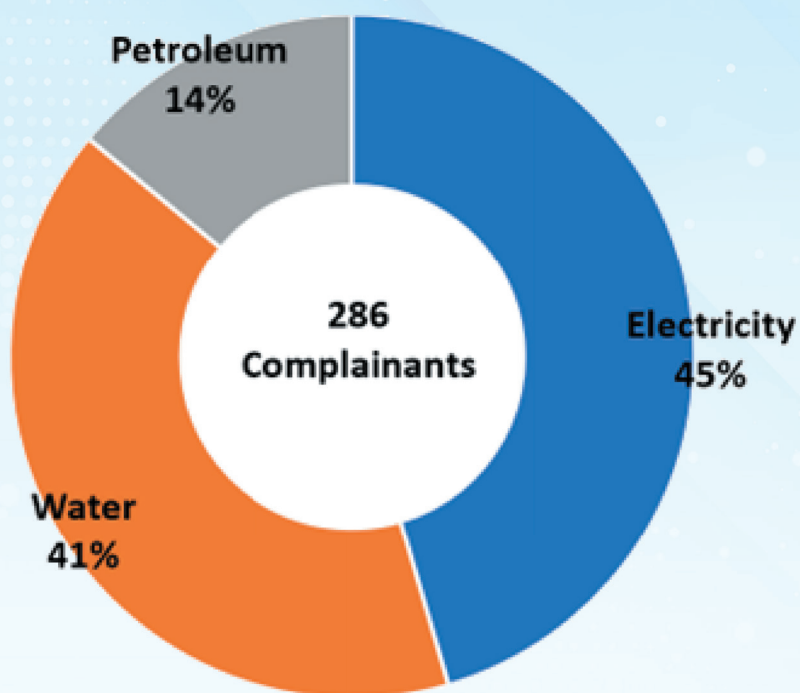
**Figure 21: Distribution of complainants by gender**

Source: EWURA CSS 2023 field data.

Their distribution sector wise is shown in Figure 22 in which many of reported complaints were in the electricity sub-sector (45.5%), water sector (40.6%) and petroleum sub-sector (13.9%). The complaints distribution by sector/sub-sectors conforms to the number of complaints mostly received by EWURA annually.

According to EWURA's annual reports for financial years (FY) 2019/2020 and 2020/2021, the electricity sub-sector and water sector were leading with the largest number of lodged complaints. Complainants from the electricity sub-sector increased by 68% from 122 to 205 in 2019/2020 and 2020/2021 respectively, while the number of complainants from the water sector doubled (from 84 to 169) during the same period. Complainants from the petroleum sub-sector increased by 22% from 37 to 45 between 2019/2020 and 2020/2021. This trend is attributed to the increased awareness and knowledge among consumers on their rights and obligations.

As shown in Figure 22, out of 286 complainants consulted, 94% lodged complaints within one year, while the remaining 6% lodged the complaints after more than one year. Since a random sampling of complainants per sector or sub-sector was done based on the sample size needed, this indicates that there is a high possibility that most complaints lodged were resolved quickly within a year. For example, in the FY 2019/2020, EWURA recorded a complaints resolution rate of 83% (202 out of 243 complaints received were resolved). Unlike in FY 2019/2020, in FY 2020/2021 EWURA recorded a complaints resolution rate of 41% (173 out of 419 complaints received were resolved), while the remaining complaints were in various stages of mediation and hearing.



**Figure 22: Distribution of Complainants by Sector and Subsectors.**

Source: EWURA CSS 2023 field data.

The study explored further on the nature of complaints, mode of communication, customers satisfaction on resolution of complaints and disputes, and EWURA response time to handle complaints.

### 3.6.2 Nature of complaints

Consumers of services provided by the regulated entities lodged complaints to EWURA on unsatisfactory service quality and loss or damages caused by service utilisation. The study noted specific complaints related to electricity and petroleum sub-sectors; and the water sector (Figure 23) below. There were no complaints registered from the natural gas sub-sector (Figure 23).

	Electricity	Petroleum	Water
Connection	✓		✓
Billing	✓		✓
Quality	✓	✓	✓
Damage of property	✓		✓
Customer service	✓	✓	✓
Rates and Charges		✓	
Competition		✓	

**Figure 23: Nature of the complaints on regulated services**

Source: EWURA CSS 2023 field data.

### 3.6.3 Reported complaints

The majority of complainants reported issues related to unrealistic tariffs (41.6%), poor customer services (27.7%) and poor-quality services from entities (16.1%) as shown in Figure 24 below.

Problems/ Complains	Frequency	Percent
Unrealistic Tariffs and charges	111	42%
Poor customer service	74	27%
Poor quality services from entities	43	16%
Poor infrastructure	31	12%
Improper location of regulated service	8	3%
Total	267	100%

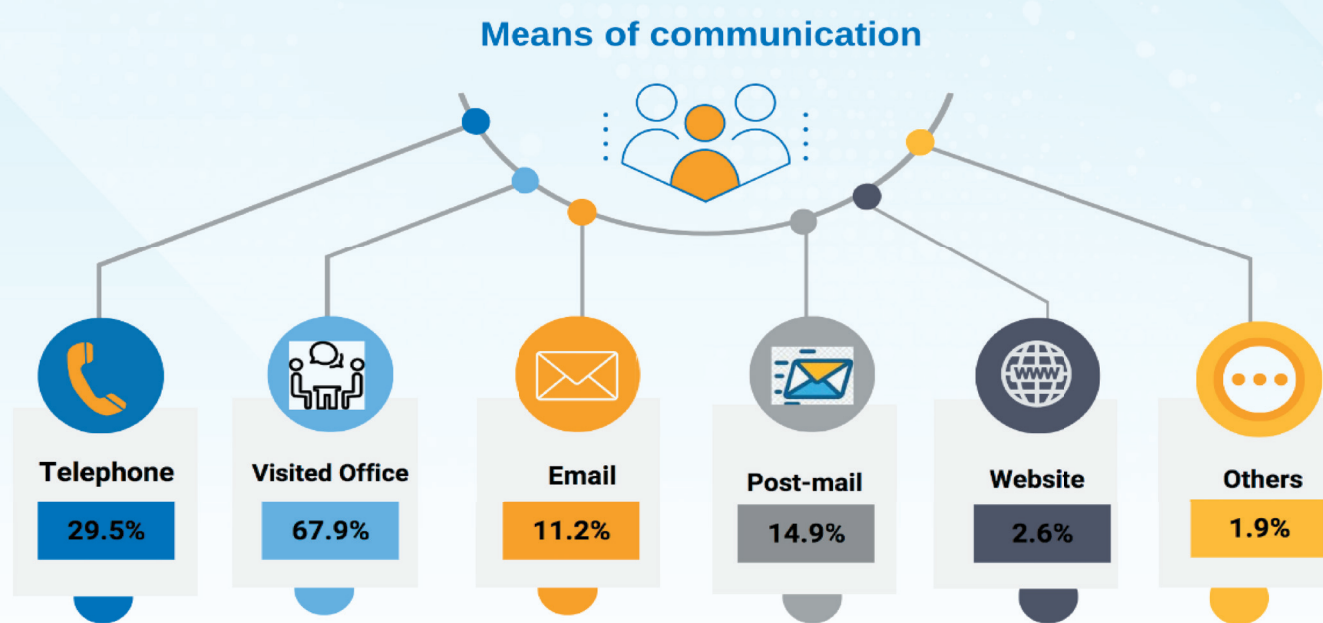
**Figure 24: Complaints reported by customers of regulated entities**

Source: EWURA CSS 2023 field data.



### 3.6.4 Mechanism used to report complaints to EWURA

Consumers who experienced problems with regard to service delivery, quality and other related problems are required to report their complaints to the Authority. EWURA has various mechanisms to communicate with clients, including telephone, emails and visiting the office. In this study, complainants were asked to mention mechanisms they have been using when communicating their complaints to EWURA. The results show that 29.5% of respondents used telephone, 67.9% visited EWURA offices, while 11.2% reported the complaint by using e-mails. Others reported their complaints by using postal office mails and websites (Figure 25).

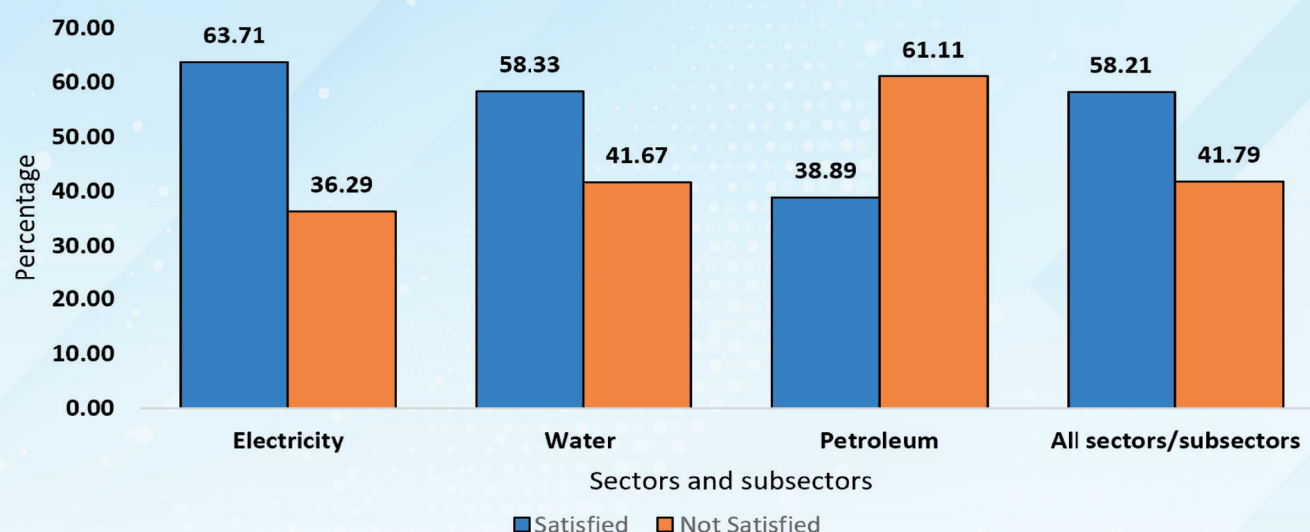


**Figure 25: Mechanism used to report complaint to EWURA**

Source: EWURA CSS 2023 field data.

### 3.6.5 Resolution of complaints and disputes

EWURA's client charter specifies resolution of complaints and disputes as one of the attributes in the service response and delivery. Respondents were asked to provide their assessment on how EWURA honours the commitment as indicated in the client service charter. The results show that customer reported complaints/problems were solved. Overall, 58.2% of the 268 consumers who reported complaints are satisfied with the way their complaints were resolved (Figure 26 below). Sector wise, satisfaction of consumers in the electricity sub-sector (63.7%) is higher than consumers in the water sector (58.3%) and petroleum sub-sector (41.2%). The main source of satisfaction was the fact that their complaints were resolved.



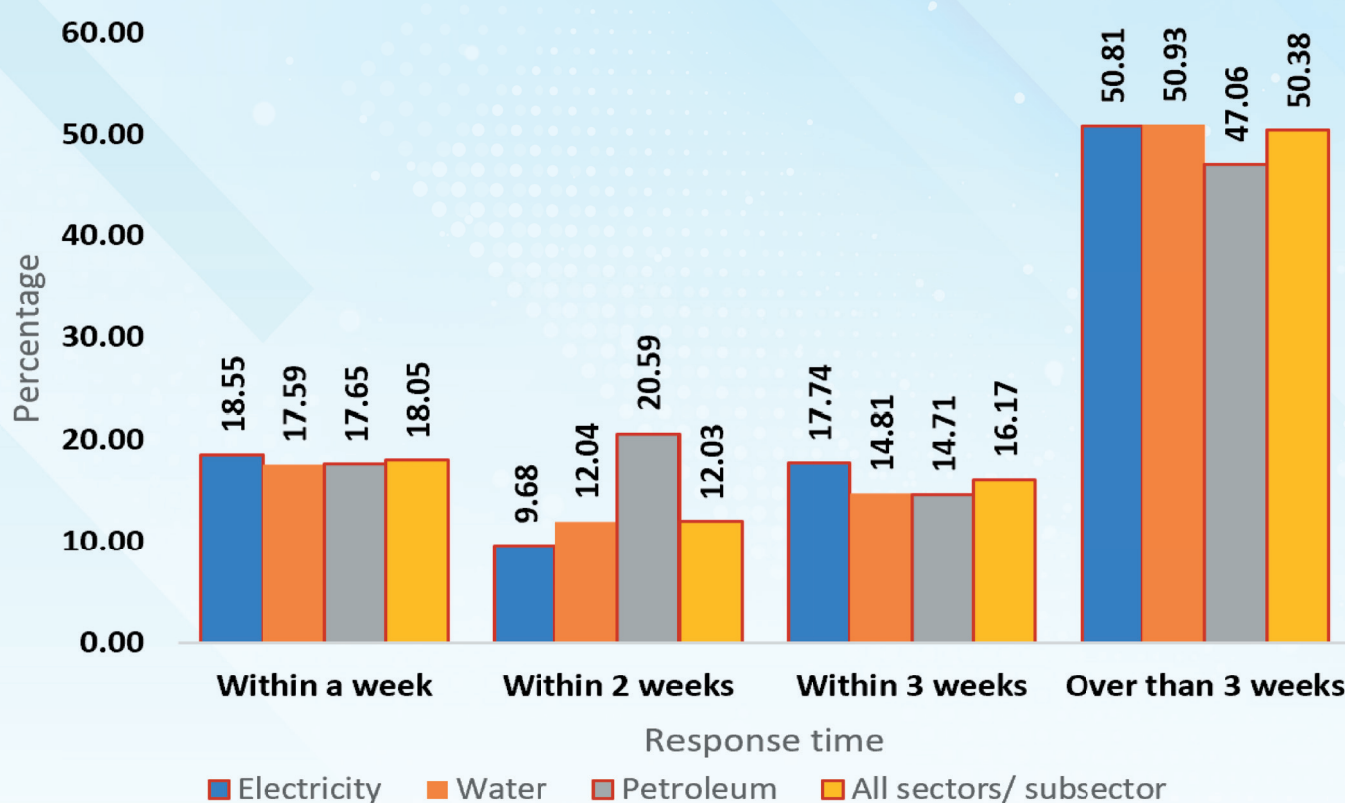
**Figure 26: Satisfaction with the way complaints were resolved by sector and subsector**  
Source: EWURA CSS 2023 field data.

On the other hand, the study also observed an unsatisfactory rate of 41.8% from consumers who lodged complaints. The main source of dissatisfaction were unresolved complaint disputes, delays in EWURA's response to their complaints and time EWURA takes in handling complaints.

### 3.6.6 Response time for handling complaints

The EWURA client service charter specifies the response time for various actions undertaken by EWURA in the process of handling complaints lodged by consumers of services from regulated entities. The time period for acknowledging a letter of receipt of complaints is five (5) days. EWURA specifies seven (7) days a response time for informing a service provider on complaints submitted by a consumer and demanding a response to the complaint within 21 days. Also, the allowable time by EWURA for the issuance of settlement award after conclusion of mediation is within 30 days after conclusion of mediation.

The response time of 60 days is earmarked for issuance of a hearing award. Complainants reported the response time for which their complaints were resolved. As per Figure 27 below, 50% of respondents reported that the complaints were resolved within three (3) weeks. This implies that complaints resolution by EWURA addresses consumers' problems within a reasonable period of time. Sector wise, the petroleum sub-sector was leading in resolving complaints within a timeframe of three (3) weeks, followed by the water sector.



**Figure 27: Time EWURA takes to resolve complaints from consumers of regulated entities.**  
Source: EWURA CSS 2023 field data.

### 3.6.7 Improve handling of complaints

The survey noted consumers' opinions on how to improve the process of handling complaints. About 47.9% of respondents mentioned that EWURA should reinforce awareness raising programmes to help complainants and regulated entities understand the procedure involved in the litigation process, while 46.4% of respondents mentioned that EWURA should ensure timely enforcement of rulings. Other potential solutions were improving customer care services, enhancing accountability and transparency (Table 23).

**Table 23: Improve complaints handling**

Response	Respondent	Percent
Promote awareness raising programmes	134	47.9
Enhance enforcement of decrees	130	46.4
Improve customer services	6	2.1
Improve efficiency in handling complaints	6	2.1
Improve accountability and transparency	4	1.4
<b>Grand Total</b>	<b>280</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

### 3.6.8 Complainants' perspectives about EWURA

In exploring the complainants' satisfaction with respect to complaints handling, the study identified and assessed issues that were favourable to consumers with respect to complaints handling and those that were unfavourable. The results show complainants like EWURA's accountability and transparency procedures (69.1%) and good customer care services (28.2%) as shown in Table 24.

**Table 24: EWURA attributes preferred by customers**

Responses	Respondent	Percent
High accountability and transparency	181	69.1
Good customer care services	74	28.2
Control of service prices	4	1.5
Provision of training and education	3	1.2
<b>Grand Total</b>	<b>262</b>	<b>100</b>

Source: EWURA CSS 2023 field data.

Similarly, consumers highlighted some attributes such as EWURA's litigation process and justice delay and limited information regarding complaints procedures that need to change for EWURA to effectively handle complaints as shown in Table 25.

**Table 25: EWURA attributes not preferred by customers**

Response	Respondent	Percent
Nothing	150	52.45
Litigation process and justice delay	53	18.53
Limited information regarding complaints procedures	40	13.99
Increased prices and penalties	17	5.94
Information about EWURA mandates and functions	13	4.55
Absence of regional level offices	8	2.8
Corruption	3	1.05
Weak complaints records keeping system	2	0.7
<b>Grand Total</b>	<b>286</b>	<b>100</b>

Source: EWURA CSS 2023 field data.



## CHAPTER FOUR

### CUSTOMER SATISFACTION INDEX

#### 4.1 Introduction

This chapter presents the overall customer satisfaction index. The index is estimated from the aggregation of weighted indices obtained from respondents on the perception levels on the service contents and processes by EWURA to regulated entities and consumers of services offered by regulated entities. The estimated index is used to determine the overall rating of the current level of satisfaction countrywide. Similarly, the chapter presents a comparative analysis of customer satisfaction levels for different internal studies undertaken by EWURA over time.

#### 4.2 Constructs and associated attributes

The Overall Customer Satisfaction Index (CSI) was developed to measure customer satisfaction. The index is used to measure how services are offered by EWURA-regulated entities and how their services meet expectations. The study developed the CSI using fourteen (14) constructs, with 62 attributes used for developing weighted indices using positive responses from respondents (Table 26). Constructs were formed based on EWURA's client service charter – a contract between EWURA and its clients who are the key stakeholders in all EWURA activities. The charter has specific service contents and processes necessary for implementing regulatory functions to ensure the quality delivery of services by regulated entities for economic benefits.

**Table 26: Constructs for Customer satisfaction and number of attributes**

No. of Attributes	Constructs	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
10	Performance of EWURA on its roles and mandates sector wise	93.7	94.3	100	98.9
4	Staff attitude and behaviour while performing their duties	93.7	89.9	100	97.5
5	Relationship of EWURA staff with clients	89.6	84.5	98.2	96.3
2	Fairness and equality	92.1	83.6	91.7	95.7
5	Respondents' levels of agreement on various statements about EWURA staffs' self-introduction sector wise	77.2	76.7	80	84.6
2	EWURA's office environment	89.1	72.4	91.7	95.7
11	Respondents' levels of agreement on the quality of EWURA information and communication services	79.4	77.6	93.9	91.8
4	EWURA licensing process	86.9	89.1	87.5	93.2
7	Consumers' satisfaction on the quality-of-service they receive from their service provider	39.85	82.51	86.96	52.5
2	Percent of respondents satisfied with EWURA water supply and sanitation license application process	-	-	-	75.7
3	Satisfaction with time and registration letter application process	-	-	-	61.1

No. of Attributes	Constructs	Electricity (%)	Petroleum (%)	Natural Gas (%)	Water (%)
2	Satisfaction of wiremen with EWURA license application and issuance process	52.2	-	-	-
2	Respondents' satisfaction with EWURA tariff review and license application process in the petroleum sub-sector	-	50.3	-	-
3	Satisfaction with the processing and issuance of provisional electricity generation and distribution licenses	50.0	-	-	-
<b>62</b>	<b>Grand Total</b>	<b>76.7</b>	<b>80.1</b>	<b>92.2</b>	<b>85.7</b>

Source: EWURA CSS 2023 field data.

### 4.3 Weighting factors for overall customer satisfaction index

The study considered the level of importance of service regulation practices by EWURA. The key assumption is that, regulation activities by EWURA to entities operating in energy sub-sectors of electricity, petroleum and natural gas and water sector is not the same and hence renders to differences in terms of resources and the level of effort. In this case, the number of entities and service categories, the extent of the public served with these services, and the sensitivity of the regulated services were among the factors considered in determining weights. The sensitivity of regulated services is related to immediate negative economic effects and public outcries that may arise when regulation is not adequate. In this case, petroleum appeared to be more sensitive, followed by electricity, water, and natural gas respectively. In terms of the population served by the regulated services, the order is such that petroleum appears to have a large number of consumers, followed by water, electricity, and natural gas. Also, the study considered a special consumer category that submitted complaints to EWURA on problems associated with services offered by the regulated entities by sector. Weighting factors were hence assigned to all the categories depending on their perceived level of interaction and importance with EWURA (Figure 28).

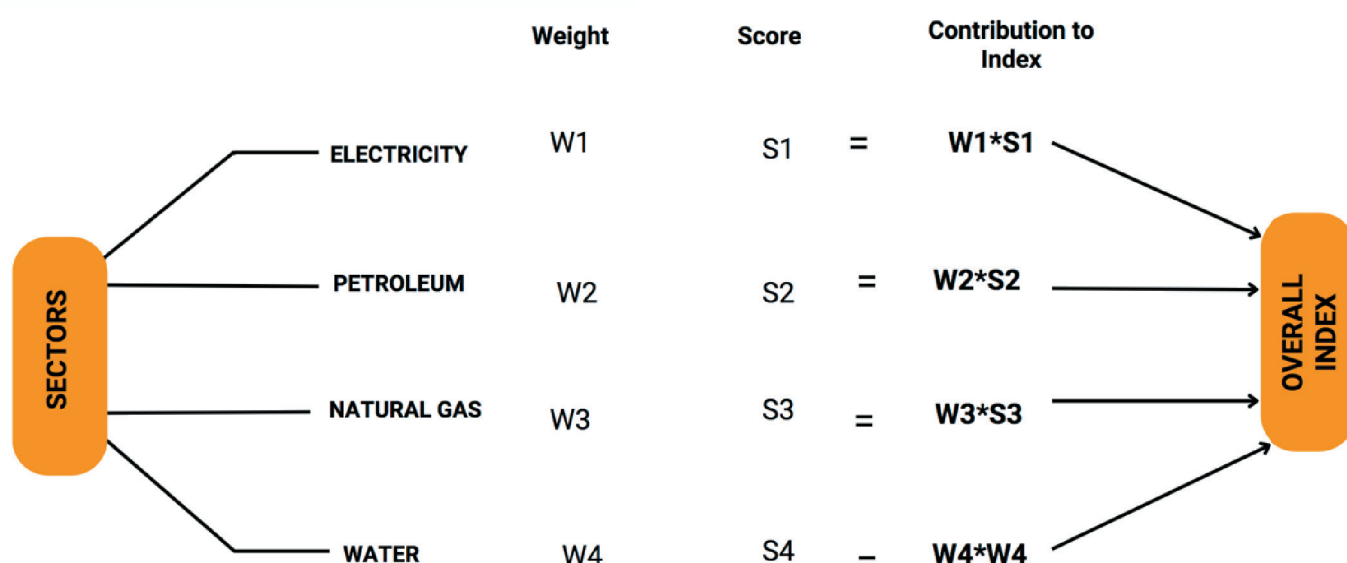


Figure 28: Customer satisfaction index weighting framework

Considering all these, weight by responses in energy sub-sectors and water sector were estimated using equation (3) and appendix 1.

$$\text{Overerall CSS index} = \sum_{i=1}^4 W_i * S_i \dots\dots\dots (3)$$

Where;

$W_i$  represents weight,  $S_i$  represent score or weighted index obtained from responses with a 4 or a 5 in equation (2) and  $i=1, 2, 3, 4$  represents electricity, petroleum, natural gas sub-sectors and water sector respectively.





Weights were developed and used to estimate the overall customer satisfaction score. Weights are based on the importance of authority and their perceived level of interaction. In this case, the number of entities and service categories, the extent of the public served with the service, and the sensitivity of the regulated service were among the factors considered in determining weights. In this study, the sensitivity of regulated service is related to immediate negative economic effects and public outcries that may arise when regulation is not adequate. In this case, petroleum appeared to be more sensitive, followed by electricity, water, and natural gas respectively. In terms of the population served by the regulated services, the order is such that petroleum appears to have a large number of consumers, followed by water, electricity, and natural gas. Also, the study considered a special consumer category that submitted complaints to EWURA on problems associated with services offered by the regulated entities by sector. Figure 29 summarises factors considered in determining weights for overall customer satisfaction by entities and consumers of regulated services by energy (electricity, petroleum, and natural gas sub-sectors) and water sector.

Category/Sector	Electricity	Petroleum	Natural Gas	Water
Type of licenses	6	20	9	4
Number of entities	3847	2964	15	87
Sample of entities	394	721	6	79
Number of complaints	130	40		116

**Figure 29: Factors for determining weights**

**Source:** EWURA CSS 2023 field data.

Information in Figure 29 was used to determine weight of entities and consumers by sector category using equation 3. The results are shown in Figure 30 below.





Sector/Category	License weight	Population weight	Sample weight	Complaints weight	Average weight
 Electricity	0.154	0.556	0.328	0.455	<b>0.373</b>
 Petroleum	0.513	0.429	0.601	0.140	<b>0.420</b>
 Natural Gas	0.231	0.002	0.005		<b>0.059</b>
 Water	0.429	0.013	0.066	0.406	<b>0.147</b>

**Figure 30: Estimated weights by factor category by sector**

Source: EWURA CSS 2023 field data.

#### 4.4 Overall Customer Satisfaction Index

Upon utilising the weighted index estimated per attribute using the Likert scale value 5 or 4 reported by respondents (Table 26) and weights estimated in equation 3, the overall customer satisfaction index for the year ending June 2023 is 80.4% as reported in Figure 31 below. This score is relatively high implying that, regulated entities, consumers of services offered by regulated entities and complainants were satisfied with EWURA's service delivery. Similar studies from other organisations have been attached under appendix 5. Despite these achievements, there is a need for further improvements to enhance customer service delivery.

Sector	Weight	Weighted index	Contribution to overall index
 Electricity	0.373	77	28.7
 Petroleum	0.420	80	33.7
 Natural Gas	0.059	92	5.4
 Water	0.147	86	12.6
<b>Overall Customer satisfaction Index</b>			<b>80.4</b>

**Figure 31: Overall customer satisfaction index.**

Source: EWURA CSS 2023 field data.



## 4.5 Analysis from internally conducted surveys

A review of internally-conducted performance report from different sources, shows different satisfaction levels for different attributes. The attributes observed in the CSS study of 2019 and the current CSS study in 2023 show a significant difference. There is great improvement in most of the attributes between 2019 and 2023 (Table 27). This implies that, for the period between 2019 and 2023, EWURA has improved service quality and delivery to customers. Some of the notable improvement is on the attributes of “need of education to understand services regulated by EWURA,” whereby in 2019 the need for information was expressed by 54% of respondents while in 2023 the same was expressed by only 30%. This suggests that the level of understanding of services regulated by EWURA has increased.

**Table 27: Customer satisfaction on the services offered by EWURA for 2019 and 2023**

S/N	Category	2019	2023
1	Overall level of satisfaction on the service offered by EWURA	50.0%	80.4%
2	EWURA keeping abreast of changes of prices of the services offered	37.8%	65.2%
3	EWURA disputes resolution mechanism	21.8%	54.5%
4	EWURA seeks opinions and views of citizens before making any changes on services it regulates	45.4%	74.0%
5	EWURA's procedure in issuing licenses	41.6%	96.0%
6	Strongly required education to understand services regulated by EWURA*	54.5%	30.7%
7	Need for EWURA to improve the process of reviewing and approving tariffs and petroleum pricing formula	42.4%	64.8%

**\*Meaning there is an improvement in education regarding services offered by EWURA.**

**Source:** EWURA CSS 2023 field data and EWURA Communication Policy 2019.

The CSS study also evaluated customer satisfaction with EWURA communication efforts, in which its results are presented in Table 28 below. This shows that EWURA has improved in its communication between 2019 and 2023.

**Table 28: Customers satisfaction with EWURA's communication efforts for 2019 and 2023**

S/N	Category	2019	2023
1	Overall level of satisfaction among customers	50.0%	80.4%
2	Licensing and other information	55.7%	89.2%
3	Education about its function to stakeholders	61.1%	84.8%
4	Communication efforts	50.4%	85.7%
5	Clients' complaints handling process	32.7%	50.2%
6	Feedback on tariff review	44.2%	50.3%

**Source:** EWURA CSS 2023 field data and EWURA Communication Policy 2019.

## CHAPTER FIVE

# CONCLUSION AND RECOMMENDATIONS

### 5.1 Conclusion

The customer satisfaction survey study was conducted to establish baseline information on the level of customers' satisfaction with EWURA's regulatory services and survey on the level of public awareness of the roles and functions of EWURA. This report shows that there are remarkable improvements in service quality and delivery by EWURA. The commitment of EWURA to deliver excellent services meeting clients' expectations has been achieved to a large extent. EWURA has continued to promote effective competition and economic efficiency, protecting the interests of consumers and promoting the wide availability of regulated services to consumers country wide. Attributes found to have remarkable improvements include keeping abreast of the changes in prices of the services offered; resolution of complaints and disputes; improvement in the process of reviewing and approving tariffs and petroleum pricing formula; and collection of citizen's opinions and views prior to making any changes on the services it regulates.

### 5.2 Recommendations

#### 5.2.1 Strengthen and promote public awareness-raising programmes

Study results show that entities and consumers are less aware of some attributes and hence this constrains EWURA's implementation of its regulatory activities. Dedicated efforts are needed on education and sensitisation of regulated entities and consumers of regulated services to ensure they have adequate knowledge of the EWURA client service charter, complaints litigation procedures, issuance of licenses, fuel marking and pricing mechanism, rights, and obligations of clients. For this to happen and bring impactful results, the following activities are proposed:

- a) Conduct training programme focusing on providing sector training on emerging issues to experts in respective sectors. Training to pump attendants and contractors on how to manage the sectors, and address challenges related to entities and consumers of the regulated services.
- b) Conduct regular training to EWURA staff on the regulated services and on how to interact with customers and professionally address sector issues.
- c) Increase public awareness raising programmes on EWURA mandates and functions using various communication and media channels as identified in the EWURA communication strategy.
- d) Deal with unlicensed individuals, especially electricity contractors according to the regulations governing the sector to reduce complaints among registered individuals.

#### 5.2.2 Improve EWURA functions

Efficient service delivery and customer relations is vital for EWURA. The current set up where regional, and district offices are missing has constrained regular information flow and interaction between clients and the regulator. The following is proposed for smooth communication and information flow;

- a) Improvement of the existing online license application system to accommodate feedback mechanism that will inform the applicants when the applications have been complete; and the time EWURA will take to process and issue the license.
- b) Expansion of the existing system, that allows regulated entities to interact with EWURA and consumers of regulated services to interact directly with EWURA.
- c) Establishment of a transparent electronic system that enables complainants to lodge and track their complaints litigation process.
- d) Increase physical accessibility to EWURA offices by splitting zones with a large coverage area and activities such as, the lake zone, so as to increase efficiency in service delivery as per EWURA's vision, mission and client service charter.
- e) Strengthening the emergency response mechanisms within the Authority.

### **5.2.3 Establishment of a Directorate of Communications and Public Relations**

The study noted that the performance of EWURA has improved due to various reasons, among them is implementation of the EWURA Communications Policy (2019) as indicated in the EWURA annual report for the year ended 30th June 2021. The communication and public relations unit has been the face of EWURA on this performance. However, the influence of EWURA in guiding client's decision on regulation aspects is impaired due to the current status of the unit. Given the high interaction and roles that the communication and public relations unit have in communicating with EWURA's clients of different status, it is important that the unit is elevated to be a directorate for the purpose of strengthening EWURA functions in addressing emerging issues and building trust when interacting with stakeholders and clients, thus improve the performance. Such experiences are also found in Uganda under the Electricity Regulatory Authority (ERA). Diversity of activities and services regulated and a multitude of organisations needed to ensure quality service delivery necessitate organisational management change and elevating the unit responsible for communication and public relation to the directorate level, within the EWURA organisation chart.

The Directorate will have more influence and mandates when interacting with other Government and Non-government authorities within the premises of EWURA functions. Establishing a directorate of communication, and public relations will catalyse further the good work that has been established, increase efficiency in implementation of EWURA's Vision, Mission, and the client service charter among others.

### **5.2.4 Area for further studies**

The current CSS addressed the needs stipulated in the TORs. However, during the survey, it was evident that in order to ensure customer satisfactory issues are well addressed, it is important to conduct other studies that will complement this survey leading to better performance of EWURA in the future. The following has been proposed:

- a) Settlement of complaints: Consumers of services provided by the regulated entities lodged complaints to EWURA on unsatisfactory service quality and loss or damages caused by service utilisation. It is important for EWURA to conduct further studies to understand the issues facing customers who lodged complaints and whether they were compensated as stipulated in the litigation process.

- b) Support systems to the customers located far from the EWURA zonal offices: It was clear during the study that the majority of customers residing far from zonal offices requested support to facilitate their engagement with EWURA (Registration, licensing, etc.). It is important that further studies are done to understand the extent of the need and possible solutions.
- c) Emerging issues: The knowledge and understanding of the sectors evolve with time, it is pertinent that further studies are done to identify new issues for communicating with stakeholders within the EWURA mandates.