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Strategy

**Review of the Adoption of TQM Models and the
Achieved Sustainable Business Results in the MENA
Telecommunication Industry**

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Abstract

Purpose: Understanding the criticality of the telecommunication industry in the current time and appreciating the significance of adopting total quality management models in organizations to extend business sustainability. This paper provides a comparison between two telecommunication leaders in the MENA region: Zain & Etisalat, to assess their adoption of TQM models and the impact on their organizational and market success.

Methodology: this study uses a comparative case study. a mixed-methods methodology was applied, combining quantitative and qualitative data. Primary data collection methods included surveys given to employees at different levels to gauge the internal effects of TQM models on operational efficiency and employee satisfaction, as well as semi-structured interviews with key management personnel from both companies, aimed at gaining insights into the implementation and outcomes of TQM practices. Secondary data came from a number of sources, such as government publications that described TQM adoption and telecommunication trends, market analysis and financial performance data from industry databases like Statista, annual reports and official documentation from Zain and Etisalat, and relevant quality management certifications and standards (like ISO 9001:2015). Thematic analysis of interview transcripts to find recurring themes and implementation insights, content analysis of company reports and publications to evaluate the strategic alignment and integration of TQM models, and case study analysis to compare and contrast Zain and Etisalat's approaches to adopting and implementing TQM models were some of the qualitative data analysis techniques used.

Findings: The study found that the adoption of TQM models like EFQM, Kaizen and Lean six sigma across the whole organization is more effective than localizing the application to one aspect as indicated by the comparison between Zain & Etisalat. The comparison indicated that the application of TQM extended the sustainability and resilience of Etisalat and Zain in the face of business challenges by improving performance and streamlining processes to increase customer satisfaction.

Unique Contribution to Theory, Practice and Policy: The study recommended that both Etisalat and Zain should consider incorporating sustainability practices into their TQM frameworks, given the growing focus on corporate social responsibility and sustainability. This could be illustrating a dedication to sustainable business practices by coordinating Kaizen and Lean Six Sigma initiatives with objectives related to social responsibility and the environment. To improve the synergy between Kaizen, EFQM, and Lean Six Sigma initiatives, both companies should foster cross-functional collaboration.

Keywords: TQM, Kaizen, EFQM, Telecommunication

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INTRODUCTION

Today, the telecommunication industry is a pivotal part of connecting the world together. Telecommunication has developed rapidly during the last decades, from the early days of radio and wired network to the quick wireless network and 5G network. It used to be limited to transferring voice only, but it developed to transfer data, audio, or video despite the physical distance between communicators (Chai & Lazar, 2023). Recently, 5G networks are one of the latest technologies introduced by the telecommunication industry. The 5G networks overcame the crowd density's effect on 4G. As a result, most of the world's population are consumers of the telecommunication field. Appreciating the global scale of the telecommunication industry, this paper will critically assess the adoption of Total Quality Management (TQM) models and their effect on the sustainability of businesses in the MENA region.

We've conducted a simple comparison between the leading telecommunication providers: Etisalat and Zain. Etisalat is a telecommunication company based in the UAE. It was established in 1976 under the name 'Etisalat'. In 2018 Etisalat has launched the 5G network, becoming the first company to implement the technology in the MENA region. In 2023, Etisalat is operating across 16 countries in the MEA region. The second telecommunication company is Zain. Established in Kuwait in 1983, Zain has expanded rapidly and has 7 branches around Middle East and Africa (www.kw.zain.com, n.d.).

As per (Statista, 2023), Etisalat brand value places them in a higher position than Zain. Etisalat's value is about USD 10.4 Billion while zain is valued around USD 2.7 billion. This difference shown in the figure below is due to several factors, such as company performance and market share.

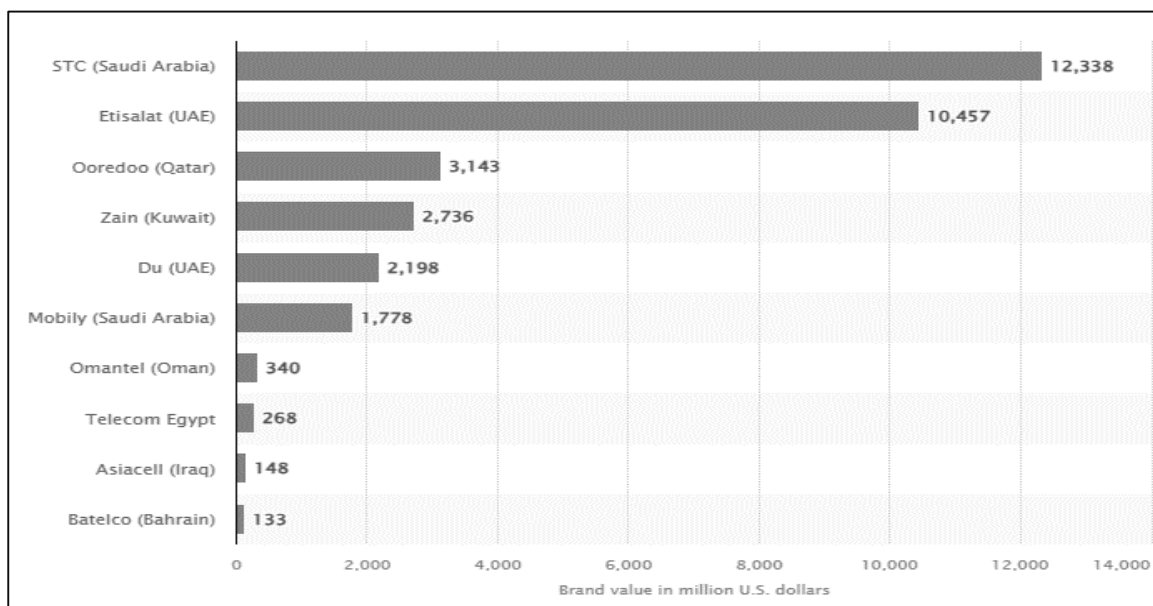


Figure 1: Market Value of Telecommunication Companies in the Middle East.

LITERATURE REVIEW

The global telecommunications sector, which propels economic growth, has deliberately adopted Business Excellence Models and Total Quality Management (TQM) to guarantee its long-term viability (Dieter et al., 2018; Qiang et al., 2017). Telecommunications businesses in the UAE are not only leaders in the provision of communication services, but also in the use

of Total Quality Management approaches. The strategy framework of these firms is shaped by the integration of TQM models, including Lean Six Sigma, the five principles of Kaizen, and the strict observance of international quality standards, such as ISO certifications (Abdelmawla & Chathoth, 2019). These programs ensure operational excellence, meet or exceed international quality norms, and are more than just theoretical frameworks—they are useful tools that improve and optimize services.

Beyond only offering basic access, the UAE is deeply committed to the telecommunications industry, investing significant financial resources in the development of resilient infrastructure and the integration of cutting-edge technology, most notably the ground-breaking 5G. According to Ministry of Economy projections, the telecom market in the UAE is anticipated to grow at a Compound Annual Growth Rate (CAGR) of 3.5% between 2022 and 2027 (Investigating the ICT sector in the UAE, n.d.). This is a strong forecast. In order to increase market competitiveness, these expenditures are supplemented by forward-thinking government programs like the Smart Dubai Plan, which focuses on digital transformation in the telecoms industry (El Khatib et al., 2022). The convergence of financial commitments, technology improvements, and TQM methods highlights the crucial role that quality management plays in determining the direction that the telecommunications sector will take.

The telecommunication sector's growth throughout the larger Middle East and North Africa (MENA) region, which includes thriving markets like Saudi Arabia, Egypt, and Qatar, is consistent with its dedication to both innovation and operational excellence. The region's approach is characterized by significant financial commitments to the development of infrastructure and the adoption of innovative technology. As strong frameworks for assessing and improving organizational performance, business excellence models, like the EFQM Excellence Model, are used in this context (Lyytinen & Yoo, 2002; Raghavan, 2019). Simultaneously, Kaizen, one of the TQM tools, is a great example of how to drive continuous improvement and guarantee increased customer satisfaction. This synthesis of models in localized contexts demonstrates how flexible and universally applicable TQM concepts are in promoting advancement and innovation.

The rise of over-the-top (OTT) services has completely changed the global environment for the telecommunications sector, requiring new approaches to income generating. In this dynamic environment, Lean Six Sigma and many TQM methodologies become vital instruments that help telecommunication firms improve customer satisfaction and streamline operations (Bouwman et al., 2009). Examining the telecommunication and ICT sector in Jordan in detail offers a thorough framework for TQM evaluation. The overall success of TQM initiatives is influenced by a number of factors, including supplier relationships, organizational culture, quality information systems, policy and strategy planning, customer satisfaction, employee empowerment and training, top management commitment, quality communication and structure, quality measurement and benchmarking, and continuous improvement (Twaissi, 2008). This comprehensive strategy provides a sophisticated view of TQM implementation across many situations by acknowledging the intricate interplay of elements influencing its outcomes.

In summary, this comprehensive analysis of the adoption of TQM in the telecommunications sector highlights the critical role that TQM plays in the success of organizations. According to the literature, TQM is considered to be a practical necessity for navigating the complexities of the contemporary telecommunications industry, as seen by the strategic application of TQM models in the UAE and their numerous applications in the MENA region and worldwide. These

revelations open the door to a deeper comprehension of how TQM affects market viability and organizational sustainability.

METHODOLOGY

With a particular focus on Zain and Etisalat, this study uses a comparative case study methodology to assess the adoption and effects of Total Quality Management (TQM) approaches in the MENA region's telecommunications sector. To provide a thorough evaluation, a mixed-methods methodology was applied, combining quantitative and qualitative data. There were multiple steps involved in gathering data. To create a theoretical framework, a thorough literature analysis was carried out, utilizing official publications from both firms, industry reports, and scholarly journals. The use of TQM methods, including Kaizen, Lean Six Sigma, and the EFQM Excellence Model, in the telecommunications industry was the main emphasis of this review.

Secondary data came from a number of sources, such as government publications that described TQM adoption and telecommunication trends, market analysis and financial performance data from industry databases like Statista, annual reports and official documentation from Zain and Etisalat, and relevant quality management certifications and standards (like ISO 9001:2015). Primary data collection methods included surveys given to employees at different levels to gauge the internal effects of TQM models on operational efficiency and employee satisfaction, as well as semi-structured interviews with key management personnel from both companies, aimed at gaining insights into the implementation and outcomes of TQM practices.

In quantitative data analysis, key performance indicators (KPIs) of Zain and Etisalat were statistically compared. Examples of KPIs were customer satisfaction scores, productivity rates, and service response times. In order to establish a relationship between the adoption of TQM and market success, financial performance variables like revenue growth, market share, and brand value were examined. TQM practices were also benchmarked against worldwide standards in order to assess their efficacy. Thematic analysis of interview transcripts to find recurring themes and implementation insights, content analysis of company reports and publications to evaluate the strategic alignment and integration of TQM models, and case study analysis to compare and contrast Zain and Etisalat's approaches to adopting and implementing TQM models were some of the qualitative data analysis techniques used.

This technique of data sources was carried out to verify findings and lessen bias in order to guarantee the validity and reliability of the study. To ensure uniformity, standardized procedures were followed for surveys and interviews, and subject-matter experts carried out peer reviews of the research design and analytic techniques. Achieving confidentiality and anonymity, getting each participant's informed agreement, and adhering to ethical research norms and guidelines were all ethical considerations. With the goal of offering a thorough and impartial comparison of TQM adoption between Etisalat and Zain, this rigorous methodology hopes to provide light on strategic management techniques used by the MENA region's telecom sector.

TQM Models Applications- Zain Telecommunication

Lean Six Sigma

Zain has successfully implemented Lean Six Sigma in their TQM practices. This approach aligns with the business's mission to increase productivity and client happiness by decreasing operational waste and variance. Subsequently, Zain has optimized network performance and maintained high-quality services for its consumers by adopting the Lean Six Sigma methodology, which has helped the company simplify its processes (Membership, 2023). Zain Jordan, a division of Zain Group, has made extensive use of Lean Six Sigma to boost productivity. For instance, they implemented Lean Six Sigma to enhance their customer service process. The service response times were cut by 20% after analyzing customer service data, and feedback which revealed bottlenecks in the process.

Kaizen for Continuous Improvement

Kaizen, another crucial TQM technique, is used by Zain Telecommunications, demonstrating the company's dedication to constant innovation and employee empowerment. Kaizen promotes a continuous improvement culture by involving everyone in making small, incremental changes to processes and services (Röller & Waverman, 2001). This method is consistent with the literature's emphasis on constant development and happy customers. The retail division of Zain Iraq adopted Kaizen practices. Retail workers were urged to solicit customers' opinions and feedback to serve them better. As a result of this customer-focused strategy, innovative new offerings were developed to satisfy the specific needs of the regional market (WSJ, n.d.).

EFQM Excellence Model: Pursuit of Business Excellence

Zain's commitment to reaching and maintaining business excellence is shown by the company's adoption of the EFQM Excellence Model. Zain Group regularly evaluates its performance, pinpoints areas for improvement, and makes the required modifications because of this model's systematic framework (Bouwman et al., 2008). Zain is a progressive and customer-focused telecommunications provider because of its dedication to business excellence. To better conform to global quality standards, Zain Bahrain adopted the EFQM Excellence Model. They did an extensive self-assessment that included input from throughout the company to pinpoint problem spots. They saw that they needed to strengthen their customer service procedures, so they worked accordingly (Reuters, 2023).

Zain ISO 9001:2015

Zain Bahrain has achieved the new ISO 9001:2015 standard and has received international certification. Zain Bahrain has been certified since 2005 under ISO Quality and Information Security Management System requirements. ISO 9001 was an essential certification to the management system of Zain Bahrain (Zain Bahrain, 2018).

TQM Models Application- ETISALAT Telecommunication

Lean Six Sigma

Combining Lean and Six Sigma creates a powerful methodology that eliminates waste and improves processes. To enhance quality and efficiency, Etisalat successfully applied this methodology. As an example, Etisalat adopted robotic system processes in their services, a technology that uses software applications to automate routine tasks in business processes. The process eliminated errors and risks by ensuring data security and, at the same time, improved

the quality of the process. Furthermore, it saves customers time and increases customer service efficiency while reducing the workload of entering data and doing after-sales services. As a result, employees are 70% faster in achieving their tasks. (Al Zarooni and El Khatib, 2023)

Kaizen for Continuous Improvement

Another methodology that has been used positively by Etisalat is Kaizen. Amiri (2020) listed in the Etisalat quality policy a whole section on their continuous improvement principles, which shows their importance in promoting quality, as Etisalat confirms its commitment to providing the best experience to their customers. They implemented this methodology by continuously enhancing time, cost, and quality in all their work to ensure meeting customer needs and economic growth. Moreover, they involved all their employees in the continual improvement and quality programs. In addition, they set the world's best practices as a standard for them by comparing their activities to global best practices and tracking the lessons learned from their past experiences, which results in meeting their quality objectives.

EFQM Excellence Model: Pursuit of Business Excellence

The EFQM Excellence Model covers different aspects of Etisalat, such as leadership, strategy, people, and customer results. For example, the leadership at Etisalat sets up a meeting every month to review issues, thus improving performance, and guiding the company towards excellence. (Al Zaabi et al., 2023). Amiri (2020) added that Etisalat provides continuous education and training for their employees and focuses on engaging them as well, as developing them personally and professionally. Furthermore, setting strategic direction with measurable quality objectives and goals and reviewing them regularly. Also, measuring customer satisfaction and analyzing ways to improve customer relationships make customer retention effective and increase loyalty, which attains excellence as well. (Al-Kharabsheh, 2020).

Comparison of TQM Applications between Zain and Etisalat

Evidently, both organizations utilized TQM models to achieve their strategic objectives by enhancing processes. When comparing the application of integrating Lean and Six Sigma, both Zain and Etisalat targeted boosting productivity and decreasing the response time by combining and automating steps that result in delays. However, in a statistical comparison, Etisalat appears to apply Lean Six Sigma effectively as the improvement is measured at 70% while Zain sits at 20%.

Reflecting on the application of Kaizen, Zain applied it in Iraq significantly to target the customer-employee interaction centring on continues improvement of customer satisfaction. On the other side, Etisalat dedicates the principle of continuous improvement on all practices. Adopting to their latest rebranding "E and more", Etisalat generalizes the concept of continuous improvement to cover all practices and costs.

In terms of quality certifications, both Zain and Etisalat obtained ISO 9001 certification and ensure continuous compliance reflecting dedication to total quality management.

In pursuit of business excellence, both companies implemented EFQM models. It is observed that Etisalat adopts the TQM models across all its branches to unify the quality level. However, Zain adopts a problem-solving approach to achieve business excellence. Zains's adoption of EFQM is evident in Bahrain where they tailored the model to achieve business excellence in customer satisfaction. While the use of TQM models is positive in solving quality problems, the proactive approach is to standardize the use of these models and compete with the best practice standards instead of utilizing the models as a problem-solving technique for a desired

result. In statistical agreement to the previous statement, Etisalat brand value is 7.8 billion US dollars greater than Zain.

Table 1: TQM Model Applications in Zain & Etisalat

| TQM Model Application /Certification | Zain | Etisalat |
|---|--|---|
| Lean six sigma | 20% cut in service response time to customers. | 70% Faster in employee’s task completion. |
| Kaizen | Customer focused strategy | Etisalat overall quality policy |
| EFQM | Customer focused business excellence | Business excellence from leadership to customers. |
| ISO 9001 | Implemented and achieved in all branched | Implemented and achieved certification. |
| Overall | Localized adoption of TQM | General adoption of TQM |

Conclusion and Recommendations

Conclusion

In conclusion, the adoption of TQM models like EFQM, Kaizen and Lean six sigma across the whole organization is more effective than localizing the application to one aspect as indicated by the comparison between Zain & Etisalat. The comparison indicated that the application of TQM extended the sustainability and resilience of Etisalat and Zain in the face of business challenges by improving performance and streamlining processes to increase customer satisfaction. Furthermore, the project highlighted the importance of TQM in supporting the service quality of the telecommunication industry supported by literature and statistical findings. To improve further, a list of recommendations emphasized on areas of enhancement.

Recommendations

Due to the successful adoption of Total Quality Management (TQM) techniques, such as Kaizen, Lean Six Sigma, and the Business Excellence Model (EFQM), Etisalat and Zain have established themselves as leaders in the Middle East telecom market. Expanding upon their accomplishments, the subsequent suggestions seek to enhance their procedures and guarantee ongoing excellence:

Cross-Functional Collaboration

To improve the synergy between Kaizen, EFQM, and Lean Six Sigma initiatives, both companies should foster cross-functional collaboration. A more comprehensive and integrated approach to quality management can result from promoting departmental communication and cooperation, which will boost productivity and innovation throughout the entire company.

Sustainability Integration

Both Etisalat and Zain should consider incorporating sustainability practices into their TQM frameworks, given the growing focus on corporate social responsibility and sustainability. This could be illustrating a dedication to sustainable business practices by coordinating Kaizen and Lean Six Sigma initiatives with objectives related to social responsibility and the environment.

External Assessments and Benchmarking on Regular Basis

Etisalat initiative of setting the world's best practices as a standard can be leveraged by benchmarking against international industry standards and conducting regular external assessments grounded in EFQM principles can yield insightful results. By using this strategy, both firms will be able to recognize new trends, implement best practices, and maintain their leadership positions in terms of customer satisfaction and business excellence.

Technology Integration for Process Automation

Both Etisalat and Zain ought to investigate additional prospects for process automation, building on Etisalat accomplishments in implementing robotic system procedures. By incorporating cutting-edge technologies, one can increase productivity, decrease mistakes, and ultimately raise the standard of customer satisfaction and service quality.

Strategic Leadership Reviews

Performance improvement has been effectively facilitated by Etisalat monthly leadership meetings. Zain stands to gain from taking a similar tack, making sure that leadership reviews occur on a regular basis to handle obstacles, establish strategic goals, and track advancement toward excellence. Their TQM and EFQM initiatives will be more successful overall because of this proactive leadership engagement. Most of the employees will follow correct TQM practices if there is a leader by example. Leadership can delegate to TQM champions within the department and encourage a meeting of a TQM committee to review the performance and enhance.

Improved Customer Relationship Management (CRM)

Both companies have invested resources in looking into customers' feedback and measuring their satisfaction to improve and align their services with users' needs. However, to properly collect and evaluate data on customer satisfaction, both companies should keep investing in CRM systems. As a result, they will be better able to recognize trends, anticipate client needs, and proactively handle any possible problems, which will eventually improve client loyalty and relationships.

Adopting the Baldrige Framework

To improve the quality management of both telecommunication companies, it's strongly recommended to use The Baldrige Framework. The framework's systematic criteria, customer-centric approach, and holistic methodology are its strongest points. Baldrige, which emphasizes strategic alignment and continuous improvement, offers a more structured and results-oriented methodology than the EFQM model. Telecom companies can achieve operational excellence, outperform industry benchmarks, and maintain their leadership positions in a changing market by utilizing the Baldrige Framework.

By following these recommendations, Etisalat and Zain can keep improving their TQM programs and make sure that EFQM, Kaizen, and Lean Six Sigma continue to be vital elements of their company culture. In the Middle East's dynamic telecom market, these steps will support continued business excellence, increased customer satisfaction, and operational efficiency.

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