ANACOM AUTORIDADE NACIONAL DE COMUNICAÇÕES

SURVEY ON THE USE OF ELECTRONIC COMMUNICATIONS SERVICES BY SMEs - 2014

Principal results

February/2015

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Introduction

Once every two years, ANACOM conducts a survey on the use of electronic communication services among micro, small and medium companies[1] (SMEs) established in Portugal.

The main results of the latest survey, carried out in December 2014, are presented below.

A summary of the methodology used for the survey is given in annex.

1. Summary

- The penetration rate of the fixed telephone service (FTS), the mobile telephone service (MTS) and the Internet access service (IAS) among Portugal's SMEs was between 89 and 94 percent. Around 53 percent use 4 or 5 different electronic communication services.

  Internet penetration among Portuguese companies is in line with the EU28 average and Portugal is ranked in 16th place. Portugal's ranking is lower in the case of construction and manufacturing and also in the case of small enterprises.

- There are significant differences in the penetration of services depending on the activity exercised. The construction sector has the highest penetration rate when it comes to mobile services but the lowest when it comes to fixed services. An opposite scenario is reported for the retail and manufacturing sectors. Subscription TV subscribers are mostly from "other services". In an EU context, high rates of penetration are reported for the majority of sectors in Portugal, with the exception of manufacturing and construction.

- The main barriers to take-up of services are cited as use of alternative networks or services and "lack of need/interest".

- 89.7 percent of the surveyed companies subscribe to bundled offers. Quadruple-play bundles are the most commonly used (27.2 percent, +15.1 percentage points versus 2012). The FTS+FBB bundle has dropped to second place (20.6 percent), falling 20.1 percentage points).

  The vast majority of the surveyed companies (84.7 percent) have a standard enterprise offer. Only 8.8 percent of SMEs have a tailor-made offer.

[1] The following concepts are used in the context of this survey: SME - companies with fewer than 250 employees, micro-enterprises - companies with less than 10 employees; small enterprises – companies with 10 - 49 employees; medium-sized enterprises – companies with 50 - 249 employees.

- As regards the use of new technologies and new information and communication services, Over-the-top (OTT) services stand out, especially the messaging service (37.3 percent) and the voice over Internet service (27.2 percent). Around 11.4 percent of the SMEs surveyed made use of cloud computing.

  On a scale of 1 (no substitutability) to 10 (full substitutability), the survey's respondents reported a degree of substitutability between OTT services and traditional services in the company of 5.5 in the case of mobile voice and 5.2 in the case of fixed voice.

- According to the survey, Grupo PT enjoys the highest share of SME customers. Grupo PT's leadership is most evident among fixed services, even though its share has been declining.

  Grupo NOS is in second place in terms of fixed services and bundled services, while Vodafone is the second largest provider when it comes to mobile services and is the provider that has reported most growth in terms of fixed services.

- In 2014, the FTS was the service which saw the highest rate of provider switching (9.4 percent, +0.9 percentage points), in line with previous years. The level of provider switching among SMEs is the highest on record in the case of the MTS (8.5 percent, +2 percentage points), FIAS (8.9 percent, +2.6 percentage points) and MIAS (7 percent, + 3.9 percentage points).

  87 percent of respondents had a 24 month contract lock-in period and the existence of a contract lock-in period was the main reason given for not switching provider.

- The business customers of services included in bundles were those that complained most (28.6 percent) during 2014. Customers of the standalone FIAS were the least satisfied (7.38 points on a scale between 1 – very dissatisfied -, to 10 – very satisfied).

2. Use of electronic communication services by SMEs

The 1st chapter of this report gives data on the use of electronic communication services by SMEs, especially as regards the penetration of the various services, individually and in combination, the penetration of services by sector of activity and company size, types of subscriptions and any barriers to the use of services.

For the first time, in the present edition of this survey, information was compiled about the use of new information and communication services by SMEs, specifically Over-the-top (OTT) and cloud computing services. This information is also reported in the first chapter.

Whenever possible, international comparison are given, based on Eurostat's “Information and Communication Technologies in enterprises” survey, which focuses on companies with 10 or more employees[2].

2.1. Penetration by service and combination of services

According to the results of the Survey conducted by ANACOM, as at the end of 2014, the penetration rate of the fixed telephone service (FTS), the mobile telephone service (MTS) and the Internet access service (IAS) among Portugal's SMEs was between 89 and 94 percent.

Despite having one of the lowest levels of penetration (54.5 percent), the mobile Internet access service (MIAS) was the service that grew most between 2012 and 2014 (+5.9 percentage points), followed by the fixed Internet access service (FIAS) – which grew by +5.7 percentage points.

[2] The universe of EUROSTAT's survey does not correspond to the universe of the survey conducted by ANACOM. The reference date of the EUROSTAT survey is March 2014.

Table 1 - Subscription to electronic communications services

	2007	2010	2012	2014
Fixed telephone service (FTS)	95.8	90.3 ↓	92.3 ↑	93.5
Mobile telephone service (MTS)	71.5	81.8 ↑	89.7 ↑	89.3
Internet access services(IAS)	63.5	76.1 ↑	89.2 ↑	93.3 ↑
Fixed Internet access services (FIAS)	:	71.0	83.2 ↑	88.9 ↑
Mobile Internet access services (MIAS)	:	32.2	48.6 ↑	54.5 ↑
Subscription Television Service (STVS)	4.5	13.1 ↑	10.9 ↓	15.7 ↑

Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2007, 2010, 2012 and 2014

Base: All companies with fewer than 250 staff

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.[3]

Note 2: The 2007 survey did not separate Internet by type of access (fixed or mobile).

Note 3: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.[4]

According to Eurostat's annual survey *"Information and Communication Technologies in enterprises"*, which specifically covers companies with 10 or more employees[5], penetration of the Internet access service among Portuguese companies is in line with the EU28 average. Mobile broadband access in Portugal is slightly higher than the EU28 average (66 percent versus 64 percent - with Portugal ranked 10th)[5].

Table 2 – Subscription to Internet access service by companies with 10 or more employees (in EU context)

	2010	2011	2012	2013	2014
EU28 (%)	94	95	95	96	97
Portugal (%)	94	95	95	96	97
Portugal ranking in EU28	18th	17th	18th	17th	16th
Difference from EU28 average (p.p)	0	0	0	0	0

Unit: %, p.p.

Source: Eurostat, European ICT survey: "Information and Communication Technologies in enterprises"

Base: Companies with 10 or more employees (not including Financial Sector)

[3] The variation coefficient is considered as sampling error indicator, based on the variance of the "proportion" or "average" estimator (according to the case) of a simple random sample. The following classification is used: reliable estimate when variation coefficient of is less than 10 percent; acceptable estimate when variation coefficient is greater than or equal to 10 percent and less than 25 percent; unreliable estimate when variation coefficient is greater than or equal to 25 percent.

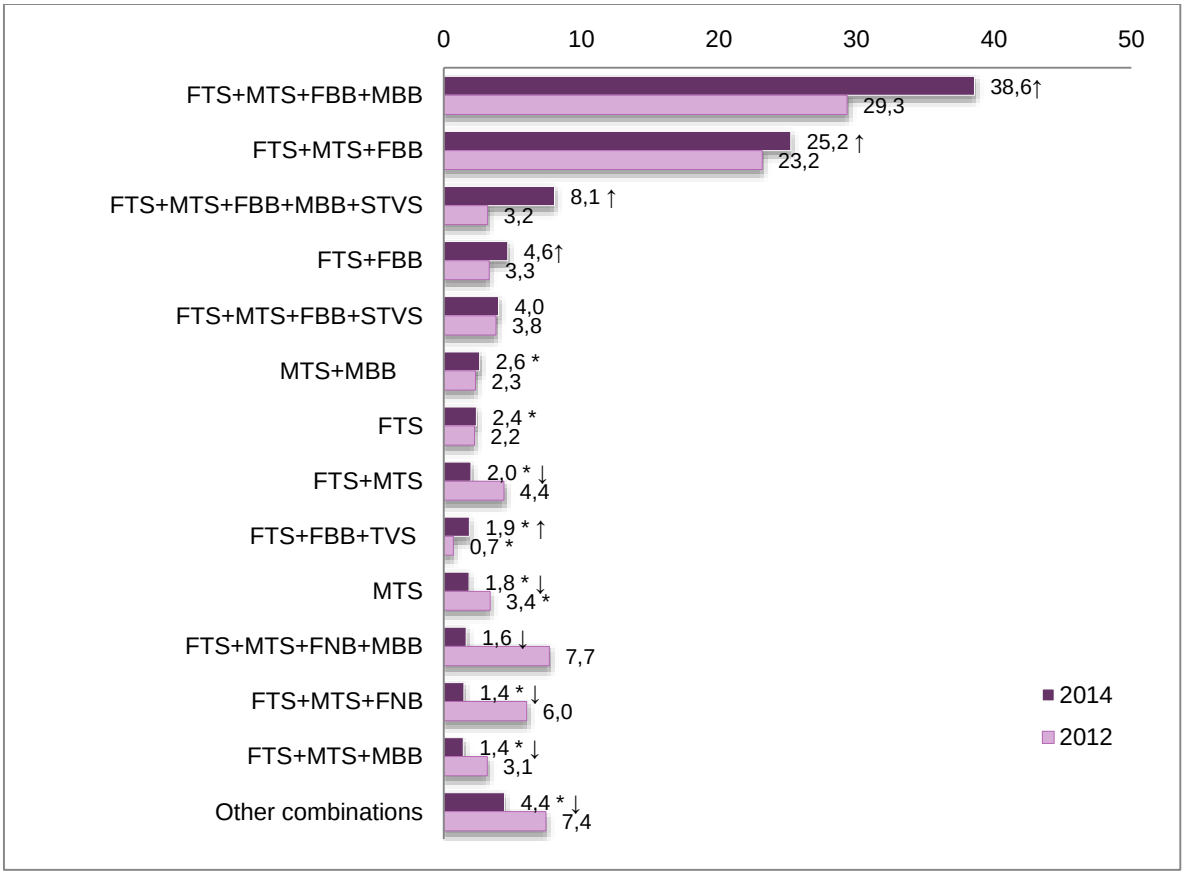
[4] A statistical test was used of the difference between two proportions for large and independent samples with a confidence level of 95 percent.

[5] The results of EUROSTAT's survey are not comparable with the survey conducted by ANACOM. The survey conducted by ANACOM includes micro-enterprises and excludes large companies, whereas EUROSTAT's survey excludes micro-enterprises and includes large companies.

Around 53 percent of SMEs use 4 or 5 different electronic communication services (+7.8 percentage points versus 2012).

The combination of FTS+MTS+fixed broadband (FBB)+mobile broadband was the most popular combination of services (stand-alone or bundled) among SMEs, and the combination that saw most growth (+9.3 percentage point). The combination with the second highest rate of growth (+4.9 percentage points) comprised all five services (FTS+MTS+FBB+MBB+STVS).

Graph 1 – Combinations of electronic communication services



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2012 and 2014

Base: All companies with fewer than 250 staff

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: FTS - Fixed telephone service; MTS - Mobile telephone service; FBB – Fixed broadband; MBB – Mobile broadband; STVS – Subscription TV.

Note 3: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

2.1.1. Use of leased lines and private networks

Leased lines and the private network management service saw little use by the companies surveyed (4.4 and 4.0 percent, respectively).

Table 3 – Use of leased lines and private networks by companies

	2014
Leased lines	4.4
Private network management service / virtual private networks	4.0

Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: All companies with fewer than 250 staff

Note: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

According to the survey's respondents, these services are used, in the most part, for storing, accessing, sharing and transmitting data and information resources, both in terms of internal company organisation (i.e. access to hardware/software/extranet/Internet/server/datacentres, internal company communications, billing/accounting, stock management, security/surveillance, external services/tele-working, relations between head office and other branches/offices/subsidiaries) and in terms of external relationships (i.e. supplier and customer payments).

2.2. Penetration by sector of activity

There are significant differences in the penetration of services associated with the nature of the activity exercised by the survey's respondents.

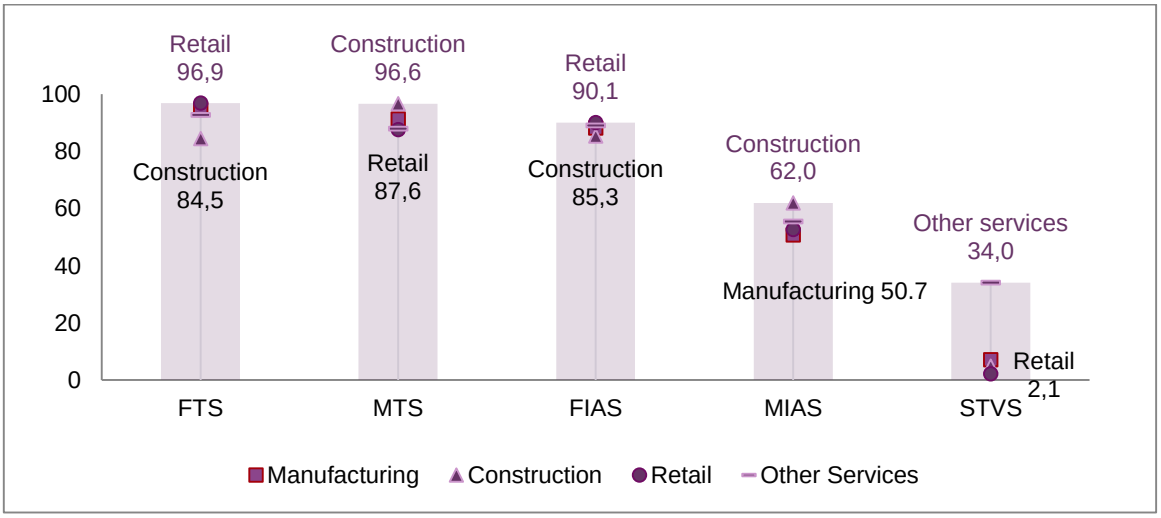
Penetration of the telephone service at a fixed location exceeds 93 percent across most sectors. The construction sector is the only sector where FTS penetration is lower (84.5 percent - increasing 14.5 percentage points since 2012).

The situation is similar in the case of fixed Internet, with penetration rates close to 90 percent in all sectors except construction where penetration is reported at 85.3 percent.

However, the Construction sector has the highest penetration rate when it comes to the mobile telephone service (96.6 percent) and when it comes to mobile Internet (62 percent). As such construction stands out from the remaining sectors which report penetration rates close to 90 percent in the case of MTS and between 50 and 55 percent in the case of mobile Internet.

Subscribers to STVS are, in the most part, from "other services"[6] (34 percent), which includes “accommodation and food service activities”.

Graph 2 - Possession of services by sector of activity



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: All companies with fewer than 250 staff according to sector of activity

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate. The minimum values reported take reliable and acceptable estimates into account, whereas lower values may exist based on unreliable estimates (#) with a variation coefficient equal to or great than 25 percent.

Note 2: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV

In the majority of sectors considered, Internet penetration among Portuguese companies is very high and ranked near the top among the EU28. The exceptions are Manufacturing and Construction which, while reporting high penetration rates (96 percent), are ranked 20th and 17th in the EU28 respectively.

[6] "Other services" include the following branches of activity H (transportation and storage), I (accommodation and food service activities), J (information and communication activities), K (financial services and insurance), L (real estate activities), M (professional, scientific and technical activities) and N (administrative and support service activities).

Table 4 – Subscription to Internet access service by companies with 10 or more employees by sector of activity (in context of EU28)

	EU28 (%)	Portugal (%)	PT ranking in EU28	Diff. vs. EU28 (p.p)
C – Manufacturing	97	96	20th	-1
D+E – Electricity, gas, steam and air conditioning Supply; water supply; Sewerage, waste management and remediation activities	98	100	1st	2
F – Constriction	97	96	17th	-1
G – Wholesale and retail trade; repair of Motor vehicles and motorcycles	97	99	8th	2
H – Transportation and storage	97	100	1st	3
I – Accommodation and food service activities	99	100	1st	1
J – Information and communication	99	100	1st	1
L – Real estate activities	93	100	1st	7
M – Professional, scientific and technical activities	99	100	1st	1
N – Administrative and support service activities	96	100	1st	4

Unit: %, p.p.

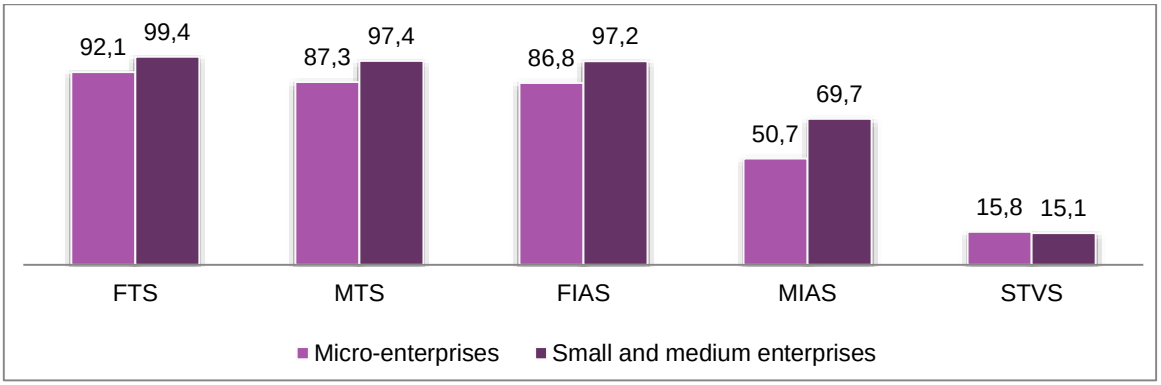
Source: Eurostat, European ICT survey: "Information and Communication Technologies in enterprises", 2014

Base: Companies with 10 or more employees according to sector of activity

2.3. Penetration by company size

On average, small and medium-sized enterprises (10 to 249 employees) report higher penetration rates for most services. The difference is greater in the case of the Internet access service, especially in the case of the mobile service, as seen in 2012.

Graph 3 - Penetration of services by company size



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: All companies with fewer than 250 staff according to company size
Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

Broadband penetration among Portugal's small and medium-sized enterprises is higher than in the EU28, with Portugal ranked in 11th place.

All large enterprises (250 or more employees) in Portugal have the Internet access service, as in the EU28. Penetration of fixed and mobile broadband among large enterprises is above the EU28 average.

Table 5 – Subscription to Internet access service by company size (in EU28 context)

		EU28 (%)	Portugal (%)	PT ranking in EU28	Diff. vs. EU28 (p.p)
Internet access service	Small and medium enterprises	97	96	18th	-1
	Large enterprises	100	100	1st	0
Fixed broadband	Small and medium enterprises	92	92	20th	0
	Large enterprises	98	100	1st	2
Mobile broadband	Small and medium enterprises	63	65	11th	2
	Large enterprises	92	95	6th	3

Unit: %, p.p.

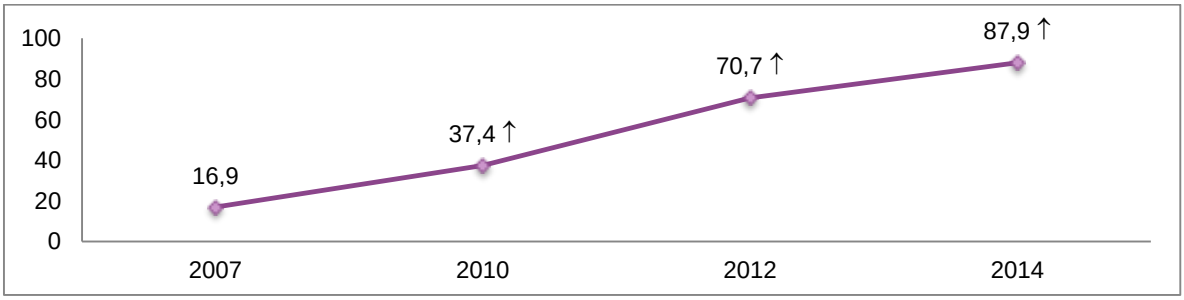
Source: Eurostat, European ICT survey: "Information and Communication Technologies in enterprises", 2014

Base: Companies according to their size

2.4. Form of subscription to services

SMEs mostly subscribe to multiple-play or bundled offers. Penetration of these types of offers has been increasing substantially. Bundles are the offers most commonly used by SMEs (+17.2 percentage points versus 2012).

Graph 4 – Percentage of companies receiving services as part of a bundle



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2012 and 2014

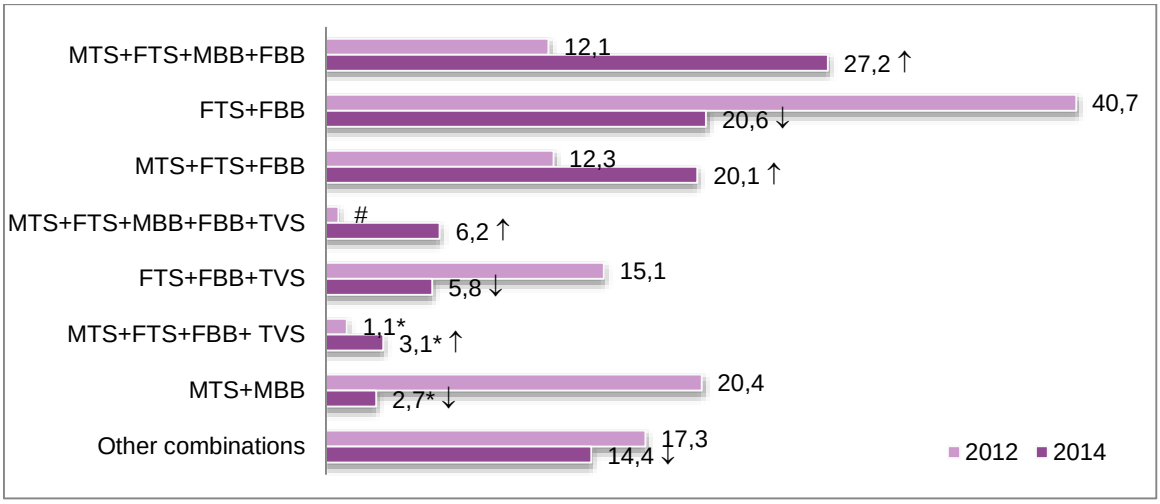
Base: All companies with fewer than 250 staff

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: An upward pointing arrow signals a statistically significant increase between the time periods t-1 and t, and a downward pointing arrow signals a statistically significant decline

The FTS+MTS+FBB+MBB quadruple-play bundle is the most commonly used bundle among micro-enterprises and SMEs (27.2 percent) and the bundle that has grown most over the last 2 years (+15.1 percentage points). The FTS+FBB bundle has dropped to second place (20.6 percent), falling 20.1 percentage points.

Graph 5 – Type of bundles of services in companies



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2012 and 2014

Base: Companies with fewer than 250 employees with mobile telephone service (does not include non-responses)

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: An upward pointing arrow signals a statistically significant increase between the time periods t-1 and t, and a downward pointing arrow signals a statistically significant decline.

Note 3: FTS - Fixed telephone service; MTS - Mobile telephone service; FBB – Fixed broadband; MBB – Mobile broadband; STVS – Subscription TV.

According to the survey's results, around 8.8 percent of SMEs receiving services as part of a bundle have a tailor-made offer. The vast majority (84.7 percent) have a standard enterprise offer. The remaining companies use a residential offer (4.5 percent) or did not respond (2 percent).

2.5. Barriers to use of services

The survey's respondents gave no indication of institutional, structural technological or behavioural barriers to take-up of services.

The main reasons for the non take-up of services appear to be use of alternative networks or services and/or lack of need/interest.

Around 88 percent of surveyed companies without mobile network access (MTS or MIAS) never had access to this type of service and around 85 percent expressed no interest in becoming customers. Meanwhile, 37 percent reported that they had "no need to communicate by this

means". Around 23 percent reported "use of personal mobiles phone to make calls" and 17 percent used fixed telephone alternatives.

Around 85 percent of surveyed companies without fixed network access (FTS or FIAS) never had access to this type of network and around 91 percent expressed no interest in becoming customers. Among micro, small and medium-sized enterprises without fixed network, around 44 percent reported that they had "no need to communicate by this means". "Mobile phone use" was the second most cited reason for not using the fixed network (40 percent).

2.6. Use of new information and communication services and degree of substitutability in respect of traditional services

As regards the use of new technologies and new information and communication services by SMEs, Over-the-top (OTT) services stand out, especially the messaging service (37.3 percent) and the voice over Internet service (27.2 percent). Around 11.4 percent of the SMEs surveyed made use of cloud computing.

Table 6 – Use of other services by companies

	2014
Voice over Internet service (e.g.: Skype, Viber)	27.2
Internet messaging service (e.g.: Skype, Viber, WhatsApp, Twitter, Facebook)	37.3
Cloud computing	11.4
Website hosting	43.5

Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: All companies with fewer than 250 staff

Note: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

On a scale from 1 (no substitutability) to 10 (full substitutability), the survey's respondents reported a degree of substitutability between OTT services and traditional services in the company of 5.5 in the case of mobile voice and 5.2 in the case of fixed voice.

Acquisition of cloud computing services in large enterprises in Portugal is reported at 31 percent in 2014 (4 percentage points below the EU28 average), according to the “cloud computing” module recently reported by Eurostat.

Table 7 – Acquisition of cloud computing services (in EU28 context).

	EU28 (%)	Portugal (%)	PT ranking in EU28	Diff. vs. EU28 (p.p)
Small and medium enterprises	19	13	16th	-6
Large enterprises	35	31	12th	-4

Unit: %.

Source: Eurostat, European ICT survey: "Information and Communication Technologies in enterprises", Special module 2014: *Cloud computing*

Base: Companies with Internet access (excludes Financial sector)

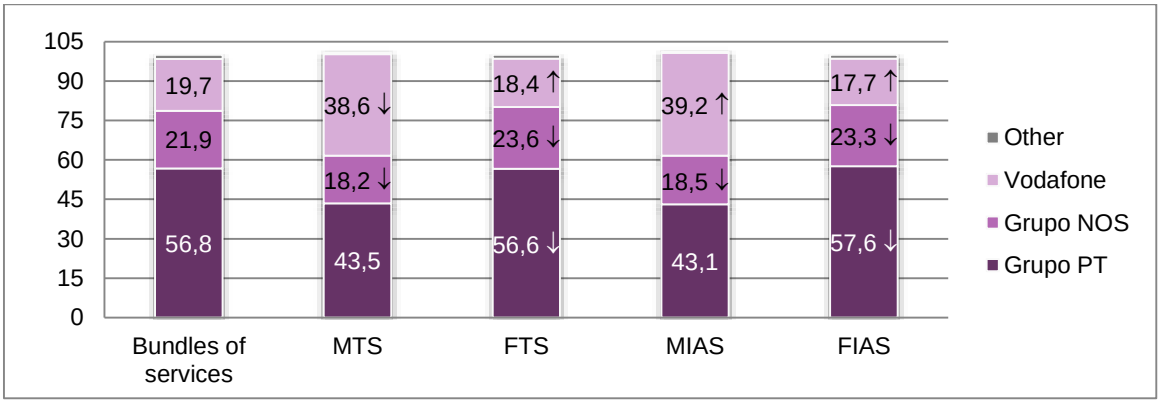
3. Offer structure, reasons for selecting provider, provider switching and number portability

3.1. Offer structure and reasons for selecting provider

According to the survey, Grupo PT enjoys the highest share of SME customers. Grupo PT's leadership is most pronounced among fixed services, even though its share has been declining.

Grupo NOS is reported in second place in terms of fixed services and bundled services, while Vodafone is the second largest provider when it comes to mobile services and is the provider that has reported most growth in terms of fixed services.

Graph 6 - Percentage of service users by provider



Unit: %

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: Companies with fewer than 250 employees receiving respective service (does not include non-responses)

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline

Note 3: Multiple choice question in MTS and MIAS.

Nota 4: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

Table 8 – Percentage of users by provider

	Bundles of services	MTS		FTS		MIAS		FIAS	
	2014	2012	2014	2012	2014	2012	2014	2012	2014
Grupo PT	56.8	40.8	43.5	66.1	56.6 ↓	39.7	43.1	61.0	57.6 ↓
Grupo NOS / Optimus/ Grupo ZON	21.9	22.1	18.2 ↓	27.0	23.6 ↓	28.8	18.5 ↓	26.7	23.3 ↓
Vodafone	19.7	45.5	38.6 ↓	9.2	18.4 ↑	35.0	39.2 ↑	8.9 *	17.7 ↑
Others	1.6 *	1.1*	0.4*	3.9*	1.5*	#	#	5.1 *	1.5 * ↓

Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: Companies with fewer than 250 employees receiving respective service (does not include non-responses)

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate

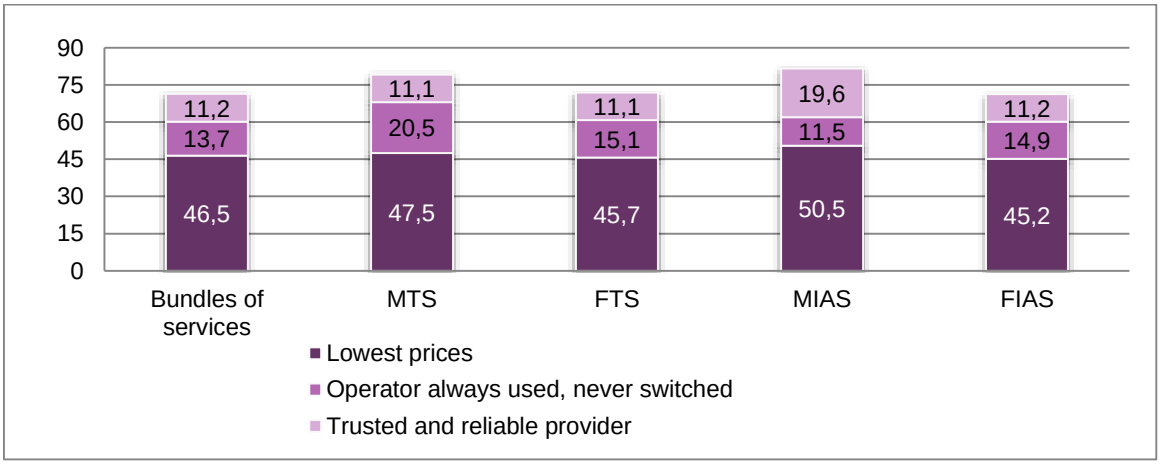
Note 2: An upward pointing arrow signals a statistically significant increase between 2012 and 2014 and a downward pointing arrow signals a statistically significant decline.

Note 3: Multiple choice question in MTS and MIAS.

Nota 4: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

"Lowest prices" is cited as the main reason for choice of provider for all services (between 45.2 percent in case of FIAS and 50.5 percent in case of MIAS).

Graph 7 - Reasons for selecting provider by service (TOP 3)



Unit: %

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: Companies with fewer than 250 employees receiving respective service

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

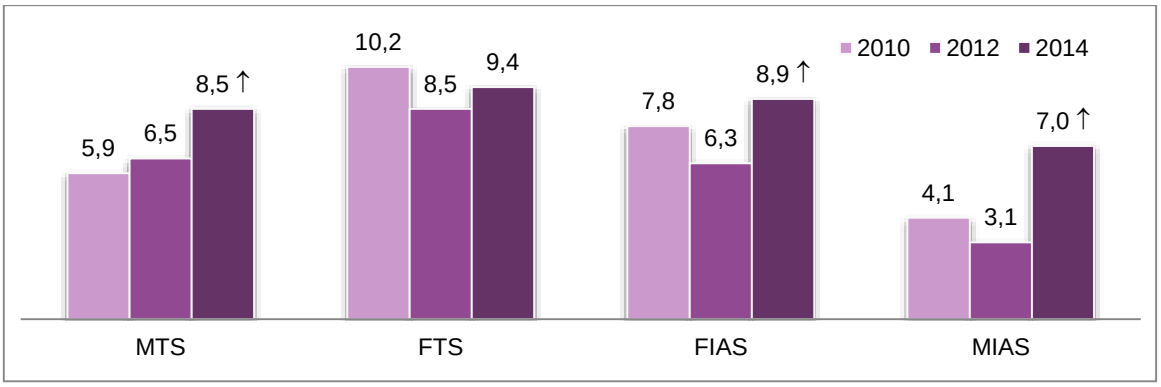
Note 2: Multiple choice and free response questions

Note 3: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

3.2. Provider switching and number portability

In 2014, the FTS was the service which saw the highest rate of provider switching (9.4 percent, +0.9 percentage points), in line with previous years. The level of provider switching among SMEs is the highest on record in the case of the MTS (8.5 percent, +2 percentage points), FIAS (8.9 percent, +2.6 percentage points) and MIAS (7 percent, + 3.9 percentage points).

Graph 8 – Trends in rates of provider switching



Unit: %.

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2010, 2012 and 2014

Base: All companies with fewer than 250 staff receiving respective service (does not include non-responses)

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

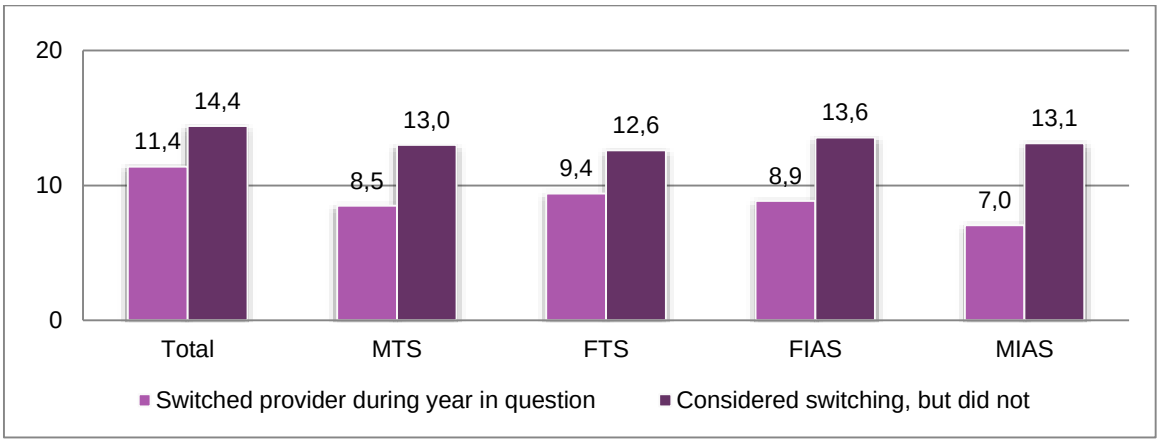
Note 2: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

Note 3: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

Among SMEs which switched provider during 2014, 79 percent concluded the contract on the company premises and 87 percent had a 24 month contract lock-in period.

Around 14 percent of the surveyed SMEs were considering switching provider, especially MIAS customers. The main reasons for not switching stem from the existence of a "contract lock-in period with current provider" (65.1 percent) and a "lack of better offers on the market" (13.1 percent).

Graph 9 – Provider switching by service



Unit: %

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: Companies with fewer than 250 staff receiving mobile telephone service (does not include non-responses)

Note 1: All estimates are reliable.

Note 2: An upward pointing arrow signals a statistically significant increase between 2012 and 2014 and a downward pointing arrow signals a statistically significant decline.

Note 3: The total considers all companies giving a response in the respective category for at least one service.

Nota 4: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

The majority of companies (98 percent) were informed about the duration of the contract lock-in period during negotiations, whereas 17 percent were reportedly "unaware of penalties" in the event of early termination or "became aware after contract conclusion".

Assessing the provider switching process on a scale of 1 "very difficult" to 10 "very easy", SMEs gave a rating of 6.3

The majority of companies switching fixed and mobile telephone service provider during 2014 used the number portability service (89 percent and 87 percent respectively).

According to those surveyed, the number portability process took 1 working day for 44 percent of FTS customers and for 49 percent of MTS customers.

4. Levels of satisfaction and complaints

The business customers of services included in bundles were those that complained most (28.6 percent) during 2014. Customers of the standalone FIAS were the least satisfied (7.38 points on a scale from 1 – very dissatisfied -, to 10 – very satisfied).

Table 9 – Satisfaction with provided services and complaints - comparison between electronic communication services

	Complaints made to provider in 2014 *(%)*		**Average satisfaction** with provider *(scale of 1 to 10)*
Bundled services	28.6	**Bundled services**	7.38
Standalone fixed services (FTS or FIAS)	18.1 *	**Standalone FTS**	7.63
		Standalone FIAS	7.31
Standalone mobile services (MTS or MIAS)	6.7 *	**Standalone MTS**	7.79
		Standalone MIAS	7.94

Unit: % / Scale 1 (very dissatisfied) to 10 (very satisfied)

Source: ICP-ANACOM, Survey on the use of electronic communications services, SME, December 2014

Base: All companies with fewer than 250 staff receiving respective service (does not include non-responses)

Note 1: Estimates: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate. On a scale of 1 to 10, the absolute margins for error do not exceed 0.1 absolute points.

Note 2: FTS - Fixed telephone service; MTS - Mobile telephone service; FIAS – Fixed Internet access service; MIAS – Mobile Internet access service; STVS – Subscription TV.

ANNEX – Summary of methodology

SURVEY ON THE USE OF ELECTRONIC COMMUNICATIONS SERVICES, SME, DECEMBER 2010, 2012, 2014

	2010	2012	2014
Universe	Micro, Small and Medium-sized Enterprises (SME), i.e., companies with fewer than 250 employees, with registered offices in Portugal and whose economic activity is covered by one of the following sections of CAE codes (Rev.3): C, F, G, H, I, J, K, L, M and N.		
Sample size	2,503	2,559	3,000
Sampling method	Random sample stratified by region (NUTSII), sector of activity and company size		
maximum absolute margin of error (1)	2.0	1.9	1.8
Fieldwork conducted by	GFK Metris	TNS – Euroteste	Spirituc
Surveying period	20 October - 16 December 2010	5 November - 21 December 2012	10 November - 24 December 2014
Information compilation method	CATI	CATI	CATI
Weighting of survey results	NUTS II, sector of activity and company size	NUTS II, sector of activity and company size	NUTS II, sector of activity and company size

(1) Semiamplitude of a confidence interval of 95% for a proportion.