

## INTRODUCTION

The aim of this document is to comply with stipulations of the statutes of the ICP-Autoridade Nacional de Comunicações (ICP-ANACOM) approved by Decree-Law no. 309/2001 of 7 December.

According to the said statutory provisions, it is this Authority's responsibility to draft an annual report on its regulatory activities, to be sent to the Government and for submission to Parliament, and also to produce, for presentation to the member of government who oversees the sector, and for public release, a report on the situation of communications and its regulatory and oversight activity.

The annual report model adopted by ANACOM reflects the joining of those two statutory provisions: Part I describes the activity undertaken during the year in the regulatory, oversight, sanctions, communications sector representation and information to citizens domains; Part II describes the situation of communications and explains its evolution over the course of the year under review.

Part I, on ANACOM Activity in 2003, has been organised according to the structure of the Authority's powers.

It thus begins with activity involving regulation, in its broadest sense. The first three chapters, on the Regulation of Electronic Communications, Regulation of Postal Services, and Planning, Management and Control of Radio Spectrum, are dedicated to this activity, the principal and fundamental core of ANACOM's many incumbent responsibilities.

The activities of Inspection and Investigation, and Disputes, to which the fourth chapter refers, derive directly from regulatory activity and are framed by the sanction function for the sector, which is also this Authority's responsibility.

Chapter five is dedicated to the activity of Representation and Co-operation, in which ANACOM acts as representative of the communications sector and of the Portuguese State in the various relevant international instances and in co-operation activities with third countries.

ANACOM's Image and Communication, both internally and externally, and the service provided to Customers, are dealt with in chapter six.

The title of the last chapter of Part I, Other Activities, may mistakenly be taken as a residual category. However, it describes activities undertaken in 2003 in areas as important as Electronic Commerce or the role of communications in the Information Society, to cite only two subpoints included therein. These activities are not directly covered by the statutory provisions that govern

ANACOM's activity but which have been made incumbent upon same, and in which this Authority has consequently also invested its resources and the best of its efforts.

Part II, the Situation of Communications in 2003, focuses in turn on the organisation of the communications sector itself, in which two distinct areas are immediately identified: electronic communications and postal services.

To frame the sector's evolution over the course of 2003 it is considered relevant to begin by broadly describing the overall, international and national situation in which that evolution took place. Although outside the limited scope of this report, this reference table is outlined in chapter 1 of the second part of this Report.

The other chapter is dedicated to the situation of communications in Portugal. It describes the evolution of the communications sector and its role in the national economy, before going on to separately study the evolution and situation in 2003 of the subsectors of electronic communications and postal services.

Although focusing on the year 2003, this Report also describes all relevant circumstances that took place before the beginning or after the end of that reference period. Indeed, the period covered by a civil year is not enough time, for example, for regulatory measures taken or any technological innovations that arise to achieve stable or complete effects on a sector of this size and nature.