

Report on the State of Communications 2006

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Introduction

According to ICP-ANACOM's statutes, approved by Decree-Law no. 309/2001 of 7 December, it is up to this Authority to produce a report on the state of communications, namely to be presented to the member of the Government overseeing the sector, and to be publicly released.

The current report intends to fulfil the above-mentioned statutory obligations.

This document maintains the same structure adopted the year before. However, some of the contents were modified taking into account the suggestions stated in the opinion of ICP-ANACOM's Advisory Council on the State of Communications' report regarding 2005. Specifically, the Advisory Council suggested that it should “[focus on] *the international comparisons* [and] *the growth's evolution in percentage*”. On the other hand, the report was complemented with an integrated analysis of the electronic communications' sector and its consumer. In general, the reference period for the analyses made is 2000-2006.

Thus, the current report, after an initial analysis of the international framework, in which the evolution of the electronic communications sector in the European Union (EU) is analysed, contains an integrated view of the sector and characterizes the electronic communications' consumer in global terms. Following that, a chapter is dedicated to each of the main electronic communications retail services: telephone service at a fixed location (FTS), mobile telephone service (MTS), Internet access service (IAS) and paid television signal distribution service. The second part presents the evolution of postal services.

For each of the considered services, the service itself is characterized, as well as its providers and its users profile, the barriers to service subscription are described, the level of service use, level of prices, and the consumers'

evaluation of these services is presented, and the evolution of competition is assessed.

As mentioned previously, whenever possible, international comparisons were used in order to evaluate the service's evolution in Portugal.

An annex contains a set of statistical elements on the sector and the analysed services. In previous years, these items were presented on the Communications Statistical Yearbook. However, it was now decided to publish this data together with the State of Communications, which will allow for their quicker release and provide a more detailed analysis of the main trends described in the Report.