

CCS Stakeholder Perception Survey 2012

Project Overview...

- **understand the knowledge levels, perceptions and attitudes of stakeholders**
- **improve investigation enforcement decisions, education and advocacy, and engagement**
- The full dimensions of this study employs two elements of design and methodology :
 - a mass on-line survey for development of top-line statistics; and
 - Cognitive Edge's methods of narrative enquiry with CCS' stakeholders, which will provide richer and more context-based understanding

This study is intended to measure the progress CCS has made in the 4 target areas of...

1. Enlightened Competition Legislation

2. Effective Enforcement

3. Enhanced Voluntary Compliance

4. Educated Stakeholders

The study was conducted in various phases...

Phase a. Review and Preparation of study design

- **Design** of study
- Configuration of **Website**

January
2012



Phase b. Multi-Pronged Capture

- **Mass Online Capture** - Design in 2 parts: Part (1) Statistical top-line, and (2) Narrative Enquiry for individuals with experience with CCS
- **Anecdote Circles** - 6 ACs conducted with invited stakeholders

February
2012 to
March 2012



Phase c. Sensemaking with CCS for Final Report

- Analysis of data by CE staff, and generation of **1 preliminary report**
- **1 half-day sensemaking workshop** with CCS team
- Delivery of **final report**

March
2012

Data Overview....

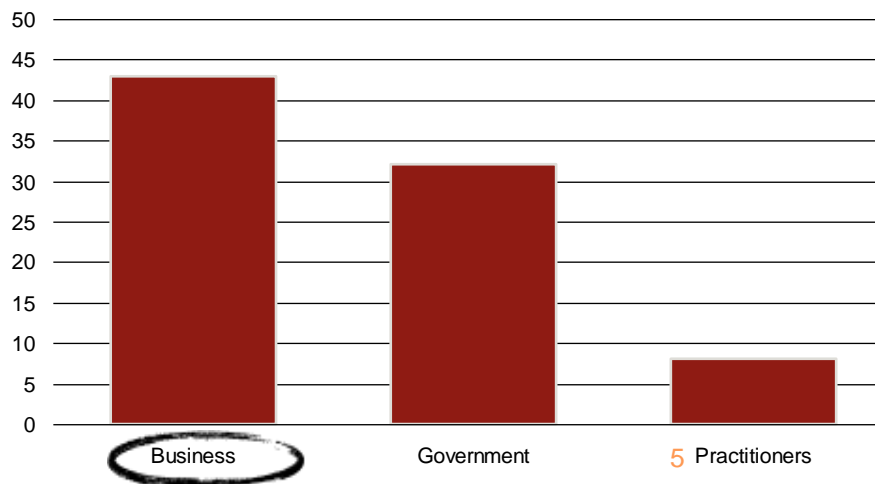
Statistical Survey



- Responses were prompted from CCS stakeholders which comprise: the **business community**, **consumers**, **government agencies**, and **competition law practitioners**
- The final sample achieved from the study included **201 consumers**, **406 businesses**, **19 government**, **17 practitioners** from the statistical online survey

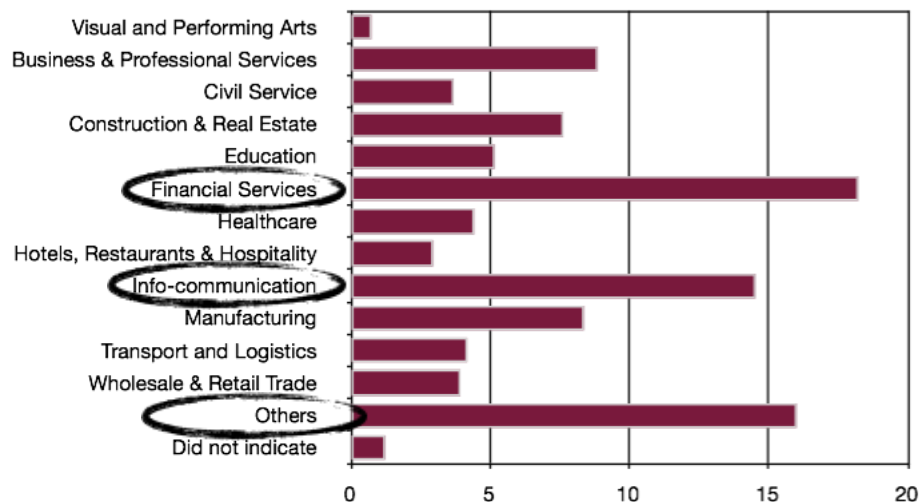
- **80 narrative entries** were collected from the deeper narrative enquiry
- Most of them were from the business community

Narrative Entries



Overview of Business group....

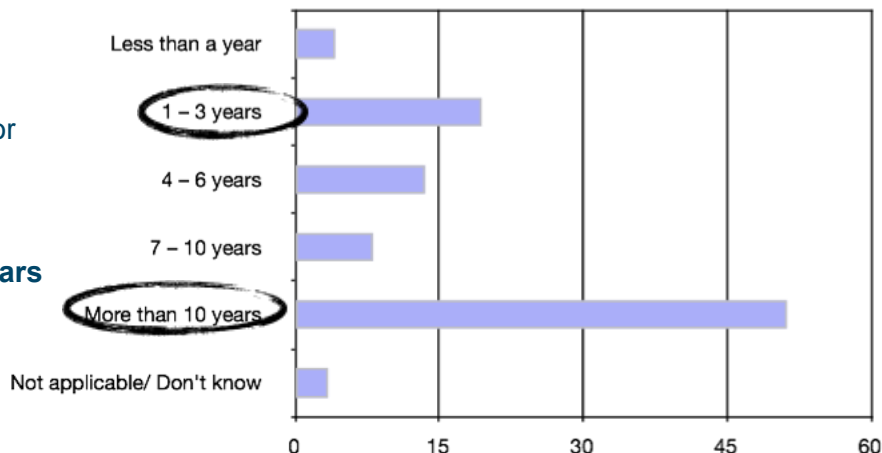
Industries...



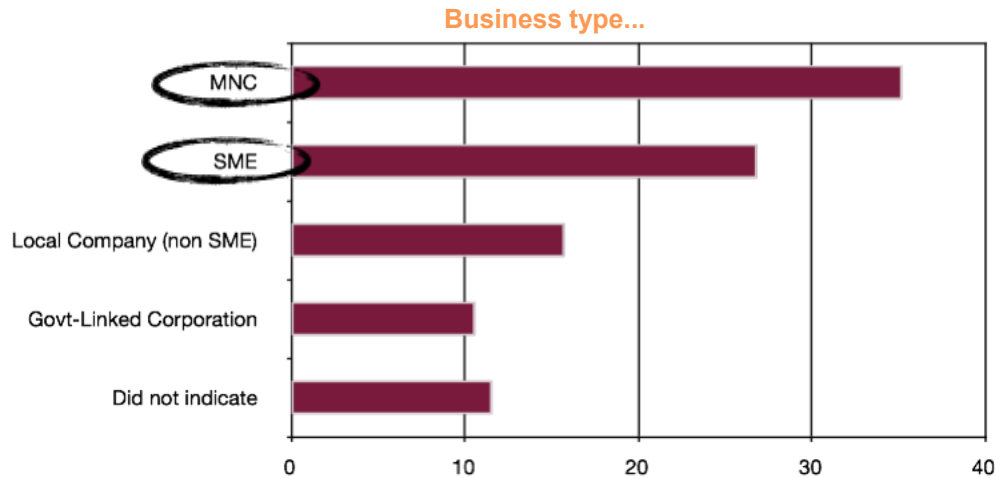
- Majority of the businesses surveyed drew from the **Financial Services** sector
- **Info-communications** formed another sizable group

- Most of the companies have been in business for **More than 10 years**
- The second largest group was formed by businesses who have been around for **1 to 3 years**

Years in business...

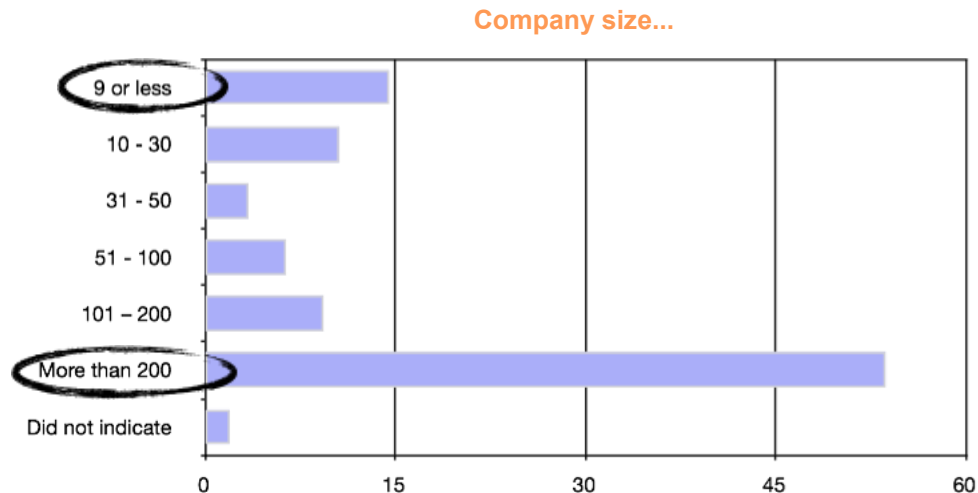


Overview of Business group....



- Most of the businesses surveyed were **MNCs**, then followed by **SMEs**

- Most of the companies surveyed have **more than 200** employees
- The second largest group was companies with **9 or less**



Data Overview & Key Findings...

- CCS is regarded as possessing good professionalism
- CCS' investigations are seen as thorough and robust
- Consumers and Businesses display fairly low level of understanding and knowledge, and a very unclear perception of Competition laws and what CCS does (Consumers display the lowest level of understanding)
- Strong need for further Advocacy and Outreach to boost awareness and knowledge with general public and businesses (SMEs especially)

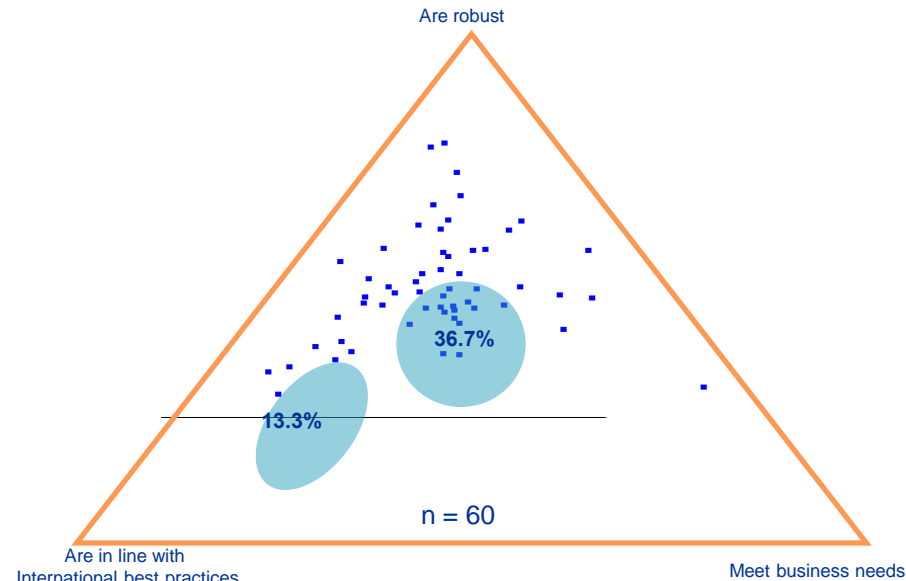
Enlightened Competition Legislation...

Relevance

- Laws and regulations are perceived to be sufficiently robust, meet business needs and are also in line with international best practices
- There is good balance between prescriptiveness and flexibility - although a small degree of ambiguity exists
- The perception about the economic effectiveness of competition legislation is generally positive
- Where experience was viewed as negative, the indication is that laws are seen as clear but not necessarily effective

The general perception is that competition laws and regulations in Singapore are clear and effective, and in line with international best practices

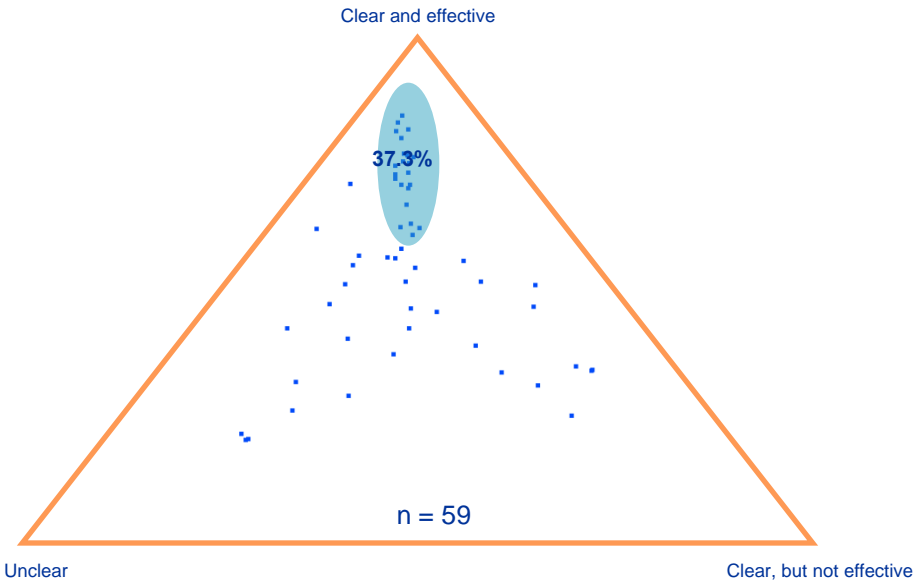
T1. In my story, competition laws and regulations in Singapore...



Observations: There is a cluster of stories in the middle of the triad and also towards the bottom-left apex

Interpretation: The general sentiment appears to be relatively balanced, with at least one third of collected stories in the middle of the triad - where respondents view the laws and regulations to be sufficiently robust, meet business needs and are also in line with international best practices. The next cluster of stories appears towards the apex where the competition laws and regulations in Singapore are strongly perceived to be in line with international best practices

T2. In my story, the body of competition laws and regulations in Singapore...

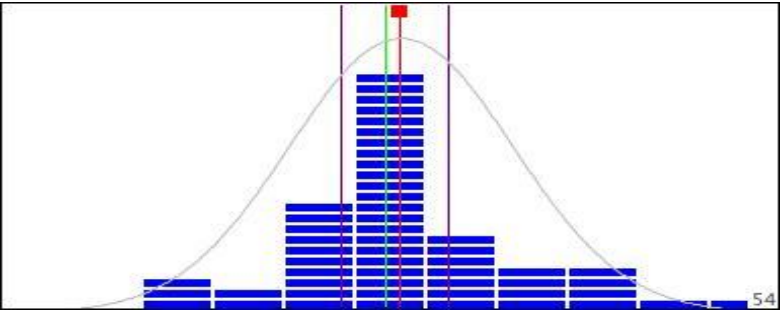


Observations: There is a clear cluster of stories towards the top apex “clear and effective”, while the rest of the stories are distributed widely across the central part of the triad

Interpretation: The perception is generally positive - while there were a few stories that were close to “unclear” or “clear but not effective”, general perception is geared towards “clear and effective”

The overall perception is that competition law and regulations are adequately prescriptive and flexible, and generally understood

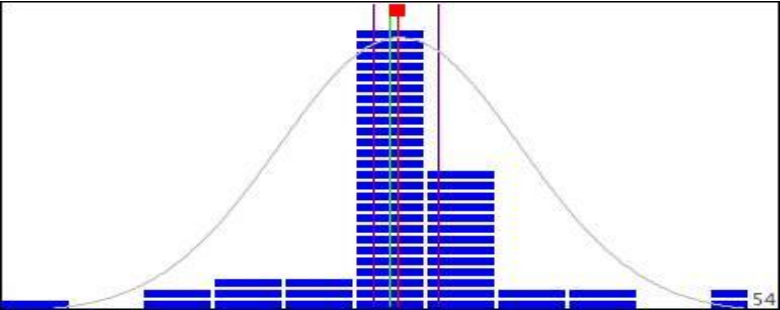
P1. In my story, competition law and regulations in Singapore are...



Observations: The mode and mean of the stories are in the middle of the polarity. There are no stories at the extreme left, and few stories toward the extreme right

Interpretation: There is generally seen to be a good balance between prescriptiveness and flexibility. Some stories view there to be a degree of ambiguity present

P2. In my story, competition law and regulations in Singapore are...



Observations: There is a clear cluster of stories in the middle, with a few stories towards both extremes

Interpretation: The view is that the competition law and regulations are generally understood. Outlier stories toward each extreme suggest instances where the law is perceived to be lacking

Effective Enforcement...


Perception

- CCS' quality of enforcement was perceived positively and favourably
- CCS is seen as a professional organisation, and their enforcement rigorous and objective
- Overall improvement in stakeholder perceptions of CCS
- Businesses display the perception that CCS can do more in effectively reaching out to the public and helping them to understand and comply to the Act

Credibility

- CCS is regarded as possessing good professionalism
- CCS' investigations are seen as thorough and robust

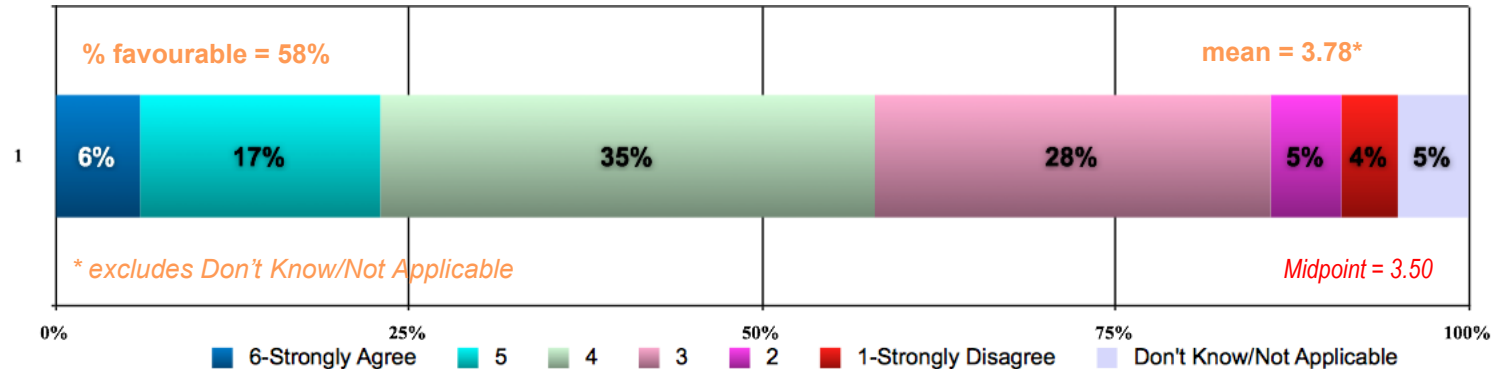
Overall, the view of CCS is favourable. It is seen as a professional and effective organisation

	Professional Organisation	Rigorous, objective analysis	Effective in enforcement	Effective in reaching out to business / public
Consumers Base: 73	70%	71%	68%	59%
 Businesses Base: 166	58%	63%	61%	43%
Practitioners Base: 17	88%	76%	65%	71%
Government Base: 19	95%	95%	89%	58%

However, Businesses display the perception that CCS can do more in effectively reaching out to the public and helping them to understand and comply to the Act

Businesses

Q. I find CCS a professional organization. It embodies attributes like competence, commitment/passion, quality and excellence.



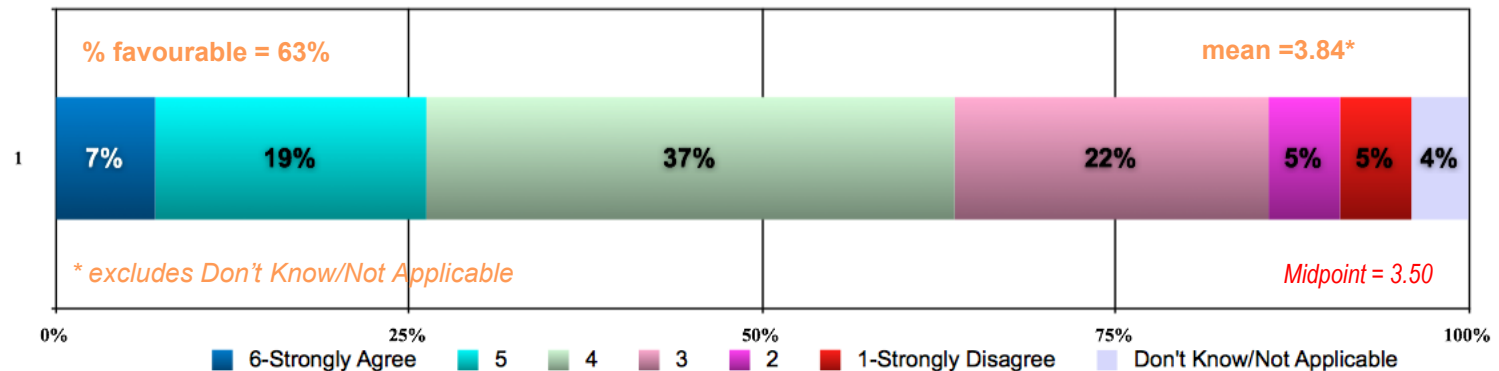
Base: Those who have heard of CCS, 166

Figures may not add up due to rounding off

- In general, 3 in 5 respondents from the business community find CCS professional as an organization.
- 37% are in disagreement on this attribute of CCS.

Businesses

Q. CCS is rigorous and objective in its analysis. I can trust CCS to make good decisions.



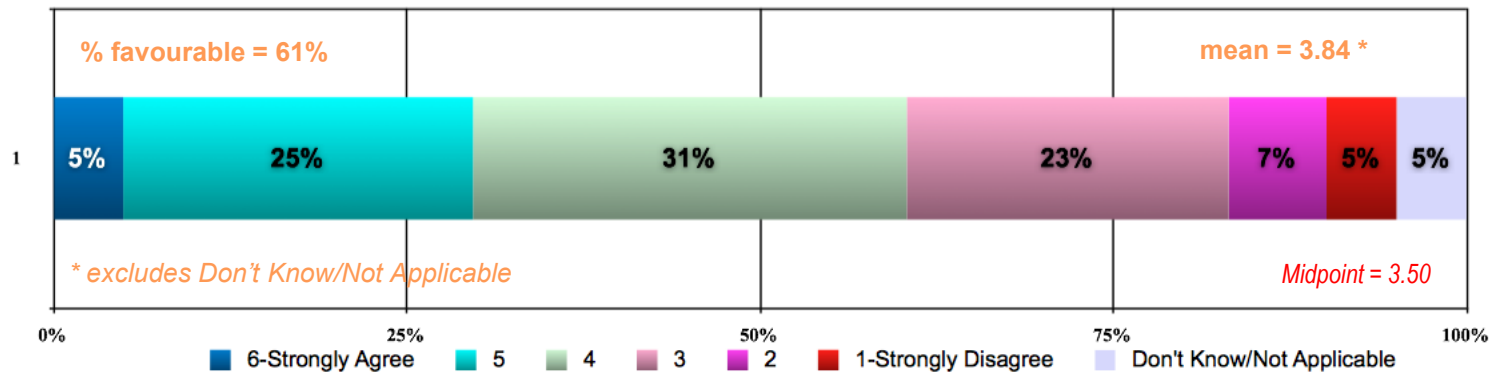
Base: Those who have heard of CCS, 166

Figures may not add up due to rounding off

- 6 in 10 businesses find CCS rigorous and objective in its analysis, trusting its ability to make good decisions.
- Nevertheless, 1 in 3 thinks otherwise.

Businesses

Q. CCS is effective in taking enforcement actions against anti-competitive practices in Singapore.



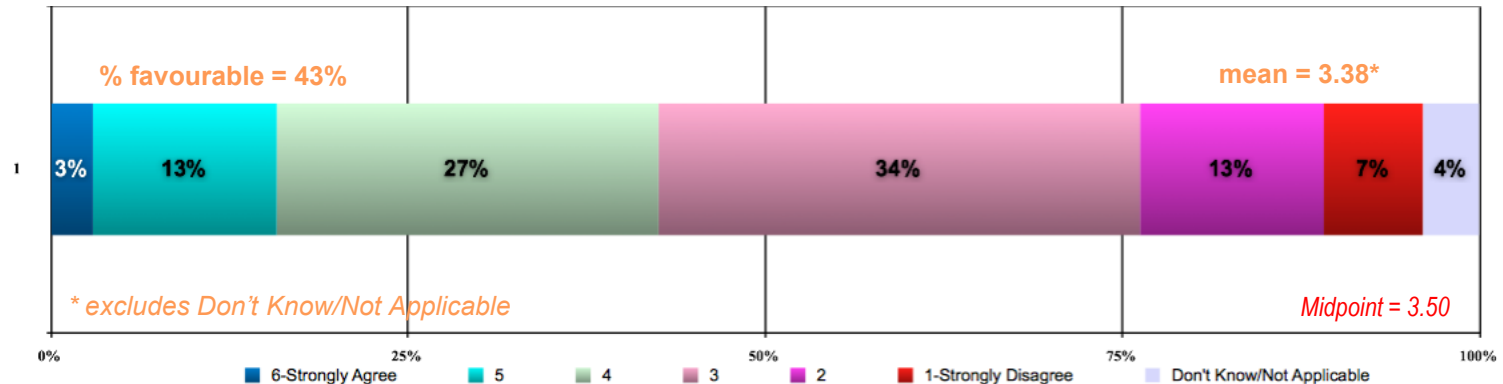
Base: Those who have heard of CCS, 166

Figures may not add up due to rounding off

- In general, 3 in 5 respondents from the business community are in agreement that CCS is effective in taking actions against anti-competitive practices in Singapore.
- 35% think the opposite.

Businesses

Q. CCS is effective in reaching out to the business community and general public to help them understand and apply the Competition Act in Singapore.



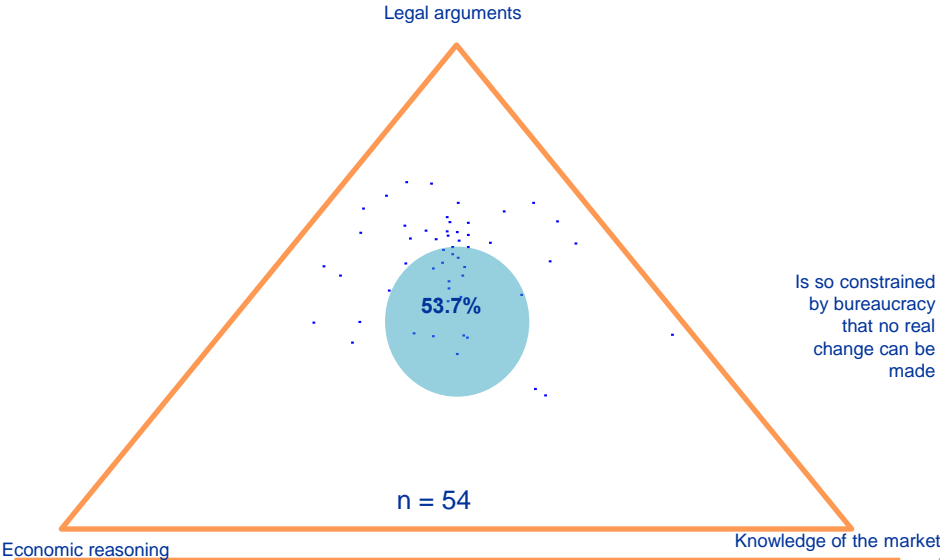
Base: Those who have heard of CCS, 166

Figures may not add up due to rounding off

- General perception of businesses in CCS' effectiveness in assisting stakeholders to understand and apply the competition law in Singapore is not very high. Only 2 in 5 are in agreement and the mean score is below the midpoint.
- More than half (54%) are in disagreement.

CCS' decisions are seen to be guided by a balance of diverse factors

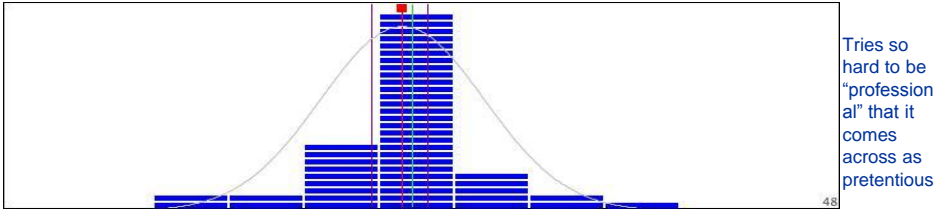
T3. In my story, CCS' decisions were most guided by...



Observations: The majority of stories are clustered in the center of the triad

Interpretation: There is seen to be a balance of all three factors. A few stories also indicate “knowledge of market”

P1. As shown in my story, when engaging stakeholders CCS...



Observations: The majority of stories are tagged towards the middle of the polarity

Interpretation: CCS is seen as seen as adequately balanced in its approach towards engaging stakeholders - it is neither overly bureaucratic or pretentious

Enhanced Voluntary Compliance...

Culture

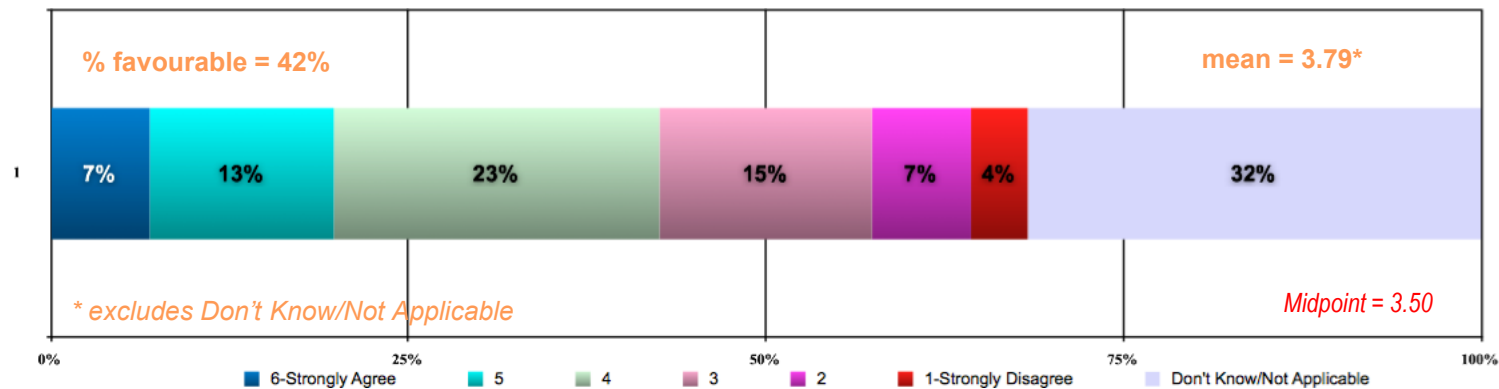
- CCS' role is regarded as necessary and their enforcement adequate - but a need for consumer education is seen as necessary to complement it
- Lack of public knowledge of CCS, competition law or consumer rights
- Competition law and regulations are seen as too complex to understand, apply and comply with

Practice & Attitude

- Most Businesses and Competition practitioners report that higher management do support compliance to Competition laws and regulations
- However, there is a sense that there is not enough real activity to educate people, and to effectively promote action

Businesses

Q30. The management/leadership in my company/agency strongly advocates compliance of Competition Law in Singapore.



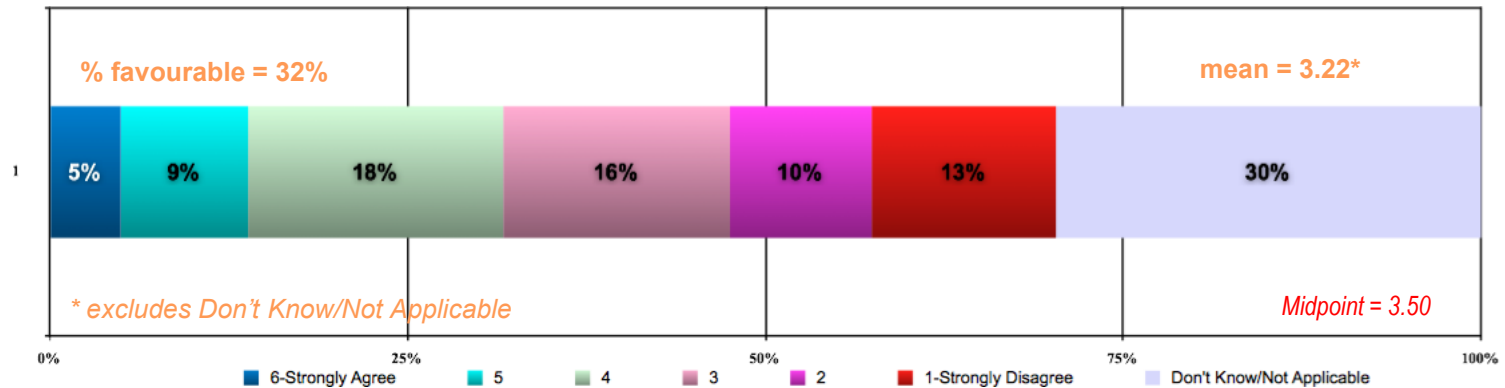
Base: All Respondents, 406

Figures may not add up due to rounding off

- Less than half of the leadership in businesses strongly advocates compliance to the Competition Law in Singapore.
- A quarter has weaker management support while the rest, 32% are not aware on this aspect.

Businesses

Q. My company/agency regularly conducts trainings for all employees on competition law and on company's policies and regulations regarding anti-competitive practices.



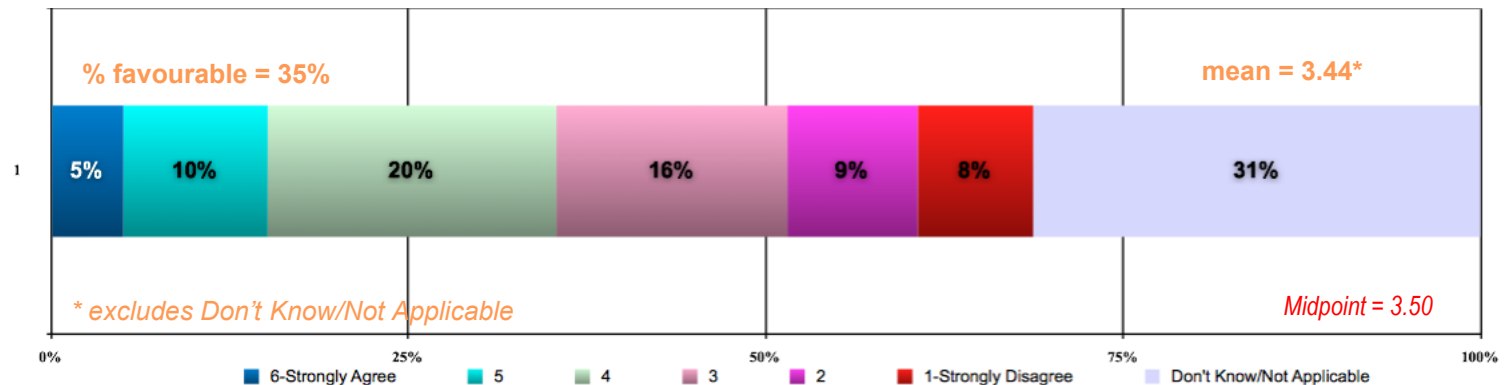
Base: All Respondents, 406

Figures may not add up due to rounding off

- Only 32% of business companies regularly conduct trainings on Competition Law for its respective employees.
- 39% are in disagreement while the rest (30%) are unaware on this aspect.

Businesses

Q. My company/agency regularly reviews and evaluates our compliance programme to ensure its effectiveness and that company/agency does not violate the Competition Law.



Base: All Respondents, 406

Figures may not add up due to rounding off

- Only 35% of business companies have periodic reviews and evaluations of their compliance programme to the Competition Law.
- 33% are in disagreement while 31% are not aware of this aspect in their respective companies.

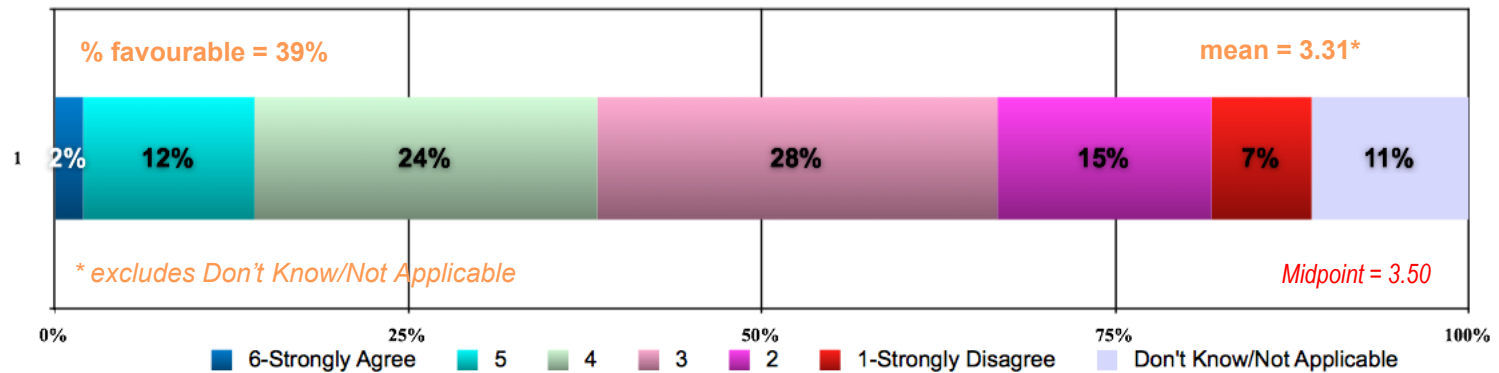
Educated Stakeholders...

Knowledge

- Consumers and Businesses display fairly low level of understanding and knowledge, and a very unclear perception
- Consumers display the lowest level of understanding.
- Strong need for further Advocacy and Outreach to boost awareness and knowledge with general public and businesses (SMEs especially)
- Businesses' perception of CCS' advocacy and outreach indicate that CCS needs to provide sufficient public information to educate people about the Competition Act in Singapore and CCS' role and responsibilities
- The most effective mediums identified by stakeholders for CCS outreach were local newspapers, local TV, CCS website and online news sites

Businesses

Q. I find CCS' outreach sessions effective in educating businesses on the Competition Act.



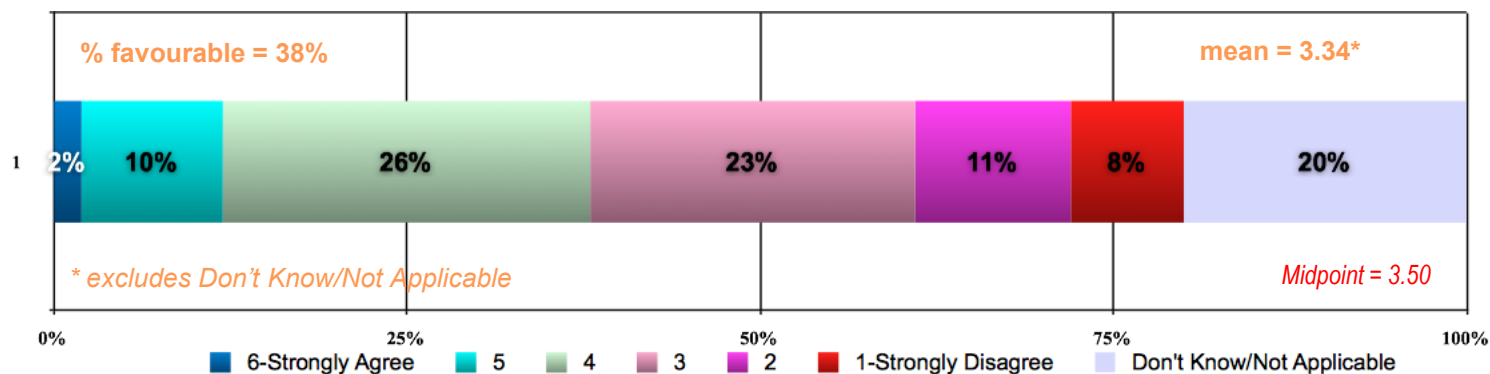
Base: Those who have heard of CCS, 166

Figures may not add up due to rounding off

- In general, 2 in 5 business companies find CCS' outreach sessions effective in educating businesses on the Competition Act in Singapore.
- Half (50%) are in disagreement with this aspect.

Businesses

Q. I find the Competition Act in Singapore clear and easy to understand.



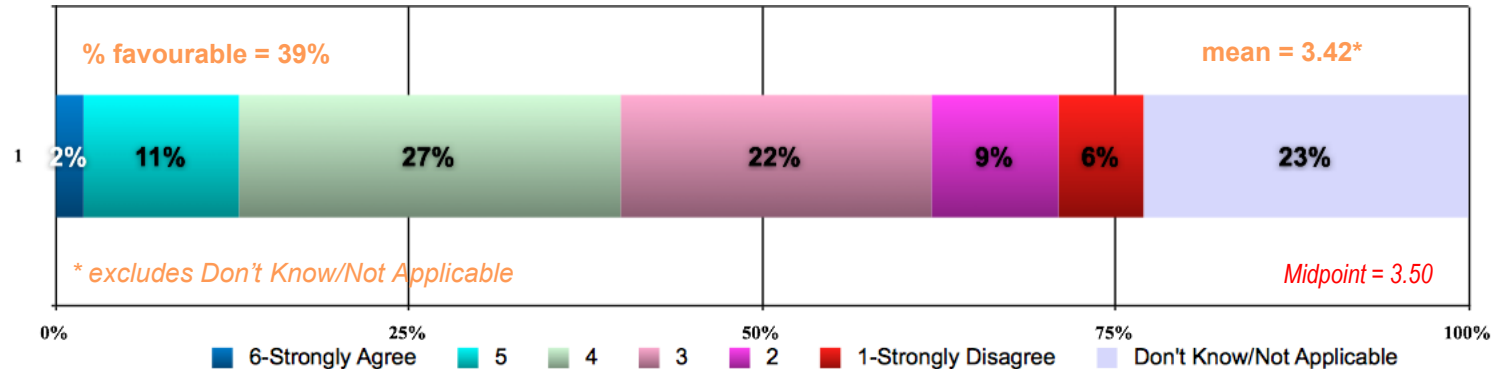
Base: All Respondents, 406

Figures may not add up due to rounding off

- However, rating on the clarity of the Competition Act is not very favourable as 2 in 5 (42%) businesses are in general disagreement.
- Moreover, 20% are unable to give any rating on this aspect.

Businesses

Q. I find the Competition Act in Singapore easy to apply and business-friendly.





Base: All Respondents, 406

Figures may not add up due to rounding off

- In general, only 2 in 5 businesses find the Competition Act in Singapore easy to apply and business-friendly.
- Notably, 23% from this group are unable to give any rating on this aspect.

CCS Stakeholder Perception Survey 2009-2012 Comparison

Improvement in Awareness of CCS

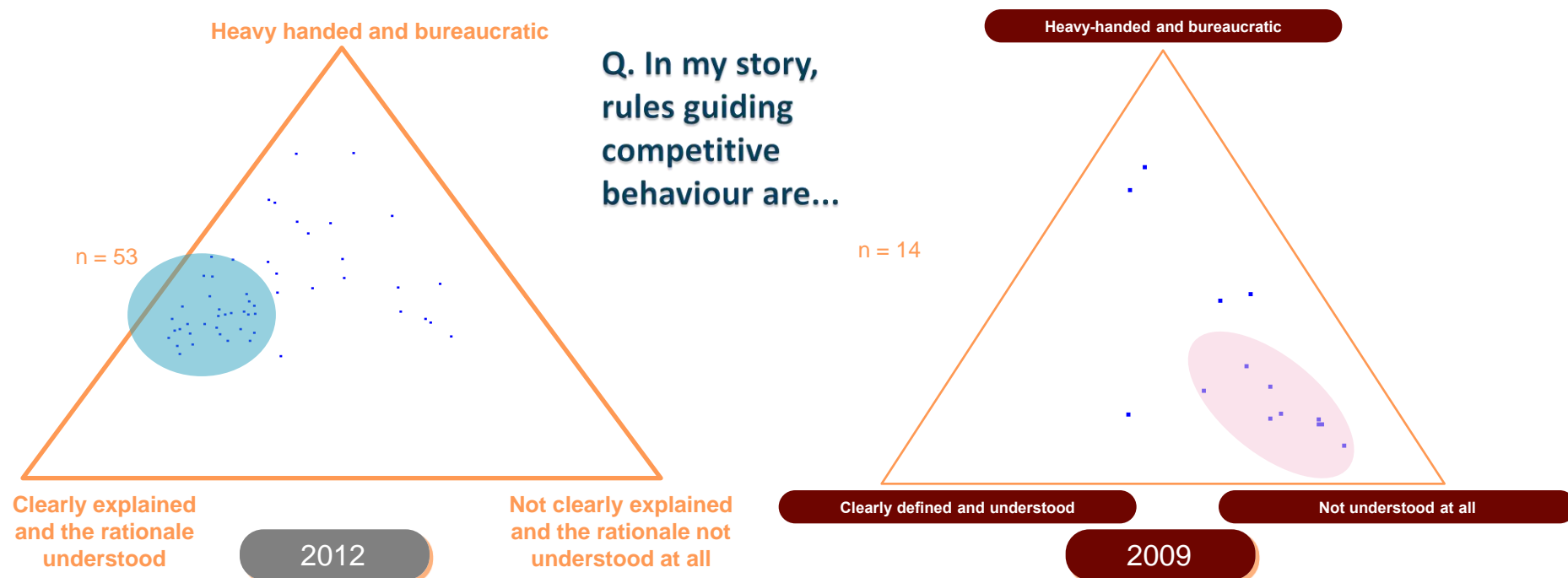
Questions	Consumers	Businesses	Practitioners	Government
Awareness of CCS, Its Roles and Responsibilities				
2009 (Total no. of respondents)	25% (800)	31% (350)	N.A. ¹	N.A. ¹
2012 (Total no. of respondents)	36% (201) 	41% (406) 	100% (17)	100% (19)

Observation:

Awareness of CCS has generally improved for consumers and business from 2009 to 2012, although awareness among them is still relatively low (<50%)

N.A.¹ = Only Consumers and Businesses were asked of the awareness of CCS in 2009. Practitioners and Government stakeholders were excluded.

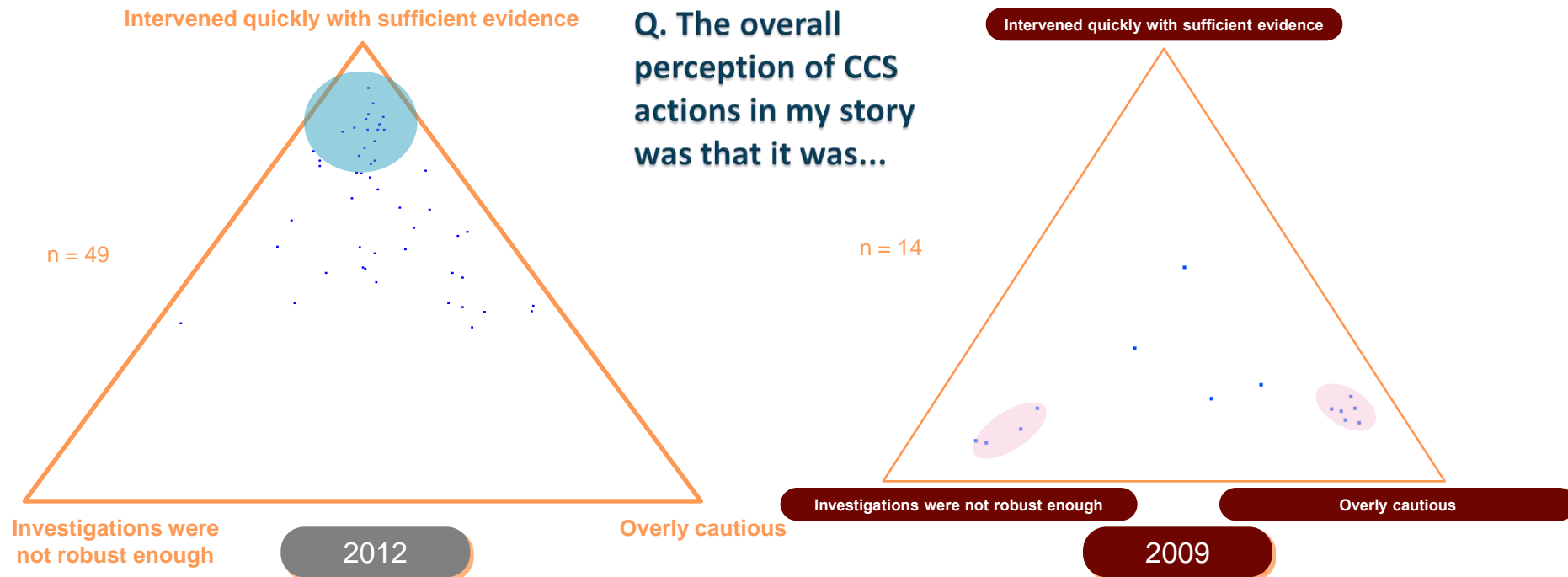
Perceptions of competition rules and regulations, and decisions undertaken



2012 stories largely indexed toward the bottom-left of “Clearly explained and rationale understood”. 2009 stories gravitated towards “Not understood”

➤ **Improved perceptions of competition rules and regulations, with decisions being viewed as more clearly explained and understood.**

Perceptions with regards to CCS' investigations and interventions



2012 stories clustered towards the apex of “Intervening quickly with sufficient evidence”. The 2009 triad saw more stories placed towards “Not robust enough” or “Overly cautious”. Strikingly, the 2009 group also did not place any stories towards the “ideal” top apex.

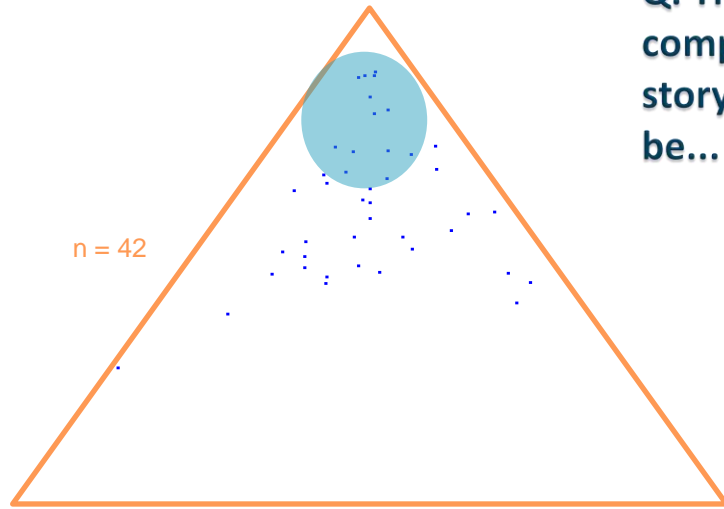
➤ **Improved perceptions with regards to CCS' investigations and interventions**

Incidences of anti-competitive behaviour

Q. Thinking about the anti-competitive actions in my story, such actions seem to be...

One off, a unique event

n = 42



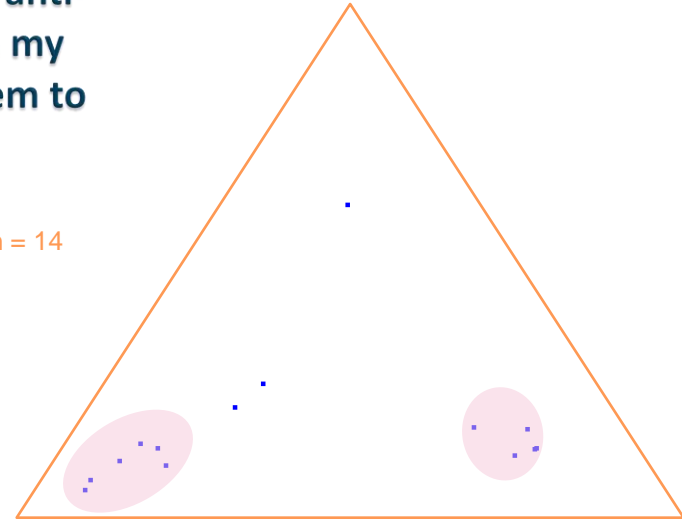
Happening all the time

2012

Growing in frequency

One-off, a unique event

n = 14



Happening all the time

2009

Growing in frequency

2009 stories were located largely towards “Happening all the time” and “Growing in frequency”. 2012 stories tended to be indexed to the top apex of “One off, a unique event”.

➤ The incidences of anti-competitive behaviour are seen as increasingly one-off; implying improvements in overall deterring or preventing anti-competitive practices

Perceptions with regards to CCS' openness to new ideas

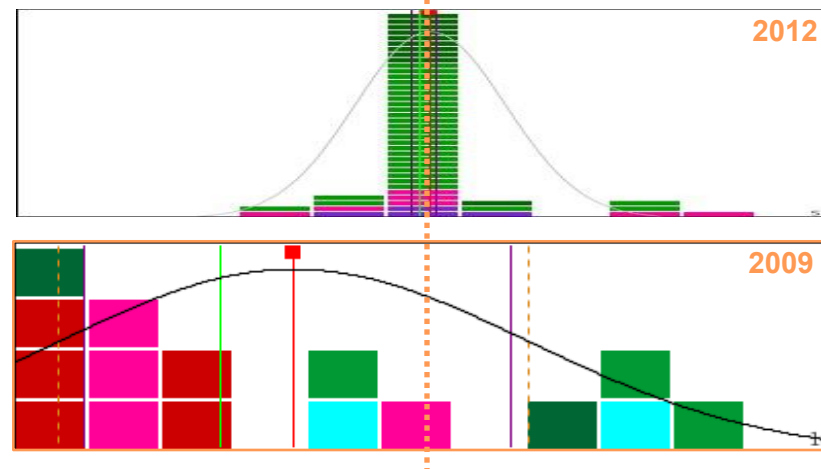
As shown in my story, CCS is...

Very closed to new influences,
typical of a bureaucracy



Overly open to new ideas, without
thinking carefully about their costs
and benefits

☐ N/A



Your feelings regarding your story are:

- Strongly positive
- Positive
- Neutral
- Negative
- Strongly negative

In 2009, the stories tended to reflect CCS as being closed to new ideas and bureaucratic – most of the stories are located in the extreme left region and are negative as well. 2012 saw stories largely located in the ideal middle range - most of the stories tended to be positive too.

➤ Improved perceptions with regards to CCS' openness to new ideas

Thank You