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Assessing the Satisfaction of Exploration Companies, Exploring Gold and Base Metal, with Services Provided by Ministry of Mines and Petroleum of Ethiopia.

A thesis paper submitted to graduate program of AAU in partial fulfillment of the requirements for the degree of Masters of Business Administration [MBA] in Management

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DECLARATION

I, Fitsum Assefa, declare that this work entitled **“Assessing the Satisfaction of Exploration Companies, Exploring Gold and Base Metal, with Services Provided by Ministry of Mines and Petroleum of Ethiopia.”** is the outcome of my own effort and study and that all sources of materials used for the study have been duly acknowledged.

I have produced it independently except for the guidance and suggestions of my research advisor. This study has not been submitted for any degree in this University or any other University. It is offered for the partial fulfillment of the degree of Masters in Business Administration [MBA].

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Assessing the Satisfaction of Exploration Companies, Exploring Gold and Base Metal, with Services Provided by Ministry of Mines and Petroleum of Ethiopia.

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Abstract

The mining sector remains to be one of the priority sectors for Ethiopia's second growth and transformation plan (GTP II). One of the strategic directions put forward to achieve this plan is attracting foreign direct investment for exploration and extraction of minerals. However, there is an annual decline in application for exploration licenses by foreign exploration companies since 2013.

Assessing existing exploration companies level of satisfaction is crucial in retaining existing exploration companies and attracting new ones. Not conducting a periodic customer satisfaction survey in any organization may make the organization to speculate or interpret areas for service improvement based on the organizations own assessment of its services. Therefore, it is the purpose of this research to measure the satisfaction level of existing foreign exploration companies with services provided by mineral licensing and administration directorate. The study applied a mixed research method by collecting both qualitative and quantitative data from foreign and joint venture exploration companies through survey and qualitative data collected by means of semi structured interview from three key informants from Ministry of Mines of Ethiopia. Descriptive data analysis was conducted on the reliability, responsiveness, communication, service accessibility and facility service dimensions for the services provided by mineral licensing case team, mineral license administration case team and mineral licensing and administration directorate. And based on the level of importance attached to the service dimensions an importance-performance analysis (IPA) was conducted to identify priority areas for service improvement.

The research findings showed that 50% of foreign and joint venture exploration companies exploring gold and base metal are dissatisfied with the reliability and responsiveness service dimension of mineral licensing and mineral license administration case teams' services. Reducing the service delivery time, putting a simplified procedure in place and making available up-to-date information that inform applicants everything that they had to do in order to get mining related service are priority areas for improvement identified by the exploration companies. The limitation of study is its generalizability to minerals other than gold, exploration company types and organizations.

The impact of factors such as infrastructure, political stability and local community relations on exploration companies could be potential research areas.

Key words: Gold and base metal, foreign and Joint venture exploration companies & service satisfaction.

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Acronyms

GTP II – Second Growth and Transformation Plan

FDI – Foreign Direct Investment

MLAD – Mineral Licensing and Administration Directorate

MoMP – Ministry of Mining and Petroleum

FDRE – Federal Democratic Republic of Ethiopia

CMT – Common Measurements tool

Chapter One: Introduction

1.1 Background of the Study

According to the second growth and transformation plan of Ethiopia (GTP II), the mining sector remains one of the priority sectors in GTP II, with main strategic directions of attracting foreign direct investment (FDI) for exploration and extraction of minerals and aims to increase modern and artisanal systems of gold production from 9,053.53 kg in 2014/15 to 25,370.0 kg by 2019/20 and foreign exchange earnings from USD 343.73 million to USD 2.011 billion during the same period (National Planning Commission, 2016). A possible scenario that will require strong intensification of exploration activities estimates Ethiopia to earn close to 2 billion USD per year by 2027, the assessment states that within the coming 15 to 20 years the Ethiopian mining sector can generate a critical mass, especially from gold, potash, tantalum and copper (World Bank Group and Ministry of Mines FDRE, 2014).

Mining Operations (Amendment) Proclamation No. 816/2013, is a proclamation to promote sustainable development of mineral resources of Ethiopia. Based on amended mining operations proclamation Ministry of Mines and Petroleum of Ethiopia issues seven types of licenses for hard (Solid) minerals. The license types are; reconnaissance, exploration and retention for mineral exploration and four types of mining licenses which are; large scale, small scale, special small scale and artisanal. As of 19 October 2018 there were only 48 active exploration licenses belonging to 35 foreign and joint venture exploration companies according to mineral licensing and administration directorate (MLAD) mineral licensing database. More exploration companies are needed to discover and mine gold and base metal. And the objective in GTP II is to undertake standard promotional work to attract capable and competent investors/companies and during this period the target is to give exploration and production licenses to 20 big international companies on selected minerals such as iron, coal, potash, gold etc. (National Planning Commission, 2016).

Service satisfaction is the key in retaining existing customers and attracting new ones; customers receiving services that exceed their expectation are satisfied and are willing to spread positive word of mouth regarding the service provider to others (Wenhua Shi, Lingshu Tang, Xiaohang Zhang, Yu Gao and Yameng Zhu, 2016). Maintaining customer satisfaction level successfully requires customer focused

corrective actions, including more frequent customer meetings and improved electronic/print mail communication (Eugene H. Fram and Michael S. McCarthy, 2011). (Milner R. & Furnham A., 2017) stated that, service organizations are quite right in being very interested in measuring the attitudes, beliefs and perceptions of their customers; it is often one of their primary metrics that will serve them for strategic intervention to improve their services. In order to retain existing exploration companies and attracting new ones MLAD needs to conduct periodic satisfaction survey that helps to identify priority areas for service improvement and proactively act on addressing them.

Service quality can be defined as the difference between customers' expectations of service and perceived service. If customers' expectations are greater than performance, then perceived quality is less than satisfactory and hence customer dissatisfaction occurs (Parasuraman et al., 1988). Customer satisfaction mainly depends upon; reliability, security, responsiveness, competence, tangibility, credibility, communication, courtesy, understanding the customers, responsiveness and service accessibility (Parasuraman & Ziethaml, 1988).

A model containing five service quality dimensions, that is; tangibility, reliability, responsiveness, empathy and assurance was developed by Parasuraman & Ziethaml (1988), and the model is known as SERVQUAL five-factor model and is commonly used for measuring service quality (Paul, Mittal & Srivastav, 2016). A performance based measure of service quality called SERVPERF, illustrating that service quality is a form of consumer attitude was developed by Cronin and Taylor (1992). Both SERVQUAL and SERVPERF failed to include importance ranking in their survey method and even strong advocates of SERVPERF recommended the use of importance-performance in measuring service quality (Meng Seng Wong, Nishimoto Hideki and Philip George, 2011).

Faye Schmidt & Teresa Strickland (1998) identify five primary elements of service delivery process, which are; client expectations, perceptions of service experience, level of importance, level of satisfaction and priorities for improvement and the impact these elements have on client satisfaction. Using the five elements as a foundation they developed a tool named "Client Satisfaction Surveying: Common Measurements Tool" or CMT. "There is strong rationale for utilizing common measures in assessing client satisfaction levels with public services and CMT is intended to bring consistency to client satisfaction measurement across time and between organizations" (Faye Schmidt & Teresa Strickland, 1998).

This research has investigated the satisfaction level of foreign and joint venture exploration companies exploring gold and base metal in Ethiopia using CMT on; responsiveness, reliability, service access, facility and communication service dimensions of MLAD's services. Responsiveness is the amount of time taken for the service provider in responding to its client's service gap questions, reliability is the service provider's ability to provide what was promised dependably and accurately, service access is the ease and convenience with which service is provided and facilities refer to the various service attributes and the approachability of the service provider at its physical location and the communication service dimension refers to providing the client with accurate, understandable and relevant information and with a means to be heard (Faye Schmidt & Teresa Strickland, 1998). Based on the level of satisfaction of exploration companies as their perceived performance assessment of the licensing and license administration case team's services under MLAD and the level of importance they assigned to the observable variables of the research instrument, Importance-Performance Analysis (IPA) was conducted. IPA evaluation tool is used to prescribe the prioritization of attributes for improvement and it can also provide guidance for strategic development (N. Slack, 1994).

The student researcher believes the study will have a direct contribution to foreign currency earning, employment creation and knowledge transfer from foreign and joint venture exploration companies.

1.2 Statement of the problem

Mineral exploration process requires long term commitment and hence it requires careful planning of the exploration company's long term objective (Charles J. Moon, Michael K.G. Whateley & Anthony M. Evans, 2006). In any business environment providing quality service has become one of the important factors in measuring the success of industries. There is a strong tie between quality service provision and customer satisfaction and the provision of quality service distinguishes competing organizations (Parasuraman, Zeithaml and Berry, 1985). Wisniewski and Donnelly (1996) defined service quality as the extent to which a service meets customers' expectations. Satisfaction is the post-purchase evaluation of products or services by customers taking into consideration their expectations (Kotler and Armstrong, 2010). MLAD should emphasize on continuously improving its service

provision to satisfy existing exploration companies and attracting new ones, which is a strategic direction put forward in GTP II.

An increase in perceived service quality will result in an increase in customer satisfaction and when perceived service quality is less than expected customer will be dissatisfied (Jain and Gupta, 2004). A number of authors postulated various determinants of service quality. Service reliability, a quality environment and delivery systems that work together with good personal service – staff attitude, knowledge and skills are determinants of service quality (Walker,1990). “Six criteria of perceived good service quality: professionalism and skills; attitudes and behavior; accessibility and flexibility; reliability and trustworthiness; recovery; reputation and credibility” postulated by Grönroos (1990). Care and concern, spontaneity, problem solving and recovery as service quality determinants was proposed by Albrecht and Zemke (1985).

“Customer satisfaction measurement considered as the most reliable feedback, providing client’s preferences and experiences in an effective, direct, meaningful and objective way” thus, customer satisfaction can be considered as a base line standard of performance and a possible standard of excellence for any business (Hamed. F., Kamarudin Bin Saadan and Kamaruzziman Bin Seman, 2015). The importance of measuring and understanding service quality is critical because it is seen as a prerequisite for success in a competitive business environment (Akbaba, 2006).

MLAD should measure the services it provides to existing exploration companies exploring gold and base metal because it can serve the directorate as a baseline for designing a strategy to improve those service dimensions that existing exploration companies dissatisfied with and put them as a priority area for improvement. From 2010 G.C to 2016 G.C four hundred applications were made to obtain an exploration license, however only two hundred four exploration licenses were granted during the same period by MoMP’s mineral licensing and administration directorate (Enrique Ortega gironés, 2016). MLAD has not conducted a satisfaction survey on existing exploration companies. In today’s dynamic market condition measuring customer satisfaction is very important and a Well-designed customer satisfaction plays an important role in identifying factors that caused customer dissatisfaction (Biesok G, Wyród-Wróbel J, 2011).

The lack of conducting a periodic satisfaction survey and getting priority areas for service improvement from existing exploration companies exploring gold and base metal may lead to service

dissatisfaction. And dissatisfied exploration companies will be discouraged from applying for another exploration license or promote the mining sector of Ethiopia through positive word of mouth. This research tried to fill the lack of service satisfaction assessment for the mining sector of Ethiopia by assessing the satisfaction level of foreign and joint venture gold and base metal exploration companies in order to propose priority areas for service improvement.

1.3 Research Questions

1. What is the satisfaction level of exploration companies exploring gold and base metal on the reliability service quality dimension for the service provided by mineral licensing case team and mineral license administration case team?
2. What is the satisfaction level of exploration companies exploring gold and base metal on the responsiveness service quality dimension for the service provided by mineral licensing case team and mineral license administration case team?
3. What is the satisfaction level of exploration companies exploring gold and base metal on the communication service quality dimension for the service provided by mineral licensing case team and mineral license administration case team?
4. What is the satisfaction level of exploration companies exploring gold and base metal on service accessibility dimension for the service provided by mineral licensing and administration directorate?
5. What is the satisfaction level of exploration companies exploring gold and base metal on service facility dimension for the service provided by mineral licensing and administration directorate?
6. What are the priority areas for service improvement for existing foreign and joint venture companies exploring gold and base metal?

1.4 Objectives of the Research

General Objective

The general objective of the study is to assess the satisfaction level of foreign and joint venture exploration companies exploring gold and base metal and identify priority areas for service improvement by MLAD.

Specific Objectives

The specific objectives are;

- 1) To measure the satisfaction level of foreign and joint venture exploration companies on the reliability, responsiveness and communication service dimensions for both mineral licensing and mineral license administration case teams.
- 2) To measure the satisfaction level of foreign and joint venture exploration companies on service accessibility dimension of MLAD.
- 3) To measure the satisfaction level of foreign and joint venture exploration companies on service facility dimension of MLAD.
- 4) To identify priority areas for service improvement.

1.5 Significance of the study

This research aims to shade some light regarding the satisfaction level of the foreign mineral exploration license holders in Ethiopia. The student researcher believes the findings will help MoMP and MLAD improve the priority service dimensions and attributes as suggested by existing exploration companies. Organizations have to go beyond addressing satisfaction levels and have to include other elements as it is possible for organizations to learn not only what components of service are not satisfactory to their clients and to what degree but also to gather information to help determine the best course of action (Faye Schmidt and Teresa Strickland, 1998).

Improving the mineral licensing and administration services will make Ethiopia an attractive destination for foreign mineral exploration companies and this in turn contributes to knowledge transfer to Ethiopian nationals, foreign currency earning and employment creation.

1.6 Scope of the study

The study purposively selects foreign exploration companies exploring gold and base metal because gold and base metals are the major commodities that Ethiopia exports from the mining sector and hence other exploration companies exploring metallic and non-metallic minerals in Ethiopia are not included. Furthermore, only the satisfaction level on reliability, responsiveness, communication, service accessibility and service quality dimensions are assessed.

1.7 Limitation of the study

The study is limited in that it attempts to measure the foreign exploration companies' satisfaction level for the services provided at the Ministry of mines of Ethiopia and exclude the service dimensions provided at the regional mining bureaus and other service sectors directly or indirectly related to the provision of services to foreign and joint venture exploration companies. These limitations are due to financial and time constraints. These limitations can be potential research areas for the future. Furthermore, it is uncertain whether the findings can be generalized to other fields as this study is for the mining industry.

1.8 Definition of Terms

Ministry of Mines and Petroleum (MoMP) – A regulatory body that regulates hard minerals, petroleum and natural gas of Ethiopia.

Mineral Licensing and Administration Directorate (MLAD) – A directorate under the Ministry of Mines and Petroleum of Ethiopia that issues and administers mineral licenses.

Mineral Licensing Case Team (ML) – A case team that is under MLAD with the role of issuing various mining and exploration licenses in accordance with the mining proclamation, regulation and directives of Ethiopia.

Mineral License Administration Case Team (MLA) – A case team that is under MLAD with the role of administering various mining and exploration licenses in accordance with the mining proclamation, regulation and directives of Ethiopia.

Mineral Exploration Company – A company that uses various geological, geophysical and geochemical techniques in order to discover and mine an economic mineral deposit.

Mineral Licensing Case Team Services;

- **Maintaining the mineral licensing flexi cadaster system** – Mineral licensing case team is responsible to maintaining the mineral licensing system to show all existing licenses that are given at federal and regional level. Accept geographic coordinate systems for applicants’ area of interest and check whether there is an overlap or not with an existing license.
- **Preparing requirement guideline for obtaining various licenses** – Mineral licensing case team prepares directives that are drawn from the mining procedure and mining proclamations of Ethiopia and make it available for license applicants to inform the requirements for obtaining a mineral license of their interest.
- **Assess financial, technical and environmental reports from license applicants** – Mineral licensing case team assess the required financial, technical and environmental reports that licenses applicants submit as part of a requirement in obtaining the mineral license of their interest.
- **Update applicants on their application status and address frequently asked questions** – Mineral licensing case team updates applicants on their application status and respond to the various questions raised from applicants on mineral licensing directives which are regularly updated.

Mineral License Administration Case Team Services;

- **Annual work program and annual report assessment and approval** - Mineral license administration case team evaluate and approve annual work program and annual work execution reports for mineral exploration license holders and assess and approve quarterly reports from mining license holders.

- **Assess and approve duty free privilege requests from mineral license holders** – Mineral license administration case team assess and approve tax free requests for various equipment, machineries and vehicles that mineral license holders request as per their agreement and according to the mining regulation and proclamation.
- **Assess and approve work permit for expatriates** - Mineral license administration case team assess the qualifications of expatriates against the need of the mining or mineral exploration work program submitted to write a support letter for ministry of labor affairs to grant a work permit.
- **Support Licensees in obtaining the cooperation of regional mining bureaus** – Mineral license administration case team is responsible for providing supporting letters, send its experts to regional mining offices, zones and woredas to support license holders to have a smooth exploration or mining campaign.
- **Support and facilitate sample export for laboratory analysis** - Exploration companies collect various samples during their exploration campaign, and they want to send some of the samples collected to laboratories abroad. It is the responsibility of mineral license administration case team to check their samples and write a letter to the customs authority for the companies to send their samples.

1.9 Organizations of the study

This study is organized into five chapters and other sections, namely, the list of reference and appendixes. The first chapter deals with the background of the study, statement of the problem, research questions, objectives of the study, significance of the study, scope and limitation of the study. The research is carried out with the review of the theoretical and empirical literature in chapter two and the methodology utilized to answer the research question were discussed in chapter three. Data analysis and interpretation of results were dealt in chapter four. The final chapter, chapter five, covered the discussion of results, conclusion and recommendation.

Chapter Two: Literature Review

2.1 Total Quality Management (TQM) and Customer Satisfaction

TQM is defined as a strategy that essentially aimed to establish and deliver high quality products and services that cover all customers' demands and achieve a high level of customer satisfaction (Azrilah Abd.Aziz, Norah Dhafer Al-Qahtani and Sabah Sa'ad Alshehri, 2015). TQM primarily focuses to achieve a comprehensive integration among organizational staff and their functions in order to gain better enhancement, progress and preservation of products and services quality to achieve customer satisfaction (Suby Khanam, Jamshed Siddiqui and Faisal Talib, 2013).

Even though the causal mechanism has rarely been made explicit several studies finds that overall employee attitudes at the business-unit level are positively correlated with several business-unit performance measures including customer satisfaction, productivity, and profitability (Daniel H. Simona, Miguel I. Gomez, Edward W. McLaughlin and Dick R. Wittink, 2008). It is important for MLAD to have a holistic approach of total quality management to continuously improve its service provision. It is also critical to address the employees' level of job and work environment satisfaction as this directly correlate to higher employee performance and high performing and competent employees in return will provide a service that is better than those who are unsatisfied with their job and work environment. MLAD needs to monitor the performance of the staff, especially those with frequent customer contact to plan an intervention in areas where customers are dissatisfied.

2.2 Service Quality and Customer Satisfaction

Services can be seen as economic activities that create value and provide benefits for customers at specific times and places, as a result of bringing about a desired change in or on behalf of the recipient of the service (Lovelock and Wright, 2002). Service can be described as the business transactions that take place between a service provider and customer in order to produce an outcome that satisfies the customer (Ramaswamy,1996). "A service is an activity or series of activities of more or less intangible nature that normally, but not necessarily, take place in interactions between the customer and service employees and /or systems of the service provider, which are provided as solutions to customer

problems” (Gronroos, 1990). Fegenbaum (1983) states that quality means products and services that meet the expectation of customers.

Customer satisfaction is a psychological state and customers are highly satisfied when service quality exceeds their expectations (Paul, Mittal, & Srivastav, 2016). Simply put, satisfaction can be defined as a post purchase evaluation of a product or service given prior purchase expectations (Kotler P, 1994). One of the best ways to raise service level is by knowing the customer’s perception (Ron Zemke, John A. Woods, 1998). Customer satisfaction reflects the degree to which a consumer believes that the possession or use of a service evokes positive feelings (Cronin, Brady and Hult, 2000).

Ultimately, if customer’s experiences exceed their expectation, customer satisfaction together with situational and personal factors will result in customer loyalty (Wilson, Zeithaml, Bitner and Gremler, 2008). Managing to keep foreign exploration companies currently exploring gold and base metal satisfied with the mineral licensing and administration services will encourage the companies to apply for more exploration licenses leading to a greater probability of discovering a mineral deposit. Anticipated performance emanates from expectations that are formed prior to purchase and are influenced by a number of factors such as customers’ prior experience and the nature of communication from the service provider’s representative or staff (Christopher Odindo & James Devilin, 2007).

“Service quality is not only a continuous interaction between customers and organizations but it also provides better solutions to customer problems” (Kainat Yousuf, 2017). The effect of service quality examined by studies showed that dissatisfied customers not only stop purchasing the products and services but also create negative publicity (Kainat Yousuf, 2017). Customer satisfaction mainly depends upon: (1) reliability (2) security (3) responsiveness (4) competence (5) tangibility (6) credibility (7) communication (8) courtesy (9) understanding the customers (10) responsiveness and (11) service accessibility (Parasuraman & Zeithaml, 1988).

2.2.1 Reliability

Reliability is defined as the ability to perform the promised service dependably and accurately (Rajasekhar Mamilla, Janardhana G., Anjan Babu G., 2013). Reliability refers to the ability to deliver

customers' expected standard at all time, how the organization handle customer services problem, performing right services for the first time, providing services within promised time and maintaining error free record (Iberahim, H., Mohd Taufik, N.K., Mohd Adzmir, A.S. & Saharuddin, H., 2015). Research conducted by Zeithaml et al. within five service sectors to explore which service dimensions were most critical to service quality revealed that reliability was consistently indicated (as cited in Faye Schmidt and Teresa Strickland, 1998). Reliability is the most important dimension of service quality and it is vital to make customers to trust that the organization is going to perform what it promises to do (Kamaruzziman Bin Seman, Kamarudin Bin Saadan and Hamed. F. Hamed Omar, 2015). A periodic customer satisfaction survey and taking corrective actions on main attributes of reliability service dimension that exploration companies state as dissatisfied with will put MLAD on the right path towards being a reliable mineral licensing and mineral license administration service provider

2.2.2 Responsiveness

“Responsiveness is defined as the ability to respond to customer requirements timely and flexibly” (Iberahim, H., Mohd Taufik, N.K., Mohd Adzmir, A.S. & Saharuddin, H., 2015). Responsiveness is reacting readily to a service gap recognized by a customer and conveyed to a service provider, so that timely response is given to the customers by the service provider (Faye Schmidt and Teresa Strickland, 1998). Studies found that responsiveness is not only an important component in the service quality dimension but also have a positive effect on customer satisfaction (Al-Azzam, 2015). “The responsiveness level is strongly dependent on the attitude and behavior of employees. Thus, it is important for firms to give required orientation to their employees on customer dealings on a regular basis” (Kainat Yousuf, 2017). MLAD has to orient and train mineral licensing and mineral license administration case team service staff on how to respond to the various service requests of customers so that customer satisfaction is achieved and attraction and retention of foreign exploration companies becomes possible.

2.2.3 Communication

In service delivery, communication should provide the client with accurate, understandable and relevant information and with a means to be heard (Faye Schmidt and Teresa Strickland, 1998).

“Communication in relationship marketing means keeping in touch with valued customers, providing timely and trustworthy information on service and service changes, and communicating proactively if a delivery problem occurs.” (Gilaninia, S., Mohammadi, A.A., Mousavian, J.S. and Pournaserani, A., 2011). Internal communication practices depend on the information that is appreciated by employees, and managers within the organization should be clear to the quantity and quality of information for effective communication (Carrière, J., and Bourque, C., 2009). As a directorate MLAD should have a customer communication strategy that is easy to use by both employees and exploration companies.

2.2.4 Service Accessibility

Service accessibility is the ease with which service is provided (Faye Schmidt and Teresa Strickland, 1998). (Owusu-Frimpong, N., Nwankwo, S., and Dason, B., 2010) found varying service access experiences among people taking public and private medical facilities. Public as opposed to private healthcare users had a rough experience in relation to getting attention from doctors, time taken to get appointments, access to core treatment and opening hours according to their research findings. They concluded that access-to-care problems need to be addressed by managers and healthcare providers so that quality of service delivery and patient satisfaction is addressed. Even though provision of service to countries’ natural resources can’t be provided privately the lack of competition should not make MLAD less concerned about access to its services. The comparison should be with other African countries mineral resource exploration service providers.

2.2.5 Service Facility

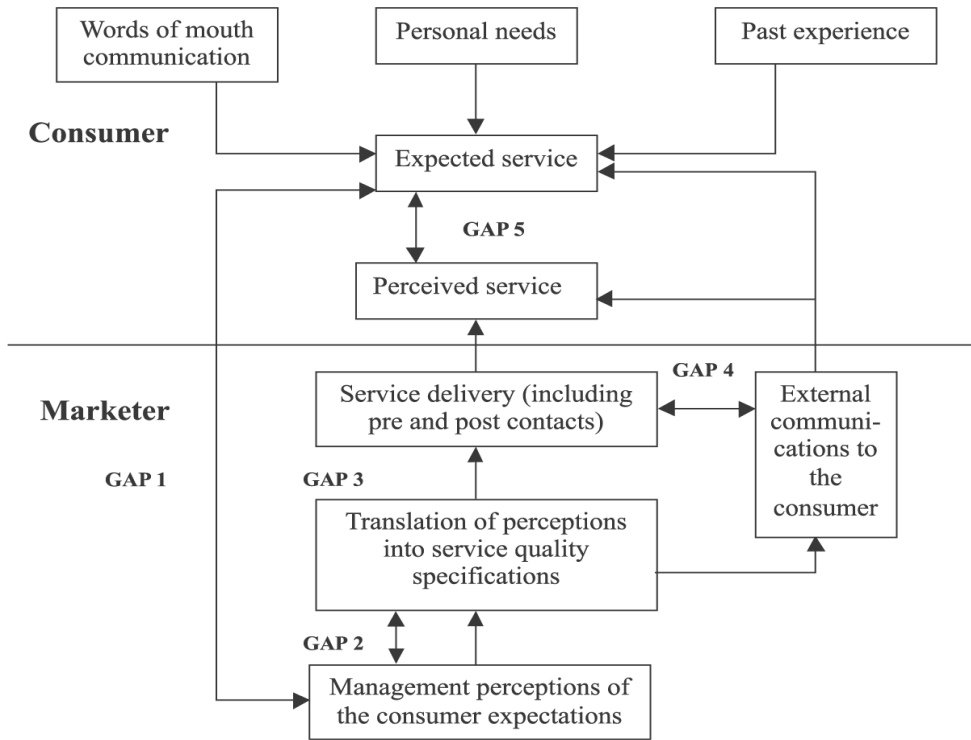
Facility of the service is where customers come in contact with tangible aspects that they can sense. “Tangibility refers to things that have a physical existence, which could be seen, felt and touched.” (Kainat Yousuf, 2017). Modern equipment, ambience and staff are tangibles that can strongly influence customer satisfaction and retention (Kainat Yousuf, 2017). “Tangibles are significant for creating differentiation, customer satisfaction and sustainable growth” (Arokiasamy & Tat, 2014).

2.3 Measuring Customer Satisfaction

Customer satisfaction measurement may be considered as the most reliable feedback, considering that it provides in an effective, direct meaningful and objective way the clients' performance and expectations. In this way, customer satisfaction is the baseline standard of performance and a possible standard of excellence for any business organization (Richard F. Gerson, 1993). Research shows that organizations that employ customer satisfaction research that goes beyond customer satisfaction, loyalty and retention measurements to identify and measure perceived customer value can deliver much more return on their research investment (Ira Kerns, 2005).

2.3.1 SERVQUAL

Service quality is linked to the concepts of perceptions and expectations (Parasuraman et al., 1985). And based on this perspective Parasuraman et al. developed the most popular service quality measuring tool known as SERVQUAL. The scale operationalizes service quality by calculating the difference between expectations and perceptions, evaluating both in relation to 22 items that represent five service quality dimensions known as 'tangibles', 'reliability', 'responsiveness', 'assurance' and 'empathy'. Figure-1 below shows the gap model of Parasuraman et al. and Figure-2 shows the 22 items proposed by Parasuraman et al. to measure the five service quality dimensions.



Source: Parasuraman *et al.* (1985)

Figure 2. 1Gap Model of Service Quality

Reliability

1. Providing services as promised.
2. Dependability in handling customers' service problems.
3. Performing services right the first time.
4. Providing services as the promised time.
5. Maintaining error-free records.

Responsiveness

6. Keeping customers informed about when services will be performed.
7. Prompt service to customers.
8. Willingness to help customers.
9. Readiness to respond to customers' enquiries.

Assurance

10. Employees who instill confidence in customers.
11. Making customers feel safe in their transactions.
12. Employees who are consistently courteous.
13. Employees who have the knowledge to answer customer questions.

Empathy

14. Giving customers individual attention.
15. Employees who deal with customers in caring fashion.
16. Having the customer's best interest at heart.
17. Employees who understand the needs of their customers.
18. Convenient business hours.

Tangibles

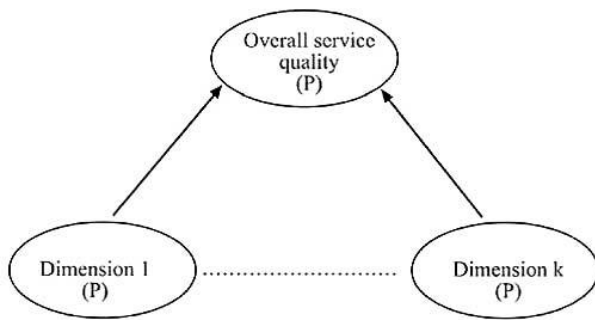
19. Modern equipment.
20. Visually appealing facilities.
21. Employees who have a neat, professional appearance.
22. Visually appealing materials associated with service.

(Source: Parasuraman et al. 1994)

Figure 2. 2 The 22 Items Measuring the five dimensions of service quality in SERVQUAL

2.3.2 SERVPERF

“Cronin and Taylor (1992) in their empirical work controverted the framework of Parasuraman, Zeithaml and Berry (1985, 1988) with respect to conceptualization and measurement of service quality, and propounded a performance-based measure of service quality called” (As cited in Mohd. Adil, Odai Falah Mohammad Al Ghaswyneh & Alaa Musallam Albkour, 2013). The model of SERVPERF is shown in Figure-3 below and the equation form for SERVPERF is shown in Figure-4 below.



Source: Martinez and Martinez (2010)

Figure 2. 3 SERVEPERF Model

$$SQ_i = \sum_{j=1}^k P_{ij}$$

Where

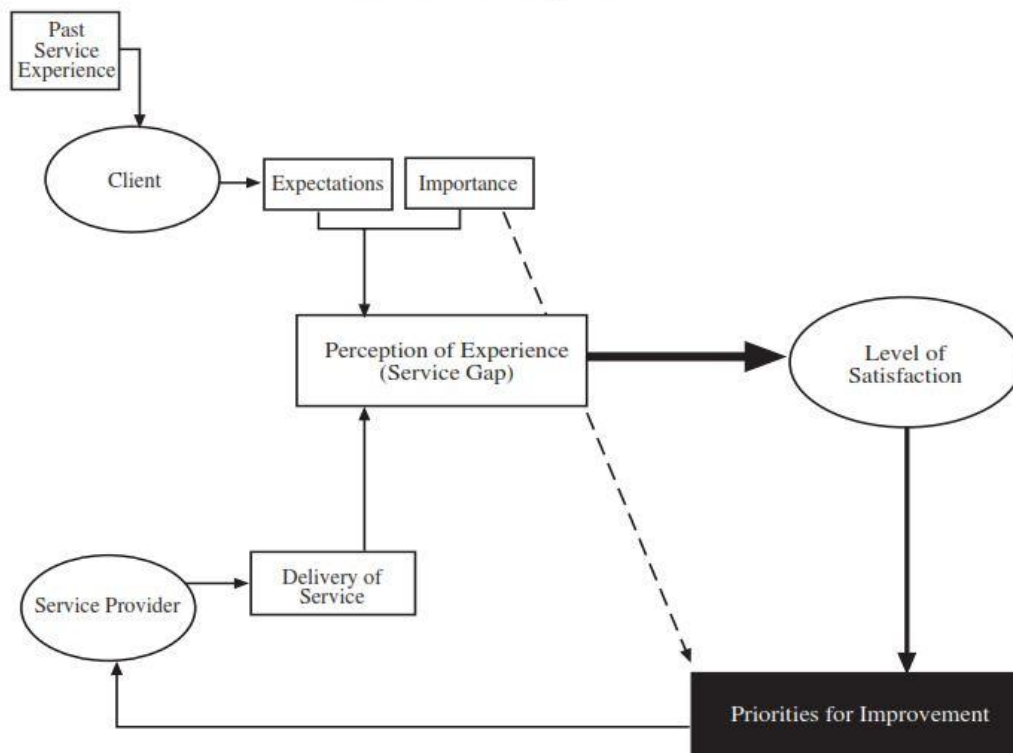
- SQ_i = perceived service quality of individual 'i'.
- k = Number of attributes / items
- P = Perception of individual 'i' with respect to performance of a service firm on attribute 'j'.

Source: Martinez and Martinez (2010)

Figure 2. 4 SERVEPERF Equation

2.3.3 Client Satisfaction Surveying: Common Measurement Tool (CMT)

CMT is intended to bring consistency to client satisfaction measurement across time and between organizations (Faye Schmidt and Teresa Strickland, 1998). “There is a strong rationale for utilizing common measures in assessing client satisfaction levels with public services” (Faye Schmidt and Teresa Strickland, 1998). CMT was developed by identifying five elements of service delivery which are; client expectation, perception of service experience, level of importance, level of satisfaction and priorities for improvement (Faye Schmidt and Teresa Strickland, 1998). The conceptual model that shows the relationship between the five elements is shown in Figure-5 below.



Source: Faye Schmidt and Teresa Strickland (1998)

Figure 2. 5 Conceptual model of CMT

The perceived importance level by customers can serve for the planning purposes for service satisfaction intervention as cross analysis of satisfaction and importance using Alen Dutka’s satisfaction/importance cross analysis matrix shown in Figure-6 below will identify priorities for improvements and thus promote efficient allocation of resources (Faye Schmidt and Teresa Strickland, 1998). “However, frequently when clients are asked to stipulate levels of importance they indicate that

all or most service elements are important which is unmanageable for planning purposes” (Faye Schmidt and Teresa Strickland, 1998), that is why priority areas for improvement suggested by clients important especially public service providers like MLAD can’t afford to address all the important service dimensions at once.

This research used CMT to assess the satisfaction level of foreign and joint venture exploration companies as the importance dimension is included in the instrument and moreover exploration companies can prioritize three areas for immediate improvement rather than entirely depending on the importance performance analysis. Both SERVQUAL and SERVPERF failed to include importance ranking in their survey method and “even strong advocates of SERVPERF recommended the use of importance-performance in measuring service quality” (Meng Seng Wong, Nishimoto Hideki and Philip George, 2011).

	<i>Satisfaction (Performance)</i>	
<i>Importance</i>	<i>Low</i>	<i>High</i>
<i>High</i>	<ul style="list-style-type: none"> • Attributes that need attention – areas where priorities should be focused 	<ul style="list-style-type: none"> • Current organization strengths
<i>Low</i>	<ul style="list-style-type: none"> • Low Priority 	<ul style="list-style-type: none"> • Unnecessary strengths – possible overkill

(Source: Alan Dutka. AMA Handbook for Customer Satisfaction (1994))

Figure 2. 6 Importance/Performance analysis Matrix

Chapter Three: Research Design and Methodology

3.1 Research Approach

The type of research methods employed in this study were both qualitative and quantitative research method. The study used quantitative research by applying quantitative survey and qualitative research using qualitative part of the survey and through semi structured interview.

3.2 Research Design

The research design employed in this study was a mixed research design. Mixed method research that involves; collecting, analyzing and integrating quantitative and qualitative data is a suitable approach that has a potential to provide a greater depth and breadth of information than utilizing quantitative or qualitative approach alone (Sami Almalki, 2016).

3.3 Population

Population refers to the entire group of people, events or things of interest that the researcher wishes to investigate (Uma Sekaran, 2003). Occasionally, it may be possible to collect and analyze data from every possible case or group member; this is termed as a census (Mark Saunders, Phillip Lewis and Adrian Thornhill, 2016). This research used a census, as the number of foreign and joint venture companies exploring gold and base metal in Ethiopia, which is the target population of the study is small enough for the descriptive part of the research. As of 19 October 2018 there were only 48 active exploration licenses belonging to 35 foreign and joint venture exploration companies according to MLAD's mineral licensing database. Due to the unique nature of the service provided by MLAD, exploration companies mostly have an assigned focal person with technical know-how to represent and communicate their company's interest for the various services sought from MLAD.

3.4 Data Collection

To conduct this research both primary and secondary data were used. Primary information was obtained using a survey from exploration companies' country managers, project managers, exploration

managers and senior exploration geologists. Semi structured interview was also conducted with key MoMP directorate directors. Secondary sources such as, assessment reports on MLAD, assessment reports on GSE, books, journals, MLAD annual reports, MLAD investor presentations, World Bank Reports, Federal Democratic Republic of Ethiopia Growth and Transformation Plan II (GTP II), Ethiopian mining policy, mining regulation, mining proclamation documents and MoMP official websites were used for the research.

3.5 Research Instrument

Primary information is collected through an online questionnaire emailed to foreign and joint venture exploration company representatives with frequent contacts with MLAD. Each survey respondent was phoned and briefed on the survey and asked their consent to participate on the survey and to provide an email address. The online questionnaire is sought as it is believed to give respondents the ability to respond on their convenient time, and can access the questionnaire anytime from anywhere and using any device. The rate of an incomplete questionnaire for each part is none as it is designed to inform the respondent which part has not been answered before submission. And the geographical challenge of locating respective respondents in different regions of Ethiopia has been addressed and all of the company representatives that serve as a focal person for MLAD communication and with working phone numbers have been reached and the online questionnaire has been sent to them.

For closed ended questions in the questionnaire 5 point likert like scale were used for the services satisfaction part. The open ended questions in the questionnaire were intended to capture what was not captured by the closed ended questions and also to capture the rationale behind the choices of respondents on the closed ended questions. The questionnaire is composed in a brief and appropriate language to avoid ambiguity and to attract respondent's interest. Semi structured interviews were conducted with three key directorate directors of MoMP.

3.6 Method of Data Analysis

Data collected through the above mentioned techniques were organized and analyzed by using percentages and tables using descriptive statistics to assess the level of satisfaction of exploration

companies on reliability, responsiveness, communication, service accessibility and facility service dimensions. Importance-Performance analysis (IPA) was also conducted to identify primary service attributes for improvement together with the analysis of the priority areas for improvement preferred by exploration companies. Qualitative data analysis was conducted by separating ideas into themes and narrating the findings on the semi-structured interview conducted with the three directorate directors of MoMP.

3.7 Ethical Consideration

Five ethical issues have been taken into account for this study. These issues are; voluntary participation and informed consent, no harm to participants, anonymity, deceiving subjects, and analyzing and reporting of the research findings.

All participation in this research has been volunteered to participate and participants of the study has been given a full description of the study before deciding to participate. After the purpose has been described to the respondents through the phone, participants gave their email address to participate on the online survey that used google docs survey. Every effort in this study has been made to guard against harming any research participant. All responses are kept anonymous for the research. And all of the data that was analyzed is reported in this study.

Chapter Four: Data Analysis and Discussion of Results

4.1 Introduction

In this chapter data were presented and discussed to address the research questions and objectives. The main headings of the chapter include: response rate, respondents' general information, descriptive statistics results, reliability and validity test and Importance-Performance Analysis on the satisfaction level and level of importance data collected on reliability, responsiveness and communication service dimensions for mineral licensing and mineral license administration case teams. Importance-Performance analysis was also conducted for service accessibility and facility satisfaction levels and level of importance data collected for MLAD.

4.2 Response Rate

The questionnaire was sent to a total of 30 active exploration companies out of a total of 35 exploration companies that their status shown as active as of 19 October 2018. Table 4.1 below shows the response rate.

Table 4. 1 Response Rate

Items	Response Rate	
	No.	Percent
Questionnaire sent	30	100%
Completed Questionnaire	28	93.3%
Uncollected Questionnaire	2	6.7%

Source: Own Survey Result, 2018

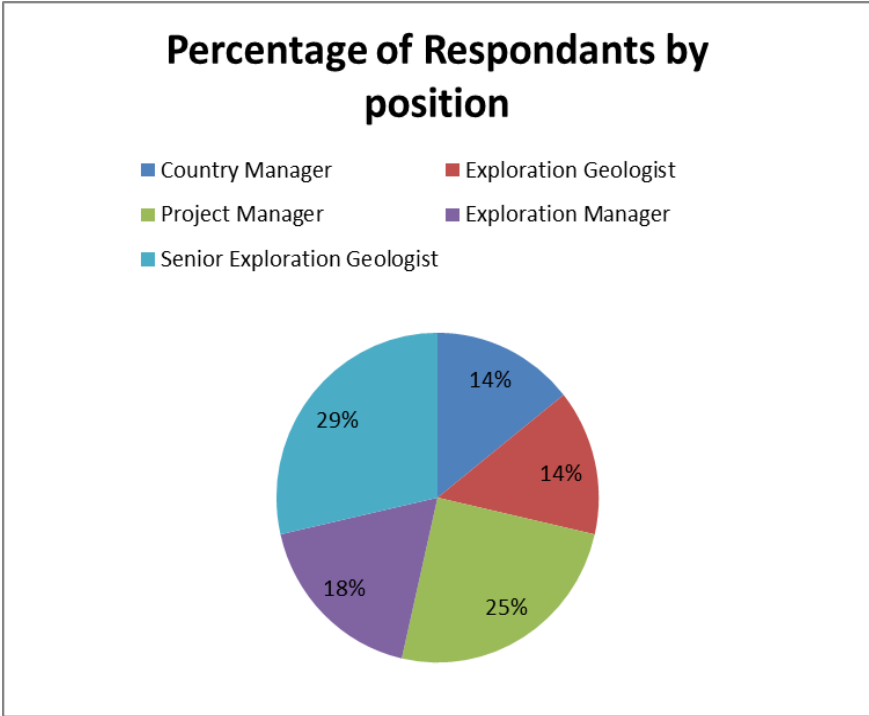
4.3 General Information of Respondents

The general information of the respondents that include: position, years of experience in the mining industry, level of education, age and gender is shown in table 4.2 below. And figure 4.1an 4.2 shows the percentage of respondents by position and years of experience in the mining industry respectively.

Table 4. 2 General Information of Respondents

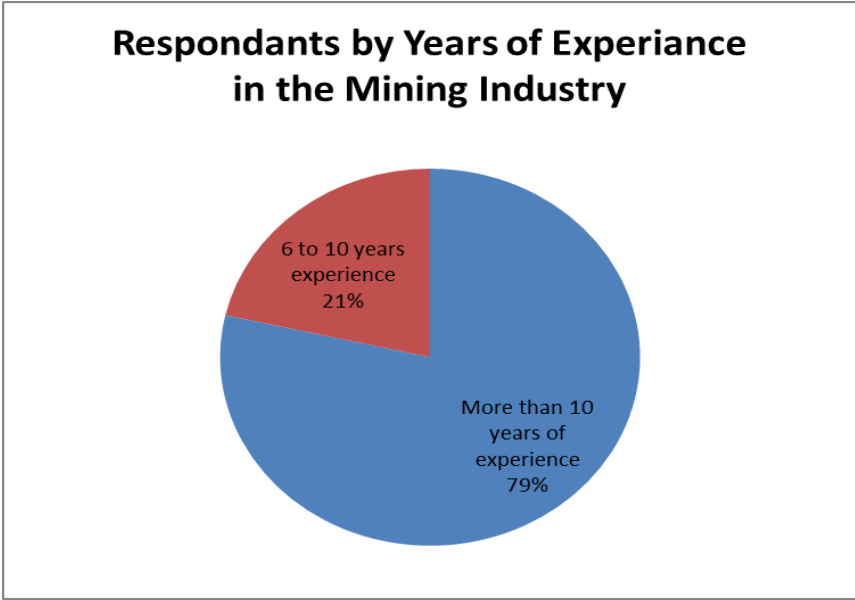
Variable	Category	No.	Percentage
Position	Country Manager	4	14%
	Project Manager	7	25%
	Exploration Manager	5	18%
	Senior Exploration Geologist	8	29%
	Exploration Geologists	4	14%
Years of Experience in the mining industry	More than 10 years of experience	22	79%
	6 to 10 years of experience	6	21%
Level of Education	Phd.	1	4%
	Master's Degree	15	53%
	First Degree	12	43%
Age	25 to 34 years of age	8	29%
	35 to 49 years of age	15	53%
	50 to 64 years of age	5	18%
Gender	Male	25	89%
	Female	3	11%

Source: Own Survey Result, 2018



(Source: Own Survey Result, 2018)

Figure 4. 1 Percentage of survey respondent by position



(Source: Own Survey Result, 2018)

Figure 4. 2 Percentage of survey respondent by years of experience in the mining industry

4.4 Descriptive Statistics Results

Table 4. 3 Mean and Standard deviation of Service Satisfaction and Importance on The Reliability of Mineral Licensing Case Team’s Services

Reliability of Mineral Licensing case team					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
A. Time required delivering the service.	1.59	0.63	4.7	0.47	28
B. Number of contacts with the organization required to receive the service.	2.89	0.51	3.5	0.58	28
C. Waiting time at the service location.	2.29	0.67	3.96	0.44	28
D. Number of people dealt with to get the service	2.78	0.75	3.67	0.62	28
E. The service was provided in a fair and equitable manner.	2.56	0.64	4.18	0.48	28
F. It was clear what to do if I had a problem.	1.74	0.59	4.11	0.51	28

(Source: Own Survey Result, 2018)

Table 4. 4 Mean and Standard deviation of Service Satisfaction and Importance on The Responsiveness of Mineral Licensing Case Team’s Staff

Responsiveness of Mineral Licensing Case team					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
G. Service staff were courteous	2.56	0.51	4.22	0.51	28
H. Service staff were Helpful	2.63	0.63	4.04	0.34	28
I. Service Staff were Good listeners	2.67	0.55	3.78	0.51	28
J. Service staff were Competent	1.7	0.61	4.15	0.46	28
K. Service staff Had up-to-date information	1.81	0.74	4.29	0.54	28
L. Service staff were Respectful	3.22	0.51	4.11	0.32	28
M. Service staff were Flexible	2.15	0.6	4.15	0.36	28
N. Service staff Met my safety and security needs	2.18	1.49	2.48	1.69	28
O. Service staff Protected my privacy/confidentiality	2.92	0.62	3.85	0.53	28

(Source: Own Survey Result, 2018)

Table 4. 5 Mean and Standard deviation of Service Satisfaction and Importance on The Communication of Mineral Licensing Case Team’s Services

Mineral Licensing Communication					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
A. My questions were answered.	2.18	0.68	4.29	0.46	28
B. The information that I needed was available.	2.15	0.72	4.15	0.46	28
C. I received consistent information/advice.	2.29	0.61	4.07	0.55	28
D. Written and verbal language was clear (e.g.,not complicated).	3.33	0.73	4.01	0.39	28
E. I had a choice of English language	4.04	0.34	4.04	0.34	28
F. Service staffs were easy to understand.	2.96	0.44	3.96	0.33	28
G. Documents and other information were easy to understand.	2.55	0.64	4.07	0.27	28
H. Forms were easy to understand and fill out.	3.81	0.39	4.11	0.32	28
I. Procedures were straight forward and easy to understand.	1.66	0.62	4.33	0.48	28
J. It was easy to find out how to get the service.	2.44	0.69	4.11	0.42	28
K. I was informed of everything I had to do in order to get the service.	1.7	0.67	4.33	0.48	28

(Source: Own Survey Result, 2018)

Table 4. 6 Mean and Standard deviation of Service Satisfaction and Importance on The Reliability of Mineral License Administration Case Team’s Services

Reliability of Mineral License Administration case team					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
A. Time required delivering the service.	3.07	0.78	4.48	0.5	28
B. Number of contacts with the organization required to receive the service.	3.26	0.65	3.59	0.57	28
C. Waiting time at the service location.	3.26	0.81	4.07	0.38	28
D. Number of people dealt with to get the service	3.33	0.68	3.67	0.55	28
E. The service was provided in a fair and equitable manner.	3.26	0.81	4.11	0.42	28
F. It was clear what to do if I had a problem.	2.33	0.78	4.11	0.57	28

(Source: Own Survey Result, 2018)

Table 4. 7 Mean and Standard deviation of Service Satisfaction and Importance on The Responsiveness of Mineral License Administration Case Team’s Staff

Responsiveness of Mineral License Administration Case team					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
G. Service staff were courteous	3.18	0.73	4.03	0.19	28
H. Service staff were Helpful	3.4	0.79	4.07	0.26	28
I. Service Staff were Good listeners	3.11	0.57	3.7	0.54	28
J. Service staff were Competent	2.81	0.92	4.33	0.55	28
K. Service staff Had up-to-date information	2.25	0.9	4.33	0.48	28
L. Service staff were Respectful	3.74	0.65	4.07	0.26	28
M. Service staff were Flexible	2.7	0.65	4.03	0.33	28
N. Service staff Met my safety and security needs	2.44	1.42	2.96	1.67	28
O. Service staff Protected my privacy/confidentiality	3.14	0.94	3.81	0.92	28

(Source: Own Survey Result, 2018)

Table 4. 8 Mean and Standard deviation of Service Satisfaction and Importance on The Communication of Mineral License Administration Case Team’s Services

Mineral License Administration Communication					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
A. My questions were answered.	3	0.78	4.25	0.44	28
B. The information that I needed was available.	2.85	0.71	4.18	0.39	28
C. I received consistent information/advice.	2.96	0.64	4.18	0.39	28
D. Written and verbal language was clear (e.g.,not complicated).	3.74	0.52	4.07	0.26	28
E. I had a choice of English language	4.07	0.26	4.07	0.26	28
F. Service staffs were easy to understand.	3.18	0.62	4.03	0.33	28
G. Documents and other information were easy to understand.	3.03	0.7	4.11	0.32	28
H. Forms were easy to understand and fill out.	4.03	0.19	4.07	0.26	28
I. Procedures were straight forward and easy to understand.	2.59	0.88	4.37	0.49	28
J. It was easy to find out how to get the service.	2.96	0.51	4.11	0.42	28
K. I was informed of everything I had to do in order to get the service.	2.07	0.87	4.4	0.5	28

(Source: Own Survey Result, 2018)

Table 4. 9 Mean and Standard deviation of Service Satisfaction and Importance on Service Accessibility of MLAD.

MLAD Service Accessibility					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
A. The service was easily accessible by telephone	1.51	0.73	4.48	0.5	28
I. Appointments with service staff were easy to make	2.4	0.63	4.22	0.42	28
J. Offered various methods of access (i.e., fax,internet, telephone, e-mail)	1.7	0.66	4.48	0.5	28

(Source: Own Survey Result, 2018)

Table 4. 10 Mean and Standard deviation of Service Satisfaction and Importance on The Facility Service Dimension of MLAD.

MLAD Service Facility					
Item	Performance Average	Performance Std.	Importance Average	Importance Std	Count
B. The facility was conveniently located	3.92	0.61	4.03	0.19	28
C. The facility had adequate hours of service	3.33	0.78	4.07	2.6	28
D. The facility had adequate parking	4.14	0.36	3.25	0.76	28
E. There were no barriers to physically entering and using the buildings	4.18	0.39	3.92	0.26	28
F. The facility had offices and waiting areas that were comfortable	3.51	0.5	3.81	0.39	28
G. The facility had signs that were easy to locate	3.96	0.19	3.77	0.5	28
H. The facility had signs that were easy to understand	3.77	0.42	3.88	0.32	28

(Source: Own Survey Result, 2018)

4.5 Reliability and Validity Tests

Reliability test was conducted on the survey instrument and the Cronbach's alpha for all the satisfaction measurement instruments were above 0.7 rule of thumb suggested by (Nunnally, 1978). The Cronbach's alpha reliability service satisfaction for mineral licensing case team services was 0.75, the Cronbach's alpha communication service satisfaction for mineral licensing case team services was 0.73, the Cronbach's alpha reliability service satisfaction for mineral license administration case team services was 0.84, the Cronbach's alpha communication service satisfaction for mineral license administration case team services was 0.78, the Cronbach's alpha facility service satisfaction for MLAD services was 0.7 and the Cronbach's alpha service accessibility satisfaction for MLAD services was 0.72. Table 4.11 below shows the Cronbach's alpha value of the instruments.

Content validity of instruments is normally assessed through literature and also preferably through domain experts (Straub, Boudreau, & Gefen, 2004), the authors of the tool consulted domain expert, literatures and pre-tested the tool on individuals who are able to respond as internal and external clients, as well as on managers who could potentially use the tool in their organizations (Schmidt and Strickland, 1998).

Table 4. 11 Cronbach’s alpha measure of the instruments

Instrument	Cronbach’s Alpha
Mineral License Administration Reliability Scale	0.844
Mineral License Administration Communication Scale	0.778
Mineral Licensing Reliability Scale	0.75
Mineral Licensing Communication Scale	0.734
MLAD Service Accessibility Scale	0.718
MLAD Facility Scale	0.7

(Source: Own Survey Result, 2018)

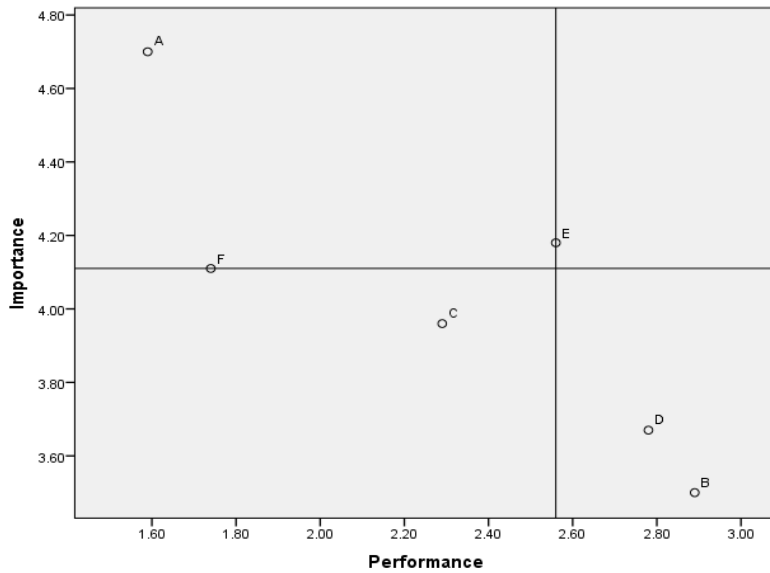
4.6 Importance-Performance Analysis of Mineral Licensing Case Team Reliability

Guidance for strategic development to prioritize and improve areas of service dissatisfaction can be identified using Importance-Performance analysis (IPA) (N. Slack, 1994).

4.6.1 IPA of Mineral Licensing Case Team’s Reliability

As shown in figure 4.3 below, items ‘A’ and ‘F’ fall in the low performance and high importance quadrant indicating that time required to deliver a service and clarity of what to do when the exploration companies face problem are priority service dimensions that should be addressed by the case team

Figure 4. 3 IPA showing mineral licensing case team’s reliability

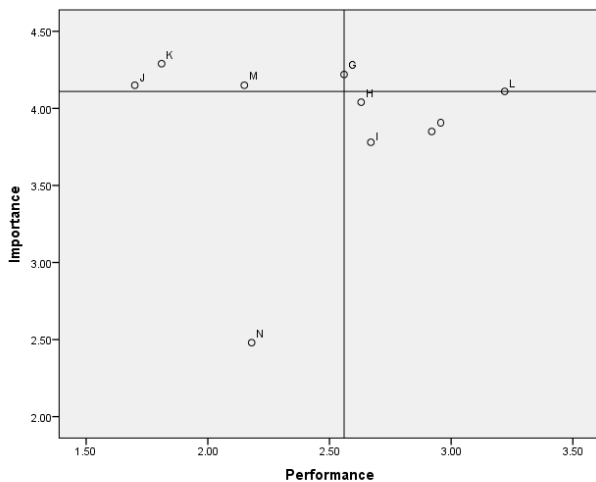


(Source: Own Survey Result, 2018)

4.6.2 IPA of Mineral Licensing Case Team’s Responsiveness

As shown in figure 4.4 below, items ‘J’, ‘K’ and ‘M’ fall in the low performance and high importance quadrant indicating that staff who are competent, flexible and with up to date information are priority responsiveness areas that should be addressed by the case team.

Figure 4. 4 IPA showing mineral licensing case team’s responsiveness

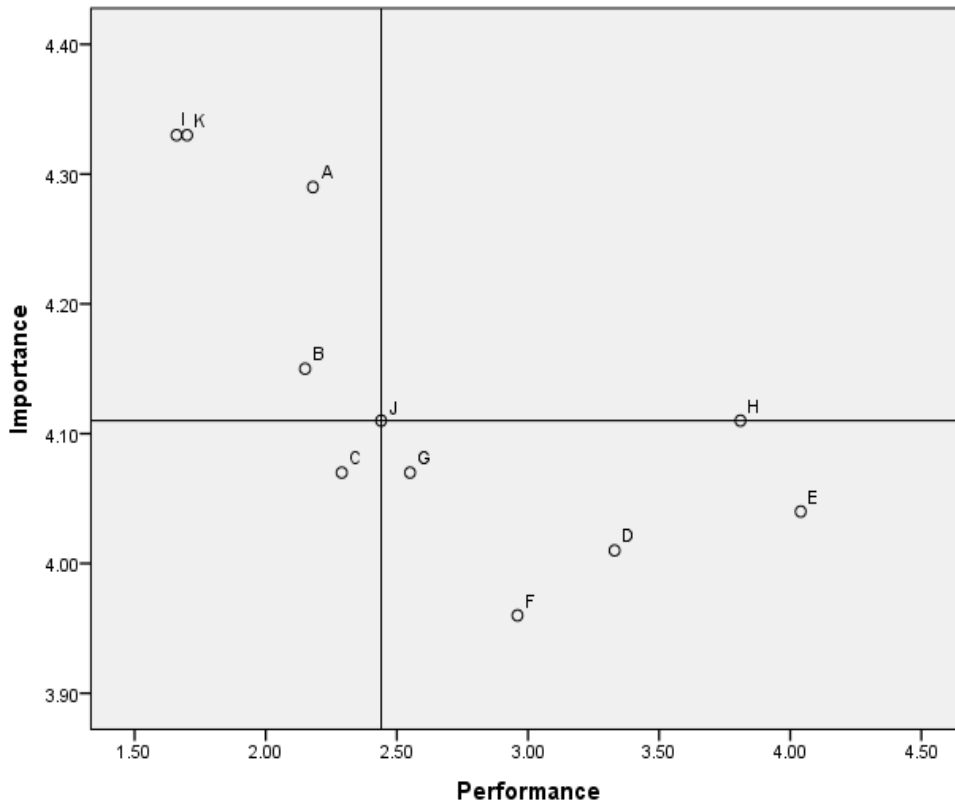


(Source: Own Survey Result, 2018)

4.6.3 IPA of Mineral Licensing Case Team's Communication

As shown in figure 4.5 below, items 'I', 'K', 'A' and 'B' fall in the low performance and high importance quadrant indicating that straight forward procedure and informing companies everything they had to do to obtain a license are priority responsiveness areas that should be addressed by the case team.

Figure 4. 5 IPA showing mineral licensing case team's communication

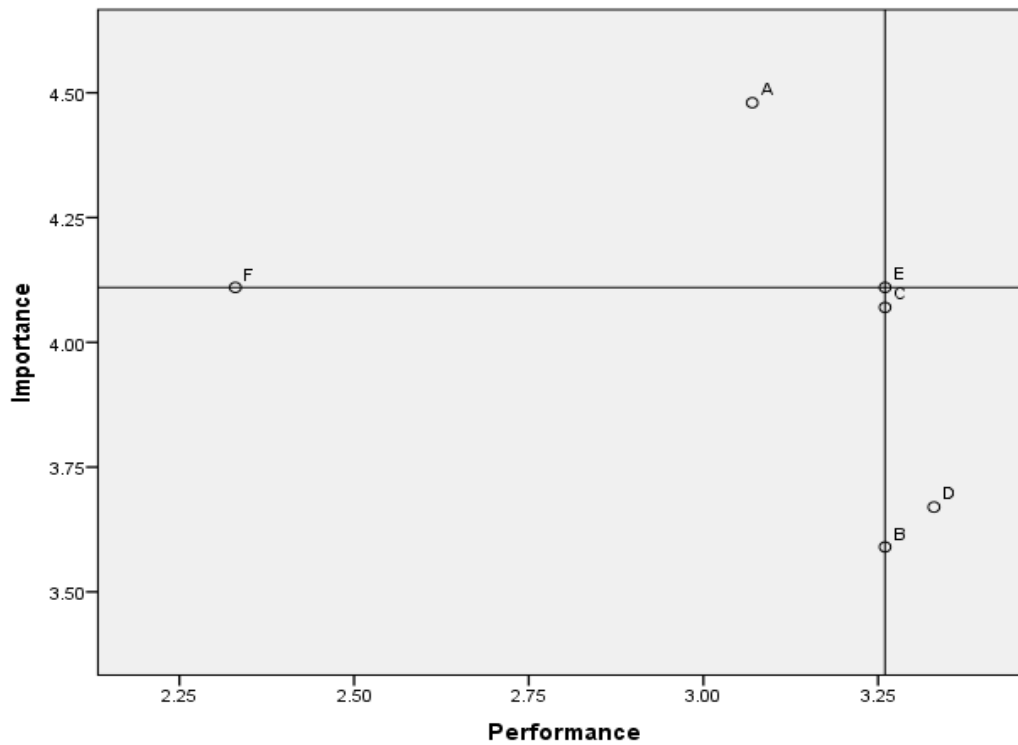


(Source: Own Survey Result, 2018)

4.6.4 IPA of Mineral License Administration Case Team's Reliability

As shown in figure 4.6 below, item 'A' falls in the low performance and high importance quadrant indicating that time required to deliver a service is the priority area that should be addressed by the case team.

Figure 4. 6 IPA showing mineral license administration case team’s reliability

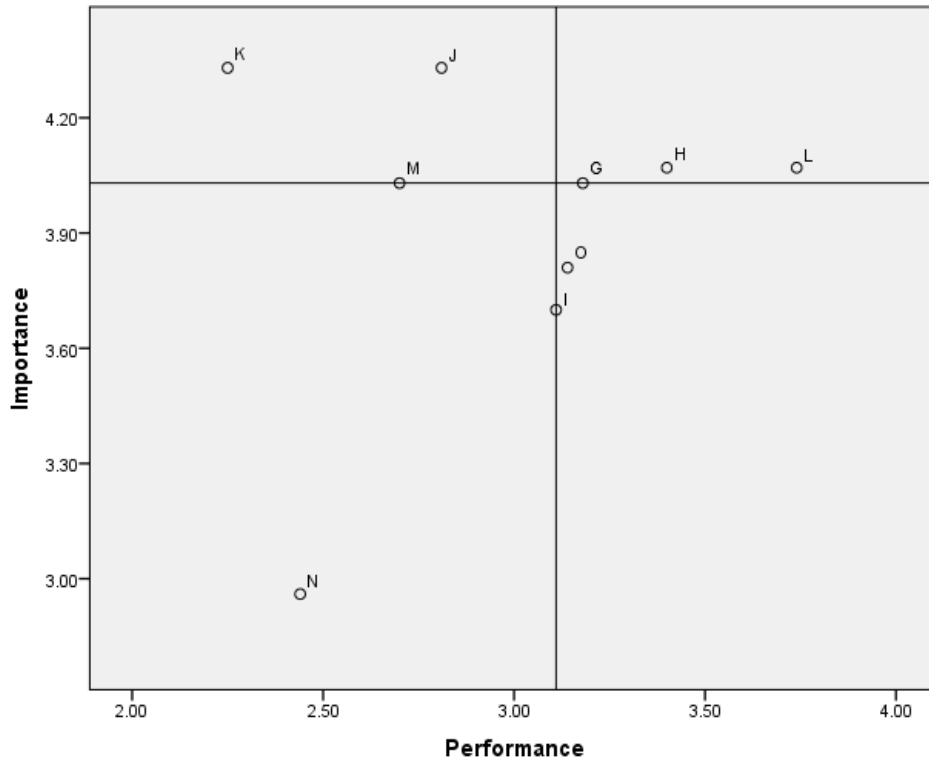


(Source: Own Survey Result, 2018)

4.6.5 IPA of Mineral License Administration Case Team’s Responsiveness

As shown in figure 4.7 below, items ‘K’, ‘J’ and ‘M’ falls in the low performance and high importance quadrant indicating that staff who are competent, flexible and with up to date information are priority responsiveness areas that should be addressed by the case team.

Figure 4. 7 IPA showing mineral license administration case team’s responsiveness

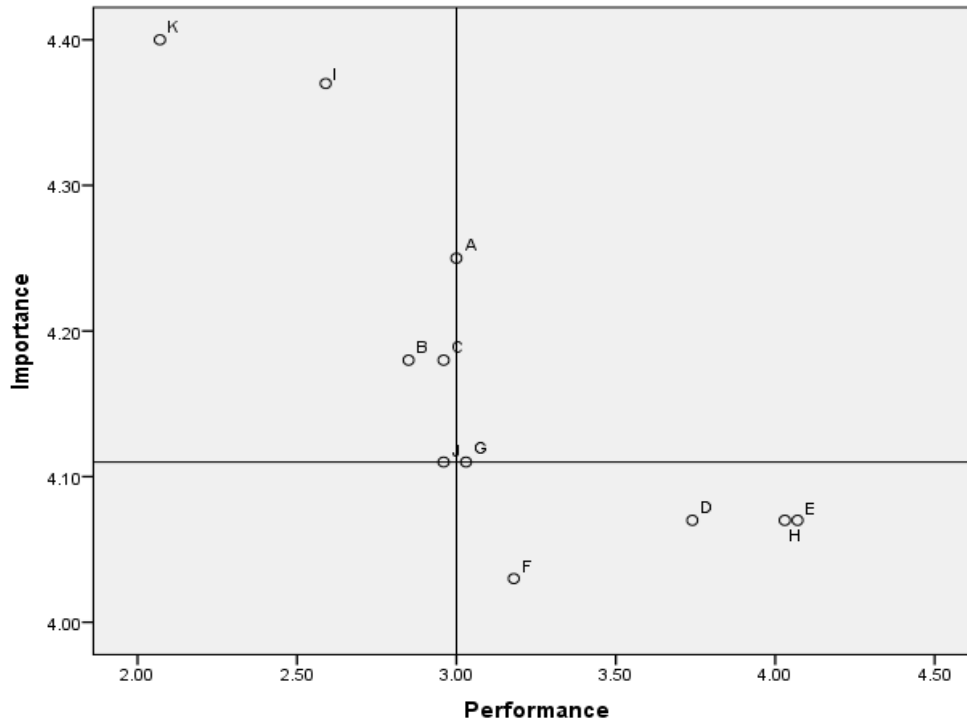


(Source: Own Survey Result, 2018)

4.6.6 IPA of Mineral License Administration Case Team’s Communication

As shown in figure 4.8 below, items ‘K’ and ‘I’ falls in the low performance and high importance quadrant indicating that straight forward procedures and informing service seekers everything they had to do to receive the service are priority communication areas that should be addressed by the case team.

Figure 4. 8 IPA showing mineral license administration case team’s communication

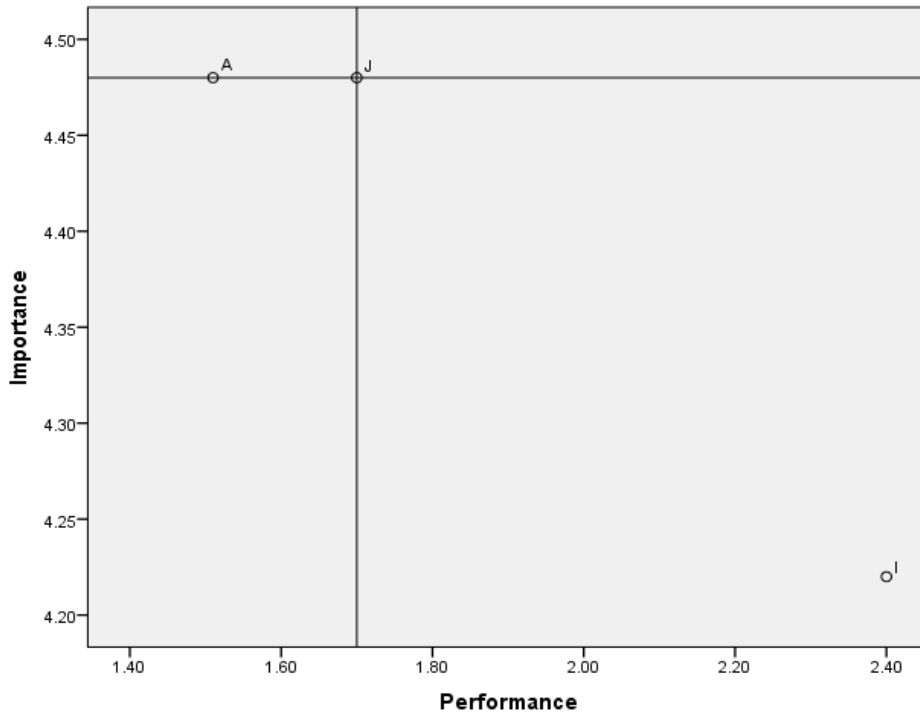


(Source: Own Survey Result, 2018)

4.6.7 IPA of MLAD’s Service Accessibility

As shown in figure 4.9 below, items ‘A’ and ‘J’ falls in the low performance and high importance quadrant indicating that telephone, internet, email and fax service accessibilities are priority areas for service accessibility improvement that should be addressed by MLAD.

Figure 4. 9 IPA showing MLAD’s service accessibility

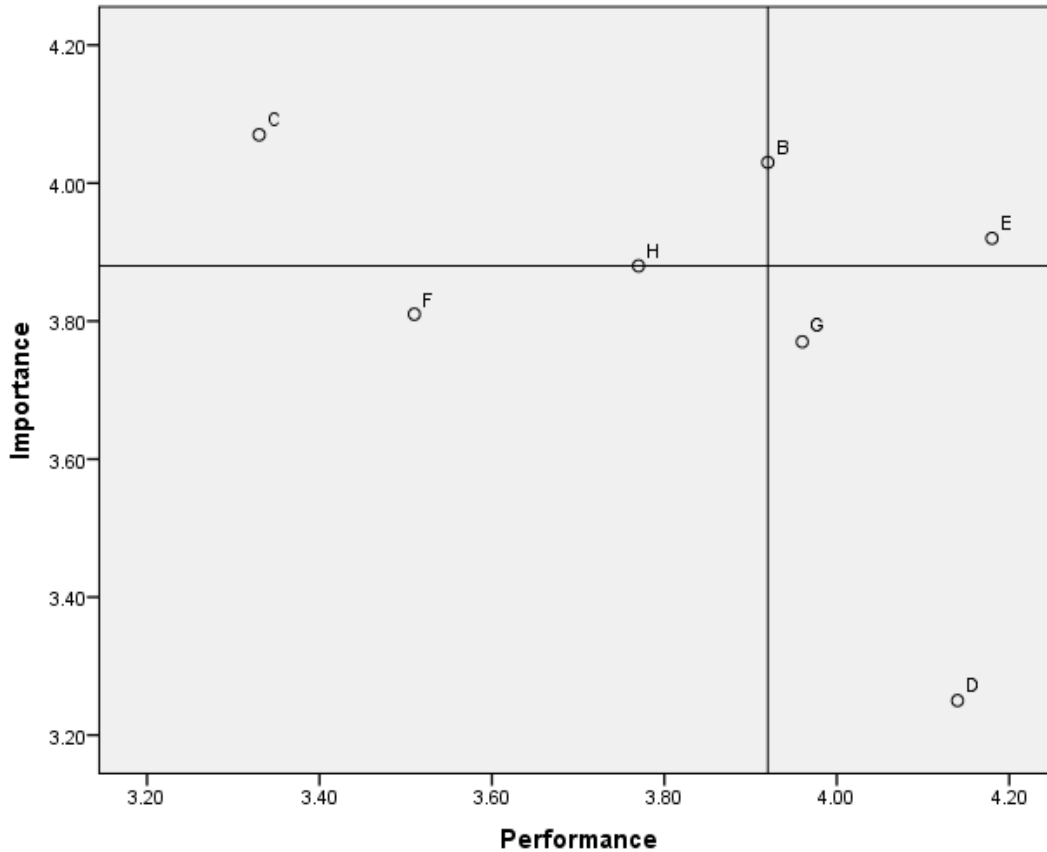


(Source: Own Survey Result, 2018)

4.6.8 IPA of MLAD’s Facility

As shown in figure 4.10 below, items ‘A’ and ‘J’ falls in the low performance and high importance quadrant indicating that provision of adequate hours of service is the priority area for improvement that should be addressed by MLAD.

Figure 4. 10 IPA showing MLAD's facility service satisfaction



(Source: Own Survey Result, 2018)

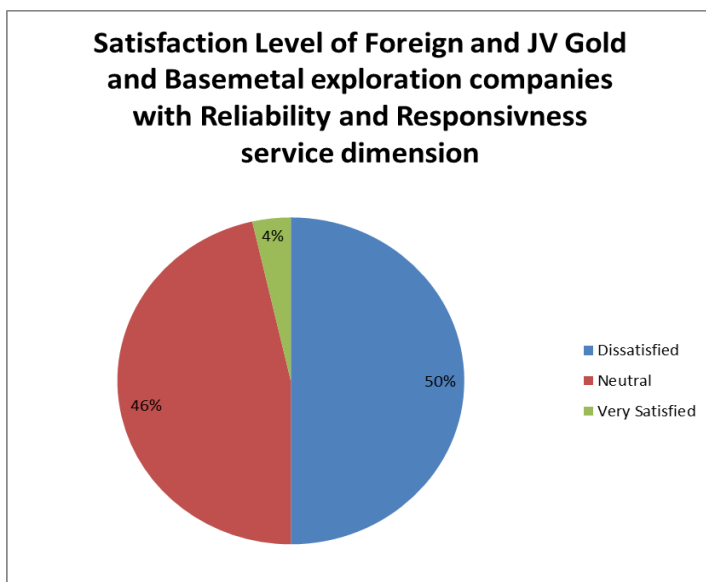
4.7 Overall Satisfaction

Overall satisfaction of foreign and joint venture exploration companies exploring gold and base metal was assessed for the reliability, responsiveness, communication, service accessibility and facility service dimensions of mineral licensing case team, mineral license administration case team and MLAD.

4.7.1 Companies' overall service satisfaction with Mineral license administration case team's reliability and responsiveness

One respondent is very satisfied, thirteen respondents are neutral and fourteen respondents are dissatisfied with the reliability and responsiveness service dimension of MLA case team. Figure 4.11 below shows the percentage of respondents and their level of satisfaction.

Figure 4. 11 Reliability and Responsiveness service dimension level of satisfaction with Mineral License administration case team.

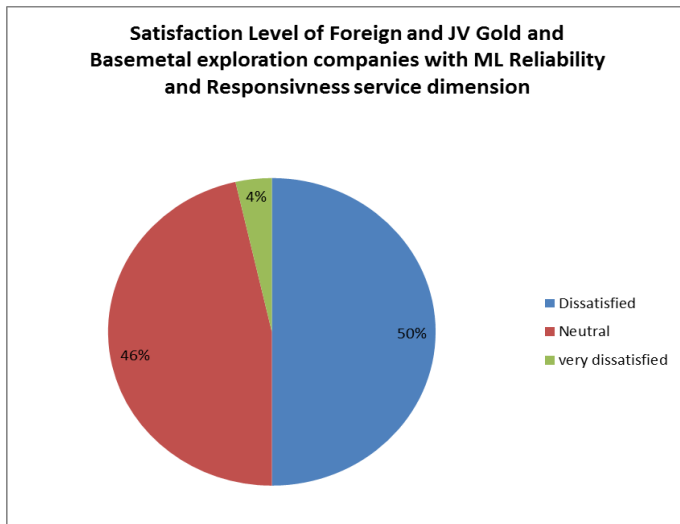


(Source: Own Survey Result, 2018)

4.7.2 Companies' overall Service satisfaction with Mineral licensing case team's reliability and responsiveness

Thirteen respondents are neutral, fourteen respondents are dissatisfied and one respondent is very dissatisfied with the reliability and responsiveness service dimension of ML case team. Figure 4.12 below shows the percentage of respondents and their level of satisfaction.

Figure 4. 12 Reliability and Responsiveness service dimension level of satisfaction with Mineral Licensing case team.

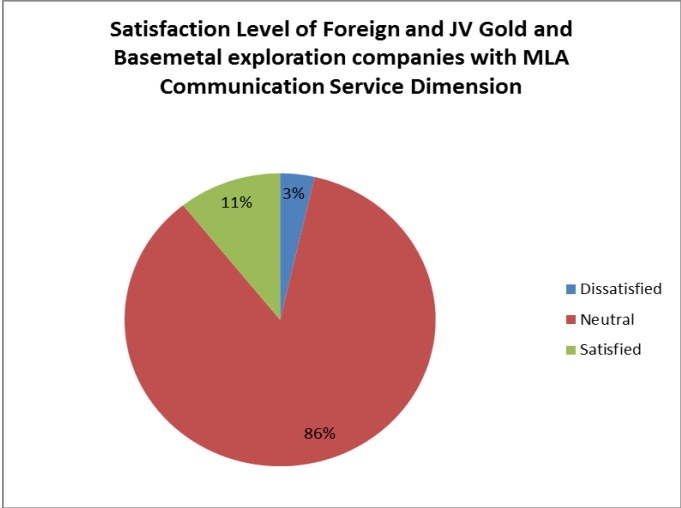


(Source: Own Survey Result, 2018)

4.7.3 Companies' Overall Service satisfaction with Mineral license administration case team's communication

Three respondents are satisfied, twenty-four respondents are neutral and one respondent is dissatisfied with the communication service dimension of MLA case team. Figure 4.13 below shows the percentage of respondents and their level of satisfaction with the communication service dimension.

Figure 4. 13 Communication service dimension level of satisfaction with mineral license administration case team

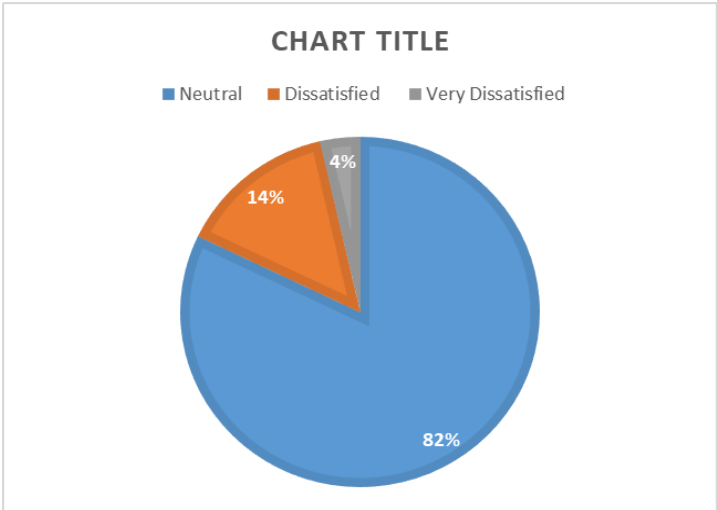


(Source: Own Survey Result, 2018)

4.7.4 Companies’ Overall Service satisfaction with Mineral licensing case team’s communication

Twenty-three respondents are neutral, four respondents are dissatisfied and one respondent is very dissatisfied with the communication service dimension of ML case team. Figure 4.14 below shows the percentage of respondents and their level of satisfaction with the communication service dimension.

Figure 4. 14 Communication service dimension level of satisfaction with mineral licensing case team

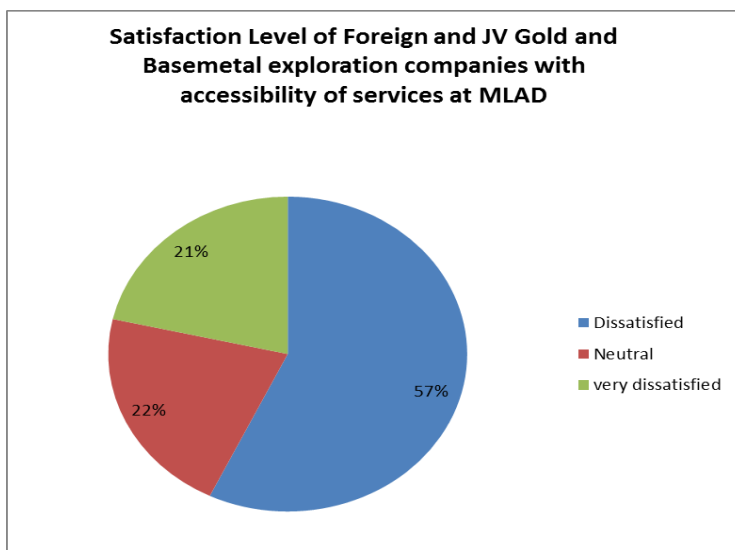


(Source: Own Survey Result, 2018)

4.7.5 Companies' Overall Service satisfaction with Mineral licensing and administration directorate's service accessibility

Six respondents are neutral, sixteen respondents are dissatisfied and six respondents are very dissatisfied with the service accessibility of MLAD. Figure 4.15 below shows the percentage of respondents and their level of satisfaction with MLAD's service accessibility.

Figure 4. 15 Accessibility service dimension level of satisfaction with MLAD

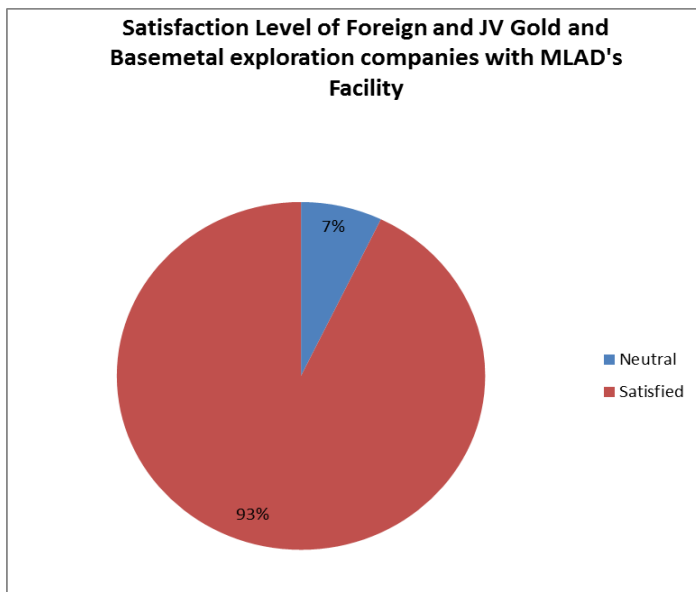


(Source: Own Survey Result, 2018)

4.7.6 Companies' Overall Service satisfaction with Mineral licensing and administration directorate's facility.

Twenty six respondents are satisfied and two respondents are neutral with MLAD's facility. Figure 4.16 below shows the percentage of respondents and their level of satisfaction with the facility of mineral licensing and license administration.

Figure 4. 16 Facility service dimension level of satisfaction with MLAD



(Source: Own Survey Result, 2018)

4.8 Semi-Structured Interviews Narration

The base of annual work plan for Mineral Licensing and Administration directorate is Ethiopia's second growth and transformation plan (GTP II) and previous year performance on annual work plan execution. MLAD and other directorates at the Ministry of Mines and Petroleum prepare their annual work program in a way that will enable the Ministry to achieve the target put in the GTP II for the mining sector. MLAD managed to accomplish 22.9% of the 1.76 billion Ethiopian birr annual target on investment capital from foreign direct investment and 16.5% of 476.44 USD for 2017/2018 calendar year foreign currency earning from exporting gold, tantalum and marble. The trend of annual work plan execution shows a decrease especially in foreign currency earnings from mineral export. The factors for the decrease in foreign direct investment attraction are instability due to public unrest in Oromia and Benishangul regions that started in 2015/2016, lack of modern system for licensing and administering the various mining licenses and experienced staff turnover. And the factors for a decrease in foreign currency earning are illegal trading of gold mined by artisanal miners, a decrease in production from commercial gold mine, commercial gold mines that are thought to start production during GTP II have not yet started production due to instability in the regions and mining policy and legal issues in operating commercial mines. Currently the Ministry is actively participating in mining conferences and

trade forums in Australia, Canada and South Africa to benchmark leading practices of other countries and promote the mineral potential of Ethiopia for mining companies at the conferences.

In general, there is a decrease in the number of foreign companies applying for an exploration license in the past five years. Lack of coordination with regional mining offices, public unrest in parts of Ethiopia with favorable geological setting for gold and base metal exploration, bureaucracy at MoMP, negative perception about foreign companies by communities, fluctuation in the price of gold and lack of an online mineral licensing and administration system are mentioned as possible factors for the decrease in foreign companies applying for exploration licenses. Work execution of existing foreign exploration companies as per annual work program has also shown a decrease, especially for those exploration companies operating in Benishangul and Oromia regions due to mainly public unrest and lack of support by regional mining offices. The amount of time for granting an exploration license varies due to applicants coming with incomplete documents and the process of checking with the regional mining offices whether the area the applicant is applying for is not occupied.

There is no system in place to periodically capture customer feedback by MLAD but the problem mostly raised by lack of support from regional and woreda administration offices for foreign exploration companies. To improve service provision efficiency a new mineral licensing and administration system implementation has been agreed with a South African based company. This new system will enable license applicants to apply online from anywhere and the system will also enable them to check whether their area of interest overlaps with existing license or not and the system will also have a short demo video on the application procedures. Experts from MLAD are sent to other African countries, Europe and Canada to learn and apply leading practices in mineral licensing and administration in order to produce packages that will improve the licensing and administration practices with Ethiopian context.

Various changes are initiated at the ministry at various levels. Each directorate organized a change management team of five with a plan to improve service delivery. Two of the major changes that are believed to bring a positive change at the Ministry are the recently implemented balanced score card (BSC) system, which will enable the Ministry's staff to focus on agreed deliverables and also bring accountability on the execution of annual work plans submitted by the various directorates. The other implemented change is a modern computerized citizen charter that aims to enable transparency and efficiency in service provision. Until November 2018 the various directorates used a ledger for customers to write their feedback on the services they received, but currently the computerized citizen

charter system in place at the reception area of the ministry where customers get information on the types of services provided, who provides the service and on which floor and office number the service is provided. The new system also allows for customers to leave a voice or text message on their service experience. MLAD is currently in the process of acquiring a mineral licensing and administration system that is going to be implemented at the ministry and in all the regions, which will increase the efficiency of licensing and administration for various mining related licenses. Formerly due to lack of incentives most staff were change resistant, but now there is a change in mindset since the staff has started believing most of the changes that are initiated are actually going to enable them to accomplish their task with ease and efficiency.

Chapter Five: Summary of Findings, Conclusion and Recommendation

5.1 Summary of Findings

Foreign and joint venture exploration companies are on average dissatisfied on the reliability & responsiveness and communication dimensions of the service provided by the mineral licensing case team of MLAD. Analyzing the respondents' priority area for the reliability and responsiveness service dimension of the mineral licensing, time required to deliver the service ranks first as 71% of respondents replied the time required attribute of reliability and responsiveness is very important and it's the area they want addressed first by mineral licensing case team. The second and third attributes of the reliability and responsiveness service dimensions that foreign and joint venture exploration companies want to be addressed are for service staff to have up-to-date information and for service staff to be competent. Even though it is given that customers have to wait for the provision of services, their waiting experience are usually negative and in many cases may affect customer's overall satisfaction of the service (Piyush Kumar, Manohar U. Kalwani, and Maqbool Dada, 1998). In mineral exploration business time is more critical as lengthy waiting time without guarantee may cause the company to lose its power to attract shareholders. As exploration is a very risky business MLAD needs to consider reducing the amount of time the licensing process takes and assure customers that they will be provided with the service on the promised timeline.

“Firms today, realize that innovative and creative employees who hold the key to organizational knowledge provide a sustainable competitive advantage because unlike other resources, intellectual capital is difficult to imitate by competitors” (Thite, Mohan & Kavanagh, Michael, 2009). As competency of staff is the priority area that customers of MLAD would like to be addressed the Ministry in general and the directorate in particular need to give considerable attention for staff development through training, performance management system and performance based reward system to enhance the competency of the staff. A staff recognition culture for a job well done should be adopted by the Ministry and the mineral licensing directorate, excellent recognition effectively drives great work (Trent Kaufman, Joshua Christensen and Andrew Newton, 2015).

Simplified procedure is the attribute of the communication service dimension that foreign and JV companies want addressed by mineral licensing case team when applying for exploration licenses. 43%

of the respondents would like the mineral licensing case team to have a simplified procedure in place and 50% would like the mineral licensing case team to prioritize informing exploration license applicants everything they had to do in order to get the service. The primary goal of any business is ensuring growth through superior performance and high quality customer relationship is a key ingredient to differentiate a business from its competitors through communication, which is one of the key tools for ensuring quality customer relationship (Kasthuri Poovalingam, Dayaneethie Veerasamy, 2007). MLAD needs to improve its communication service dimension for both mineral licensing and license administration case teams. As indicated in figure 4.4 and figure 4.5, 50% of foreign and JV exploration companies are dissatisfied with mineral licensing case team's communication and 86% are neither satisfied nor dissatisfied with mineral license administration case team's communication.

Exploration companies are on average neither satisfied nor dissatisfied with the reliability & responsiveness and communication service dimensions of mineral license administration case team. 43% of foreign and joint venture exploration companies put provided up-to-date information and 32% put reduced service delivery time by MLA staff as priority attributes that need to be addressed for the reliability and responsiveness service dimension. Exploration companies have similar preference when it comes to the improvement of the communication service dimension of MLA as 43% of the respondents would also like the mineral license administration case team to have a simplified procedure in place and communicate that with the service staff and the exploration companies.

Foreign and JV exploration companies are on average satisfied with the facility of MLAD. However, the companies are on average dissatisfied with the accessibility of the service. 61% of respondents would like MLAD to give the highest priority to work on improving the various methods of service access such as internet, email, fax and telephone. As compared to African countries like Kenya ("Kenyan Ministry of Mining", 2014), Tanzania ("Tanzania Ministry of Energy and Minerals", 2014), Uganda ("Ugandan Ministry of Energy and Mineral Development", 2012) and South Sudan ("Minister of Petroleum and Mining in South Sudan", 2015) the mineral licensing and administration service provision lacks a robust online system that enables customers to view and apply for exploration licenses online. The unavailability of online viewing and applying service will have a negative impact on investor confidence and may become a stumbling block for foreign direct investment.

The findings of the interview from the planning monitoring and evaluation directorate director, mineral licensing and administration director and change management director of MoMP clearly shows

that there is a gap in service provision. There is a decline in foreign exploration companies apply for exploration licenses, even though part of this decline is due to public unrests, still the lack of systematic feedback capturing mechanism that should be initiated by MLAD rather than leaving it to the customers to reflect on a single service instance that could hide problems is a gap that needs attention by the directorate. The initiation of change by applying BSC, computerized system that inform customer on the available service and how to get them and the upcoming mineral licensing and administration system that will enable customers to apply online for various mineral exploration and exploitation licenses at MoMP indicates that positive steps are being taken towards addressing issues that reduce customer dissatisfaction and promote the mining sector. Awareness creation for MoMP staff and other stakeholders, continuous training for mineral licensing and administration officers at the federal and regional level and having a performance management system to enable performance based reward are necessary to sustain the initiated changes.

Overall the research was successful in answering the research questions which are satisfaction level of exploration companies exploring gold and base metal on the reliability, responsiveness, communication, service accessibility and facility service dimensions for the services provided by the mineral licensing case team, mineral license administration case team and MLAD. The research was also successful in identifying priority areas for service improvement on the assessed service dimensions.

5.2 Conclusion

Based on the analysis done on the satisfaction level of foreign and joint venture companies it was found that most of the companies are dissatisfied with the mineral licensing process. And the priority areas suggested by the exploration companies for service improvement are reducing the service delivery time, putting a simplified procedure in place and make available up-to-date information that inform applicants everything that they had to do in order to get mining related service. Some of the weaknesses of the mineral licensing process also identified from the ministry's side and remedial measures are being initiated such as implementing a system that will enable customers to apply for various licenses online. However, the system alone cannot bring change, it is the licensing and license administration staff at the federal and regional mining offices using the system can create a positive impact. And the fact that the

survey respondents put staff competency and staff with up to date information as their priority area for improvement, could serve as a basis for the Ministry to consider training and motivating the mineral licensing case team staff both at federal and regional level.

The license administration case team needs to consider finding ways to support the companies to complete their annual work program as per their agreement with the Ministry, as it is only through successful work program executions that new gold and base metal discoveries can be made and the desired foreign currency earnings from gold and base metal export becomes achievable.

5.3 Recommendations

Having a systematic periodic customer satisfaction survey as a feedback mechanism can help both the licensing and license administration case teams to identify, reduce and solve problems that the companies are facing.

It is also the aim of this research to encourage other researchers to propose and investigate other predictor variables such as infrastructure, political stability, local community relations of exploration companies, regional government support, woreda administration support, compensation and land rent related issues, etc. with the annual work program performance of exploration companies exploring gold and base metal and other minerals. Knowing which predictors affect performance the most will enable governing bodies to come up with policies, strategies and directives to address the problem there by accelerating exploration activities that lead to discoveries of economic deposits and ultimately increase the sectors contribution to Ethiopia's GDP.

It is also worth researching the impact of the initiated changes such as the use of BSC to increase staff efficiency and measure staff performance, the newly implemented computerized customer assistance system on the provided services and the upcoming mineral licensing and administration system, that will enable customers to apply for licenses online and make license administration efficient, once the systems are stabilized.

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Appendix-A Satisfaction Survey questionnaire

Foreign Mineral Exploration Companies Satisfaction Survey

This client satisfaction survey is used for descriptive and inferential analysis for a thesis as part of a fulfillment for an MBA in management. The data and analysis is believed to provide Ministry of mines with information that will assist in better serving foreign and joint venture mineral exploration companies exploring gold and base metal. This survey provides, foreign and joint venture gold and base metal companies, with the opportunity to tell how MoME is doing regarding mineral licensing and administration and how it can improve. The researcher highly values the time you take to complete this survey. Your response will remain anonymous as the researcher summarizes responses from 35 foreign exploration companies and will not disclose the identity of the respondents to any other party. If you have any questions about this survey and the use of this information feel free to contact the researcher either by phone (+251911530984) or through email (fitsuma12@gmail.com). Thank you!

Demographic data (Please choose one)

A. Your position

1. Country Manager
2. Project Manager
3. Exploration Manager
4. Senior Exploration Geologist
5. Exploration Geologist
6. Other. Please specify _____

B. Your total years of experience in the mining industry

1. 1 to 5 years
2. 6 to 10 years
3. More than 10 years

C. Type of Exploration Company

1. Foreign exploration company
2. Joint venture exploration company (between two or more foreign companies)
3. Joint venture exploration company (between foreign and Ethiopian exploration companies)

D. Exploration period that your company is at

1. 1st year Exploration period
2. 2nd year exploration period
3. 3rd year exploration period
4. More than 3 years in the exploration period

E. Which part of Ethiopia your company conducts its exploration

1. Afar
2. Oromia
3. Benishangul
4. Gambela
5. Tigray
6. Other please Specify _____

F. Your level of Education

1. Diploma
2. First degree
3. Postgraduate degree
4. Ph.D.

G. Your age

1. 18 to 24
2. 25 to 34
3. 35 to 49
4. 50 to 64
5. 65+ years

H. Sex

1. Female
2. Male

Mineral licensing service is a service provided by mineral licensing sub process which issues mineral operation licenses to investors that full fill the requirement in accordance with mining laws.

Please circle the response that best describes your satisfaction with the following aspects of Mineral licensing service.

	How satisfied were you with this aspect of the service? 1 = Very Dissatisfied 2 = Dissatisfied 3 = Neutral 4 = Satisfied 5 = Very Satisfied N/A – Not Applicable	How important is this aspect of the service to you? 1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important N/A – Not Applicable
A. Time required to deliver the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
B. Number of contacts with the organization required to receive the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
C. Waiting time at the service location.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
D. Number of people dealt with to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
E. The service was provided in a fair and equitable manner.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
F. It was clear what to do if I had a problem.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Service staff were:		
G. Courteous	1 2 3 4 5 N/A	1 2 3 4 5 N/A
H. Helpful	1 2 3 4 5 N/A	1 2 3 4 5 N/A
I. Good listeners	1 2 3 4 5 N/A	1 2 3 4 5 N/A
J. Competent	1 2 3 4 5 N/A	1 2 3 4 5 N/A
K. Had up-to-date information	1 2 3 4 5 N/A	1 2 3 4 5 N/A
L. Respectful	1 2 3 4 5 N/A	1 2 3 4 5 N/A
M. Flexible	1 2 3 4 5 N/A	1 2 3 4 5 N/A
N. Met my safety and security needs	1 2 3 4 5 N/A	1 2 3 4 5 N/A
O. Protected my privacy/confidentiality	1 2 3 4 5 N/A	1 2 3 4 5 N/A
P. Overall, how satisfied were you with the way the service was provided by the service staff?	1 2 3 4 5 N/A	

Q. If mineral licensing sub process could only improve in **three of the above areas, which should it focus on? **Please circle three.****

A B C D E F G H I J K L M N O

To receive the mineral licensing service a number of aspects of mineral licensing sub process communications with you may have affected your experience. Please circle the response that best describes your service experience.

	How satisfied were you with this aspect of the service? 1 = Very Dissatisfied 2 = Dissatisfied 3 = Neutral 4 = Satisfied 5 = Very Satisfied N/A – Not Applicable	How important is this aspect of the service to you? 1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important N/A – Not Applicable
In receiving mineral licensing services:		
A. My questions were answered.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
B. The information that I needed was available.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
C. I received consistent information/advice.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
D. Written and verbal language was clear (e.g., not complicated).	1 2 3 4 5 N/A	1 2 3 4 5 N/A
E. I had a choice of English language	1 2 3 4 5 N/A	1 2 3 4 5 N/A
F. Service staff were easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
G. Documents and other information were easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
H. Forms were easy to understand and fill out.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
I. Procedures were straight forward and easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
J. It was easy to find out how to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
K. I was informed of everything I had to do in order to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
L. How satisfied were you regarding communications?	1 2 3 4 5 N/A	

M. If mineral licensing sub process could only improve in three of the above areas, which should it focus on? Please circle three.
A B C D E F G H I J K

Please leave your comment regarding mineral licensing service taking into account your expectation of the service and your perceived experience at the mineral licensing case team.

Mineral license administration case team follows up and administers reconnaissance, exploration and small & large scale mining licenses which are issued by the Ministry. The administration process includes handling annual reports, work programs, work permits, tax free privilege facilitation, support letters and sample export facilitation for laboratory analysis.

Please circle the response that best describes your satisfaction with the following aspects of Mineral license administration service.

	How satisfied were you with this aspect of the service? 1 = Very Dissatisfied 2 = Dissatisfied 3 = Neutral 4 = Satisfied 5 = Very Satisfied N/A – Not Applicable	How important is this aspect of the service to you? 1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important N/A – Not Applicable
A. Time required to deliver the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
B. Number of contacts with the organization required to receive the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
C. Waiting time at the service location.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
D. Number of people dealt with to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
E. The service was provided in a fair and equitable manner.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
F. It was clear what to do if I had a problem.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Service staff were:		
G. Courteous	1 2 3 4 5 N/A	1 2 3 4 5 N/A
H. Helpful	1 2 3 4 5 N/A	1 2 3 4 5 N/A
I. Good listeners	1 2 3 4 5 N/A	1 2 3 4 5 N/A
J. Competent	1 2 3 4 5 N/A	1 2 3 4 5 N/A
K. Had up-to-date information	1 2 3 4 5 N/A	1 2 3 4 5 N/A
L. Respectful	1 2 3 4 5 N/A	1 2 3 4 5 N/A
M. Flexible	1 2 3 4 5 N/A	1 2 3 4 5 N/A
N. Met my safety and security needs	1 2 3 4 5 N/A	1 2 3 4 5 N/A
O. Protected my privacy/confidentiality	1 2 3 4 5 N/A	1 2 3 4 5 N/A
P. Overall, how satisfied were you with the way the service was provided by the service staff?	1 2 3 4 5 N/A	

Q. If Mineral license administration sub process could only improve in **three** of the above areas, which should it focus on?

Please circle three.

A B C D E F G H I J K L M N O

To receive the Mineral license administration service a number of aspects of Mineral license administration case team communications with you may have affected your experience. Please circle the response that best describes your service experience.

	How satisfied were you with this aspect of the service? 1 = Very Dissatisfied 2 = Dissatisfied 3 = Neutral 4 = Satisfied 5 = Very Satisfied N/A – Not Applicable	How important is this aspect of the service to you? 1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important N/A – Not Applicable
In receiving mineral licensing services:		
A. My questions were answered.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
B. The information that I needed was available.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
C. I received consistent information/advice.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
D. Written and verbal language was clear (e.g., not complicated).	1 2 3 4 5 N/A	1 2 3 4 5 N/A
E. I had a choice of English language	1 2 3 4 5 N/A	1 2 3 4 5 N/A
F. Service staff were easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
G. Documents and other information were easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
H. Forms were easy to understand and fill out.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
I. Procedures were straight forward and easy to understand.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
J. It was easy to find out how to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
K. I was informed of everything I had to do in order to get the service.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
L. How satisfied were you regarding communications?	1 2 3 4 5 N/A	

M. If Mineral license administration sub process could only improve in three of the above areas, which should it focus on? Please circle three.

A B C D E F G H I J K

Please leave your comment regarding mineral license administration service taking into account your expectation of the service and your perceived experience at the mineral license administration case team

Please circle the answer that best describes your experience in the below areas of mineral licensing and administration service.

	How satisfied were you with this aspect of the service? 1 = Very Dissatisfied 2 = Dissatisfied 3 = Neutral 4 = Satisfied 5 = Very Satisfied N/A – Not Applicable	How important is this aspect of the service to you? 1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important N/A – Not Applicable
Facility that provided mineral licensing services:		
A. Was easily accessible by telephone	1 2 3 4 5 N/A	1 2 3 4 5 N/A
B. Was conveniently located	1 2 3 4 5 N/A	1 2 3 4 5 N/A
C. Had adequate hours of service	1 2 3 4 5 N/A	1 2 3 4 5 N/A
D. Had adequate parking	1 2 3 4 5 N/A	1 2 3 4 5 N/A
E. Was easily accessible (e.g., there were no barriers to physically entering and using the buildings)	1 2 3 4 5 N/A	1 2 3 4 5 N/A
F. Had offices and waiting areas that were comfortable	1 2 3 4 5 N/A	1 2 3 4 5 N/A
G. Had signs that were easy to locate	1 2 3 4 5 N/A	1 2 3 4 5 N/A
H. Had signs that were easy to understand	1 2 3 4 5 N/A	1 2 3 4 5 N/A
I. Appointments with service staff were easy to make	1 2 3 4 5 N/A	1 2 3 4 5 N/A
J. Offered various methods of access (i.e., fax, internet, telephone, e-mail)	1 2 3 4 5 N/A	1 2 3 4 5 N/A
K. Overall, how satisfied were you with the accessibility of the service?	1 2 3 4 5 N/A	
L. Overall, how satisfied were you with the facilities for the service?	1 2 3 4 5 N/A	

M. If mineral licensing sub process could only improve in three of the above areas, which should it focus on? Please circle three.

A B C D E F G H I J

Please leave your comment regarding mineral licensing and administration directorate service taking into account your expectation of the service and your perceived experience at the mineral licensing and administration directorate.

Appendix-B Questions for Semi Structured Interview

Questions for semi structured interview with planning, monitoring and evaluation directorate director

1. What is the base for each directorates annual plan?
2. What is the percentage of annual work plan execution for the previous year by MLAD? And what is the trend on annual plan execution for the past five years by MLAD?
3. What are the factors for the trend in annual work plan execution by MLAD?
4. What remedial measures are taken or are being considered to promote foreign direct investment on the mining sector?
5. What customer feedback mechanism is in place to address customers concern in a timely manner, especially to retain existing foreign exploration companies and to attract new ones?

Questions for semi structured interview with mineral licensing and administration directorate director

1. Is the number of foreign exploration companies applying for gold and base metal exploration increasing or decreasing in the past five years?
2. What are the possible factors for the increase or decrease in applications for gold and base metal exploration by foreign exploration companies?
3. On average how long does it take for a foreign exploration company to obtain an exploration license for gold and base metal?
4. Is the annual work plan execution by foreign and joint venture exploration companies meet their submitted work program or is it below their submitted work program?
5. What are the possible factors for exploration companies executing their annual work program below the agreed work plan with MLAD?
6. Is there a clear procedure online, which informs everything that foreign mineral exploration companies have to do to get an exploration license from MLAD?
7. Is there a periodic satisfaction survey conducted by MLAD to address areas for service improvement? If so what are the areas customers seek service improvement?

Questions for semi structured interview with change management directorate director

1. What changes are initiated in the past two years? And what was the reason for initiating those changes?
2. Is there any specific change initiated for MLAD?
3. What is the view on initiated changes by the staff of the Ministry in general and by the staff of MLAD in particular?

**Appendix-C Survey responses for the service dimensions
Mineral License Administration Reliability and Responsiveness**

No.	A. Time required to deliver the service.	B. Number of contacts with the organization required to receive the service.	C. Waiting time at the service location.	D. Number of people dealt with to get the service.	E. The service was provided in a fair and equitable manner.	F. It was clear what to do if I had a problem.	G. Service staff were courteous	H. Service staff were Helpful
1	2	4	2	3	3	2	3	2
2	2	3	2	3	3	2	3	3
3	2	3	3	3	3	2	3	3
4	3	3	2	3	3	1	2	2
5	3	4	4	4	3	2	3	4
6	5	5	5	5	5	5	5	5
7	4	3	4	3	4	2	4	4
8	3	3	3	4	3	2	4	4
9	3	3	4	3	2	2	3	3
10	3	3	2	3	4	2	2	2
11	2	2	3	3	1	2	3	3
12	4	4	4	3	4	3	4	4
13	3	3	4	3	4	3	3	4
14	3	3	3	4	3	3	3	4
15	3	3	3	3	3	2	3	3
16	3	3	4	4	4	3	3	3
17	4	3	4	4	4	3	4	4
18	2	3	2	2	2	1	2	2
19	2	3	4	4	3	2	4	4
20	3	3	2	3	4	2	2	2
21	4	4	4	3	3	2	4	4
22	3	4	3	3	4	3	3	4
23	3	3	3	3	3	2	3	3
24	4	4	3	4	4	3	4	4
25	3	3	3	4	4	3	3	4
26	3	2	3	2	3	2	3	3
27	4	4	4	4	3	2	3	4
28	3	3	3	3	3	2	2	3

Mineral License Administration Reliability and Responsiveness (Continued)

No.	I. Service Staff were Good listeners	J. Service staff were Competent	K. Service staff Had up-to-date information	L. Service staff were Respectful	M. Service staff were Flexible	N. Service staff Met my safety and security needs	O. Service staff Protected my privacy /confidentiality	P. Overall, how satisfied were you with the way the service was provided by the service staff?	If Mineral license administration case team could only improve in three of the above areas, which should it focus on? Please select three.
1	3	2	2	3	2	3	3	3	J, K, M
2	3	2	1	3	2	3	3	2	F, J, M
3	3	2	1	4	2	3	3	3	A, F, K
4	3	2	2	3	3	3	3	2	A, F
5	3	1	1	4	3	3	3	3	F, J
6	5	5	5	5	4	5	5	5	M
7	3	3	2	4	2	3	3	3	E, K
8	3	3	3	4	3	3	3	3	J, K, M
9	3	2	1	4	3	2	2	2	
10	2	2	3	2	1	0	4	3	E, H, K
11	3	2	2	4	3	3	2	2	A, K
12	3	4	3	4	3	3	2	4	K, M
13	4	3	3	4	3	3	3	3	A, K
14	3	3	2	4	3	0	3	4	A, M
15	3	3	2	4	3	0	3	3	A, K
16	3	3	2	4	3	0	3	4	A, F, J
17	4	3	3	4	3	4	3	4	K, L
18	2	1	1	2	3	0	0	2	A, F
19	3	3	2	4	3	3	4	4	K
20	2	2	3	2	1	0	4	3	E, H, K
21	3	3	2	4	3	0	4	4	I, K
22	3	4	3	4	3	3	4	4	K, M
23	3	3	2	3	2	3	4	3	A, J
24	4	4	3	4	4	3	4	4	
25	3	3	3	4	2	4	4	3	F
26	3	3	2	4	3	3	3	3	A, F
27	3	4	3	4	3	3	4	4	F
28	3	3	2	4	2	3	3	3	F

Mineral License Administration Communication

No.	A. My questions were answered.	B. The information that I needed was available.	C. I received consistent information/advice.	D. Written and verbal language was clear (e.g.,not complicated).	E. I had a choice of English language.	F. Service staff were easy to understand.	G. Documents and other information were easy to understand.	H. Forms were easy to understand and fill out.
1	2	2	3	4	4	3	2	4
2	2	2	3	3	4	2	3	4
3	3	2	3	4	4	3	3	4
4	3	2	3	3	4	3	2	4
5	3	2	3	4	4	3	2	4
6	5	5	5	5	4	5	5	5
7	3	3	2	4	4	3	2	4
8	3	3	3	4	4	3	2	4
9	3	2	2	3	4	3	3	4
10	3	4	3	4	5	3	3	4
11	2	3	3	4	4	3	4	4
12	4	3	3	4	4	4	3	4
13	3	3	3	4	4	3	4	4
14	3	3	3	4	4	3	3	4
15	3	3	3	3	4	3	3	4
16	3	3	3	4	4	3	3	4
17	3	3	3	4	4	3	3	4
18	1	2	2	3	4	3	3	4
19	3	4	3	4	5	3	3	4
20	4	2	4	3	5	3	4	4
21	3	3	3	4	4	3	4	4
22	3	3	2	3	4	2	3	4
23	3	4	4	4	4	4	3	4
24	4	3	3	4	4	4	3	4
25	3	3	3	4	4	3	3	4
26	2	3	3	4	4	4	3	4
27	4	3	3	4	4	4	3	4
28	3	3	2	3	4	3	3	4

Mineral License Administration Communication (Continued)

No.	I. Procedures were straight forward and easy to understand.	J. It was easy to find out how to get the service.	K. I was informed of everything I had to do in order to get the service.	L. How Satisfied were you regarding communications?	If mineral license administration case team sub process could only improve in three of the above areas, which should it focus on? Please select three.
1	2	2	1	2	A, F, K
2	1	2	1	2	B, I, K
3	2	3	2	2	B, I, K
4	2	3	2	2	G, I, J
5	2	2	1	3	A, B, G
6	5	4	5	5	J
7	3	3	2	3	G, J, K
8	3	3	2	3	G, J, K
9	1	3	2	2	
10	4	3	2	4	C, I, K
11	2	3	2	3	K
12	3	3	2	3	I, K
13	3	3	3	3	I, J, K
14	3	3	2	3	I, K
15	3	3	3	3	A, I
16	3	3	2	3	I, K
17	2	3	2	3	I, K
18	2	3	2	2	A, K
19	2	2	1	2	K
20	4	3	2	4	C, I, K
21	3	3	3	4	I, K
22	4	3	1	3	K
23	3	3	2	4	K
24	3	4	3	4	
25	2	3	2	3	I, K
26	2	3	2	3	K
27	2	3	3	3	I, K
28	3	4	1	3	K

Mineral Licensing Reliability and Responsiveness

No.	A. Time required to deliver the service.	B. Number of contacts with the organization required to receive the service.	C. Waiting time at the service location.	D. Number of people dealt with to get the service.	E. The service was provided in a fair and equitable manner.	F. It was clear what to do if I had a problem.	G. Service staff were courteous	H. Service staff were Helpful
1	1	3	2	2	3	2	3	3
2	3	3	3	3	3	1	3	3
3	2	4	3	4	3	2	3	3
4	2	3	3	4	3	2	3	4
5	1	3	2	2	3	1	2	2
6	2	2	2	3	3	2	2	3
7	3	3	2	3	2	2	3	3
8	2	3	3	3	3	2	3	3
9	1	3	2	3	2	1	2	2
10	2	2	3	3	3	2	2	3
11	1	3	2	4	2	2	2	3
12	1	3	2	3	2	3	3	3
13	2	4	3	3	4	2	3	3
14	1	3	3	3	2	2	3	3
15	2	3	2	3	3	2	3	2
16	2	2	2	2	2	2	3	3
17	1	3	1	1	1	1	2	1
18	1	3	1	3	3	2	3	3
19	1	3	1	1	3	1	2	2
20	2	2	3	3	3	2	2	3
21	2	3	2	3	3	1	3	2
22	2	3	3	3	2	1	3	2
23	1	3	2	3	2	1	2	2
24	2	3	3	3	2	3	3	3
25	1	2	2	2	2	2	2	3
26	1	3	3	3	3	2	2	2
27	2	3	3	3	3	1	2	2
28	1	2	2	2	2	2	2	3

Mineral Licensing Reliability and Responsiveness (Continued)

No.	I. Service Staff were Good listeners	J. Service staff were Competent	K. Service staff Had up-to-date information	L. Service staff were Respectful	M. Service staff were Flexible	N. Service staff Met my safety and security needs	O. Service staff Protected my privacy/confidentiality	P. Overall, how satisfied were you	If Mineral licensing case team could only improve in three of the above areas, which should it focus on?
1	3	2	2	4	2	3	3	2	A, J, K
2	3	2	1	3	3	2	3	3	A, F, K
3	3	2	3	3	2	4	3	3	F, K
4	3	2	1	4	3	3	3	3	C, J
5	3	1	1	3	2	3	2	1	F, K
6	3	3	1	4	2	4	4	2	F, K, M
7	3	2	2	3	2	3	3	2	A, K, M
8	3	2	2	3	2	0	3	2	A, F, J
9	3	1	1	3	2	3	2	1	
10	3	2	2	3	2	3	3	2	A, J
11	2	1	1	3	2	0	3	2	A, K
12	3	2	2	4	2	3	2	2	A, K, M
13	3	1	2	4	3	0	3	2	J, K, M
14	2	3	2	4	2	3	3	2	A
15	2	1	2	3	2	3	3	2	A, K
16	3	2	1	3	3	0	3	1	J
17	1	1	1	3	1	3	1	2	A, J
18	3	2	1	3	3	3	3	1	A
19	2	1	1	2	1	4	3	3	A, K
20	3	2	2	3	2	3	3	2	A
21	2	1	2	3	2	0	3	2	A, F
22	3	2	2	3	2	0	3	2	A, F, J
23	3	1	2	3	1	3	3	3	A, J
24	3	2	3	3	3	3	4	2	A
25	3	2	2	3	2	3	4	2	A
26	3	1	3	4	3	3	3	2	A
27	2	2	3	3	2	0	3	2	A
28	2	2	3	3	2	0	3	2	

Mineral Licensing Communication

No.	A. My questions were answered.	B. The information that I needed was available.	C. I received consistent information/advice.	D. Written and verbal language was clear (e.g.,not complicated).	E. I had a choice of English language	F. Service staff was easy to understand.	G. Documents and other information were easy to understand.	H. Forms were easy to understand and fill out.
1	2	2	2	4	4	3	2	4
2	3	2	2	3	4	3	2	4
3	3	2	3	3	4	3	2	4
4	3	2	3	4	4	3	2	3
5	1	1	2	3	4	3	3	4
6	2	1	2	3	4	3	2	4
7	1	2	2	4	4	3	3	3
8	2	3	2	3	4	3	3	4
9	1	1	2	4	4	3	3	4
10	3	3	2	3	4	3	3	4
11	2	3	3	3	4	3	3	4
12	2	2	3	4	4	3	2	4
13	3	2	2	4	5	3	3	4
14	2	1	3	4	4	3	3	4
15	2	3	2	3	4	3	2	4
16	2	2	3	4	4	3	3	4
17	1	1	1	1	3	1	1	4
18	3	3	3	3	4	3	2	3
19	2	3	2	3	4	3	2	4
20	3	3	2	3	4	3	3	4
21	2	2	1	3	4	4	2	4
22	2	3	2	3	5	3	3	3
23	3	3	3	4	4	3	3	4
24	2	3	3	5	4	3	4	4
25	2	2	2	3	4	3	2	4
26	3	2	3	3	4	3	3	4
27	2	2	2	3	4	3	3	3
28	3	2	2	3	4	3	3	4

Mineral Licensing Communication (Continued)

No.	I. Procedures were straight forward and easy to understand.	J. It was easy to find out how to get the service.	K. I was informed of everything I had to do in order to get the service.	L. How satisfied were you regarding communications?	If mineral license administration case team sub process could only improve in three of the above areas, which should it focus on? Please select three.
1	2	2	2	2	B, I, K
2	2	3	2	2	B, G, I
3	2	2	2	3	G, I
4	1	2	2	2	B, J, K
5	1	2	2	1	A, J, K
6	1	2	2	2	A, I, K
7	2	3	1	2	A, J
8	2	3	2	3	A, K
9	2	1	1	2	K
10	2	2	1	3	I, K
11	1	2	1	2	I, K
12	2	3	3	2	I
13	1	3	1	1	C, I, K
14	1	3	2	2	I, K
15	2	3	2	2	K
16	2	3	2	2	I, K
17	1	1	1	1	I
18	1	3	1	2	A, I, K
19	1	1	1	2	I, K
20	2	2	1	3	I, K
21	1	3	3	2	I
22	1	3	1	2	I, K
23	2	3	1	3	I, K
24	3	3	3	3	A, K
25	2	3	2	2	A, K
26	2	3	1	3	K
27	3	2	2	2	K
28	2	2	2	2	I, K

Mineral licensing and administration directorate facility

No.	B. The facility was conveniently located	C. The facility had adequate hours of service	D. The facility had adequate parking	E. Was easily accessible (e.g., there were no barriers to physically entering and using the buildings)	F. The facility had offices and waiting areas that were comfortable	G. The facility had signs that were easy to locate	H. The facility had signs that were easy to understand	L. Overall, how Satisfied were you with the facilities for the service?
1	4	2	4	4	3	3	3	4
2	4	2	4	4	4	4	4	4
3	4	4	4	4	3	4	4	4
4	4	3	4	4	3	4	4	4
5	4	4	4	5	3	4	3	4
6	4	3	4	4	3	4	4	4
7	4	3	4	4	4	4	3	4
8	5	4	4	4	4	4	3	4
9	4	3	4	4	4	4	4	5
10	4	4	4	4	3	4	4	4
11	4	4	4	4	3	4	4	4
12	5	4	5	4	4	4	4	4
13	4	3	4	4	4	4	4	4
14	4	3	4	5	4	4	4	4
15	3	3	4	4	3	4	4	3
16	4	4	4	4	4	4	4	4
17	4	3	5	5	4	4	4	1
18	5	4	5	5	4	4	4	4
19	4	4	5	5	4	5	4	4
20	4	4	4	4	3	4	4	4
21	3	3	4	4	3	4	3	3
22	3	3	4	4	3	4	3	3
23	3	4	4	4	4	4	4	4
24	5	4	4	4	4	4	4	4
25	4	4	4	4	3	4	4	4
26	3	3	4	4	3	4	4	3
27	3	3	4	4	3	4	4	4
28	4	4	4	4	4	4	4	4

Mineral licensing and administration directorate services accessibility

No.	A. The service was easily accessible by telephone	I. Appointments with service staff were easy to make	J. Offered various methods of access (i.e., fax,internet, telephone, e-mail)	K. Overall, how satisfied were you with the accessibility of the service?	M. If mineral licensing and mineral license administration case teams could only improve in three of the above areas, which should they focus on? Please select three.
1	2	2	1	3	C, I, J
2	1	2	1	2	C, I, J
3	1	2	2	3	A, I, J
4	2	2	2	3	A, C, J
5	1	2	1	2	C, I
6	2	2	2	3	G, I, J
7	1	1	2	3	C, I
8	2	1	1	3	A, C, I, J
9	1	2	1	2	J
10	2	3	2	3	J
11	2	4	2	3	A, J
12	2	2	2	3	A, J
13	3	3	3	3	A, I, J
14	2	2	1	3	A, J
15	2	2	1	2	A, J
16	2	3	2	3	A, J
17	1	1	2	1	A
18	2	2	1	2	A, J
19	3	2	2	3	A, J
20	2	3	2	3	J
21	2	3	2	3	J
22	3	3	2	2	J
23	2	3	3	4	J
24	3	3	3	3	A, J
25	3	2	2	3	I
26	2	2	1	2	A
27	2	2	2	3	J
28	3	3	2	3	J