
MULTI-ANNUAL
ACTIVITIES PLAN
2014-2016
AND BUDGET
2014

ANACOM



AUTORIDADE
NACIONAL
DE COMUNICAÇÕES

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EXECUTIVE SUMMARY



1. Executive Summary

ICP-Autoridade Nacional de Comunicações (ICP-ANACOM) has formulated its 2014-2016 Multi-Annual Plan to guide its activity over the coming years. The plan covers all areas of action given priority by ICP-ANACOM to ensure quality regulation, supervision and oversight of the electronic communications and postal sectors.

The Plan also covers other areas in which ICP-ANACOM is engaged on an ongoing and permanent basis; ICP-ANACOM's work in these areas, although not strategic, is essential to the successful accomplishment of its mission.

In the 2014-2016 period, ICP-ANACOM faces the challenge of ensuring conditions, through regulatory intervention, that promote innovation and investment in the sector, while at the same time providing an environment of effective competition in a market which is tending towards consolidation

To address this difficult balance, ICP-ANACOM must promote predictability in its regulation, prosecuting regulatory intervention that is, as far as possible, unobtrusive, while being stable and consistent over time, in order to create an environment that instils investor confidence. This approach calls for more proactive regulatory action, by which ICP-ANACOM can anticipate sector trends and problems and, therefore, respond to big issues in a timely manner.

ICP-ANACOM is also focused on developing and implementing mechanisms which measure the impact of its activities, especially through indicators to evaluate market competition levels and satisfaction among consumers with the quality of the services offered.

In terms of regulatory activity, 2014 will be a particularly intense and challenging year for ICP-ANACOM. The implementation of certain decisions, such as resulting from the Recommendation of the European Commission (EC) on measures of non-discrimination in access to next generation networks and costing methodologies, involves particularly complex mechanisms. Since Portugal is one of the first European countries to implement the remedies called for under the recommendation, ICP-ANACOM will not have the opportunity to benefit from the experience of other markets.

On the other hand, ICP-ANACOM's activity in 2014 will be impacted by two exogenous factors that will impose important constraints on its operations: the persistence of a regime of strict cost containment and a new legal framework for regulators.

A commitment to cost containment obliges ICP-ANACOM to continue in pursuit of improved organisational internal efficiency, seeking to maximize the results of its work without an increase, and perhaps even with a reduction, in resources. The impact of cost-cutting measures is felt most critically in human resources policy, since cost-cutting limits ICP-ANACOM's scope for new recruitment (even to replace outgoing staff) and prohibits the use of incentive schemes that might boost motivation and loyalty among the organisation's most proficient staff. However, ICP-ANACOM cannot permit the economic and financial context to become a factor which undermines its performance and prevents it from carrying out its responsibilities with quality and rigour. In fact, since the regulatory activity budget is financed entirely by the market's operators, the application of constraints that weaken the effectiveness of regulatory activity may have negative implications for the functioning of communications markets and consumer wellbeing.

Meanwhile, the Framework Law governing regulators will determine the amendment of ICP-ANACOM's Statutes to reflect the changes introduced by the new legal regime. While it's not known whether the law is in its final version, there is a concern that some of its provisions may affect ICP-ANACOM's administrative and financial agility and autonomy.

The areas to be addressed by ICP-ANACOM over the next three-year period include: regulation of access to next generation networks, the universal service in electronic communications and the postal sector, analysis of new forms of spectrum use as a result of international decisions, evaluation of the opportunity of making radio spectrum available to the market and evolution of the digital terrestrial television network (DTT).

In order to ensure the fulfilment of its mission, ICP-ANACOM has determined that the five strategic priorities defined for the previous three years will remain in force for the 2014-2016 period:

1. Promote open and competitive markets;
2. Assure and protect the rights of users;
3. Ensure efficient management of public resources;
4. Promote institutional and technical cooperation;

5. Promote internal efficiency and effectiveness.

ICP-ANACOM's performance in terms of accomplishing its strategic priorities and current activities are evaluated internally through a set of indicators detailed in this plan.

The need to improve organizational efficiency makes effective human resource management essential to ensure the motivation, retention and promotion of talent. ICP-ANACOM achieves this through training plans and by encouraging internal mobility, to provide staff with new career opportunities. As such, ICP-ANACOM plans to implement a new strategy in 2014 for the structured development of technical and behavioural competencies, covering its entire staff. One of the goals of this initiative is to foster an organizational culture with a focus on innovation and change, instilling capacity to respond to the challenges of regulating and supervising an extremely dynamic market such as the communications market.

In parallel, initiatives will be promoted to engage the organization and its staff in actions of social and environmental responsibility, which therefore contribute to a stronger institutional culture and a more sustainable society.

The 2014-2016 investment plan fulfils ICP-ANACOM's commitment to rationalize capital expenditure, without undermining the quality and rigour of regulatory activity and supervision. The most significant investments in the three-year period will result from: the acquisition of DTT probes, which will be used to measure the quality of the signal provided by the authorised operator; repairs to one of the SINCRER - Sistema nacional de controlo remoto das emissões radioelétrica (National System for Remote Control of Radioelectric Emissions) stations used for spectrum management; and development of the SIC - sistemas de informação centralizado (Centralized Information System) project.

Despite these calls on resources, the investment proposal for 2014 is about 1 percent below the amount budgeted for 2013, and 24 percent below the actual amount invested during 2012. For the 2014-2016 three-year period, a reduction of 8 percent (252 thousand euros) in investment is expected, compared to a reduction of 19 percent (608 thousand euros) forecast in the 2013-2015 plan.

With regard to the financial plan, as in previous years, the main source of income in 2014 remains the application of specific fees (as approved by the Government) to cover the costs of ICP-ANACOM's regulatory activity. These fees are paid by the operators and are

set according to a criterion of allocation in proportion to the weight of each operator's relevant income in the total sector. ICP-ANACOM also charges special fees that are incurred by operators in return for the use of scarce public resources (such as the radio spectrum). Revenues are forecast at 69.094 million euros, slightly lower than budgeted for 2013 (1 percent) and than reported in 2012 (8 percent). This decline results primarily from a reduction in administrative regulation fees payable by operators, which, in the current economic climate, is of particular relevance. Since regulation fees are cost oriented, the reduction in fees reflects the enormous effort that ICP-ANACOM has undertaken in order to reduce its costs.

In terms of spending, the 2014 budget forecasts a total of around 45.582 million euros, representing a decrease of 4 percent compared to the budget for 2013 and a decrease of 2 percent compared to actual expenditure in 2012, due mainly to the reduction of costs associated with supplies and services from third parties. ICP-ANACOM expects to maintain this decreasing trend throughout the three-year period, reducing budgeted expenses by 1 percent in 2015 and by 3 percent in 2016 (compared to 2014).

Strategic Priorities	Priority activities	Intermediate Results (No. of action)	Final results (no. of action)
Promote open and competitive markets	1.1 Analyse relevant markets susceptible to ex ante regulation 1.2 Review wholesale offers in the electronic communications sector 1.3 Develop and improve regulatory costing systems and analyse and audit their results 1.4 Define and distribute the CLSU values among eligible operators 1.5 Promote equivalence of access to offers resulting from the analyses of markets 4 and 5 1.6 Oversee access to the network and to infrastructure elements of the universal postal service provider 1.7 Establish appropriate conditions in terms of numbering management 1.8 Define and monitor indicators for market monitoring 1.9 Assess the impact of regulatory decisions on the markets	1.1, 1.2, 1.7 to 1.11, 1.15, 1.16, 1.21 to 1.23, 1.24, 1.25	1.3 to 1.6, 1.12 to 1.14, 1.17 to 1.20, 1.26, 1.27
Assure and protect the interests of users and citizens	2.1 Keep consumers informed, so they can make more reasoned choices 2.2 Improve ICP-ANACOM's responsiveness in the management of complaints 2.3 Enhance/improve performance in the area of monitoring spectrum with impact on consumers 2.4 Verify compliance with universal service pricing obligations 2.5 Assess the conditions of universal postal service provision 2.6 Define and oversee the quality parameters of the universal postal service and respective targets 2.7 Examine and assess the aptness of quality of services levels provided to consumers 2.8 Examine and implement measures on net neutrality 2.9 Implement measures to enhance the security of communications 2.10 Define conditions governing the use of numbering	2.5, 2.6, 2.10	2.1 to 2.4, 2.7 to 2.9, 2.11 to 2.17, 2.18, 2.19
Promote institutional and technical cooperation	3.1 Evaluate developments in the broadcasting, fixed and private mobile services, as well as the potential use of existing and future spectrum availability 3.2 Analyse the development prospects of radiocommunication services with a view to the digital dividend and spectrum policy programme 3.3 Define rules for drawing up the inventory of assets associated with the CTT concession	3.1, 3.2, 3.4	3.3
Ensure efficient management of public resources	4.1 Develop cooperation activities with other regulatory authorities 4.2 Ensure active representation in international organizations 4.3 Promote the sector internationally and transfer knowledge 4.4 Update ITED and ITUR manuals 4.5 Ensure coordination and promote cooperation with national and international spectrum management bodies, and organisations concerned with consumer protection and communications security 4.6 Ensure coordination of the various stakeholders in the planning, construction and maintenance of telecommunications infrastructure	4.1, 4.2, 4.4 to 4.6, 4.12, 4.13	4.3, 4.7 to 4.11
Promote internal efficiency and effectiveness	5.1 Implement cost reduction measures 5.2 Dematerialise/simplify processes and automate procedures 5.3 Expand the provision of services online 5.4 Invest in the excellence of human resources	5.4 to 5.12	5.1 to 5.3



BACKGROUND -
REGULATORY
COMMITMENT

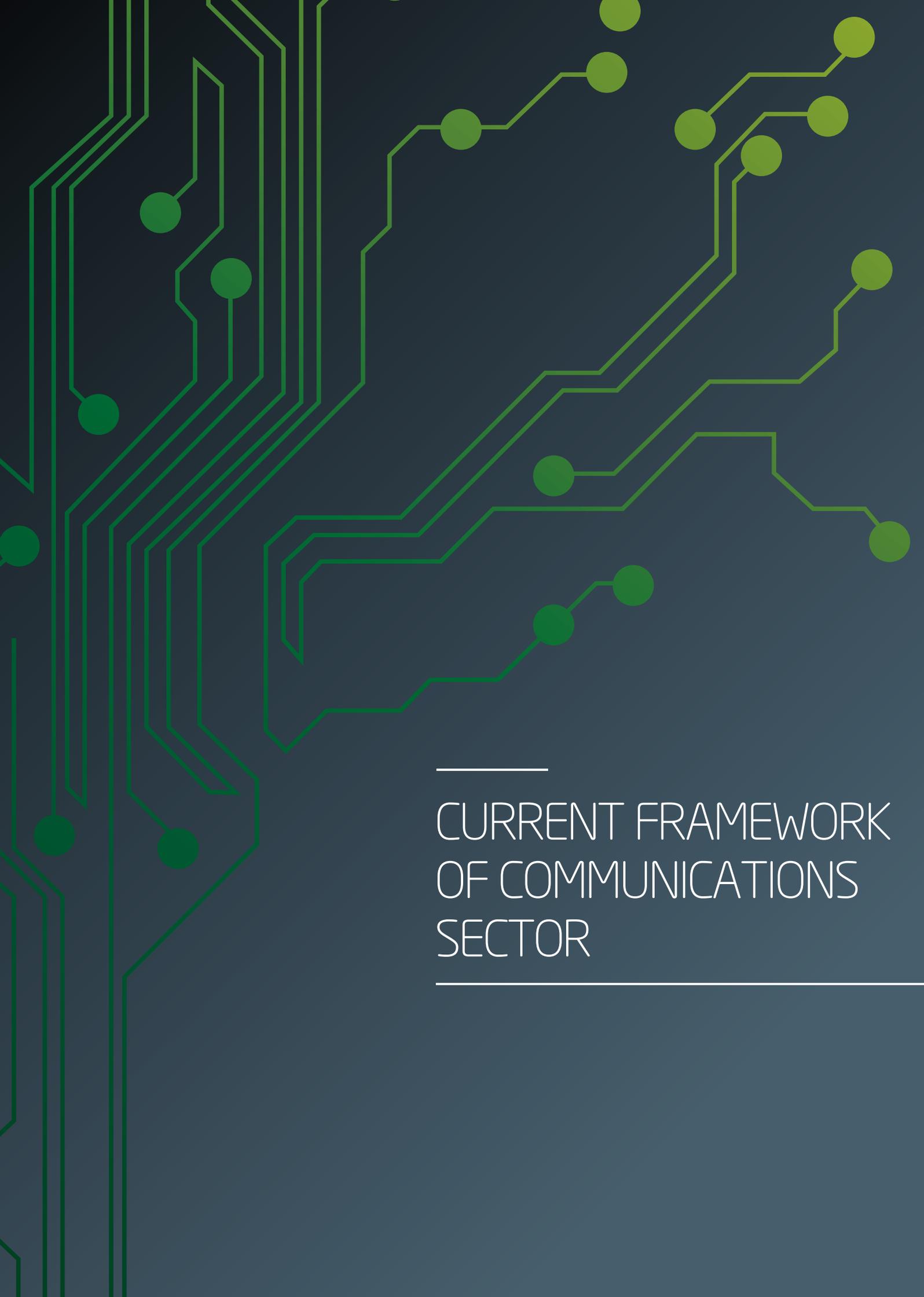
2. Background - regulatory commitment

ICP-ANACOM seeks to further enhance its capacity to act within the sector and to speed up its analysis and decision-making processes. As such, ICP-ANACOM's objective is to be more agile and proactive, seeking to anticipate the major challenges that it will face in the future as a result of market dynamics and rapid technological change. By doing so, regulatory intervention will be made more efficient, providing for remedies which are better-matched to the evolution of markets.

ICP-ANACOM's action will always be proportionate and, as far as possible, unobtrusive; it will only intervene in cases where the market lacks the competitive conditions which are conducive to the promotion of investment and to the accomplishment of operator business plans; where the needs of consumers are not met and where their rights are not safeguarded.

This commitment is reflected in the set of actions detailed in this plan. Meanwhile, enabling an environment suited to the promotion of investment and to innovation, ICP-ANACOM continues to submit its work to the principles of ensuring stability in the regulatory framework and ensuring predictability in its decision-making, and, likewise, to the principle of transparency. Under this principle of transparency, and also according to its statutes, ICP-ANACOM is bound to submit all decisions with external impact to public consultation. These consultations give ICP-ANACOM opportunity to communicate its positions to stakeholders, increasing regulatory predictability, while at the same time strengthening the decision process with the support of the inputs it receives in the form of contributions to consultations.

This aspect is especially relevant, given regulation's fundamental role in ensuring an environment of healthy competition, which promotes the entry of new firms on the market and encourages innovation in the provision of new services at competitive prices.



CURRENT FRAMEWORK
OF COMMUNICATIONS
SECTOR

3. Current framework of communications sector

The electronic communications and postal sectors have always played a very important role in the development of the national economy. In 2011, the most recent year for which data is available, these sectors made up 4.42 per cent of gross domestic product (GDP) (5 per cent in 2010), 4.2 per cent of gross fixed capital formation (3.8 percent in 2010) and provided 0.60 per cent of Portugal's employment (0.59 percent in 2010), directly employing about 28 500 people. Compared to 2010, the sector's weight in terms of GDP has declined and there has been a slowdown in investment; this can be partly explained by the increased difficulty in accessing finance, as well as by the rise in interest rates resulting from heightened sovereign risk.

Despite the economic crisis affecting the country, with disposable household income collapsing and a resulting drop in consumption, the communications sector remains one of the economy's most dynamic sectors. This dynamism stems from the unique situation of the electronic communications market in Portugal, driven by the strong competition existing between two technology platforms, one based on fibre-to-the-home (FTTH) and another based on cable (Docsis 3.0). A decisive contribution to the accomplishment of this market structure resulted from the spin-off of PT Multimédia in 2007, which split ZON TV Cabo (ZON) off from Grupo Portugal Telecom (Grupo PT). This gave rise to an increase in competition in the subscription television market, leading to a multitude of bundled offers with high rates of growth - in the year ended March 2013, customers with triple-play bundles (composed of fixed voice, broadband Internet and television) increased by 13.3 percent.

More recently, the announcement of a series of concentration operations, such as the merger of Optimus and ZON or Cabovisão's acquisition of Onitelecom, has had a large impact on the market, leading operators to anticipate these developments with the launch of new offers. Following the announcement of the ZON/Optimus merger, Portugal Telecom, announced the launch of a quadruple-play bundle (composed of fixed and mobile voice, broadband Internet and television), which encouraged other operators to follow with new offers almost immediately. As such, in a short space of time, Portugal now has three quadruple-play offers, greatly increasing the range of consumer choice and levels of competition in the market.

With the spread of triple-play and quadruple-play offers, the penetration of broadband and subscription television services has continued to increase. In fact, fixed, and especially mobile, broadband continues to report significant increases in terms of number of users. This is not unrelated to the fact that coverage by next generation networks (NGN) and Long term evolution (LTE) in Portugal is above the European average. The severe economic crisis afflicting the country is, however, a strong impediment to the rapid growth of broadband service subscription. The availability of fixed and mobile high-speed networks, allowing the circulation of large quantities of information, has been accelerating the trend of voice traffic substitution by data traffic, which is experiencing very high levels of growth.

These networks have also helped to advance the development of cloud computing. This has had a disruptive impact on all areas of information technology, and, in particular, has led to the design of new applications. By making it possible to store data in an external unit, accessible via the Internet, from any location and at any time, cloud computing has opened up a new business area for telecommunication operators and a range of new business opportunities.

This dynamic set-up has been driving an increasing digitalisation of economic and social life. E-Government, e-education, e-commerce, e-banking, e-payments and mobile payments are examples of how telecommunications and new technologies have been changing lives and society and can help improve our quality of life. It will take a long time to take full advantage of this dynamic, but Portugal is well positioned, occupying a leading position among the most advanced countries of Europe in the field of telecommunications.

The regulatory improvements introduced in the communications market have contributed and will continue to contribute to the creation of conditions which are conducive to the development of a competitive market structure, with more quality products and services and better prices. Note should be made at this point of ICP-ANACOM's recent work to reduce barriers to new entrants in the electronic communications sector (such as the implementation of the *Regulamento da Portabilidade* (Portability Regulation), improvement to leased lines wholesale conditions and definition of procedures to be followed when measuring the quality of service of regulated wholesale offers). ICP-ANACOM has also recently ordered operators to reduce tariffs charged for call termination on fixed and mobile networks; these tariffs are already among the lowest in Europe, and a further reduction should have a positive effect on the prices paid by

households and businesses. The recent release of spectrum enabled by DTT and the multi-band frequency auction held in 2012 means spectrum is becoming available that will allow operators to develop new business.

Meanwhile, the postal sector has been evolving along different lines. While the sector continues to experience a decline in traffic, largely due to competition from electronic communications and substitutability, the development of e-commerce has boosted volumes of parcel traffic with the growing trend in online purchases by Internet users. This has guided postal operators towards new business opportunities and calls on the regulator to give increased attention to this growing niche market.

The full liberalization of the postal sector and the privatization of the incumbent provider, which is due to be completed by the end of 2013, may bring changes which impact the development of the postal sector.

Based on the 2014-2016 Plan, ICP-ANACOM is seeking to position itself in order to achieve the goal of strengthening competitive conditions in the market, with a view to meeting the needs of consumers in a context of economic crisis.



PRIORITIES AND AREAS
OF INTERVENTION
2014-2016

4. Priorities and areas of intervention 2014-2016

ICP-ANACOM is engaged in a wide range of activities: regulation, supervision, market oversight, monitoring of networks and services, spectrum and numbering management and network security; it also provides advice to the government and represents the Portuguese state at various international bodies.

The present Multi-year Plan presents the strategic priorities and priority activities to be developed within this plurality of functions over the 2014-2016 period. Considering that the implementation of the various actions requires the allocation of human, technical and financial resources, the Multi-year Plan also includes ICP-ANACOM's People Plan and Investment Plan for the same period.

In addition to ICP-ANACOM's priority activities, this document also details its current activities, as those that are developed on a more stable and permanent, ongoing basis but which but are crucial in ensuring ICP-ANACOM's capacity to carry out its responsibilities efficiently, while involving the use of significant resources.

The document also sets out the global activity indicators designed to monitor ICP-ANACOM's performance in implementing the actions under the Plan.

The strategic people, resources and financial plans quantify the appropriate levels of resources required by ICP-ANACOM to perform these functions.

Finally, the actions to be undertaken are specified and an implementation timetable given for the three-year period 2014-2016, grouped according to strategic priority.

As part of its advisory functions, ICP-ANACOM is often called on to support the Government, either upon the Government's request or upon its own initiative, in the definition of general policy for the communications sector or in the preparation of legislation. The activities in this area are difficult to foresee when the multiannual plan is being prepared, so that, a large part of the work that arises over the year in providing advice will not be included in the plan. In the period covered by this plan, it is expected that ICP-ANACOM will support the government especially in the designation of provider of the telephone directory services, in preparing the draft Decree-Law which approves the exploration and use of postal services and also in different areas related to the universal service of electronic communications and postal services.

For the 2014-2016 period, ICP-ANACOM maintains the five strategic priorities defined in the previous plan (Figure 1- Strategic priorities of ICP-ANACOM for the 2014-2016 three-year period):

Figure 1- Strategic priorities of ICP-ANACOM for the 2014-2016 three-year period



Strategic Priority 1: Promote open and competitive markets

Promote open and competitive markets

- 1.1 Analyse the relevant markets susceptible to ex ante regulation
- 1.2 Review wholesale offers in the electronic communications sector
- 1.3 Develop and improve regulatory costing systems and analyze and audit their results
- 1.4 Define and distribute CLSU values among eligible operators
- 1.5 Promote equivalence of access to offers resulting from the analyses of markets 4 and 5
- 1.6 Oversee access to the postal network and access to infrastructure components of the universal postal service provider
- 1.7 Establish appropriate conditions for the management of numbering
- 1.8 Define and monitor market oversight indicators
- 1.9 Assess the impact of regulatory decisions on markets

1.1 Analyse the relevant markets susceptible to ex ante regulation

ICP-ANACOM performs analysis of the various relevant markets defined by the EC, and examines the competitive situation of each market. Whenever it is concluded that failures exist in these markets, ICP-ANACOM decides on the most fitting measures to remedy these failures and to restore competitive conditions. Therefore, depending on the competitive situation, ICP-ANACOM may decide to reinforce, reduce or suppress regulatory measures, and may also opt for full or partial deregulation.

In 2014, ICP-ANACOM plans to complete the following analyses:

- Wholesale market of call termination on individual mobile networks (market 7 of the current EC Recommendation)
- Evaluation of the mobile communications market, following completion of the multi-band auction, to ascertain whether distortions to competition exist and to ascertain the need to adopt measures to remedy them.

1.2 Review wholesale offers in the electronic communications sector

Regulated wholesale offers are very important to alternative operators, especially in cases where they do not control their own infrastructure. Through these regulated offers, alternative operators are able to gain access to conditions that allow them to develop their own distinct offers on the market.

Regulated wholesale offers are presented by operators which have been identified as possessing significant market power (SMP) following market analyses and are designed to restore market balance. Wholesale offers are reviewed periodically when warranted by changes in the market.

ICP-ANACOM expects to advance with a wholesale offer of access to optical fibre networks in 2014, following analysis of markets 4 and 5, and to conclude its review of mobile termination prices established on the basis of the cost model adopted in 2012, with the revision of the glide path for the 2014-2016 period.

Finally, amendments to the Reference Interconnection Offer (RIO) and the Wholesale Line Rental Offer (WLRO), and a reassessment of leased line pricing, including CAM circuits (Mainland-Azores-Madeira) will also take place in 2014.

1.3 Develop and improve regulatory costing systems and analyze and audit their results

Relevant operators are required to employ accounting systems that provide the regulator with information it can use to check a set of items that contribute to the formulation of prices.

It is also important that costing models are developed and refined to check the orientation of prices to costs, since there is a requirement, in many cases, that pricing reflect the evolution of the costs incurred by operators in the provision of services.

Several actions are planned in 2014, including analysis of results and auditing of the SCA - sistema de contabilidade analítica (Analytical Accounting System) used by relevant operators and the definition of new regulatory costing systems:

- Development and establishment of new costing models, particularly for call termination on fixed networks (conclusion). Commencement of model for next generation networks (NGN).
- Completion of audits of annual results of regulatory costing of PT Comunicações, S.A. (PTC) - from 2010, integrated with auditing of CLSU - custos líquidos decorrentes da prestação do serviço universal (net costs of universal service provision) of electronic communications.
- Launch of audit of the new SCA - sistema de contabilidade analítica (analytical accounting system) used by CTT - Correios de Portugal, S. A. (CTT) for 2012-2013 and review of CTT's cost of capital methodology.

1.4 Define and distribute CLSU values among eligible operators

It is incumbent upon ICP-ANACOM to ensure auditing, by independent entities, of the CLSU values presented by the respective providers to ascertain whether they comply with established calculation methodologies, and also to approve the final values of these costs.

ICP-ANACOM is also required to define the allocation of costs between eligible operators, both in the electronic communications sector and in the postal sector, and manage the process of collecting the various contributions and reimbursing the universal service provider(s).

Within this framework the following actions are planned for 2014:

- Audits of net cost estimates of PTC in the 2010-2012 period and corresponding re-submissions, with a final decision due in early 2015.
- Audits of the values of relevant turnover in the context of the universal service compensation fund (2013).
- Audits of the values in respect of retirees and pensioners in the period subsequent to the designation of the universal service provider by public tender (2013 and 2014).
- Start of the process of compensating PTC, for the period prior to the designation of the universal service provider by public tender (2007-2009), doing the same for the period subsequent to the designation of the universal service provider (2013).
- Evaluation of the postal CLSU for the previous year.
- Start of process to compensate postal CLSU (if applicable).

1.5 Promote equivalence of access to offers resulting from the analyses of markets 4 and 5

Following the EC recommendation on non-discrimination and costing methodologies, ICP-ANACOM plans to launch a public consultation and take a final decision on the implementation of this recommendation in 2014.

An audit should be initiated to verify conditions of equivalence of access for the various operators, in which an analysis will be made of processes, systems and indicators of quality of services that the incumbent operator provides to other operators.

1.6 Oversee access to the postal network and access to infrastructure components of the universal postal service provider

In a context of full liberalization of the postal sector and privatization of the universal postal service provider, it is important to ensure minimum levels of accessibility and availability of the universal postal service. Therefore, in 2014, ICP-ANACOM will need to define the rules governing access to the postal network and infrastructure components of the universal postal service provider.

1.7 Establish appropriate conditions for the management of numbering

Proper management of numbering should reduce technical barriers to provider switching and facilitate the development of new applications and services of value to the end-user. In this respect, ICP-ANACOM plans to undertake the following actions in 2014:

- Begin definition of rights and obligations of telephone services resellers as regards the rights of use of numbering.
- Assess the necessity of using numbering resources for eCall.
- Analyze requirements and rules for Mobile Network Codes (MNC).
- Define the conditions governing use of geographic numbers, particularly in situations of user mobility.

1.8 Define and monitor market oversight indicators

In 2014, ICP-ANACOM will continue to monitor the retail prices of telecommunications in the Portuguese market (evolution) and make international comparisons in the residential and business segments. Although this does not fall within ICP-ANACOM's regulatory remit, this monitoring will provide a further insight to gauge the level of competition in the sector, as well as the competitiveness of telecommunication costs for Portuguese companies and the reasonableness of costs for Portuguese consumers.

Rapid technological developments witnessed in the electronic communications sector have led to the emergence of new products and services. ICP-ANACOM is charged with monitoring the dynamics of markets, and is required to maintain statistical indicators which are appropriate to this evolution. In 2014, the methodology and indicators will be defined to monitor the evolution of mobile broadband (LTE) as well as indicators to monitor accomplishment of the Digital Agenda.

1.9 Assess the impact of regulatory decisions on markets

In order to improve its performance and demonstrate accountability, ICP-ANACOM will continue to assess the impact of its regulatory decisions on markets (initiative launched in 2013), with an assessment to be carried out in 2014 on the impact of the reduction of fixed termination rates.

Strategic priority 2: Assure and protect the rights of users

Assure and protect the rights of users and citizens

- 2.1 Keep consumers informed, so they can make more reasoned choices
- 2.2 Improve ICP-ANACOM's responsiveness in the management of complaints
- 2.3 Enhance/improve performance in monitoring spectrum with impact on consumers
- 2.4 Verify compliance with universal service pricing obligations
- 2.5 Assess the conditions of universal postal service provision
- 2.6 Define and oversee the quality parameters of the universal postal service and respective targets
- 2.7 Examine and assess the aptness of quality of services levels provided to consumers
- 2.8 Evaluate and implement measures on net neutrality
- 2.9 Implement measures to enhance the security of communications
- 2.10 Define conditions governing the use of numbering

2.1 Keep consumers informed, so they can make more reasoned choices

Providing consumers with quality information is crucial to assure and protect their rights and interests. This is the only way, given the range of offers in the market, of ensuring that consumers are equipped to make choices which best respond to their needs and that they are protected from overly-aggressive sales tactics. With this in mind, ICP-ANACOM will continue to work in 2014 to ensure that operators provide consumers with accurate, clear and transparent information and to improve the quality of this information, in particular through:

- Introduction of new features on ANACOM's Consumers' Website, with a wider range of information than currently offered, in addition to improvements in the interactive area.

- Introduction of new features in the COM.escolha tariff comparison tool, which will allow users to compare other aspects of provider offers in addition to tariffs.

2.2 Improve ICP-ANACOM's responsiveness in the management of complaints

The electronic communications sector generates a large number of complaints, and use of litigation between consumers and operators is common. Paradoxically, this situation results from the market's competitive environment which has given rise to aggressive commercial practices. In this context, less informed consumers are often induced to accept less favourable contractual conditions or, in some cases, are even made victims of abusive practice and opaque offers; this situation calls on ICP-ANACOM to act in a more rapid and robust manner to assure consumer interests, in accordance with its statutory powers and responsibilities.

In 2014, ICP-ANACOM will implement a new integrated model to process the complaints it receives from users and providers; this will enable major improvements over the current model. The new model will speed up the complaint-handling process, increasing capacity to process enquiries and providing consumers who complain with faster and better quality responses. ICP-ANACOM will also revise the framework governing end-user complaints and their processing by providers.

2.3 Enhance/improve performance in monitoring spectrum with impact on consumers

ICP-ANACOM intends to modernise the technology used by its *Monitorização e Controlo do Espectro* (Monitoring and control of the spectrum) area, which will increase its capacity for action on the ground. ICP-ANACOM also plans to step up its monitoring of the operating conditions of the DTT network, in order to gauge the quality of service being provided to end-customers; probes are to be installed across the country to provide ongoing measurements of the DTT signal, pursuant to the right of use of frequencies awarded to the operator (PTC). Additionally, ICP-ANACOM will require the operator to ensure DTT signal quality through the consolidation of the DTT platform and by enhancing its technical robustness, in accordance with the determination on the evolution of the DTT network.

At the same time ICP-ANACOM seeks to harmonize supervisory activities in the area of MCE, setting up standard reporting to cover 70 percent of the infraction cases usually

encountered by the service. This will help speed up cases and enhance internal efficiency, which translates into enhanced protection of user interests.

2.4 Verify compliance with Universal Service pricing obligations

ICP-ANACOM regulates pricing in the context of the universal service of electronic communications and the postal sector; it is therefore incumbent upon ICP-ANACOM to conduct proper analysis of these prices and to ascertain compliance with applicable determinations and conventions.

2.5 Assess the conditions of universal postal service provision

In 2014, ICP-ANACOM will evaluate the conditions of universal postal service provision, including:

- Monitor accomplishment of objectives related to postal network density and minimum offers of service.
- Evaluate and, if necessary, define exceptional circumstances or geographical conditions that give basis to a waiver of the obligation of daily universal service collection and distribution and/or distribution at addressee's address.

2.6 Define and oversee the quality parameters of the universal postal service and respective targets

In 2014, ICP-ANACOM will establish the quality of service (QoS) parameters and respective targets for the universal postal service, safeguarding consumer rights.

The values of the universal service QoS indicators will be audited to confirm the reported data and monitor compliance with applicable regulations.

Universal postal service QoS levels will be monitored on a regular basis to confirm compliance and with a view to possible sanction, if necessary.

2.7 Examine and assess the aptness of quality of services levels provided to consumers

Lacking the power to set QoS targets for providers other than the universal service provider, ICP-ANACOM regularly conducts QoS studies through which it evaluates the

quality of services provided and compares it to advertised offers. By making the results of these studies public, ICP-ANACOM provides consumers with important information to support their decision-making.

The following studies will be conducted in 2014:

- QoS of broadband Internet access.
- QoS on mobile networks: voice and data.

2.8 Evaluate and implement measures on net neutrality

The Body of European Regulators for Electronic Communications (BEREC) has produced guidance on net neutrality, which ICP-ANACOM will be implementing, while evaluating the need for regulatory intervention, with the definition of indicators or minimum quality requirements and the establishment of metrics.

Consumers will also be provided with a more robust tool that will allow them to check the Internet speed provided to them by their service provider.

2.9 Implement measures to enhance the security of communications

With telecommunications networks playing a key role in society, at an economic level and at a social level, at the level of personal relationships, it is imperative that they remain in constant, full working order, without downtime. As a result, network security and integrity has become an increasingly important component of the sector regulator's remit.

With a view to this reality, ICP-ANACOM aims to put a set of measures in place by 2014 that will enable continued monitoring and ensure that any security breaches are addressed. ICP-ANACOM will be installing a centre for reporting notifications of security breaches and integrity losses, and also plans to conduct security audits, in order to improve the reliability and security of electronic communications networks and services.

ICP-ANACOM will also be participating in a series of security exercises at a European and national level, throughout the year, ensuring it is properly prepared to respond to the identified requirements.

2.10 Define conditions governing the use of numbering

In the context of the PNN - Plano Nacional de Numeração (National Numbering Plan), ICP-ANACOM will evaluate the opportunity to establish conditions governing the use of calling line identification (CLI).

Strategic Priority 3: Ensure efficient management of public resources

Ensure efficient management of public resources

3.1 Evaluate developments in the broadcasting, fixed and private mobile services, as well as the potential use of existing and future spectrum availability.

3.2 Analyze the development prospects of radiocommunications services with a view to the digital dividend and spectrum policy programme

3.3 Define rules for drawing up the inventory of assets associated with the CTT concession

3.1 Evaluate developments in the broadcasting, fixed and private mobile services, as well as the potential use of existing and future spectrum availability

With the identification of scenarios on the use of spectrum for radio and television broadcasting, in 2014, ICP-ANACOM plans to define the various scenarios of spectrum use and identify the benefits and constraints associated with each scenario, so that it can submit proposals to the government for future evolution.

The same work will be done in relation to spectrum used for fixed and private mobile services, with a view to presenting proposals for future action.

In parallel, ICP-ANACOM will examine issues related to the evolution of the DTT platform, promoting, in areas where ICP-ANACOM has responsibility, the adequacy of the channel offer on this platform.

Given the existence of spectrum available for the provision of broadband wireless access (BWA), ICP-ANACOM proposes to advance with its release in 2014, after sounding out interest in the market.

In the case of surplus spectrum subsequent to the multi-band auction held in 2012, the opportunity of offering it to the market will be reassessed.

3.2 Analyze the development prospects of radiocommunications services with a view to the digital dividend and spectrum policy programme

ICP-ANACOM will begin to identify the feasibility and method of provision of additional spectrum bands in which mobile broadband services can be deployed. This work will be completed in late 2015.

ICP-ANACOM will conduct a prospective analysis of the Ultra High Frequency (UHF) band, as used for television broadcasting, with special attention to the digital dividend II band, and will start planning the 700 MHz band.

ICP-ANACOM will also discuss and define the national positions to be put forward at the 2016 World Radiocommunication Conference (WRC-2016) of the International Telecommunication Union (ITU).

3.3 Define rules for drawing up the inventory of assets associated with the CTT concession

Following the full liberalization of the postal sector, the government is due to proceed with the adaptation of CTT's concession contract, adapting it to the new reality. Since these assets are assets of the public domain, with the liberalization of the market and access of other operators to the incumbent provider's network, and with the privatization of the universal postal provider, it is important to conduct an inventory of public assets encompassed by the concession.

It falls to ICP-ANACOM to define the rules which govern preparation of the inventory. Subsequently there will be an audit of the values to evaluate the methodology and make any corrections.

Strategic Priority 4: Promote institutional and technical cooperation

Promote institutional and technical cooperation

- 4.1 Develop cooperation activities with other regulators
- 4.2 Ensure active representation in international organizations
- 4.3 Promote the sector internationally and transfer knowledge
- 4.4 Update ITED and ITUR manuals
- 4.5 Ensure coordination with national and international agencies having radio spectrum management responsibilities, and organisations concerned with consumer protection and communications security
- 4.6 Ensure coordination of the various stakeholders in the planning, construction and maintenance of telecommunications infrastructure

4.1 Develop cooperation activities with other regulators

At a national level, ICP-ANACOM intends to strengthen relations with other sector regulators and AdC - Autoridade da Concorrência (Portuguese Competition Authority), in order to promote cooperation and the sharing of information and good practice, contributing to an improvement in the quality of regulation in Portugal.

At a European level, ICP-ANACOM's participation in BEREC stands out in terms of its relevance to national regulation and given that national regulation is highly dependent on the European Union (EU) framework. BEREC brings together regulators from EU countries (national regulatory authorities - NRA) and is engaged in a range of important activities: it issues opinions on EC draft decisions, recommendations and guidelines; it promotes the sharing of knowledge and experiences among the various regulators, including third-country regulators, helping to promote the European regulation model; and advises the EC, the European Parliament (EP) and the European Council.

In the period covered by the plan, ICP-ANACOM will seek to continue its participation in all BEREC working groups and maintain the presidency of one of these groups, simultaneously strengthening coordination with the market at a national level.

In terms of cooperation with Portuguese-speaking countries, bilateral cooperation with Portuguese-speaking African countries (PALOP), Brazil and East Timor, remains a priority at both institutional and technical level. A key part of ICP-ANACOM's work with PALOP has been its involvement and commitment, in the context of the Association of Communications and Telecommunications Regulators of the Community of Portuguese Speaking Countries (ARCTEL-CPLP), in the creation of a roaming tariff that will apply between the association's member countries. The goal is that this tariff will take effect at the end of 2014.

ICP-ANACOM also participates in various regulators organizations and associations, and in particular, the European Regulators Group for Postal Services (ERGP), the Independent Regulators Group (IRG), the Euro-Mediterranean Regulators Group (EMERG) and the Latin-American Forum of Telecommunications Regulatory Authorities (Regulatel), in which it plans to maintain an active policy of intervention.

ICP-ANACOM will also maintain bilateral meetings with other National Regulatory Authorities (NRA), such as Spain's *Comisión del Mercado de las Telecomunicaciones* (CMT), where joint interests are identified that may provide a basis for coordinated action at an international level.

4.2 Ensure active representation in international organizations

In the context of its duties of assisting the Government, ICP-ANACOM provides representation of the Portuguese State at international bodies of the communications sector and on various committees and working groups, where it is charged with undertaking a pro-active promotion and defence of Portuguese interests and positions.

While continuing to perform functions of representation, ICP-ANACOM is seeking to achieve greater financial efficiency in terms of the results of its participation in different bodies, including by securing a reduction in the contributions that it incurs. ICP-ANACOM has been working in this regard in recent years and, in 2014, actions are planned to reduce the financial contributions payable to the ITU and the Universal Postal Union (UPU).

ICP-ANACOM intends to define a new strategy for participation in international organizations and bodies, which it should begin to implement from late 2014.

Within the EU, ICP-ANACOM provides advice and undertakes representation of the Portuguese State in a number of groups and committees including the Communications Committee (COCOM), the Postal Policy Committee, the Group of Experts on Electronic Commerce, the Radio Spectrum Policy Group (RSPG), the Spectrum Committee and the Telecommunications Conformity Assessment and Market Surveillance Committee (TCAM). It also advises the Government at different levels, including at the level of Council of Ministers.

ICP-ANACOM participates on behalf of the Portuguese state in a number of bodies, including; the ITU, UPU and the Postal Union of the Americas, Spain and Portugal (PUASP), the European Telecommunications Satellite Organization (EUTELSAT IGO), the International Mobile Satellite Organization (IMSO) and the International Telecommunications Satellite Organization (ITSO).

On issues of security of communications, ICP-ANACOM participates in the work of several groups, in particular the European Network and Information Security Agency (ENISA) and EC working groups as regards the protection of critical infrastructure and future European cybersecurity strategy, and also the North Atlantic Treaty Organization (NATO) with regard to civil emergency planning.

4.3 Promote the sector internationally and transfer knowledge

Over the course of the multi-annual plan, ICP-ANACOM will focus on promoting the sector internationally, favouring an intense transfer of knowledge to other entities through organisations which work in the field of internationalisation.

To this end, a partnership will be formed with AICEP-Global and a protocol established.

ICP-ANACOM also seeks to redefine a strategy for bilateral cooperation protocols and to put reformulated bilateral agreements into operation. An evaluation will be conducted of the economic impact of ICP-ANACOM's cooperative effort.

4.4 Update ITED and ITUR manuals

In 2014, ICP-ANACOM will complete its update of the technical manuals for ITED - Infraestruturas de Telecomunicações em Edifícios (Telecommunications infrastructure in buildings) and ITUR - Infraestruturas de Telecomunicações em Loteamentos,

Urbanizações e conjuntos de edifícios (Infrastructures for telecommunications in housing developments, urban settlements and concentrations of buildings)

The economic crisis has caused a paradigm shift in the Portuguese construction industry, which is focusing more on building renovation rather than new construction. This reality presents a set of challenges when it comes to telecommunications infrastructure intervention, which need to be addressed in conjunction with market agents and which ICP-ANACOM wants to see incorporated into new technical regulations. Subsequently, ICP-ANACOM will undertake efforts to spread information about the new ITED / ITUR regimes, as well as about the rules governing Radio and Telecommunications Terminal Equipment (R&TTE).

4.5 Ensure coordination with national and international agencies having radio spectrum management responsibilities, and organisations concerned with consumer protection and communications security

In 2014, ICP-ANACOM will start defining procedures to be adopted in relation to the various national entities with spectrum management responsibilities, with a view to further clarifying the role of each one and so contributing to more efficient management. This work should be completed in the last quarter of 2015. ICP-ANACOM also seeks to strengthen cooperation with the *Estado Maior General das Forças Armadas* (Armed Forces General Staff).

As part of its activities to ensure the security of communications ICP-ANACOM will undertake cooperation actions with other entities and agencies with responsibilities and expertise in this area. These entities include IPMA - Instituto Português do Mar e da Atmosfera (Portuguese Sea and Atmosphere Institute), CNPD - Comissão Nacional de Proteção de Dados (National Data Protection Commission) and GNS - Gabinete Nacional de Segurança (National Security Office).

In 2014, ICP-ANACOM is also due to embark on a process consolidation and coordination with the Ministry of tutelage and other entities, including FCT - Fundação para a Ciência e Tecnologia (Foundation for Science and Technology), with a view to the defence of the national position on Internet governance.

In defence of the rights and interests of consumers, ICP-ANACOM will continue to develop cooperation activities with relevant organisations in this area (public and private),

such as Direção-Geral do Consumidor (General Consumer Directorate) and consumer associations and organizations.

4.6 Ensure coordination of the various stakeholders in the planning, construction and maintenance of telecommunications infrastructure

Decree-Law no. 123/2009 of 21 May, as rectified by Statement no. 43/2009 of 25 June, and as subject to subsequent amendment (Decree-Law no. 258/2009 of 25 September), makes it incumbent upon ICP-ANACOM to design, manage, maintain and guarantee access to a constantly updated register of "infrastructure suitable for carrying electronic communications networks", which aggregates and systematises the record information of "entities in possession of infrastructure which is suitable for carrying electronic communications networks" (including ducts, manholes and associated infrastructure). In 2014, the SIC - Sistema de informação centralizado (centralized information system) will be consolidated and widely disseminated by the agents and entities with responsibilities in the implementation of the process. The SIC is considered in various spheres, including among the various Member States of the EU, an instrument which provides an essential basis for the proper definition and planning of broadband promotion policies.

While definition of the SIC's implementation model is expected by the end of 2013, the process to select the entity that will manage the corresponding platform was the subject of litigation, with a court judgement only handed down on 31 January 2013. The court ordered that the tender be re-launched six months following notification of the non-award decision to one of competitors to the tender - which occurred on 9 May 2013. This will enable the SIC of "infrastructure suitable for carrying electronic communications network's to be properly implemented in 2014, when it will also be possible to advertise the construction and access conditions, by publicizing the regulations which entities possessing or managing this infrastructure will be required to develop.

ICP-ANACOM is bound to ensure availability of the information to be included in the SIC and to coordinate the process and oversee the obligations laid down in Decree-Law no. 123/2009 with a view to achieving its objectives - this is an activity that merits ICP-ANACOM's fullest commitment.

Strategic Priority 5: Promote internal efficiency and effectiveness

Promote internal efficiency and effectiveness

- 5.1 Implement cost reduction measures
- 5.2 Dematerialise/simplify processes and automate procedures
- 5.3 Expand the provision of services online
- 5.4 Invest in the excellence of human resources

5.1 Adoption of cost reduction measures

For several years, ICP-ANACOM has followed a stringent policy aimed at reducing costs. For the 2014-2016 three-year period, cost reduction remains a paramount objective, which represents a commitment for the entire organization. There are a number of ways to accomplish this objective, including: renegotiation of contracts, rationalization of resources and consumption, behaviour change, and the review and de-materialisation of processes. For the duration of this plan, the objectives continue to stipulate a reduction of costs, and in 2014, ICP-ANACOM plans a reduction in total costs of 3 per cent over the amount reported in 2012.

5.2 Dematerialise/simplify processes and automate procedures

In 2014, ICP-ANACOM will continue to move forward with a set of concrete projects that will enable it to improve its internal efficiency. These projects involve the simplification of procedures, streamlining processes and reducing the bureaucracy inherent in certain work processes. This effort may result in the release of resources for higher value-added functions, while also improving ICP-ANACOM's capacity to respond to external enquiries. In this way, ICP-ANACOM will be able to achieve an improvement in quality and response times.

The envisaged alterations in terms of changing procedures and the dematerialization of processes include:

- Developing new features in computer applications to support spectrum management, including electronic licensing;
- Maintaining and making a database available of geo-referenced information that will enhance the efficiency and agility of processes. This database will facilitate internal work and improve relationships with third parties, since operators will have full access to information via the website;
- Computerizing the procedure for the handling, by providers, of enquiries from users of communications services;
- Adopting a new complaints management system;
- Developing an application to register the perpetrators of offences, allowing instant access to a history of reoccurring offences and providing for the fulfilment of a legal requirement as regards administrative offences. The creation of this legal database introduces greater facilities for consultation and enables rapid response to requests from the competition court;
- Implementing a document management solution that will classify and categorize documents, facilitating process handling and enhancing internal productivity;
- Computerizing procedures related to equipment market supervision processes, which will accelerate the completion of procedures and referral to litigation;
- Extending the current Extranet to encompass the fixed telephone service (FTS), Internet access service (IAS), subscription television service (STVS) and postal services (SP), the annual communications questionnaire and the portability, questionnaire, accomplishing efficiency gains.

In parallel, activity control mechanisms will be systematized and new indicators created to monitor the tasks performed and measure results.

5.3 Expand the provision of services online

ICP-ANACOM will continue to expand the range of services it provides online through its Institutional and Consumers' Website, particularly with the entry into operation of new features. This will involve electronic licensing and management and availability of geo-referenced information. By adding to the service's quality, in addition to improved ease of access, ICP-ANACOM is seeking to improve its relationship with its customers. To

facilitate interaction with end-consumers, new features will be developed on ANACOM's Consumers' Website. In particular, standard forms will be available online that can be used to contact ICP-ANACOM or other entities.

5.4 Invest in excellence in human resources

ICP-ANACOM's human resources are its main asset. It needs highly motivated and qualified teams to achieve its proposed objectives and to perform its regulatory activity with increasing quality.

ICP-ANACOM recognises the importance of people who are committed to the organization and its goals, and will use the latest management techniques to promote excellence among its staff. In this respect, ICP-ANACOM will continue to invest in the quality of its human resources, with a focus on training which improves and develops staff skills.

In this regard, ICP-ANACOM plans to implement a new strategy in 2014 for the structured development of technical and behavioural competencies for all staff. One of the goals of this initiative is to foster an organizational culture which is focused on innovation and change, in order to instil capacity to respond to the challenges of regulation and supervision of an extremely dynamic market such as communications.

The training plan to be implemented will incorporate the results of the work done to identify profiles and technical and behavioural competencies, aligning training needs with these profiles.

A series of actions will be developed aimed at consolidating the ANACOM culture and to engage in social responsibility initiatives.

Likewise, ICP-ANACOM's work experience programme will be a priority in 2014. This programme will promote and facilitate the entry of high-potential young graduates into the labour market by providing them with the opportunity of a first professional experience.

In 2014, ICP-ANACOM will further consolidate its global study on internal customer satisfaction, assessing levels of satisfaction with internal relationships and provision of services between different departments. This survey will identify problems and diagnose opportunities to improve internal functions and practices.

CURRENT ACTIVITIES OF ICP-ANACOM



5. Current activities of ICP-ANACOM

In addition to each year's designated priority actions, ICP-ANACOM is engaged, on an ongoing basis, in a wide range of activities which are crucial to the proper performance of its responsibilities. Although these activities are not strategic in nature, it is important to consider them, since they take up significant resources, both human and financial, and in terms of time.

These activities will be listed according to the strategic priorities defined in the multi-annual plan.

Strategic Priority 1: Promote open and competitive markets

- **oversee the fulfilment of obligations, carry out enforcement actions and instigate breach proceedings**

In its activity, ICP-ANACOM is responsible for enforcing the prevailing regulatory framework; it therefore engages in activities to supervise and monitor the market, through which it oversees and enforces compliance with sector legislation and determinations, and also with the obligations associated with allocated rights of use of frequencies and titles governing exercise of provider activities. ICP-ANACOM also oversees the conditions associated with the operation of networks and services.

In general, enforcement actions can be preventative or reactive. On average, ICP-ANACOM conducts around one thousand preventative enforcement actions every year, and when these actions reveal evidence of unlawful practice, the processes are referred to litigation. In 2012, ICP-ANACOM's legal services received 700 official reports that led to the instigation of breach proceedings in 300 cases, with 343 pending cases decided during the year.

For 2014, ICP-ANACOM has nearly one thousand enforcement actions planned, targeting the electronic communications sector, the postal sector, ITED/ITUR and the equipment market.

- **Compile and disseminate statistical information about the communications sector to evaluate market trends and support decision-making**

ICP-ANACOM regularly compiles and analyses a wide range of statistical information on the sector, thereby obtaining a deep understanding of the market and enabling quality decision-making. These analyses are then published, so that all stakeholders have access to information that may be relevant in defining their strategies and market positioning.

By publishing the information it receives and analyses, ICP-ANACOM is contributing to market transparency; this discourages certain less suitable practices and corrects certain improper behaviour by market agents that may impact the interests of consumers and the proper functioning of the market.

With the statistical information it collects, ICP-ANACOM prepares and publishes an annual report on the status of the communications sector, which brings together the most relevant data in the electronic communications and postal sector, with great detail.

- **Grant and revoke licenses for the exercise of activity, allocate numbers and frequencies**

Pursuit of activity in the electronic communications sector is subject to the general authorization regime. In the case of the postal sector, commencement of activity also follows this rule, but may, in some cases, be subject to licensing. In such cases, it is ICP-ANACOM's responsibility to issue licences.

Also in cases where the exercise of the activity involves the use of numbering resources, these are allocated by ICP-ANACOM, just as it is responsible for allocation of rights of use frequencies, when applicable.

At the request of operators or upon its own initiative, ICP-ANACOM has powers to revoke titles in the event of non-compliance with their provisions.

- **Monitor the development of next generation networks in rural areas**

In its role as adviser to the government, ICP-ANACOM is keeping track of these projects as they are developed, particularly through audits and analysis of operator reports, overseeing the fulfilment of the objectives set for each rural area.

Strategic Priority 2: Assure and protect the interests of users and citizens

- **Distribute information to consumers**

ICP-ANACOM publishes a wide range of information on the sector on an ongoing basis. Such information helps users and consumers make informed choices and covers areas such as: the launch of new products and services, tariffs, sector legislation, ICP-ANACOM decisions, data on trends in complaints and data on which operators and services are cited most in complaints.

This information is disclosed to the public through ICP-ANACOM's institutional website (www.anacom.pt) and on ANACOM's Consumers' Website (www.consumidor-anacom.pt), which was set up specifically to cement ICP-ANACOM's relationship with the general public and consumers. ICP-ANACOM continues to make improvements to this website, in terms of content and design, and will continue to add information and features that are helpful for users and consumers, making interaction with the regulator easier and quicker.

- **Monitor information distributed by service providers**

ICP-ANACOM monitors the information which providers distribute to end-users and consumers, in order to ascertain whether this information complies with sector legislation and with the determinations of ICP-ANACOM, thereby, safeguarding consumer rights. It also periodically reviews provider contracts to check that their clauses comply with legal requirements and applicable obligations of disclosure and transparency.

- **Respond to complaints and enquiries from consumers**

Each year, ICP-ANACOM receives tens of thousands of complaints about the sector (more than 57 thousand in 2012); each complaint is analysed, classified and answered. ICP-ANACOM's goal is to respond to 95 percent of enquiries in the year to which they relate. This work contributes to the resolution of problems that consumers face when situations that give rise to complaints fall within ICP-ANACOM's remit. Even where complaints are not covered by ICP-ANACOM's remit, a response is still provided to the consumer, giving them information on their rights and on which entity should be approached in order resolve their problem.

Reports on the complaints received by ICP-ANACOM are produced and published on a regular basis, reporting on trends and on which sectors, services and operators are most commonly cited in complaints.

Whenever analysis of complaints gives indication of non-compliance, processes are submitted to investigation and may even be referred directly to litigation when there is evidence that an offence has been committed.

The analysis of complaints may also result in regulatory measures to put an end to unwarranted practices.

- **Conduct sector studies**

ICP-ANACOM regularly conducts studies on the electronic communications and postal sectors. These serve as an important tool in support of ICP-ANACOM's regulatory activity and decision-making process, and in many cases, make international comparisons, providing ICP-ANACOM with thorough knowledge of the regulatory situation compared to other countries.

Strategic Priority 3: Ensure efficient management of public resources

- **Monitor and control the spectrum**

In the context of spectrum management, ICP-ANACOM monitors use of the spectrum on a constant and ongoing basis. ICP-ANACOM's four operational centres - Barcarena, Porto, Madeira and the Azores - conduct this monitoring continuously, 24 hours a day, seven days a week, 365 days a year. ICP-ANACOM also conducts around 1500 investigations each year related to the spectrum; these are planned regularly to check the conditions under which networks and stations are operating. These preventative actions are complimented by reactive investigations, in response to external requests. Planning spectrum use to accommodate new or existing services requires coordination with neighbouring countries to agree on effective use of frequencies without interference. And so, ICP-ANACOM holds regular coordination meetings on spectrum use with Spain and with Morocco.

ICP-ANACOM also works to ensure constant coordination with national entities (including with military and maritime authorities).

- **Increase laboratory activities**

ICP-ANACOM does important laboratory work, undertaken at LEC - Laboratório de Ensaios e Calibração (Testing and Calibration Laboratory), which conducts electromagnetic compatibility tests, radioelectric testing and equipment calibration. This area of activity complements ICP-ANACOM's investigative work, since in many cases equipment seized during investigations needs to be analyzed at the LEC to verify compliance with the technical requirements in force. In addition to its work in support of investigative activities, LEC performs work for third parties.

In 2012, LEC performed 230 radioelectric tests, 130 electromagnetic compatibility tests and 189 calibrations. 38 of these were performed for external customers.

- **Licensing of telecommunications networks and stations**

ICP-ANACOM issues station and network licences for the different radiocommunications services, which, in practical terms, is equivalent to authorizing the operation of those networks and stations; as such, ICP-ANACOM is responsible for the analysis and processing of the respective licensing procedures, including the allocation of frequencies.

Strategic Priority 4: Promote institutional and technical cooperation

- **Cooperate with national authorities**

The regular activity carried out by ICP-ANACOM calls for ongoing collaboration with other Portuguese regulatory authorities, particularly with the AdC (Competition Authority) and with ERC - Entidade Reguladora para a Comunicação Social (Media Regulatory Authority). ICP-ANACOM is often called by these entities to issue opinions, whenever their work requires the opinion of the sector regulator.

ICP-ANACOM also works with the *Assembleia da República* (Assembly of the Republic), giving information and responding to clarification requests, in person or in writing, in accordance with statutory requirements.

Work on spectrum management and network security is also developed in cooperation with third parties.

- **Cooperate internationally**

As well as cooperating nationally, ICP-ANACOM regularly cooperates with international entities. In addition to the cooperation of a strategic nature outlined above, involving countries with which Portugal has close relations, including EU and Portuguese-speaking countries, ICP-ANACOM seeks to develop relationships with non-European regulators and other regional NRA associations. The goal of this activity is to promote and disseminate regulations, national laws and regulatory practices adopted by ICP-Autoridade Nacional de Comunicações (ICP-ANACOM) in a context of experience exchange with others organisations and make a substantial contribution, in relation to both electronic communications and postal services.

Strategic Priority 5: Promote internal efficiency and effectiveness

- Continuously modify procedures, dematerialize processes and expand the range of services provided online

With the objective of becoming more efficient, agile and quick to respond to enquiries, ICP-ANACOM seeks to continuously improve the way it works, simplifying procedures, reducing the bureaucratic burden associated with many tasks and dematerialising processes. In its relations with third parties, consumers and providers, ICP-ANACOM

seeks, wherever possible, to facilitate interaction, making services available online whenever deemed appropriate and also in response to legal requirements.

- **Promote excellence in human resources**

ICP-ANACOM has a policy of adding value to its human resources based on the development of skills.

For this purpose, it is ICP-ANACOM's intention that all staff undergo the stipulated number of training hours, delivered through training actions which develop new skills or consolidate existing ones. This means staff are better able to perform their duties or perform other tasks, within a framework of internal mobility that is able to respond to the organisation's needs as they arise.



GLOBAL INDICATORS

6. Global indicators

ICP-ANACOM has implemented a system to oversee its activities and monitor the evolution of its performance, taking into account objectives of continuous improvement. This system includes global indicators, which extend across the entire organization, and specific indicators to monitor performance in individual areas.

With this set of indicators, ICP-ANACOM is able to evaluate its responsiveness to enquiries, specifically its performance in providing a timely response to external consumers and entities and also to internal requests from its own departments.

The defined global indicators will be maintained throughout the period of the plan 2014-2016.

For the next three years, the target associated with the indicator 'Average time of licensing (in working days)', will be reduced to five working days, compared to the previous target of eight days.

The targets associated with global indicators are presented in Annex V.



RESOURCE PLAN AND FINANCIAL PLAN

7. Resource Plan and Financial Plan

People Plan (human resources)

ICP-ANACOM's people are the most important driver of its success; they ensure that ICP-ANACOM can operate effectively in the demanding scenario that is envisaged over the next three-year period, as it deals with changes in the sector and a difficult overall economic situation.

Building on the work that it has already accomplished in terms of human resource management, ICP-ANACOM intends to implement and strengthen a range of practices in 2014, with a view to the organization's development and the promotion of excellence in human resources, including:

- Consolidate the objective definition/control model and performance evaluation model.
- Employ profile/competency models to provide inputs for the performance assessment system, training plan and definition of functional profiles/careers.
- Consolidate the training plan, ensuring that it is integrated and aligned with the organization's strategy and needs.

In 2014 and in partnership with academic institutions, ICP-ANACOM will expand its work experience scheme to promote the development and enhancement of skills among young people as they transition to a life of employment, and providing a complement to pre-existing qualification through training and practical experience at ICP-ANACOM; this will enhance participants' employability and facilitate access to the labour market.

ANACOM will promote internal mobility as a factor which provides its employees with new career opportunities.

ICP-ANACOM intends to promote further organisation-wide initiatives in 2014, which involve staff in actions of social and environmental responsibility.

With regard to personnel policy, ICP-ANACOM plans maintaining staff numbers in line with current levels, and as employees leave the organisation, especially for retirement, ICP-ANACOM will focus on staff rejuvenation.

Annex II presents tables with the forecast variations in the human resources plan, both in terms of the number of employees and in the number of hours of worked and corresponding financial resources.

In terms of staff numbers, it will be ICP-ANACOM's policy to maintain the number of permanent staff over the next three-year period (Table 6- Evolution in ICP-ANACOM human resources).

As regards complementary forms of work, all prevailing temporary contracts were terminated in 2013, and no new temporary contracts will be entered into over the period. Meanwhile, a progressive reduction has been stipulated in overtime over the period of the plan (see Table 7 of Annex II), in line with recent years.

With regard to the financial resources corresponding to the human resources plan (see Table 7- Evolution in types of complementary work of Annex II), no increase is foreseen in nominal values over the three-year period and the salary cuts which have affected the entire public sector, including ICP-ANACOM, will be maintained.

Personnel costs in 2014, under the 2014-2016 plan, are below those in the budgets of 2012 (9 percent) and 2011 (15 percent). Planned costs are 19 percent above actual 2012 costs, although in 2012 there were increased wage cuts, including cuts of between 3.5 percent and 10 percent in salaries and other allowances and suspension of summer holiday and Christmas bonus payments. As such, personnel costs show a clear reduction compared to the recent past, with the exception of 2012, for the exceptional reasons explained above.

Investment Plan

The 2014-2016 investment plan is marked by a strong commitment to the rationalization of investment expenditures, notwithstanding the need for targeted investments of significant value, such as: i) the repair of a remote SINCRER station which has been rendered partially inoperable due to violent thunderstorms occurring in the area; ii) completion of the acquisition of DTT probes to assess the quality of service provided by the authorised operator (process begun in 2013); iii) legal obligation to coordinate implementation of the SIC project pursuant to Decree-Law no. 123/2009; iv) replacement of spectrum monitoring equipment and acquisition of new equipment in higher bands

which were previously less relevant. It is estimated that these four projects/investments will make up around 1.286 million euros, representing 41 percent of total investment.

Remaining investments focus on consolidating efforts initiated in previous years in order to maintain the conditions which enable the performance of activities supporting the regulation and supervision of the electronic communications and postal sectors, according to a principle of greater rigor and based on cost/benefit evaluations which also take into account the systematic and permanent updates which the technological developments in the market demand.

The projects associated with information systems are mainly aimed at technological adaptation - architecture and technological platforms, hardware and software, whose improvements will benefit all the services of ICP-ANACOM.

The investment proposed for 2014 is 3.125 million euros, which represents a reduction of 24 percent compared to 2012, a reduction 1 percent over the 2013 budget. Over the course of the 2014-2016 Plan, a reduction of 8 percent (252 thousand euros) is expected in the investment effort.

Investment programmes listed in the plan, broken down by areas of intervention are detailed in Table 10 – Investment projects of annex III.

Financial Plan

As outlined above, this Multi-annual Plan reflects Portugal's current economic and financial situation and is in keeping with the structural adjustment and ongoing international financial assistance programmes.

It is in this context that ICP-ANACOM remains committed to promoting a continued reduction in internal expenditure and rationalisation of investments, to ensure progressive reductions in regulation fees imposed on the sector. However, ICP-ANACOM must also maintain its capacity to act as an effective independent regulator, in a scenario of increasingly demanding and complex regulation, given that, under European directives, its powers and responsibilities have increased.

In accordance with its statutes, the accounts of ICP-ANACOM are organized according to the POC - Plano Oficial de Contabilidade (National Accounting Plan), replaced in 2010 by

the SNC - Sistema de Normalização Contabilística (Accounting Standardisation System). The 2014-2016 financial plan, which took this reality into account, reflects the financial quantification appropriate and necessary for the implementation of activities set out in the Multi-annual Plan.

The components that make up ICP-ANACOM's financial plan for the 2014-2016 period are as follows:

- Income Plan.
- Expenditure Plan.
- Income statement by nature.
- Cash-flow forecast.
- Balances.

Income plan

Expected 2014 revenues are 69.094 million euros, an amount which falls short of previous years and is lower than the 2012 budget (9 percent), lower than the 2013 budget (1 percent) and lower than revenues earned in 2012 (8 percent). This loss of income in 2014, compared to recent years, is mostly due to lower administrative regulation fees. This follows a reduction in ICP-ANACOM's administrative costs, essentially owing to the reduced impact of provisions for the purpose of calculating fee values, as well as the sustained decrease in ICP-ANACOM's operating costs.

In the current economic and financial environment, it should be noted that decreases in the regulatory fees payable by operators of electronic communications networks have a highly positive impact. As regards postal service regulation fees, the 2014 budget provides for the application of the Postal Directive, and specifically for the adoption of the model of cost-oriented fees, anticipating the corresponding change in legislation.

The income plan is detailed in Table 11 - Income Plan of annex IV and comprises the proceeds derived from the collection and settlement of all fees payable to ICP-ANACOM by providers of electronic communications networks and services. These fees are calculated in accordance with the regulation costs incurred as a result of the respective regulatory activities. Together with fees charged for the use of frequencies and the use of

numbering, this income represents about 96 percent of total income, while fees in respect of postal services and other income, represent the remaining 4 percent.

The main sources of income mentioned are derived from the application of specific tariffs approved by the Government, serving on the one hand to cover the costs of ICP-ANACOM's regulatory activities and, on the other, to ensure that operators pay for the occupation/use of scarce public resources that are essential to the exercise of their activities (such as spectrum and numbering). A relevant part of the fees charged by ICP-ANACOM are delivered to the State. In recent years, this delivery to the State, in the form of distribution of profits, has reached 85 percent.

Administrative Rule no. 1473-B/2008 of 17 December, as amended and republished by Administrative Rule no. 291-A/2011 of 4 November sets out the fees charged by ICP-ANACOM.

Expenditure Plan

Further measures will be taken in 2014 to reduce expenditure and to restructure ICP-ANACOM's costs. Total expenditure for 2014 is estimated at 44.582 million euros. This level of total expenditure represents an overall reduction compared to previous years, including in comparison with the 2012 budget (13 percent), the 2013 budget (4 percent) and actual 2012 expenditure (4 percent).

For the years 2015 and 2016, total estimated costs remain in a downward trend, falling, respectively, by 1 percent and 3 percent in 2015 and 2016 compared to 2014. The overall expenditure plan for the 2014-2016 period is detailed in Table 12.

The expenditure plan includes all expenditure necessary to ensure accomplishment of objectives and the development of all ICP-ANACOM's activities as identified in this document (priority activities, current activities and the accomplishment of indicators).

The overall reduction in expenditure achieved by ICP-ANACOM in recent years is not uniform for all categories of spending, whereby it is important to examine expenditure by category and also to make a distinction between reductions that result from internal cost-cutting measures and reductions that are related to other exogenous factors not directly related to ICP-ANACOM's management efforts.

In 2014, external supplies and services will total 11.335 million euros, which translates into a reduction of these costs from the previous years, being lower than in the 2012 budget (24 percent), lower than the 2013 budget (10 percent) and lower than actual expenditure in 2012 (6 percent). In the time frame of the plan (between 2014 and 2016) a further decrease is planned in this category of 6 percent.

This trend reflects the fact that all types of supplies and services will be subject to a determined and persistent internal challenge to reduce costs incurred by ICP-ANACOM, particularly in categories which weigh most in the cost structure, such as specialized work, maintenance and repairs, rents and leases and travel and accommodation.

The specialized work category, the most significant within supplies and services, covering the work of consulting, auditing, studies and reports required to implement the actions defined in the plan, including work related to the regulation and markets area, will continue to weigh heavily in 2014, as determined by the large number and high density of actions to be developed over the year.

"Personnel expenses" will be 21.992 million euros in 2014, which represents a reduction in these costs compared to the 2012 budget (9 percent), and is in line with the expenditure budget of 2013. However, the 2014 value represents a significant increase compared to the actual value of 2012 (19 percent), as a result of factors exogenous to the management of ICP-ANACOM; 2012 saw large reductions in wages resulting from the stipulations of *Lei do OE2012* (2012 Budget Law) (specifically reductions of between 3.5 percent and 10 percent in base salary and other allowances), and especially because the payment of holiday and Christmas bonuses was suspended.

Over its course (between 2014 and 2016), the plan provides for unchanged levels of spending under this heading in nominal terms, since the cuts applicable to the public administration, as apply equally to ICP-ANACOM, have already been incorporated .

The most important resources of a regulatory body, such as ICP-ANACOM, are its human resources, so that it is normal that personnel costs constitute the largest share in the organisation's cost structure.

With regard to 'other expenses and losses', the estimated value for 2014 amounts to 6.657 million euros, which likewise represents a reduction compared to reference values

from previous years, particularly in relation to the 2012 budget (20 percent), 2013 budget (10 percent) and actual expenditure in 2012 (27 percent); this is a category which partially reflects the savings associated with internal management measures. The heading covers ICP-ANACOM's contribution to the running costs of AdC (Portuguese Competition Authority), in compliance with the guidelines of the Government, and also its contribution (as a founder) to FPC - Fundação Portuguesa das Comunicações (Portuguese Communications Foundation).

Other expenditure categories of a non-cash nature (amortisation, depreciation and impairment provisions) depend somewhat on internal investment policies and decisions, but also on accounting rules and internal risk management policies.

Remaining financial components

Tables 13-16 present the remaining accounting and financial statements based on income, expenses and investments as have already been explained; in formulating these statements, ICP-ANACOM has employed the accounting criteria of the SNC, as it habitually uses and as accepted by the auditors.

ANNEXES



Annex I -Breakdown and timing of actions to be undertaken in 2014-2016 three-year period

Strategic Priorities	Priority activities	Intermediate results (No. of action)	Final results (No. of action)
Promote open and competitive markets	1.1 Analyse the relevant markets susceptible to ex ante regulation 1.2 Review wholesale offers in the electronic communications sector 1.3 Develop and improve regulatory costing systems and analyze and audit their results 1.4 Define and distribute CLSU values among eligible operators 1.5 Promote equivalence of access to offers resulting from the analyses of markets 4 and 5 1.6 Oversee access to the postal network and access to infrastructure components of the universal postal service provider 1.7 Establish appropriate conditions for the management of numbering 1.8 Define and monitor market oversight indicators 1.9 Assess the impact of regulatory decisions on markets		

Table 1– Actions under strategic priority 1: Promote open and competitive markets

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
1.1 Implementation of EC recommendation on non-discrimination and costing methodologies	X Start			X End					
Public consultation on general approach	X								
Report and national consultation on draft decision		X Start	X End						
Decision for notification to EC, BEREC and NRA and final decision				X					
1.2. Promote audit on the equivalence of access				X Start				X End	
1.3 Reassess the pricing of leased lines (including CAM circuits)			X Start						
Evaluation of prices based on SCA 2013 (to be submitted by June 2014)			X Start	X End					
Possible draft decision					X Start	X End			
1.4 Assess the offer of virtual access to FTTH that may be imposed pursuant to analysis of markets 4 and 5		X Start	X End						
1.5 Review relevant markets in the light of the current and new EU regulatory framework, with possible updates of associated obligations									
Market 7		X End							
Review of MTR glide-path (2014-2016 three-year period)		X End							
Amendments to wholesale offers (RIO/WLRO)			X End						

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
1.6. Evaluate the mobile electronic communications market - Article 39 of Regulation no. 560-A/2011 (multi-band auction)		X End							
1.7 Promote the audit of SCA/CLSU estimates presented by PTC (2010/2012)									
Monitor development of draft (SCA 2010/2012 and CLSU 2010/2011 audit)	X End								
Presentation of findings and preparation of the draft decision and final decision (SCA 2010/2012 and CLSU 2010/2011)	X Start		X End						
Monitor development of draft (CLSU 2012 audit)		X Start	X End						
Presentation of conclusions and preparation of the draft decision and final decision (CLSU 2012)			X Start	X End					
Monitor development of draft (audit of SCA drivers) and approval of final decision								X Start	X End
1.8 Promote audit of the values re-submitted by PTC with respect to SCA 2010/2012 and CLSU 2010/2012									
Award audits		X							
Monitor work of the audit (SCA 2010/2012)			X Start						
Presentation of conclusions and preparation of the final decision (SCA)			X						
Monitor the work of the audit (CLSU 2010/2011)			X						
Presentation of findings and preparation of the final decision				X End					
Monitor the work of the audit (CLSU 2012)				X Start	X End				
Present findings and preparation of the final decision					X				
1.9 Promote the audit estimates of SCA/CLSU presented by PTC (2013) and re-submissions									
Contract audits			X						
Monitor the development of the audit; preparation of draft decision and final decision on the SCA			X Start			X End			
Resubmission - monitor the development of the audit and the final decision on the SCA						X Start	X End		
Monitor the development of the audit; preparation of draft decision and final decision on CLSU				X Start		X End			
Resubmission - monitor the development of the audit and final decision on CLSU							X		
1.10 Promote audits of figures relating to retirees and pensioner in the period following the designation of the universal service provider by public tender (as regards 2013 and 2014)									
As regards 2013									

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
As regards 2014									
1.11 Promote audits of the values of turnover used in respect of the universal service compensation fund for the SU (electronic communications)									
Audit the values reported by operators on 30/06/2014 (with reference to 2013)			X						
Audit the values reported by operators on 30/06/2015 (with reference to 2014)							X		
1.12 Develop processes for reimbursement of CLSU to PTC (period prior to designation of the PSU for tender)									
Reimbursement of CLSU in respect of 2007/2009			X Start		X End				
Reimbursement of CLSU in respect of 2010/2011							X Start		X End
Reimbursement of CLSU in respect of 2012/2013									X Start
1.13 Develop process of CLSU reimbursement in the period following designation of the universal service provider by public tender									
CLSU 2013			X Start		X End				
CLSU 2014							X Start		X End
1.14 Process to designate the universal service provider of telephone directories (1)									
1.15 Develop FTR costing model with a view to regulation of market 3									
Completion of development model	X End								
1.16 Develop NGN costing model									
Contract consultant			X Start	X End					
Development of work				X Start					X End
1.17 Plano nacional de numeração (National Numbering Plan) - assessment of numbering resource usage requirements for eCall	X Start	X End							
1.18 Plano nacional de numeração (National Numbering Plan) - MNC management analysis and decision									
Analysis and establishment of scenarios for the evolution of MNC, taking into account demand for codes, existing solutions on the ground (including at international level), normative limitations and technical, administrative and operational constraints		X End							
Define MNC allocation rules		X Start		X End					

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
1.19 Plano nacional de numeração (National Numbering Plan) - decision and implementation of measures on VoIP as a result of the public consultation on the ERG common position on VoIP and conditions governing use of geographic numbers									
Implementation of the decision on VoIP as regards information to be sent to PSAP in the case of nomadic 112 calls	X Start		X End						
1.20 Plano nacional de numeração (National Numbering Plan)									
Definition of rights and obligations applying to telephone service resellers as regards rights of use of numbering		X Start			X End				
1.21 Promote audit of new SCA proposed by CTT									
Draft conclusion	X End								
1.22 Promote audit of SCA (CTT 2012/2013)									
Audit of SCA 2012/2013				X End					
1.23 Review CTT cost of capital methodology									
Contract consultant				X Start	X End				
Development of work					X Start	X End			
1.24 Assess need to define rules of access to the postal network and infrastructure components of the universal postal service provider									
Public Consultation	X								
Final Report		X End							
1.25 Evaluate CLSU where presented by universal postal service provider for previous calendar year									
Define the technical specifications and type of procedure for formation of contract governing provision of services	X				X				
Auditor selection procedure		X			X	X			
Presentation of CLSU by universal service provider (by end of 2nd quarter year n +)		X				X			
Perform CLSU audit				X			X	X	
Draft decision on CLSU				X				X	
Final decision (up to 120 working days following universal service provider's submission of CLSU)				X End				X End	
1.26 CLSU reimbursement process (if applicable)									
CLSU 2013		X Start			X End				

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
CLSU 2014							X Start		X End
1.27 Develop methodology for assessing impact of regulatory decisions									
Conduct study on competition and regulation issues in MTS market		X End							
Assess impact of reduction in fixed termination rates				X End					

Strategic Priorities	Priority activities	Intermediate results (No. of action)	Final results (No. of action)
Assure and protect the interests of users and citizens in general	2.1 Keep consumers informed, so they can make more reasoned choices 2.2 Improve ICP-ANACOM's responsiveness in the management of complaints 2.3 Improve ICP-ANACOM's responsiveness in the management of complaints 2.4 Verify compliance with universal service pricing obligations 2.5 Assess the conditions of universal postal service provision 2.6 Define and oversee the quality parameters of the universal postal service and respective targets 2.7 Examine and assess the aptness of quality of services levels provided to consumers 2.8 Evaluate and implement measures on net neutrality 2.9 Implement measures to enhance the security of communications 2.10 Define conditions governing the use of numbering		

Table 2 – Actions under strategic priority 3: Assure and protect the interests of users and citizens in general

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
2.1 Introduce new features on ANACOM's Consumers' Website		X End							
2.2 Develop new features on COM.escolha				X End					
2.3 Review of the framework governing enquiries/complaints from end-users of communications services and respective processing by providers		X End							
2.4 Review the processing of enquiries/complaints from end-users of communications services. Introduce new complaints management system				X End					
2.5 Conduct review of price-cap compliance as established for provider(s) of universal service of electronic communications (FTS)				X				X	
2.6 Develop review of price-cap compliance as established for the provider(s) of the universal service of electronic communications (public pay-telephones)				X				X	
2.7 Monitor compliance with postal network density and minimum postal service objectives	X	X	X	X	X	X	X	X	X
Auditing				X					
2.8 Evaluate and, if necessary define, circumstances or geographical conditions that provide waiver from daily universal service collection and distribution and/or distribution at the addressee's address									
Identification, in conjunction with universal service provider, of the current situation	X								
Identification of possible criteria to be defined and assess their impact on universal service provision		X							

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Draft decision			X						
Final decision				X End					
2.9 Define universal postal service quality parameters and respective targets									
Draft decision			X						
Final decision				X End					
2.10 Promote audit of QoS indicator values with respect to universal postal service in year n-1									
Definition of technical specifications and definition of type of procedure to be used in formation of the provision of services contract	X Start				X Start				X
Selection of auditor		X				X			
Perform auditing		X	X			X	X		
Final decision on audit findings and subsequent actions				X End				X End	
2.11 Prepare draft decree-law that approves regime governing exploration and use of postal services for submission to government		X Start		X End					
2.12 Implement and evaluate measures concerning network neutrality (QoS)									
Application of BEREC guide on QoS in context of NN and evaluation of possible need for regulatory intervention to define indicators and minimum quality requirements and establishment of corresponding metrics				X End					
2.13 Evaluate opportunity for a regulation on use of CLI (PNN)									
Definition of rules on use of numbering	X End								
2.14 Conduct study of internet broadband quality of service	X Start			X End	X Start			X End	X Start
2.15 Conduct studies of quality of service provided by mobile networks									
Voice, video streaming and coverage in mainland Portugal				X				X	X
Lisbon suburban rail network		X							X
Porto suburban rail network						X			
SMS/MMS	X				X				X
Autonomous Regions of Azores and Madeira			X						X
Voice, video streaming and coverage on CP Alfa Pendular high-speed rail service							X		
2.16 Harmonise and promote efficient interaction with spectrum users through the implementation of appropriate information systems									

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Harmonise the MCE oversight activity, including through the establishment and maintenance of harmonized reporting	X Start			X End					
2.17 Install reporting centre	X Start		X End						
2.18 Perform security audit	X Start				X End				
2.19 Participate in security exercises	X Start					X End			

Strategic Priorities	Priority activities	Intermediate results (No. of action)	Final results (No. of action)
Ensure the efficient management of public resources	3.1 Evaluate developments in the broadcasting, fixed and private mobile services, as well as the potential use of existing and future spectrum availability. 3.2 Analyze the development prospects of radiocommunications services with a view to the digital dividend and spectrum policy programme 3.3 Define rules for drawing up the inventory of assets associated with the CTT concession		

Table 3 – Actions under strategic priority 3: Ensure the efficient management of public resources

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
3.1 Assess development prospects of broadcasting (radio and television), private mobile and fixed services, as well as the potential use of existing and future spectrum availability (follow-up)									
Assessment of the issues inherent to the evolution of DTT under the terms of the adopted definitive solution	X Start			X End					
Following approval of scenarios for spectrum use by the broadcasting service (radio and television), prepare draft decision to be submitted to the tutelage ministry, as deemed most suitable.		X Start		X End					
Subsequent to identification of the various scenarios for spectrum use by fixed and mobile services, prepare draft decisions as deemed most fitting	X Start		X End						
Make available spectrum as remains following the BWA auction, following the decision taken in light of the public consultation to be conducted	X Start			X End					
Reassess the opportunity of making spectrum available as remains from the multi-band auction	X Start			X End					
Make spectrum available as remains from the multi-band auction following any decision					X Start			X End	
3.2 Assess the development prospects of radiocommunications services with a view to the digital dividend and spectrum policy programme (RSPP)									
Identify feasibility and mode of making additional spectrum bands available for the implementation of mobile broadband services	X Start								
Prospective analysis of UHF band, used for radio broadcasting, with special attention to upholding national positions in the Dividend II band (694-790 MHz). Identify planning of the 700 Mhz band considering applications in the band as well as applicable technical conditions	X Start		X End						
Prospective analysis of the UHF band used by television broadcasting with special attention to the Dividend II band (694-790 MHz), uphold national positions in discussions on the future of broadcasting in the UHF band	X Start			X End					
Monitor and contribute to performance of an inventory of the spectrum and subsequent follow-up, taking into account the contributions of stakeholders								X End	

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Discussion and definition of national positions for WRC-15								X End	
3.3 Define rules for drawing up the inventory of assets associated with the CTT concession									
Draft decision		X							
Final decision			X End						
3.4 Promote audit of the 2014 inventory of assets associated with the concession, as presented by CTT									
Define the technical specifications and type of procedure for formation of contract governing provision of services					X Start				X
Selection of auditor						X			
Perform auditing						X	X		
Final decision on audit findings and subsequent actions								X End	

Strategic Priorities	Priority activities	Intermediate results (No. of action)	Final results (No. of action)
Promote institutional and technical cooperation	4.1 Develop cooperation activities with other regulators 4.2 Ensure active representation in international organizations 4.3 Promote the sector internationally and transfer knowledge 4.4 Update ITED and ITUR manuals 4.5 Ensure coordination with national and international agencies having radio spectrum management responsibilities, and organisations concerned with consumer protection and communications security 4.6 Ensure coordination of the various stakeholders in the planning, construction and maintenance of telecommunications infrastructure		

Table 4 – Actions under strategic priority 4: Promote institutional and technical cooperation

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
4.1 Maintain participation effort in BEREC									
Active participation in all Expert Working Groups (EWG) and ad hoc groups				X End				X End	X (Continues)
Participation of three drafters in EWG				X End				X End	X (Continues)
Presidency of one EWG				X End				X End	X (Continues)
4.2 Participate in EMERG									
Perform role of vice-chair	X Start			X End					
Active participation in secretariat	X Start							X End	
Maintenance of participation effort in working groups				X End					
4.3 Review contributions to international organizations									
Reduce contribution to UPU GLPO				X End					
Reduce ITU quota			X Start	X End					
Reduce UPU quota									X End
4.4 Define new strategy for participation in international organizations									

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Survey of the involvement of each department in international organizations	X								
Preparation and presentation of strategy to Management Board	X Start	X End							
Implementation of the strategy approved				X Start					
Involvement of the private sector and universities through communication actions	X Start	X End							
Promote improvements in ITU and UPU, as regards efficiency and resource management	X Start			X End					
4.5 Collaborate in clarification of national position on Internet governance									
Collaboration with tutelage ministry	X Start			X End					
Partnership with FCT and other entities		X Start						X End	X (Continues)
4.6 Participate in ARCTEL									
Perform secretariat role									X End
Maintain active participation in Roaming WG with view to implementation of a single tariff among member countries				X End					
Maintenance of participation effort in the other WG				X End				X End	X (Continues)
Annual support for CFA Workshops/Seminars	X Start			X End	X Start			X End	X End
Active contribution to the completion of a study on universal service in CPLP countries	X Start			X End					
Promote establishment of ITU-ARCTEL protocol to conduct joint CoE-CFA actions	X Start	X End							
4.7 International promotion of sector and of knowledge transfer									
Establish protocol with AICEP-global	X Start			X End					
Partnership with AICEP-global	X Start			X End				X End	X (Continues)
Prioritise actions of existing and future bilateral cooperation	X Start			X End	X Start			X End	X End
Strategic redefinition of bilateral cooperation protocols	X Start		X End						
Put reformulated bilateral cooperation protocols into operation		X Start						X End	
Assess economic impact of cooperative effort		X Start		X End				X End	X (Continues)
4.8 Update ITED technical manuals		X End							
4.9 Update ITUR technical manuals			X End						
4.10 Promote dissemination and awareness of ITED/ITUR regime		X Start		X End		X Start		X End	X
4.11 Promote dissemination and awareness of R&TTE/EMC regime				X End				X End	X

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
4.12 Promote effective and efficient coordination with various national bodies with spectrum management responsibilities									
Definition of procedures to be implemented with EMGFA	X Start			X Start					
Definition of procedures to implemented with maritime authorities					X Start			X End	
4.13 Promote cooperation with third parties in the context of communications security	X Start			X End					
4.14 Develop SIC and put into operation pursuant to DL 123/2009	X Start			X End	X Start			X End	X

Strategic Priorities	Priority activities	Intermediate results (No. of action)	Final results (No. of action)
Promote internal efficiency and effectiveness	5.1 Implement cost reduction measures 5.2 Dematerialise/simplify processes and automate procedures 5.3 Expand the provision of services online 5.4 Invest in the excellence of human resources		

Table 5 – Actions under strategic priority 5: Promote internal efficiency and effectiveness

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
5.1 Renegotiate contracts	X Start			X End					
5.2 Implement annual plan for environmental sustainability	X Start			X End					
5.3 Conduct global study of internal customer satisfaction	X Start			X End					
5.4 Develop new features to be implemented in computer applications supporting spectrum management, including electronic licensing									
Analysis and survey of current functional requirements to engage 1st phase of e-lic	X Start				X End				
Development of new identified functions	X Start				X End				
5.5 Manage and provide geo-referenced information. Phase I - Validation of radiocommunication station locations				X End					
5.6 Develop systems of indicators on spectrum planning and management activity (IGE-PLAGE)	X Start			X End					
5.7 Computerize procedures related to equipment market investigations (SGR&TTE)									
Entry into production	X End								
Functional adjustments		X Start		X End					
5.8 Develop application to register infringing agents									
5.9 Equip spectrum monitoring and control centres with testing and measurement systems, with a view to implementing new technology systems and equipment renovation									
Implementation of measures to strengthen in situ intervention capacity of spectrum monitoring and control and strengthen resources for DTT analysis - conclusion of DTT probe programme		X End							
Technological upgrade of MCE				X End					
5.10 Extend current extranet to encompass FTS, IAS, STVS and PS services, the annual communications questionnaire and the portability questionnaire [DIC]				X End					
5.11 Promote culture of excellence at ANACOM									
Communication of vision and strategy to staff	X								

Actions	TIMETABLE								
	2014				2015				2016
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
5.12 Implement technical and behavioural skills development plan									
Completion of the individual training and development plan	X				X				X
Promote skills and leadership development programme (II)	X								
5.13 Develop social responsibility initiatives									
Work experience programmes	X Start			X End	X Start			X End	X
5.14 Implement talent management programme					X Start	X End			

Annex II – Strategic People Plan (tables)

Table 6- Evolution in ICP-ANACOM human resources

Category	2014	2015	2016
1 – Managerial staff	248	248	248
2 – Non managerial staff	151	151	151
Total permanent staff (1+2)	399	399	399

Unit: number of staff.

Table 7- Evolution in types of complementary work

2014/2016 Plan			
Category	2014	2015	2016
Supplementary work	5882	5570	5292
Total	5882	5570	5292

Unit: hours.

Table 8 - Evolution in personnel costs

2014/2016 Plan			
Category	2014	2015	2016
Wages and expenses	20 054 793	20 047 193	20 039 993
Other Personnel Costs	1 937 407	1 937 407	1 937 407
Total	21 992 200	21 984 600	21 977 400

Unit: Euros.

Table 9 -Personnel costs plan

Category	2014	2015	2016
1. Permanent contracts (year end)	399	399	399
2. Permanent staff potential (1800 hours/year)	718 200	718 200	718.200
3 Supplementary work (hours)	5 882	5 570	5 292
4. Potential work (2 to 4)	724 082	723 770	723 492
5. Management Remuneration	944 470	944 470	944 470
6. Staff remuneration	13 149 380	13 149 380	13 149 380
7. Additional remuneration	2 813 262	2 807 062	2 801 162
8. Post-employment benefits	702 565	702 565	702 565
9. Salary expenses	3 147 681	3 146 281	3 144 981
10. Work accident insurance	66 649	66 649	66 649
11. Social action costs	699 866	699 866	699 866
12. Other personnel costs	468 327	468 327	468 327
13. Total (6 to 13)	21 992 200	21 984 600	21 977 400

Unit: Euros.

Annex III – Investment plan (Table)

Table 10 – Investment projects

Category	Objectives	2014	2015	2016
Modernization of laboratories	Acquisition of equipment in light of evolution in technology and regulatory framework; and update of software	66 500	60 000	60 000
Technological refurbishment of spectrum monitoring	Upgrade of existing MCE facilities and acquisition of equipment for the new communications systems	477 000	700 000	650 000
Repair of Monte Barrete remote SINCRER station	Repair of Monte Barrete remote SINCRER station following atmospheric discharge in 2012	300 000	0	0
DTT probes	Complete process of acquiring and installing probes to evaluate QoS provided by DTT operator	359 000	0	0
SIC	Adaptation of the terms of availability and information on access to ducts, poles, other installations and sites by the public communication service concessionaire for coordination with SIC	150 000	180 000	162 000
Technological adaptation -architecture and technology platforms	Adaptation of infrastructural technological strongpoints through the acquisition of necessary hardware and software	1 353 000	1 187 100	1 184 200
Acquisition of various basic radioelectric equipment	Acquisition of basic equipment for current inspection actions	70 000	446 400	426 000
Acquisition of various IT equipment	Acquisition of current hardware and software	240 000	320 000	300 000
Miscellaneous day-to-day acquisitions	Acquisition of administrative equipment and performance of works in building	109 000	99 100	90 300
Total		3 124 500	2 992 600	2 872 500

Unit: Euros.

Annex IV – Financial plan (Tables)

Table 11 - Income Plan

Category	2014	2015	2016
Electronic communications	66 260 700	66 477 400	66 190 400
* Statements of rights	14 000	14 000	14 000
* Exercise of electronic communications activity	24 291 400	24 491 400	24 162 400
* Use of frequencies - SCET ¹	28 056 000	28 056 000	28 056 000
* Use of frequencies - other	12 226 500	12 226 500	12 251 500
* Use of numbers	1 672 800	1 689 500	1 706 500
Postal services	1 075 900	1 608 700	2 060 500
ITED-ITUR	146 400	141 300	136 200
Remaining provisions of Service	351 000	351 000	351 000
Interest and other similar income	1 200 000	1 100 000	1 000 000
Other income and gains	60 000	60 000	60 000
TOTAL	69 094 000	69 738 400	69 798 100

Unit: Euros.

Table 12 - Expenditure Plan

Category	2014	2015	2016
External Supplies and Services	11 334 900	11 014 700	10 709 800
* Specialized work	3 219 500	3 058 600	2 905 600
* Advertising and promotion	146 700	145 200	143 800
* Surveillance and Security	439 000	439 000	439 000

¹ SCET – Terrestrial electronic communication services.

* Maintenance and repairs	2 796 600	2 656 800	2 524 000
* Books and technical documents	250 000	247 500	245 000
* Energy and liquids	552 700	558 200	563 800
* Travel, accommodation and transport	486 100	481 200	476 400
* Rents and leasing	1 700 200	1 700 200	1 700 200
* Communication	626 900	620 600	614 400
* Insurance	132 000	132 000	132 000
* Cleanliness, hygiene and comfort	283 200	280 400	277 600
* Other supplies and services	702 000	695 000	688 000
Personnel costs	21 992 200	21 984 600	21 977 400
* Wages and wage expenses	20 054 793	20 047 193	20 039 993
* Other personnel expenses	1 937 407	1 937 407	1 937 407
Depreciation and amortization	3 507 000	3 374 600	2 979 600
Impairment losses	90 000	90 000	90 000
Provisions for period	1 000 000	1 000 000	1 000 000
Other expenses and losses	6 657 400	6 696 500	6 611 800
* Contributions	986 500	984 600	896 800
* Meetings and conferences	289 500	286 600	283 700
* Sponsorships	218 100	215 900	213 800
* Payments/Transfers	4 949 200	4 994 900	5 002 600
* Cooperation	173 100	173 100	173 100
* Other expenses and losses	41 000	41 400	41 800
TOTAL	44 581 500	44 160 400	43 368 600

Unit: Euros.

Table 13 - Financial Statements by nature

Category	2014	2015	2016
Income and expenses			
* Fees for exercise of activity of electronic communications	24 291 400	24 491 400	24 162 400
* Fees for use of frequencies	40 282 500	40 282 500	40 307 500

* Fees for use of numbering	1 672 800	1 689 500	1 706 500
* Fees for exercise of activity of postal services	1 075 900	1 608 700	2 060 500
* Remaining provisions of service	511 400	506 300	501 200
* External Supplies and Services	-11 334 900	-11 014 700	-10 709 800
* Personnel costs	-21 992 200	-21 984 600	-21 977 400
* Impairment losses	-90.000	-90.000	-90.000
* Provisions for the period	-1 000 000	-1 000 000	-1 000 000
* Other income and gains	60 000	60 000	60 000
* Other expenses and losses	-6 657 400	-6 696 500	-6 611 800
Profit before depreciation and amortization	26 819 500	27 852 600	28 409 100
* Expenses/Reversals of depreciation and amortization	-3 507 000	-3 374 600	-2 979 600
Operating profit	23 312 500	24 478 000	25 429 500
* Interest and similar income earned	1 200 000	1 100 000	1 000 000
NET RESULTS FOR PERIOD	24 512 500	25 578 000	26 429 500

Unit: Euros

Table 14 - Cash-flow forecast

Category	2014	2015	2016
Balance brought forward	80 449 300	88 286 700	94 501 000
Receipts			
* Income from operations	67 894 000	68 638 400	68 798 100
* Interest and other similar income	1 200 000	1 100 000	1 000 000
Total receipts	69 094 000	69 738 400	69 798 100
Payments			
* Investment	3 124 500	2 992 600	2 872 500
* Operations	39 984 500	39 695 800	39 299 000
* Transfer to the State	18 147 600	20 835 700	21 741 300
Total payments	61 256 600	63 524 100	63 912 800
Available cash	88 286 700	94 501 000	100 386 300

Unit: Euros.

Table 15 – Balances

Category	2014	2015	2016
Assets			
Non-current assets	20 901 200	20 519 200	20 412 100
* Tangible Assets	15 147 600	15 141 800	15 149 300
* Intangible Assets	3 453 600	3 077 400	2 962 800
* Other receivables	2 300 000	2 300 000	2 300 000
Current assets	96 686 700	103 001 000	108 986 300
* Customers	4 900 000	5 000 000	5 100 000
* Other receivables	1 000 000	1 000 000	1 000 000
* Deferrals	2 500 000	2 500 000	2 500 000
* Bank deposits and cash at hand	88 286 700	94 501 000	100 386 300
Total assets	117 587 900	123 520 200	129 398 400
Equity and liabilities			
Equity	46 646 100	51 388 400	56 076 600
* Other reserves	22 133 600	25 810 400	29 647 100
* Net result for period	24 512 500	25 578 000	26 429 500
Liabilities	70 941 800	72 131 800	73 321 800
* Debts and provisions post-employment benefits	62 039 900	63 129 900	64 219 900
* Other account payables	8 901 900	9 001 900	9 101 900
Total liabilities + equity	117 587 900	123 520 200	129 398 400

Unit: Euros.

Table 16 – Statement of cash flows

Category	2014	2015	2016
Cash Flows - Operating Activities			
* Receipts from customers	67 834 000	68 578 400	68 738 100
* Payments to suppliers	-11 334 900	-11 014 700	-10 709 800
* Payments to employees	-21 992 200	-21 984 600	-21 977 400
Cash generated from operations	34 506 900	35 579 100	36 050 900
* Other receipts/payments	-24 746 000	-27 473 200	-28 294 100
Cash flows from operating activities	9 760 900	8 105 900	7 756 800
Cash Flows - Investment Activities			
Payments with reference to			
* Tangible Assets	-2 195 200	-1 681 500	-1 497 300
* Intangible assets	- 929 300	-1 311 100	-1 375 200
Receipts from			
* Receipts from:	1 000	1 000	1 000
* Interest and similar income	1 200 000	1 100 000	1 000 000
Cash flows from investment activities	-1 923 500	-1 891 600	-1 871 500
Change in cash and cash equivalents	7 837 400	6 214 300	5 885 300
Cash and cash equivalents at beginning of period	80 449 300	88 286 700	94 501 000
Cash and cash equivalents at end of period	88 286 700	94 501 000	100 386 300

Unit: Euros.

Annex V – Global indicators for 2013-2015 three-year period

Category	2014		2015		2016	
	Target	Actual	Target	Actual	Target	Actual
Percentage of prior hearing reports and final decisions released within a maximum period of (n+15) , where n is the number of working days provided for the prior hearing of interested parties	90%		90%		90%	
Rate of implementation of actions under 2013-2015 Plan (Percentage of actions included in the Strategic Plan executed according to approved timetable)	95%		95%		95%	
Average time taken for the allocation of numbering resources (working days)	5		5		5	
Maximum time taken for the allocation of numbering resources (working days)	15		15		15	
Average response time to radio licensing requests (working days)	5		5		5	
Enquiries regarding the market processed during the period / Total enquiries received on the market in the period	95%		95%		95%	
Number of inspections conducted	994		1 010		1 010	
Electronic communications services	305		310		310	
Postal services	19		20		20	
ITED Infrastructure	430		440		440	
ITUR Infrastructure	40		40		40	
Equipment market (R&TTE/CEM)	180		180		180	
Training providers	20		20		20	
Percentage of breach processes with initial review in period, out of total number of breach processes over period	85%		85%		85%	
Percentage of breach processes with final decision in the period, out of total number of breach processes brought over period	55%		55%		55%	

List of acronyms and abbreviations

CLSU	<i>Custos líquidos decorrentes da prestação do serviço universal</i> (Net costs of universal service provision)
DTT	Digital terrestrial television
ITED	<i>Infra-estruturas de telecomunicações em edifícios</i> (telecommunications infrastructure in buildings)
ITUR	<i>Infra-estruturas de telecomunicações em loteamentos, urbanizações e conjuntos de edifícios</i> (infrastructures for telecommunications in housing developments, urban settlements and concentrations of buildings)
LEC	<i>Laboratório de Ensaios e Calibração</i> (Testing and Calibration Laboratory)
MCE	<i>Monitorização e controlo do espectro</i> (Monitoring and control of the spectrum)
QoS	Quality of service
SIC	<i>Sistema de informação centralizado</i> (centralised information system)
SINCRER	<i>Sistema nacional de controlo remoto das emissões radioelétricas</i> (National System for Remote Control of Radioelectric Emissions)
SNC	<i>Sistema de normalização contabilística</i> (Analytical Accounting System)

List of Operators

CTT	CTT - Correios de Portugal, S. A.
PTC	PT Comunicações, S. A.

List other undertakings/organisations

AdC	Autoridade da Concorrência (Portuguese Competition Authority)
BEREC	Body of European Regulators for Electronic Communications
EC	European Commission
EU	European Union
ICP-ANACOM	ICP-Autoridade Nacional de Comunicações
ITU	International Telecommunication Union
NRA	National Regulatory Authority
PALOP	Países Africanos de Língua Oficial Portuguesa (Portuguese-speaking African countries)
UPU	Universal Postal Union

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