COMPETITION AND CONSUMER PROTECTION COMMISSION

PROPOSED SECTOR-WIDE MARKET INQUIRY INTO AUDIO-VISUAL (AV) SERVICE AGREEMENTS IN THE HOSPITALITY SECTOR IN ZAMBIA

MARKET INQUIRY QUESTIONNAIRE

Respondent Category: Pure AV Service Providers

Period covered: 1 January 2021 to 31 December 2025

INTRODUCTION

The Competition and Consumer Protection Commission is undertaking a sector-wide market inquiry into the provision of audio-visual services within Zambia's hospitality and conferencing sector.

The inquiry seeks to understand the structure and functioning of the market, including the contractual and commercial relationships between hotels, conference facilities, AV service providers, event management companies and customers.

In particular, the Commission is examining preferred-provider and exclusive arrangements, venue access requirements, accreditation, access fees, commissions, revenue sharing, procurement practices, customer referrals, bundling of venue and AV services, pricing and other practices that may affect competition, market access and consumer choice. These areas are expressly identified in the concept note.

The questionnaire is not intended to presume that any particular arrangement is anti-competitive. Respondents are therefore encouraged to explain both the **commercial rationale and competitive effects** of any arrangements identified.

Where a question does not apply, please indicate **N/A**. Where the requested information is not available, please indicate **Not Available**.

PART A: RESPONDENT PROFILE

1. General information

Particular	**Response**
Registered name	
Trading name	
Company registration number	
Year established	
Year AV operations commenced	
Principal business address	
Other offices/branches	

Contact person	
Position	
Telephone	
Email	

2. Legal form

   Please tick one.

   ☐ Sole proprietorship
   ☐ Partnership
   ☐ Private limited company
   ☐ Public limited company
   ☐ Cooperative
   ☐ Other: _____

3. Ownership structure

   Please provide details of all shareholders/owners holding **5% or more** of the business.

Name	**Type of shareholder**	**Percentage ownership**	**Date acquired**	**Other relevant business interests**

4. Board and management

   Provide details of the directors and senior management as at **31 December 2025**.

Name	**Position**	**Date appointed**	**Shareholding**	**Other business interests**

5. Vertical or horizontal relationships

   Does any shareholder, director or senior manager, have a financial, ownership, management or other significant relationship with any business involved in:

☐ Hotel/hospitality services
☐ Conference facilities
☐ Event management
☐ Another AV service provider
☐ AV equipment supply/rental
☐ Other event-related services
☐ None

6. If yes above, describe the relationship.
……
……

PART B: NATURE AND SCOPE OF AV ACTIVITIES

7. Which AV services does your company provide?

   Tick all that apply.

   ☐ Sound/audio systems
   ☐ Microphones
   ☐ Projection systems
   ☐ LED screens
   ☐ Digital displays
   ☐ Video conferencing
   ☐ Hybrid conferencing
   ☐ Interpretation equipment
   ☐ Event lighting
   ☐ Live streaming
   ☐ Recording
   ☐ Event production
   ☐ Technical support
   ☐ Equipment rental
   ☐ Installation
   ☐ Maintenance
   ☐ Other: _____

8. How does your company obtain most of its AV business?

   ☐ Direct customer procurement
   ☐ Event management companies
   ☐ Hotels/conference venues
   ☐ Government procurement
   ☐ Corporate procurement
   ☐ NGOs/development partners

☐ Subcontracting from other AV providers
☐ Other: _____

9. Where does your company operate?

   Please indicate all provinces/cities in which the company regularly provides AV services.

   ☐ Lusaka
   ☐ Copperbelt
   ☐ Southern
   ☐ Central
   ☐ Eastern
   ☐ Western
   ☐ Northern
   ☐ Luapula
   ☐ Muchinga
   ☐ North-Western
   ☐ Other: _____

10. Approximately what percentage of your AV revenue is generated from your principal geographical market? _____%

PART C: MARKET POSITION AND BUSINESS PERFORMANCE

11. Provide the following information for each year from 2021 to 2025.

Indicator	**2021**	**2022**	**2023**	**2024**	**2025**
Total company turnover (K)					
AV-related turnover (K)					
Number of AV contracts					
Value of AV contracts (K)					
Number of events serviced					
Number of hotels/venues served					
Number of employees					

12. Approximately what percentage of your AV revenue in each year came from events held at hotels, conference centres or other hospitality venues?

Year	**Percentage**
2021	
2022	
2023	

2024	
2025	

13. Identify your ten largest venues/customers by value of AV business during 2021-2025.

	Venue/customer	**Type**	**Period of relationship**	**Approx. annual value of business**	**Approx. % of total AV revenue**
1					
2					
10					

14. Identify your five principal competitors and indicate the AV services in which you compete with each.

	Competitor	**Principal service**	**Geographic area**	**Relative position**
1				
2				
3				
4				
5				

PART D: CONTRACTUAL RELATIONSHIPS WITH VENUES

15. Between 2021 and 2025, did your company have any formal or informal contractual/commercial arrangement with a hotel, conference centre or other hospitality venue concerning the provision of AV services?

☐ Yes
☐ No

16. If yes above, what type of arrangement did you have?

Tick all applicable options.

☐ Exclusive-provider agreement
☐ Preferred-provider agreement
☐ Approved/accredited supplier arrangement
☐ Standard supplier agreement
☐ Concession
☐ Partnership
☐ Revenue-sharing arrangement

☐ Referral arrangement
☐ Informal understanding
☐ Other: _____

17. Complete the following for each significant arrangement**.**

Venue	**Provider status**	**Start date**	**End date**	**Renewed?**	**Exclusive?**	**Approx. value of business**
				☐	☐	
				☐	☐	

18. Did any agreement contain any of the following provisions?

Provision	**Yes**	**No**	**N/A**
Exclusive right to provide AV services	☐	☐	☐
Venue prohibited from using other providers	☐	☐	☐
Customers required to use your services	☐	☐	☐
Customers required to obtain venue approval to use another provider	☐	☐	☐
Venue required to recommend your company	☐	☐	☐
Restrictions on providing services to competing venues	☐	☐	☐
Minimum volume/revenue requirements	☐	☐	☐
Revenue-sharing requirement	☐	☐	☐
Commission payment	☐	☐	☐
Venue access fee	☐	☐	☐
Preferential pricing or other commercial benefit	☐	☐	☐

PART E: VENUE ACCESS AND ACCREDITATION

19. During 2021-2025, did you experience any requirement to obtain approval, accreditation or registration before providing AV services at a venue?

☐ Yes, at most venues
☐ Yes, at some venues
☐ Rarely
☐ No

20. If yes above, what requirements applied?

☐ Registration fee
☐ Accreditation fee
☐ Insurance
☐ Minimum equipment standards

☐ Technical certification
☐ Staff qualifications
☐ Security requirements
☐ Financial requirements
☐ Prior relationship with venue
☐ Other: _____

21. Were the same accreditation or access requirements applied to all AV providers?

☐ Yes
☐ No
☐ Don't know

If no, explain the differences……

22. Have you ever been refused or restricted access to a venue to provide AV services?

☐ Yes
☐ No

23. If yes, what was the reason?

☐ Existing exclusive arrangement
☐ Preferred-provider arrangement
☐ Accreditation failure
☐ Access fee
☐ Venue policy
☐ Customer directed to another provider
☐ Technical requirement
☐ Security requirement
☐ Other: _____

24. Please provide details of the most significant instance.

……
……

PART F: FEES, COMMISSIONS AND REVENUE SHARING

25. Have you paid any hotel/conference venue any fee, commission or other financial consideration in connection with providing AV services?

☐ Yes
☐ No

26. If yes above, indicate the arrangement.

Venue	Type of charge	Amount/%	Basis of calculation	Period	Applied to all providers?

27. What was the effect of these charges on your business?

☐ No significant effect
☐ Increased operating costs
☐ Increased prices to customers
☐ Reduced margins
☐ Made certain venues commercially unattractive
☐ Caused us to stop servicing a venue
☐ Made it difficult to compete with preferred/in-house providers
☐ Other: _____

PART G: CUSTOMER CHOICE AND STEERING

28. In your experience, who normally determines the AV provider for an event?

☐ Final customer
☐ Event management company
☐ Hotel/conference venue
☐ Government/procuring entity
☐ Joint decision
☐ Other: _____

29. Have you experienced venues recommending or directing customers towards particular AV providers?

☐ Frequently
☐ Sometimes
☐ Rarely
☐ Never

30. Where this occurred, what was the nature of the recommendation?

☐ Neutral recommendation
☐ Preferred provider list
☐ Strong recommendation

☐ Customer told provider was mandatory
☐ Alternative providers not disclosed
☐ Customer discouraged from using another provider
☐ Other: _____

31. In your experience, are customers generally aware that they can appoint an independent AV provider when holding an event at a hotel/conference facility?

☐ Always
☐ Usually
☐ Sometimes
☐ Rarely
☐ Never
☐ Don't know

PART H: BUNDLING AND TYING

32. Have you encountered situations where venue hire and AV services were offered as a combined package?

☐ Frequently
☐ Sometimes
☐ Rarely
☐ Never

33. Where this occurred:

☐ Customer could purchase venue and AV separately
☐ Customer could use an alternative AV provider
☐ Customer could use an alternative provider but incurred an additional fee
☐ Customer was required to use the designated provider
☐ Other: _____

34. In your assessment, do bundled arrangements affect the ability of independent AV providers to compete?

☐ Significantly restrict competition
☐ Moderately restrict competition
☐ Slightly restrict competition
☐ No material effect
☐ Don't know

Please explain……

PART I: ENTRY, EXPANSION AND SWITCHING

35. Which factors have made it difficult for your company to enter or expand within the hospitality/conferencing AV market?

Rank the **three most significant**.

Factor	Rank 1-3
Exclusive venue agreements	
Preferred-provider arrangements	
Venue access restrictions	
Accreditation requirements	
Access fees	
Established customer relationships	
Established competitor relationships with venues	
Equipment investment	
Access to finance	
Skilled personnel	
Customer loyalty	
Other	

36. During 2021-2025, did your company lose or fail to obtain business because a venue required or preferred another AV provider?

☐ Frequently
☐ Sometimes
☐ Rarely
☐ Never

37. If yes, provide up to three examples.

Venue	Approx. date	Reason	Estimated value of lost business

PART J: MARKET EFFECTS AND RESPONDENT ASSESSMENT

38. Which of the following effects have you observed from contractual or commercial arrangements between venues and AV providers?

Tick all applicable.

☐ Reduced supplier choice
☐ Increased prices

☐ Reduced ability to negotiate
☐ Increased costs for independent AV providers
☐ Reduced access to customers
☐ Difficulty entering venues
☐ Difficulty expanding
☐ Reduced investment
☐ Reduced innovation
☐ Reduced service quality
☐ No material effect
☐ Other: _____

39. In your view, what changes to the current arrangements would improve competition and customer choice while allowing hotels and conference venues to address legitimate operational, technical, security and quality requirements?

Response**:**

……
……
……
……

SCHEDULE A: CONTRACT AND AGREEMENT REGISTER

Complete one row for every relevant agreement existing at any time between 1 January 2021 and 31 December 2025.

No.	Venue	Other party	Agreement type	Start	End	Exclusive/preferred	Key restrictions	Fees/commission	Revenue share	Document attached

SCHEDULE B: VENUE ACCESS AND CHARGES

Venue	Accreditation required?	Access fee	Commission	Revenue share	Other charges	Preferred provider?	External providers permitted?

SCHEDULE C: SIGNIFICANT COMPETITION INCIDENTS

Please provide details of specific instances where contractual or commercial arrangements affected your ability to compete.

Date	Venue	What happened?	Arrangement/rule relied upon	Effect on respondent	Estimated value affected	Supporting document

SCHEDULE D: DOCUMENTS TO BE SUBMITTED

Please tick the documents being submitted.

☐ Contracts and agreements, 2021-2025
☐ Amendments and renewals
☐ Venue accreditation documents
☐ Venue access policies
☐ Price lists/rate cards
☐ Invoices and quotations
☐ Commission/revenue-sharing records
☐ Procurement documents
☐ Correspondence concerning AV provider selection
☐ Documents relating to customer referrals/recommendations
☐ Documents relating to bundled venue/AV packages
☐ Other relevant documents: _____

DECLARATION

I certify that the information provided in this questionnaire and accompanying schedules is, to the best of my knowledge and belief, complete and accurate.

Name: _____

Position: _____

Organisation: _____

Signature: _____

Date: _____