

STATISTICAL INFORMATION

FIXED TELEPHONE SERVICE

4TH QUARTER 2010

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1. Providers of the Fixed Telephone Service, Voice over Internet and nomadic VoIP¹

At the end of the 4th quarter of 2010 (4Q10) there were 25 companies authorised to provide the Fixed Telephone Service (Table 1).

Of the companies authorised to provide this service, 17 were operational². Of these, six provided direct access only, one provided indirect access only and the rest provided services using both types of access.

Table 1 - Number of FTS providers

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Authorized providers	25	25	25	25	25
Operational providers ³	17	17	17	17	17
Providers with direct and indirect access traffic	10	10	10	10	10
Providers with direct access traffic only	6	6	6	6	6
Providers with indirect access traffic only	1	1	1	1	1

Unit: Number of providers

Source: ICP-ANACOM

With respect to telephone voice traffic resale providers, it is reported that, in 4Q10, there were 22 entities authorised to provide this service, while only five were operational.

¹ NOTE: The information presented in this report was compiled from the providers of this service and may be subject to alteration in the event that data is revised or updated.

² Undertakings which, according to available statistical data, recorded traffic during the period being reported.

³ Undertakings which, according to available statistical data, recorded traffic during the period being reported.

Table 2 - Number of telephone voice traffic resale providers

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Authorised providers	19	20	21	21	22
Operational providers ⁴	5	5	5	5	5

Unit: Number of providers

Source: ICP-ANACOM

With respect to providers of voice over Internet services⁵ provided at a fixed location and according to conditions perceived by users as being equivalent to traditional FTS, at the end of 4Q10, there were five operational providers (Table 3).

Table 3 - Number of voice over Internet providers

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Operational providers ⁶	6	6	5	5	5

Unit: Number of providers

Source: ICP-ANACOM

With respect to nomadic VoIP Services⁷, at the end of 4Q10, there were 22 providers authorised to provide this service (Table 4). However, only ten were operational.

⁴ Undertakings which, according to available statistical data, recorded traffic during the period being reported.

⁵ See position of ICP-ANACOM on VoIP services available at <http://www.anacom.pt/template12.jsp?categoryId=183074>.

⁶ Undertakings which, according to available statistical data, recorded traffic during the period being reported.

⁷ See position of ICP-ANACOM on VoIP services available at <http://www.anacom.pt/template12.jsp?categoryId=183074>.

Table 4 - Number of nomadic VoIP providers

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Authorised providers	20	21	21	22	22
Operational providers ⁸	8	10	10	10	10

Unit: Number of providers

Source: ICP-ANACOM

2. Number of installed accesses of the Fixed Telephone Service

The total number of main telephone accesses installed at customer request stood at around 4.4 million as at the end of the 4Q10 (Table 5), corresponding to a penetration rate of approximately 41.3 accesses per 100 inhabitants. Compared to the previous quarter, there was an increase in the number of these accesses (0.4 per cent). The decline in analogue accesses and in basic and fractioned ISDN accesses was offset by the growth reported in accesses using other technologies, especially VoIP/ VoB⁹ and optical fibre (FTTH/B). It is noted that, for the first time since their introduction, a decline has been reported in accesses supported over GSM/UMTS (-0.4 percent).

In annual terms, an increase of 4 per cent is reported over the same period of 2009 in the number of accesses installed at customer request. In this context, of particular note is the increase reported in the number of “other accesses”¹⁰ (+39.5 percent), which includes VoIP accesses, which increased by around 37 per cent. Meanwhile, accesses based on GSM/UMTS technology grew in the same period by 4.8 per cent.

⁸ Undertakings which, according to available statistical data, recorded traffic during the period being reported.

⁹ VOIP/VOB – *voice over internet protocol/ voice over broadband*.

¹⁰ These access include those associated with the voice over Internet services provided at a fixed location and according to conditions perceived by the user as being equivalent to the traditional FTS, access associated with voice over Internet services according to conditions that may be considered as being equivalent to the traditional FTS, accesses based on optical fibre and cable telephony accesses. See position taken by this Authority with respect to the general guidelines governing the regulatory approach to VoIP services at <http://www.anacom.pt/template12.jsp?categoryId=183074>.

Table 5 - Evolution in the number of FTS accesses

	4Q09	3Q10	4Q10	Variation	
				4Q10/ 3Q10	4Q10/ 4Q09
Total Main Accesses ¹¹	4 343 250	4 450 278	4 484 498	0,8%	3,3%
Accesses installed at customer request	4 221 342	4 370 428	4 389 649	0,4%	4,0%
Analogue Accesses	2 280 053	2 183 571	2 148 522	-1,6%	-5,8%
ISDN and Diginet Accesses ¹²	708 930	674 981	669 455	-0,8%	-5,6%
Basic	423 580	395 594	385 152	-2,6%	-9,1%
Primary	282 585	274 590	279 450	1,8%	-1,1%
Fractioned	969	791	772	-2,4%	-20,3%
Other digital accesses	1 796	4 006	4 081	1,9%	127,2%
GSM	424 149	446 278	444 586	-0,4%	4,8%
Other accesses ¹³	808 210	1 065 598	1 127 086	5,8%	39,5%
Public payphones	33 304	32 024	31 506	-1,6%	-5,4%

Unit: Number of accesses

Source: ICP-ANACOM

Note: A re-classification of accesses has been conducted, whereby the categories above may not be identical to the information published previously.

It should be noted that the increase seen in the number of accesses results above all from sign-up to multiple play offers.

¹¹ This indicator corresponds to the sum of the indicators for "number of analogue accesses" and "number of equivalent digital accesses", "number of GSM accesses" and "number of other accesses" with respect to direct access, including accesses installed at customer request, public payphones and the providers' own complement. The own complement of accesses is understood to be the complement of accesses for use by the provider itself (accesses pertaining to companies with which the provider has a dominant or group relationship are not included in its own complement and are accounted for as "accesses installed at customer request").

¹² The "number of equivalent digital accesses" corresponds to the sum of the number of lines pertaining to the fixed telephone service supported in each installed digital access. In ISDN accesses the number of equivalent accesses is two for each basic ISDN access and 30 for each primary ISDN access. Fractioned accesses are parts of primary ISDN accesses.

The "Others" category mainly encompasses accesses of the "Diginet" type.

¹³ These access include those associated with the voice over Internet services provided at a fixed location and according to conditions perceived by the user as being equivalent to the traditional FTS, access associated with voice over Internet services according to conditions that may be considered as being equivalent to the traditional FTS, accesses based on optical fibre and cable telephony accesses. See position taken by this Authority with respect to the general guidelines governing the regulatory approach to VoIP services at <http://www.anacom.pt/template12.jsp?categoryId=183074>.

In this quarter, there were around 31.5 thousand installed payphones, with a decline seen of 1.6 per cent over the previous quarter and a year-on-year decline of 5.4 percent.

Most of the installed accesses continued to belong to companies of the Portugal Telecom Group^{14,15} (Grupo PT) operating in these markets (Table 6 and Graph 1). At the end of the quarter, Grupo PT¹⁶ held about 59.5 percent of all accesses installed at customer request, 0.2 percentage points less than at the end of the previous quarter and 3.2percentage points less than a year earlier¹⁷.

¹⁴ Includes PT Comunicações S.A., PT Prime Soluções Empresariais Telecomunicações e Sistemas S.A. and TMN – Telecomunicações Móveis Nacionais S.A. - Serviços Fixos.

¹⁵ During 4Q07 TV Cabo was included in a Spin-off which was concluded during the month of November. By determination of 3 April 2008, this Authority clarified that, with the spin-off, PT Multimédia, now ZON Multimédia, would no longer be included in Grupo PT, whereby the obligations arising in respect of market analysis conducted pursuant to Title IV of Chapter II of the Law of Electronic Communications (LCE) which are binding upon said Group, do not apply. ZON Multimédia encompasses CATVP – TV Cabo Portugal, S.A., Cabo TV Açoreana, S.A. and Cabo TV Madeirense, S.A. In addition, on 24 November 2008, Autoridade da Concorrência (the Competition Authority) notified ZON Multimédia of its decision not to oppose the acquisition of the companies Grupo Parfitel (Bragatel, Pluricanal Leiria and Pluricanal Santarém), as well as TV Tel, enabling the merger by acquisition of these companies into ZON TV Cabo Portugal on 31 July 2009.

¹⁶ Includes PT Comunicações S.A., PT Prime Soluções Empresariais Telecomunicações e Sistemas S.A. and TMN – Telecomunicações Móveis Nacionais S.A. - Serviços Fixos.

¹⁷ SLRO based offers are reported as direct accesses of the alternative providers.

Table 6 - Evolution of the shares of accesses installed at the request of FTS customers

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Grupo PT	62.7%	61.6%	60.5%	59.7%	59.5%
PT Comunicações	62.0%	60.8%	59.6%	58.8%	58.6%
PT Prime	0.6%	0.7%	0.8%	0.8%	0.8%
TMN	0.1%	0.1%	0.1%	0.1%	0.1%
Alternative Providers	37.3%	38.4%	39.5%	40.3%	40.5%
Grupo ZON/TV Cabo^{18, 19}	10.7%	12.0%	13.4%	14.4%	15.1%
ZON Portugal / TV Cabo	9.9%	11.0%	12.4%	13.2%	13.8%
ZON Açores/ CaboTV Açoreana	0.3%	0.4%	0.4%	0.5%	0.5%
ZON Madeira/ CaboTV Madeirense	0.5%	0.6%	0.6%	0.7%	0.8%
Optimus/Sonaecom	14.6%	14.3%	14.1%	13.9%	13.2%
Cabovisão	5.8%	5.8%	5.9%	5.9%	5.9%
Vodafone	3.9%	4.1%	4.1%	4.2%	4.3%
ONITELECOM	1.0%	1.0%	1.0%	1.0%	1.0%
AR Telecom	0.8%	0.8%	0.8%	0.7%	0.7%
Other alternative providers	0.5%	0.4%	0.2%	0.2%	0.3%

Unit: %

Source: ICP-ANACOM

Note: There are certain operators which are active in specific market segments. The relative position of the operators in this table should in no way be taken as an indicator of the quality of the service which these operators provide or of their performance in the segments which they are active.

Grupo PT's share of accesses has fallen 35 percentage points since the beginning of 2004 (Graph 1).

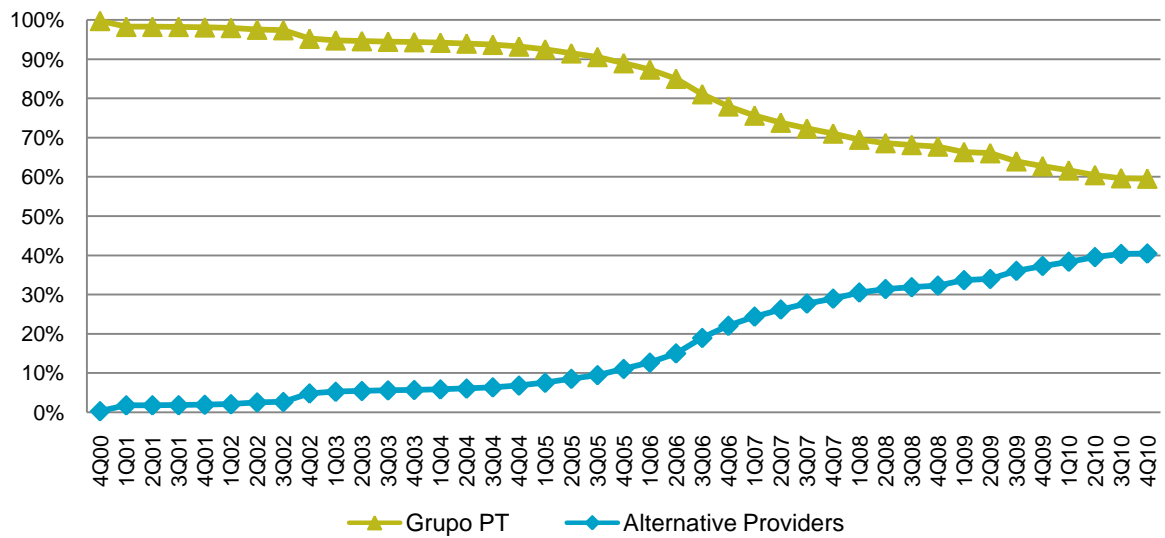
¹⁸ During 4Q07 TV Cabo was included in a Spin-off which was concluded during the month of November. By determination of 3 April 2008, this Authority clarified that, with the spin-off, PT Multimédia, now ZON Multimédia, would no longer be included in Grupo PT, whereby the obligations arising in respect of market analysis conducted pursuant to Title IV of Chapter II of the Law of Electronic Communications (LCE) which are binding upon said Group, do not apply. ZON Multimédia encompasses CATVP – TV Cabo Portugal, S.A., Cabo TV Açoreana, S.A. and Cabo TV Madeirense, S.A. In addition, on 24 November 2008, Autoridade da Concorrência (the Competition Authority) notified ZON Multimédia of its decision not to oppose the acquisition of the companies Grupo ParfiteL (Bragatel, Pluricanal Leiria and Pluricanal Santarém), as well as TV Tel, enabling the merger by acquisition of these companies into ZON TV Cabo Portugal on 31 July 2009.

¹⁹ ICP-ANACOM has been asked to explain the differences between the values published in this report and the values regularly published by ZON.

ICP-ANACOM reports that the values considered in this table refer only to the service provided in respect of the authorisation granted for the provision of the telephone service at a fixed location and according to conditions which are perceived by the user as being equivalent to the traditional FTS (See regulatory approach to VoIP services at <http://www.anacom.pt/template12.jsp?categoryId=183074>). The values released by ZON include the total number of customers of services provided in respect of the authorisation granted for the provision of nomadic VoIP.

According to available information, the data released by ZON is consistent with the information sent to ICP-ANACOM with respect to the two services mentioned above..

Graph 1 - Evolution of the shares of accesses installed at the request of FTS customers



Unit: %

Source: ICP-ANACOM

3. Fixed Telephone Service and nomadic VoIP service customers

There were around 3.5 million fixed telephone service customers using direct access, an increase of 0.6 per cent on the previous quarter and an increase of 5.4 per cent on the same quarter of 2009 (Table 7). This trend was significantly driven by bundled offers which combine fixed telephone and cable television and/or Internet as well as the offers from alternative providers supported over cable TV networks.

Table 7 - Evolution in the number of FTS and nomadic VoIP customers

	4Q09	3Q10	4Q10	Variation	
				4Q10/ 3Q10	4Q10/ 4Q09
Direct access customers ²⁰	3 365 727	3 525 173	3 546 114	0.6%	5.4%
Indirect access customers	147 565	126 174	117 287	-7.0%	-20.5%
Pre-selection	141 703	121 433	112 770	-7.1%	-20.4%
Call-by-call selection	5 862	4 741	4 517	-4.7%	-22.9%
Nomadic VoIP customers	112 818	105 524	104 739	-0.7%	-7.2%

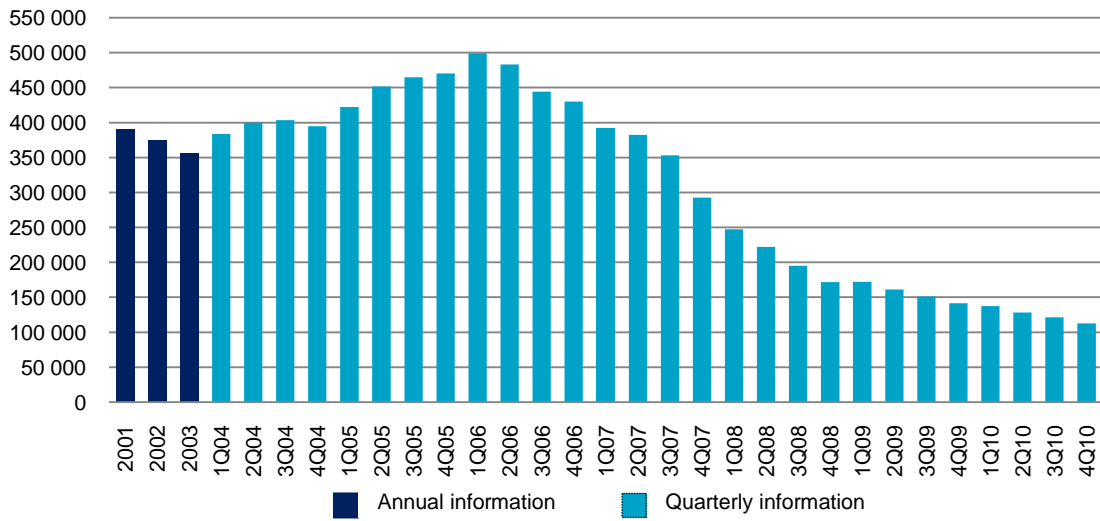
Unit: Number of customers

Source: ICP-ANACOM

The number of indirect access customers using operator pre-selection fell in 4Q10 by 7.1 percent, to 113 thousand, the lowest level since 2001. Compared to the same period of the previous year, the number of pre-selection customers fell by 20.4 per cent. It is noted that this result is in line with the declining trend seen in the number of this type of accesses which began in 2Q06 (Graph 2). This trend is explained by the fact that new providers have focused on other business models with better profitability prospects and by new tariff offers of the incumbent operator.

²⁰ Includes customer benefiting from the SLRO.

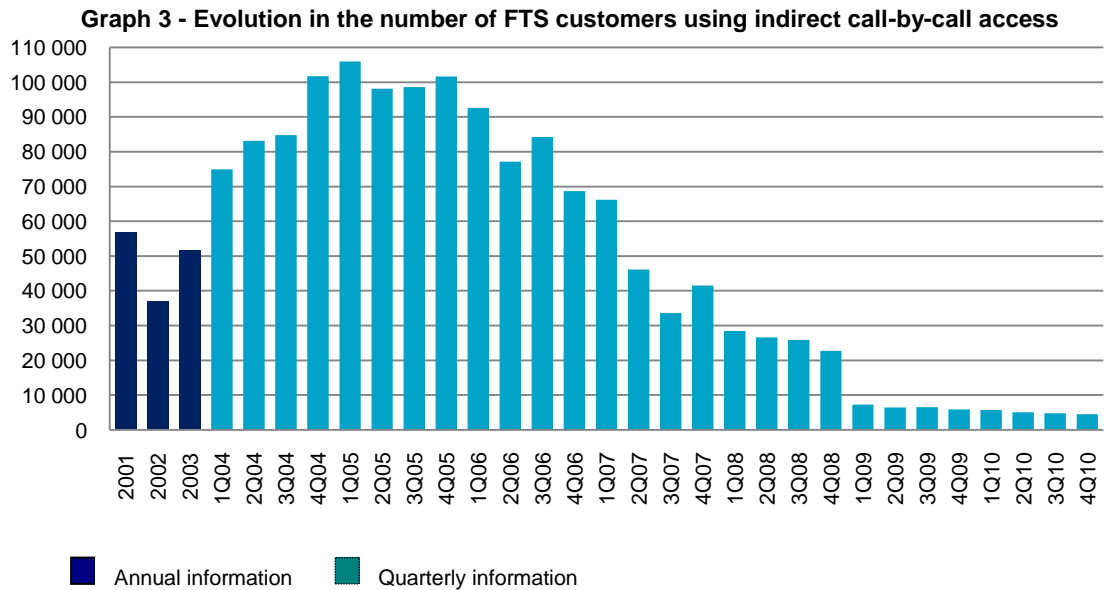
Graph 2 - Evolution in the number of FTS customers using indirect access via pre-selection



Unit: No. of customers

Source: ICP-ANACOM

In 4Q10 there were 4.5 thousand active customers using call-by-call selection, representing a fall of 4.7 per cent over the previous quarter and a decline of 22.9 per cent year-on-year (Table 7 and Graph 3). The number of customers using call-by-call selection represents just 0.12 per cent of this service’s customer base.

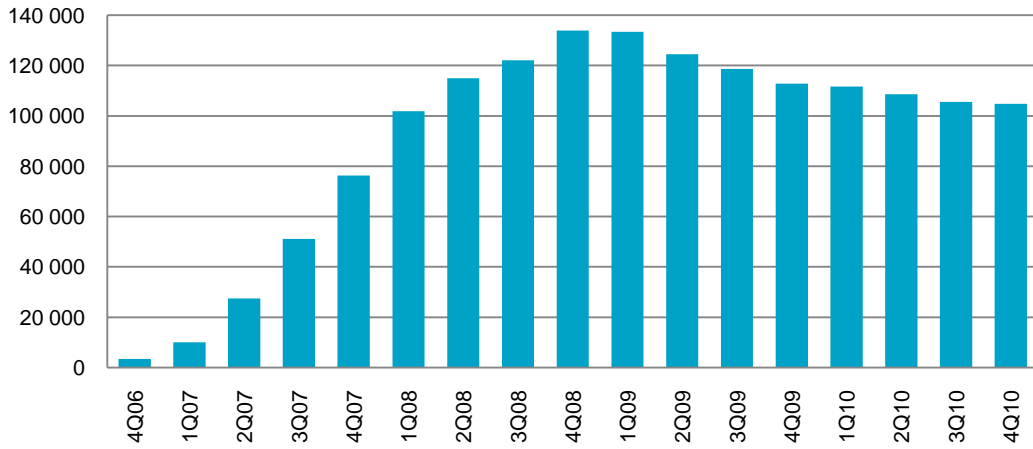


Unit: No. of customers

Source: ICP-ANACOM

With respect to nomadic VoIP customers, at the end of 4Q10 there were around 105 thousand active customers, representing a decline of 0.7 per cent over the previous quarter (Table 7 and Graph 4). It should be noted that since the beginning of 2009, the number of nomadic VoIP customers has been in a downward trend. This decline can be put down to the migration by one operator of a significant set of its customers to other types of voice telephony solutions.

Graph 4 - Evolution in the number of nomadic VoIP customers



Unit: No. of customers

Source: ICP-ANACOM

Grupo PT's share of direct access customers has been falling since 2000. In this quarter a further decline of 0.1 percentage points was reported over the previous quarter and 3.1 percentage points over the same quarter of 2009, to 54.4 per cent at the end of the quarter²¹ (Table 8). This drop in the share of direct access customers results essentially from new offers based on access technologies distinct from the traditional Fixed Telephone Service, especially bundled offers. It is noted, however, that Grupo PT's focus on multiple play services has meant a slowdown in the decline reported in the share of direct access customers.

²¹ SLRO based offers are reported as direct accesses of the alternative providers.

Table 8 - Evolution in the shares of direct access customers of the Telephone Service at a Fixed Location

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Grupo PT	57.5%	56.7%	55.3%	54.5%	54.4%
PT Comunicações	57.3%	56.4%	55.1%	54.3%	54.2%
PT Prime	<0.05%	0.1%	0.1%	0.1%	0.1%
TMN	0.2%	0.2%	0.1%	0.1%	0.1%
Alternative Providers	42.5%	43.3%	44.7%	45.5%	45.6%
Grupo ZON/TV Cabo ^{22, 23}	13.5%	15.0% ²¹	16.4% ²¹	17.4% ²¹	18.6% ²¹
ZON Portugal / TV Cabo	12.5%	13.8%	15.1%	16.0%	17.1%
ZON Açores/ CaboTV Açoreana	0.4%	0.5%	0.5%	0.6%	0.6%
ZON Madeira/ CaboTV Madeirense	0.7%	0.7%	0.8%	0.8%	0.9%
Optimus/Sonaecom	16.8%	16.0%	16.0%	15.8%	15.0%
Cabovisão	7.2%	7.2%	7.2%	7.2%	7.0%
Vodafone	4.1%	4.2%	4.2%	4.2%	4.2%
AR Telecom	0.8%	0.8%	0.8%	0.7%	0.7%
ONI	0.1%	0.1%	<0.05%	<0.05%	<0.05%
Other Alternative Providers	<0.05%	<0.05%	0.1%	0.2%	0.1%

Unit: %

Source: ICP-ANACOM

Note: There are certain operators which are active in specific market segments. The relative position of the operators in this table should in no way be taken as an indicator of the quality of the service which these operators provide or of their performance in the segments which they are active.

²² During 4Q07 TV Cabo was included in a Spin-off which was concluded during the month of November. By determination of 3 April 2008, this Authority clarified that, with the spin-off, PT Multimédia, now ZON Multimédia, would no longer be included in Grupo PT, whereby the obligations arising in respect of market analysis conducted pursuant to Title IV of Chapter II of the Law of Electronic Communications (LCE) which are binding upon said Group, do not apply. ZON Multimédia encompasses CATVP – TV Cabo Portugal, S.A., Cabo TV Açoreana, S.A. and Cabo TV Madeirense, S.A. In addition, on 24 November 2008, Autoridade da Concorrência (the Competition Authority) notified ZON Multimédia of its decision not to oppose the acquisition of the companies Grupo ParfiteL (Bragatel, Pluricanal Leiria and Pluricanal Santarém), as well as TV Tel, enabling the merger by acquisition of these companies into ZON TV Cabo Portugal on 31 July 2009.

²³ ICP-ANACOM has been asked to explain the differences between the values published in this report and the values regularly published by ZON.

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According to available information, the data released by ZON is consistent with the information sent to ICP-ANACOM with respect to the two services mentioned above.

4. Traffic originating on the fixed network

As shown in Tables 9 and 10, total voice traffic originating ²⁴ on the fixed network during 4Q10 totalled around 2 billion minutes and 587 million calls.

Table 9 - Traffic originating on the fixed network - minutes ²⁵

	4Q09	3Q10	4Q10	Variation	
				4Q10/ 3Q10	4Q10/ 4Q09
FTS voice traffic	2 025 601	1 875 796	1 999 491	6.6%	-1.3%
National traffic (voice)	1 887 242	1 741 252	1 860 884	6.9%	-1.4%
National Fixed -Fixed traffic	1 642 279	1 523 173	1 650 051	8.3%	0.5%
National Fixed -Mobile traffic	244 963	218 079	210 834	-3.3%	-13.9%
International outgoing traffic	138 359	134 544	138 606	3.0%	0.2%
Internet Access Traffic	23 042	17 694	15 469	-12.6%	-32.9%
Nomadic VoIP traffic	65 343	59 365	65 652	10.6%	0.5%

Unit: Thousands of minutes

Source: ICP-ANACOM

²⁴ Includes national Fixed-Fixed and Fixed-Mobile traffic, outgoing international traffic and Internet access traffic, made through direct access and indirect access (pre-selection and call-by-call selection) and traffic associated with the nomadic VoIP service.

²⁵ Includes direct and indirect access traffic via pre-selection and call-by-call selection.

Table 10 - Traffic originating on the fixed network - Calls²⁶

	4Q09	3Q10	4Q10	Variation	
				4Q10/ 3Q10	4Q10/ 4Q09
FTS voice traffic	620 891	574 594	587 489	2,2%	-5,4%
National traffic (voice)	593 466	548 221	561 541	2,4%	-5,4%
National Fixed -Fixed traffic	465 727	433 477	449 827	3,8%	-3,4%
National Fixed -Mobile traffic	127 739	114 744	111 715	-2,6%	-12,5%
International outgoing traffic	27 425	26 373	25 948	-1,6%	-5,4%
Internet Access Traffic	4 372	3 761	3 308	-12,0%	-24,3%
Nomadic VoIP traffic	12 722	11 423	12 188	6,7%	-4,2%

Unit: Thousands of Calls

Source: ICP-ANACOM

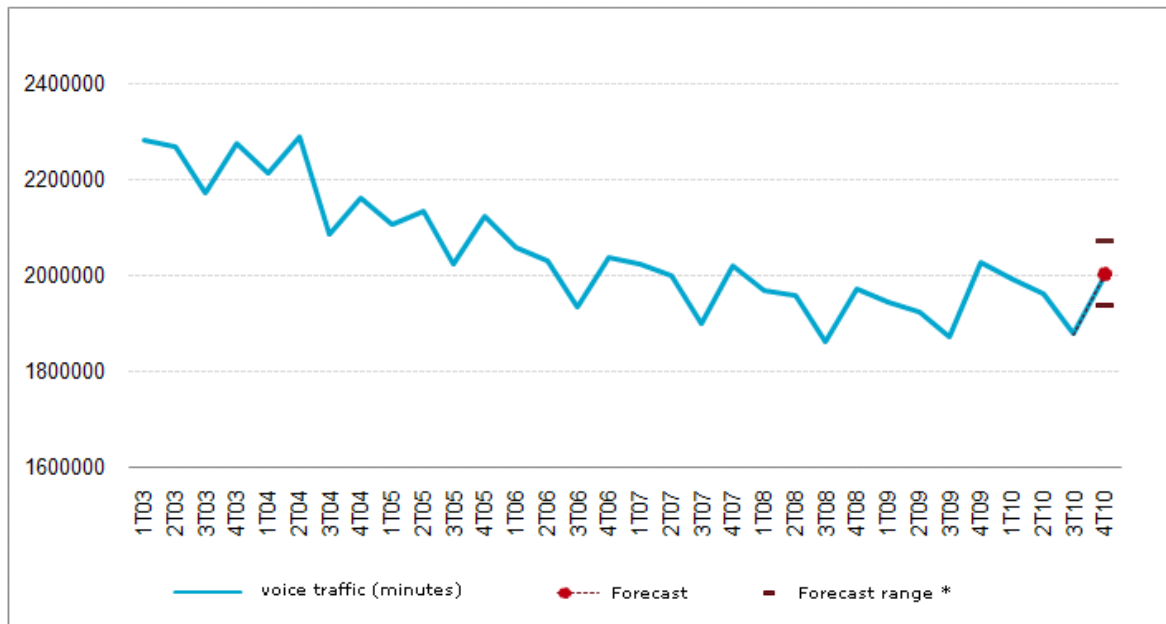
Compared to the previous quarter, the volume of FTS minutes and the volume of calls increased by 6.6 percent and 2.2 percent respectively. Meanwhile, year-on-year, a fall of 1.3 per cent was reported in the volume of minutes and 5.4 percent in the volume of calls.

The overall trend in voice traffic, reported in minutes, should be analysed taking account of seasonal trends and effects affecting this variable. Conducting an econometric analysis of the traffic data series reported in minutes, a declining quadratic trend is evident, whereas in the fourth quarter of each year a seasonal increase is seen in this traffic of around 33.5 thousand minutes on average.

It is stressed that the volume of minutes actually reported in 4Q10 is within the forecast range resulting from the estimated model.

²⁶ Includes direct and indirect access traffic via pre-selection and call-by-call selection.

Graph 5 - Evolution in FTS voice traffic (minutes)



Unit: Thousands of minutes

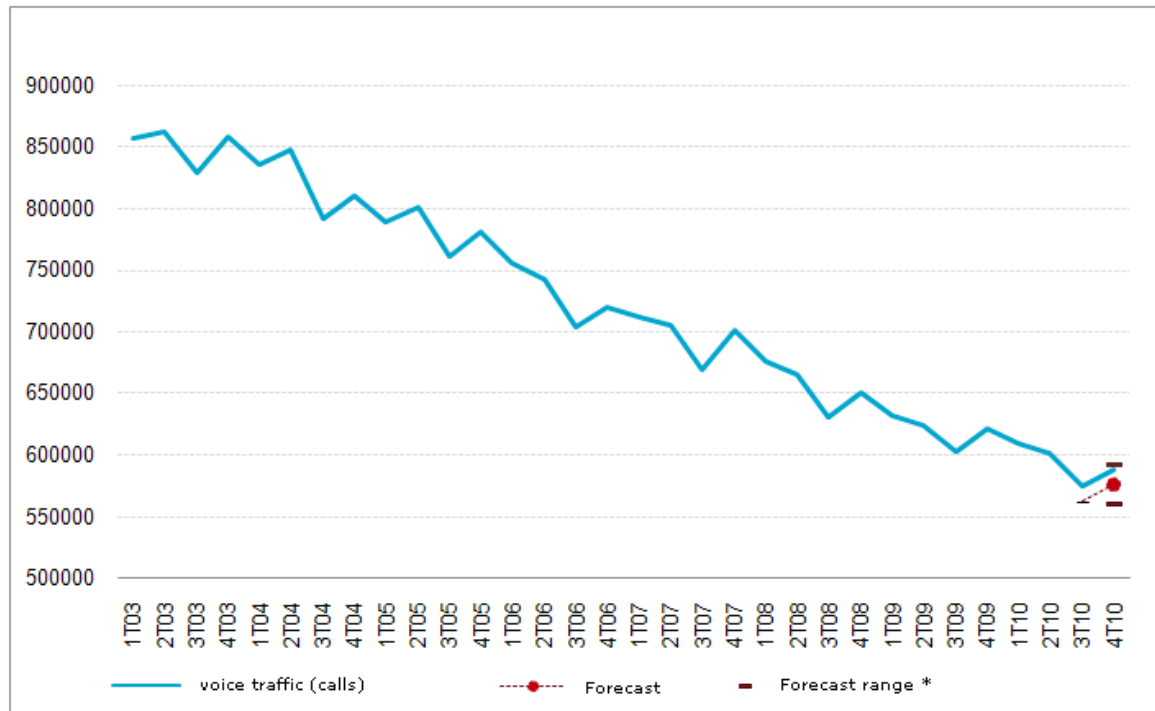
Source: ICP-ANACOM

Notes: * Forecast range at a significance level of 95 percent.

A quadratic regression model was used with the following significant independent variables at a confidence level of 95 percent: trend, seasonal dummy relative to third and fourth quarters. Model's adjusted R² is 0.95.

With respect to voice traffic reported in terms of calls, a decreasing linear trend is evident. Voice traffic in calls in 4Q10 is reported within the limits forecast by the estimated model, in line with the trend seen in traffic in terms of minutes.

Graph 6 - Evolution in FTS voice traffic (calls)



Unit: Thousands of calls

Source: ICP-ANACOM

Notes: * Forecast range at a significance level of 95 percent.

A regression model was used with a linear trend, taking into consideration the following seasonal indices for the multiplicative model: Q2=1.01; Q3=0.97; Q4=1.02. Model's adjusted R2 is 0.974.

In terms of traffic associated with the nomadic VoIP service, it is noted that despite the slight decline reported in the number of active customers, traffic associated with this type of service increased compared to 3Q10 (3rd quarter 2010), both in terms of calls and in terms of minutes.

Looking at indirect access, in 4Q10, it can be seen that 6.9 per cent of the total of voice minutes were originated through indirect access, 0.8 percentage point less than the figure reported in the previous quarter and 1.8 percentage points less than in the same quarter of 2009 (Table 11).

Table 11 - Percentage of traffic routed through indirect access modes of the FTS (minutes)²⁷

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Voice traffic	8.7%	8.7%	8.0%	7.7%	6.9%
National Traffic	8.8%	8.7%	8.0%	7.7%	6.9%
Outgoing International Traffic	7.8%	8.2%	8.0%	7.1%	6.5%

Unit: %

Source: ICP-ANACOM

Of the total of voice calls made in the first quarter of this year, 10 percent were made using indirect access (Table 12), 1.9 percentage points below that reported in the same quarter of the previous year.

Table 12 - Percentage of traffic routed through indirect access modes of the FTS (calls)²⁸

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Voice traffic	11.9%	12.0%	11.3%	10.7%	10.0%
National Traffic	11.9%	12.0%	11.2%	10.7%	10.0%
Outgoing International Traffic	11.6%	12.7%	12.6%	11.0%	10.4%

Unit: %

Source: ICP-ANACOM

It should be emphasised that the weight of indirect access as a proportion of voice traffic is significantly greater than its weight in terms of customers.

²⁷ Includes indirect access traffic via pre-selection and call-by-call selection.

²⁸ Includes indirect access traffic via pre-selection and call-by-call selection.

5. FTS Traffic shares

During the quarter being reported, the FTS voice traffic share of Grupo PT was reported at 60.1 percent, a decline of 0.9 percentage points over the previous quarter.

Table 13 - Evolution in shares of FTS voice traffic (Minutes)

	2009	2010			
	4Q09	1Q10	2Q10	3Q10	4Q10
Grupo PT	61.6%	61.1%	60.6%	61.0%	60.1%
PT Comunicações	55.0%	54.2%	54.0%	54.4%	54.1%
PT Prime	5.5%	5.9%	5.7%	5.7%	5.2%
TMN	1.1%	1.0%	0.9%	0.9%	0.8%
Alternative Providers	38.4%	38.9%	39.4%	39.0%	39.9%
Grupo ZON/TV Cabo^{29, 30}	10.1%	11.5%	12.5%	12.9%	14.4%
ZON Portugal /TV Cabo	9.1%	10.1%	11.0%	11.2%	12.8%
ZON Açores/CaboTV Açoreana	0.5%	0.6%	0.6%	0.7%	0.7%
ZON Madeira/ CaboTV Madeirense	0.5%	0.8%	0.9%	1.0%	0.9%
Optimus/Sonaecom	14.4%	13.8%	13.3%	12.9%	12.4%
Vodafone	6.1%	6.3%	6.2%	6.1%	5.8%
Cabovisão	3.6%	3.4%	3.5%	3.6%	3.8%
ONITELECOM	2.2%	2.2%	2.2%	2.0%	2.0%
AR Telecom	1.4%	1.3%	1.2%	1.1%	1.0%
Colt Telecom	0.2%	0.2%	0.2%	0.2%	0.2%
Other Alternative Providers	0.4%	0.2%	0.3%	0.2%	0.3%

Unit: %

Source: ICP-ANACOM

Note: There are certain operators which are active in specific market segments. The relative position of the operators in this table should in no way be taken as an indicator of the quality of the service which these operators provide or of their performance in the segments which they are active.

²⁹ During 4Q07 TV Cabo was included in a Spin-off which was concluded during the month of November. By determination of 3 April 2008, this Authority clarified that, with the spin-off, PT Multimédia, now ZON Multimédia, would no longer be included in Grupo PT, whereby the obligations arising in respect of market analysis conducted pursuant to Title IV of Chapter II of the Law of Electronic Communications (LCE) which are binding upon said Group, do not apply. ZON Multimédia encompasses CATVP – TV Cabo Portugal, S.A., Cabo TV Açoreana, S.A. and Cabo TV Madeirense, S.A. In addition, on 24 November 2008, Autoridade da Concorrência (the Competition Authority) notified ZON Multimédia of its decision not to oppose the acquisition of the companies Grupo ParfiteL (Bragatel, Pluricanal Leiria and Pluricanal Santarém), as well as TV Tel, enabling the merger by acquisition of these companies into ZON TV Cabo Portugal on 31 July 2009.

³⁰ ICP-ANACOM reports that the values considered in this table refer only to the service provided in respect of the authorisation granted for the provision of the telephone service at a fixed location and according to conditions which are perceived by the user as being equivalent to the traditional FTS (See regulatory approach to VoIP services at <http://www.anacom.pt/template12.jsp?categoryId=183074>). The values released by ZON include the total number of customers of services provided in respect of the authorisation granted for the provision of nomadic VoIP.

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