

Public Opinion Survey on the functioning of the telecommunications market and consumer preferences

Report on the survey concerning business customers


Warsaw, Gdansk, 22.12.2018

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Basic information

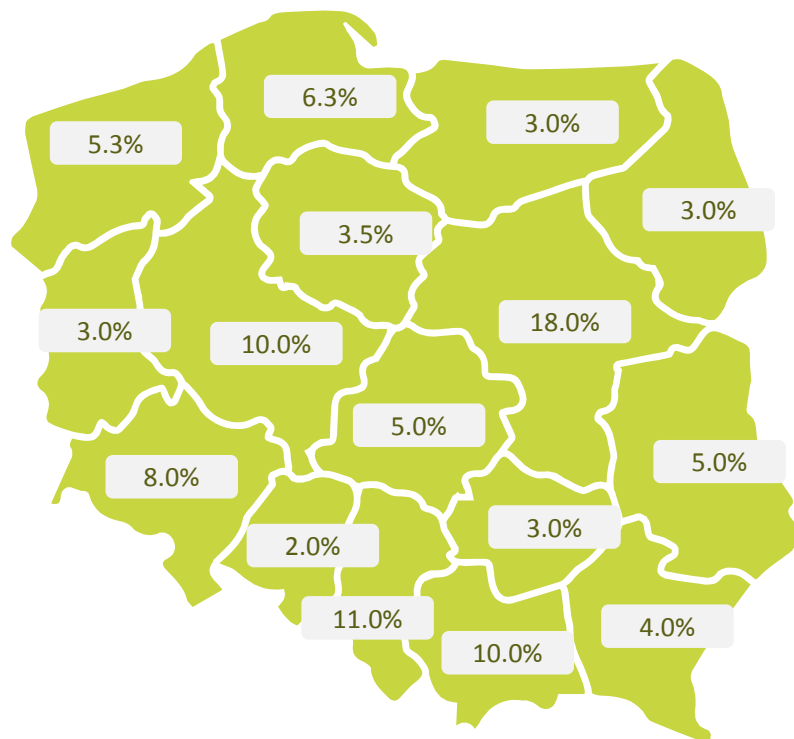
Basic information

UKE

Title	Public opinion survey on the functioning of the telecommunications market and consumer preferences / business customers
Contracting Entity	Office of Electronic Communications 
Contractor	Danae Sp. z o. o. and Realizacja Sp. z o. o. 
Sample size	N=400 business customers
Sample selection	Random-quota sample, stratified by location and employment size
Technique	CAPI – computer-assisted personal interviewing
Location	A nationwide survey in Poland
Period	November - December 2018

Sample characteristics

Region

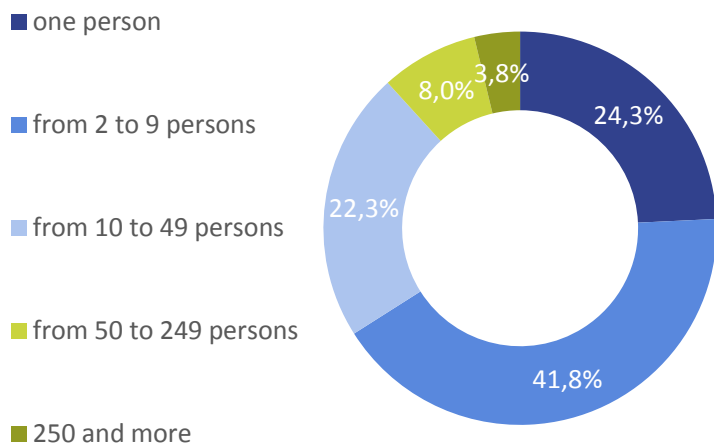


VOIVODESHIP	%	VOIVODESHIP	%
Lower Silesian	8.0%	Subcarpathian	4.0%
Kuyavian-Pomeranian	3.5%	Podlasie Region	3.0%
Lublin Region	5.0%	Pomeranian	6.3%
Lubusz Region	3.0%	Silesian	11.0%
Łódź Region	5.0%	Świętokrzyskie Region	3.0%
Malopolska Region	10.0%	Warmia and Masuria Region	3.0%
Mazovian	18.0%	Greater Poland	10.0%
Opole Region	2.0%	West Pomeranian	5.3%

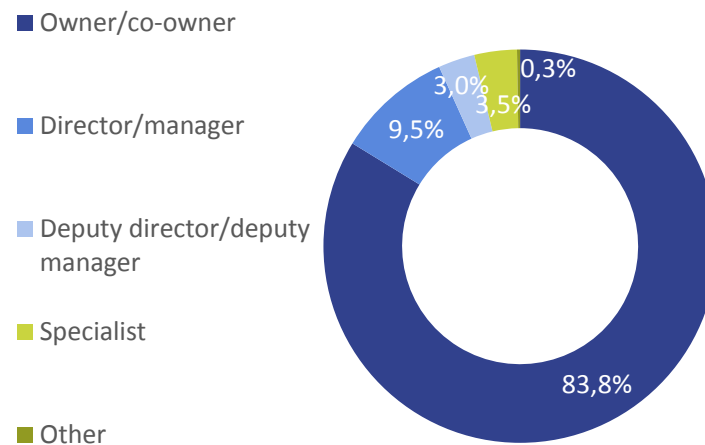
The most numerous respondents were in the Mazovian Region (18% indications), followed by the Silesian (11% indications), Greater Poland and Malopolska (10.0%).

Sample characteristics

Institution size



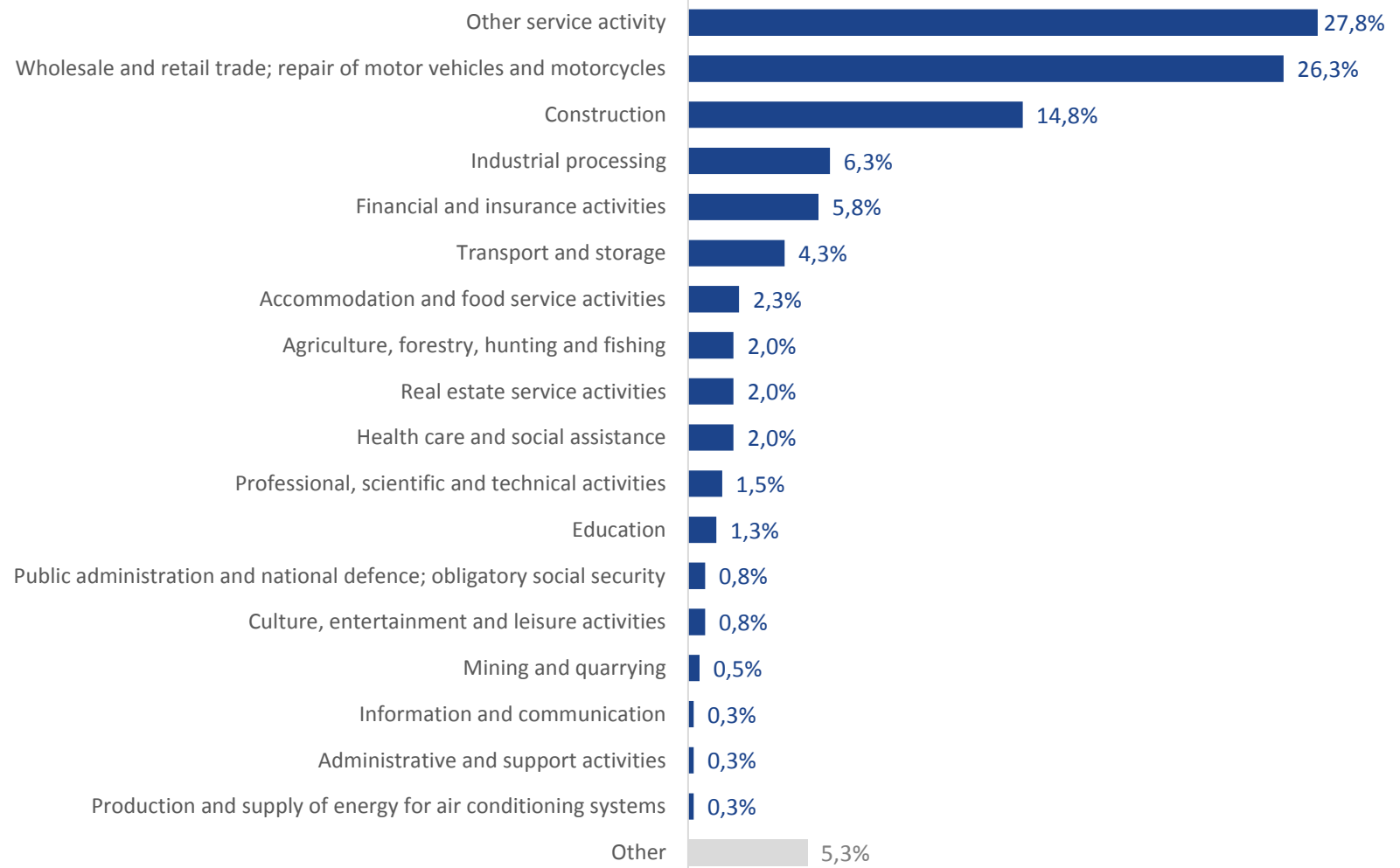
Respondent's position



Most of the surveyed respondents run a company that employs from 2 to 9 people (41.8%). Nearly every fourth respondent runs a sole proprietorship, slightly less respondents run a company employing between 10 and 49 people (22.3%). The smallest percentage concerned people representing companies employing over 250 people (3.8%).

The respondents were dominated by owners or co-owners of the surveyed enterprises. Every tenth respondent was a director or a manager. The sample included a small share of deputy directors / managers and specialists.

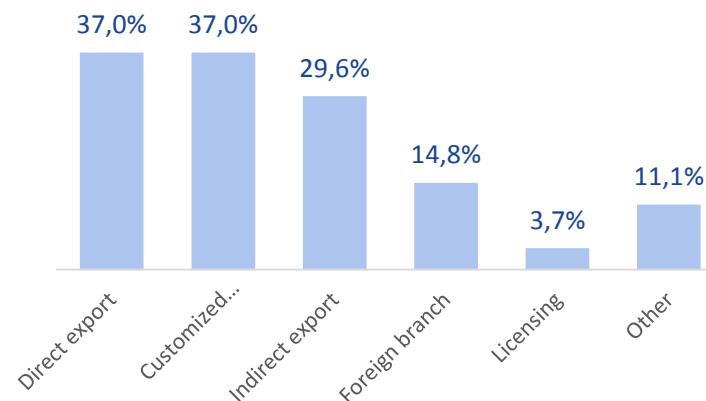
Business sector



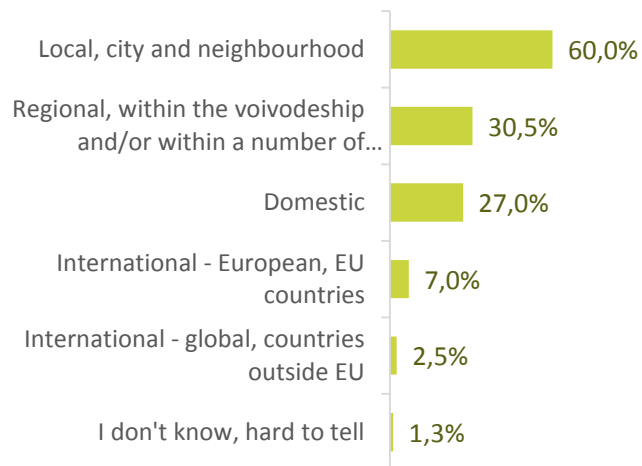
Activity market



Form of activity on foreign markets



Activity range



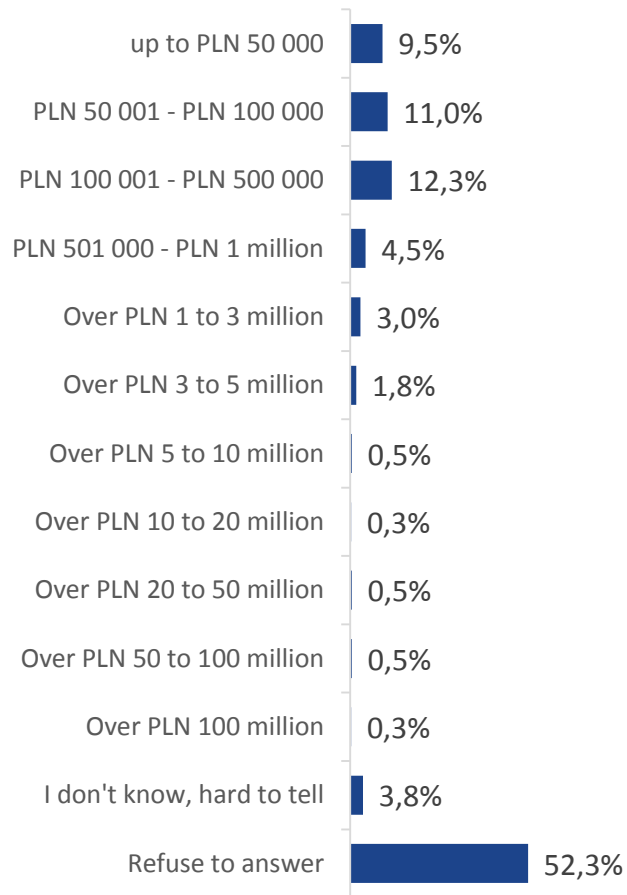
Basis: All respondents, N = 400

Enterprises that were included in the study usually operate on the local market (60.0%). The company's activity on the regional market was declared by 30.5% of respondents, while on the domestic market - by 27.0%. The smallest number of respondents represented enterprises operating on the global international market, i.e. in countries outside the EU (2.5% of responses).

Only 6.8% of organizations were active on foreign markets. Most often in line with the principle of direct exports (37.0%) and custom production (37.0%).

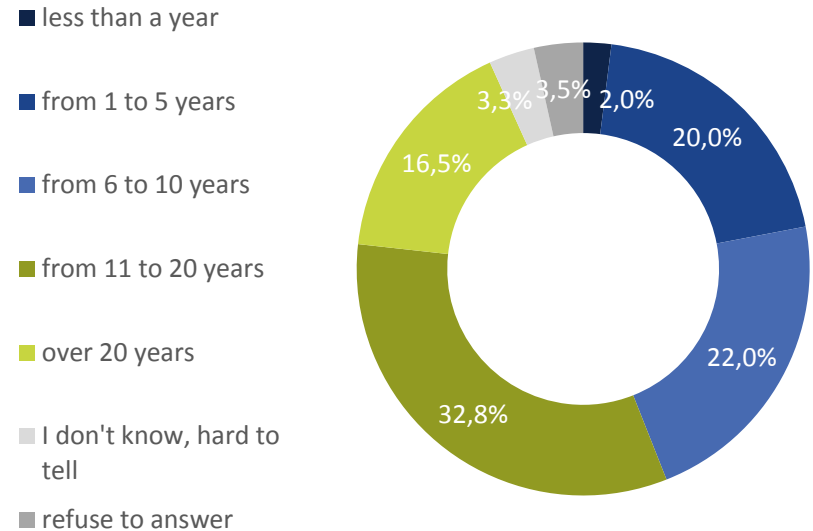
Basis: Companies operating on foreign markets, N = 27

Organizations' turnover



Basis: All respondents, N = 400

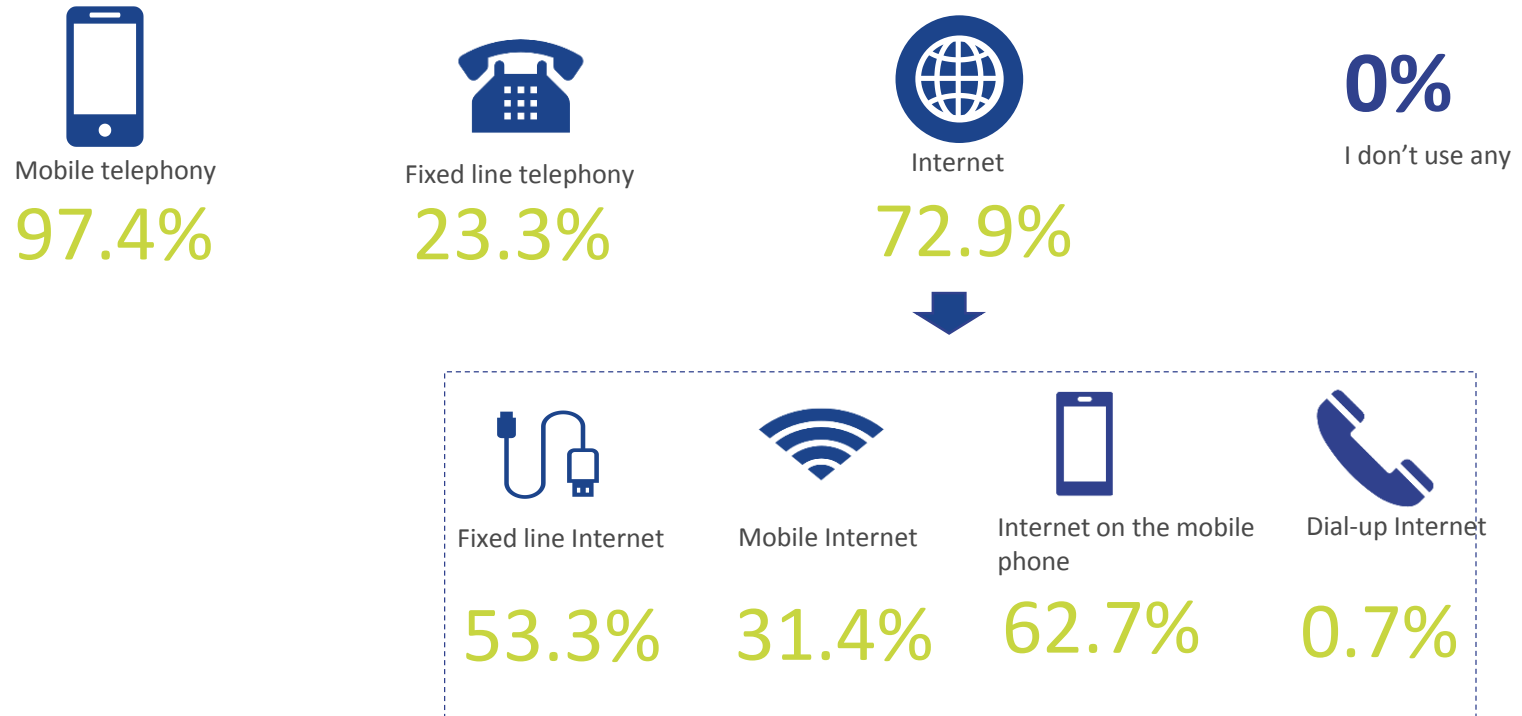
Organizations' years of establishment



A significant proportion of respondents refused to disclose the organization's turnover (52.3% of respondents). Among the persons who wanted to express their opinion about earnings, the most frequently indicated was the turnover of up to PLN 500,000.

Almost every third company operated on the market between 11 and 20 years, and every fifth one up to 5 years and from 6 to 10 years.

Use of services



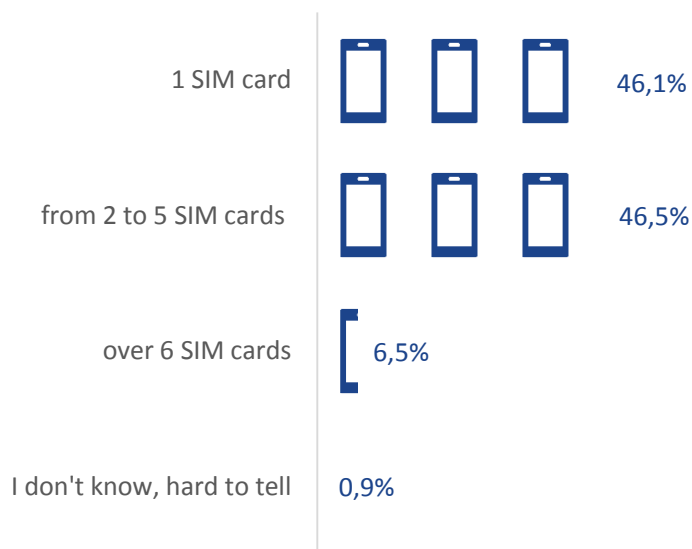
Almost all respondents (97.4% of indications) used a mobile phone. Among the Internet users (72.9%), most companies use the Internet on a mobile phone (62.7%) and through a fixed line access (53.3%).

Mobile telephony

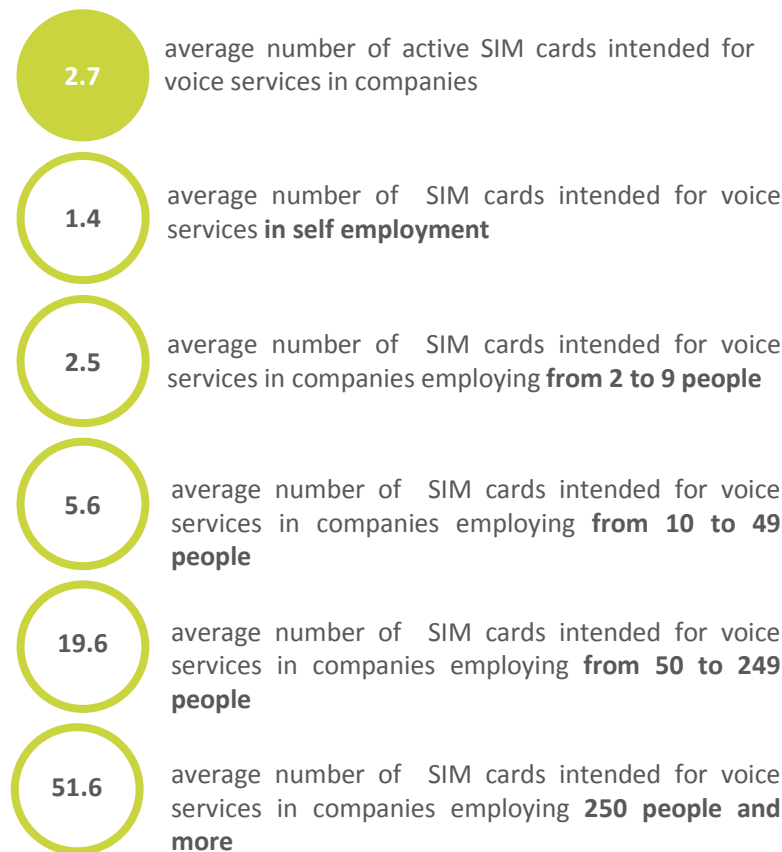
Mobile telephony

Number of active sim cards in a company

What is the number of active SIM cards related to voice services in your company?

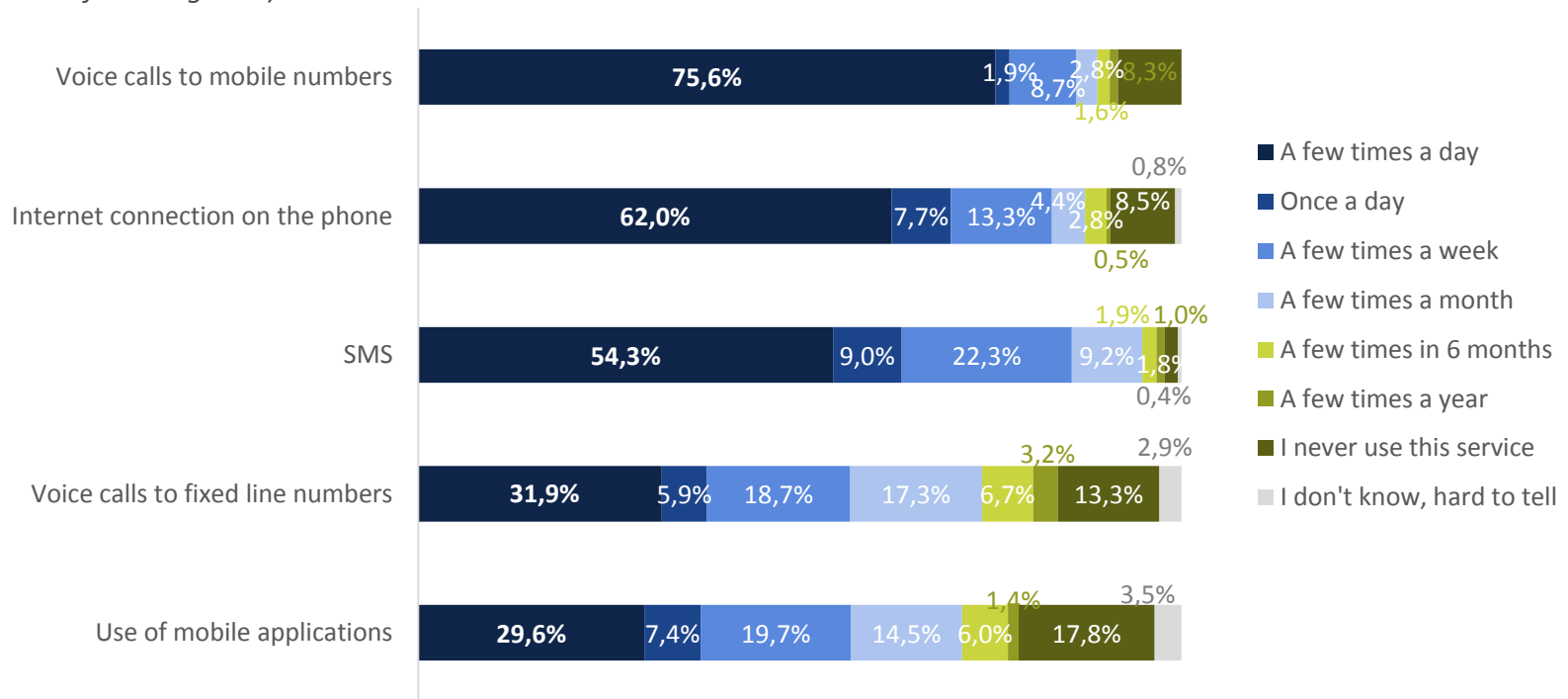


Companies usually have no more than 5 active SIM cards (46.1% - 1 card and 46.5% - between 2 and 5 cards).



Frequency of service use

How often did your company use the following services of mobile telephony in the past year? *(The second part of the chart is on the following slide)*

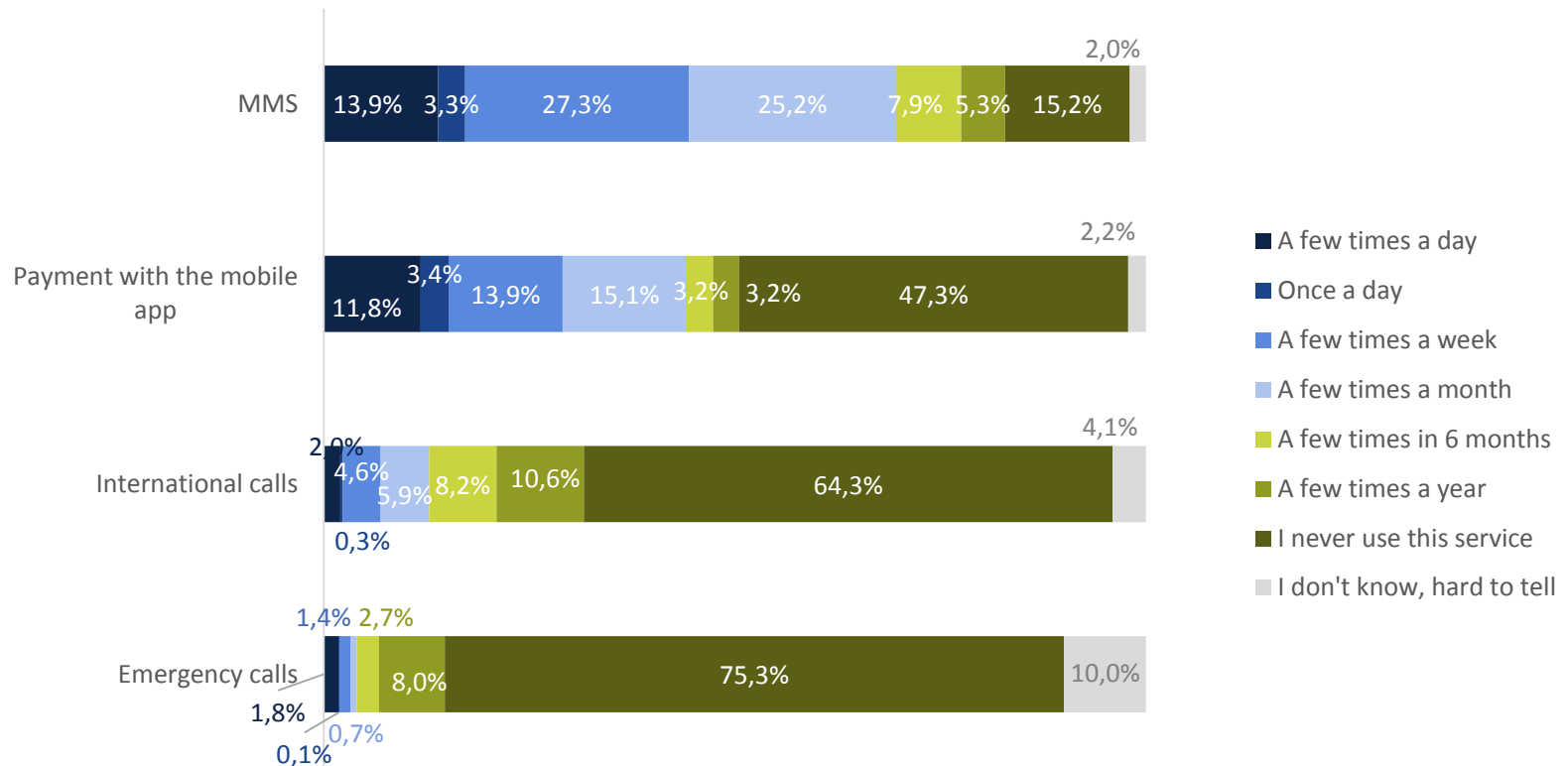


Respondents most often use voice calls to mobile numbers (77.5% of respondents use them several times or once a day). Subsequently, respondents often use Internet connections on the phone (69,7% of respondents use them several times or once a day) or send SMSs (63.3% of respondents use them several times or once a day).

Frequency of service use

(second part of the chart)

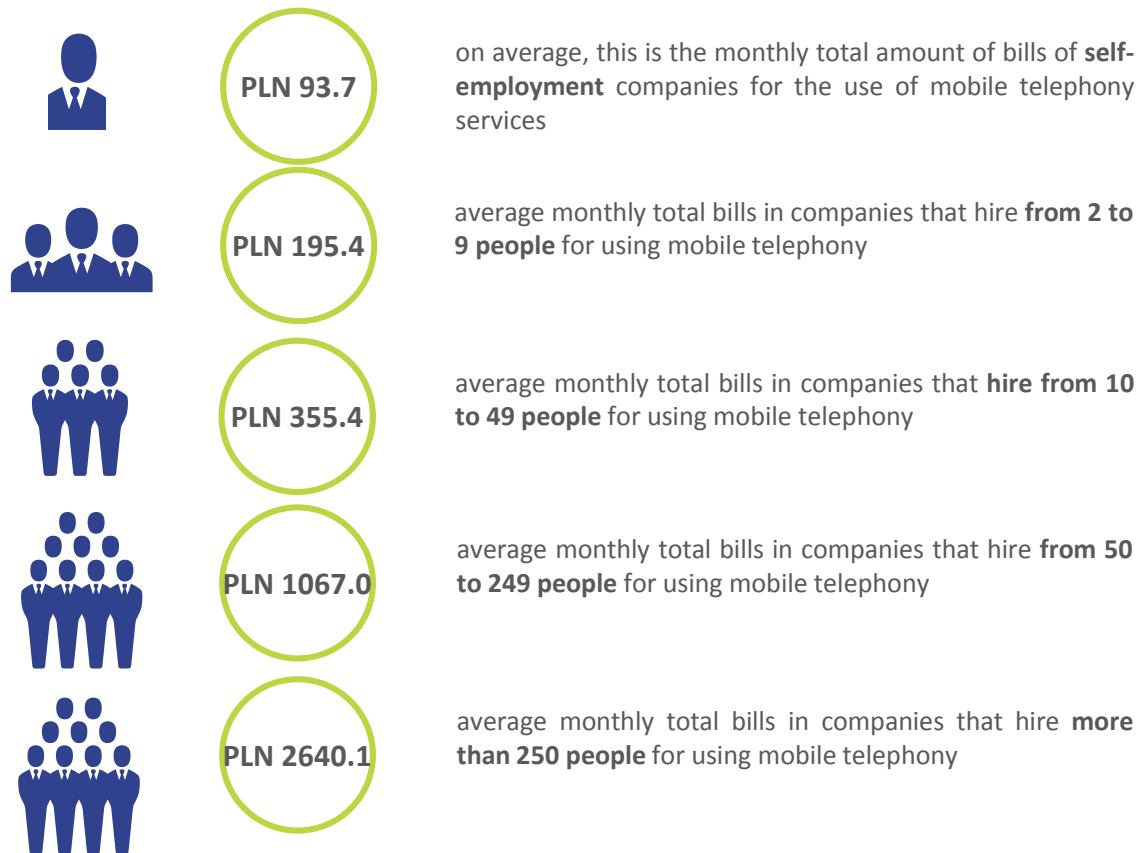
How often in the past year did your company use the following services of mobile telephony?



Respondents rarely use such a function as payment using a mobile application. They make international calls or emergency calls the least frequently. At the same time, it is worth pointing out that 47.3% of them never use mobile applications for payments, 64.3% for international calls, or 75.3% for emergency calls.

Expenses on the use of mobile telephony

What is the average total amount of monthly bills of your company for using mobile telephony services?

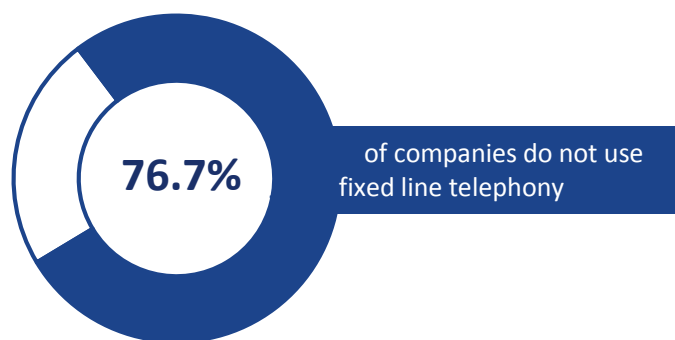


Fixed line telephony

Fixed line telephony

Departure from the use of fixed line telephony

Which of the listed services of fixed line telephony does your company use?



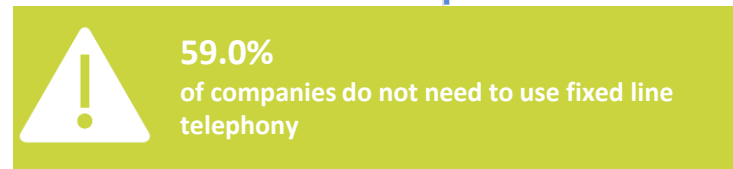
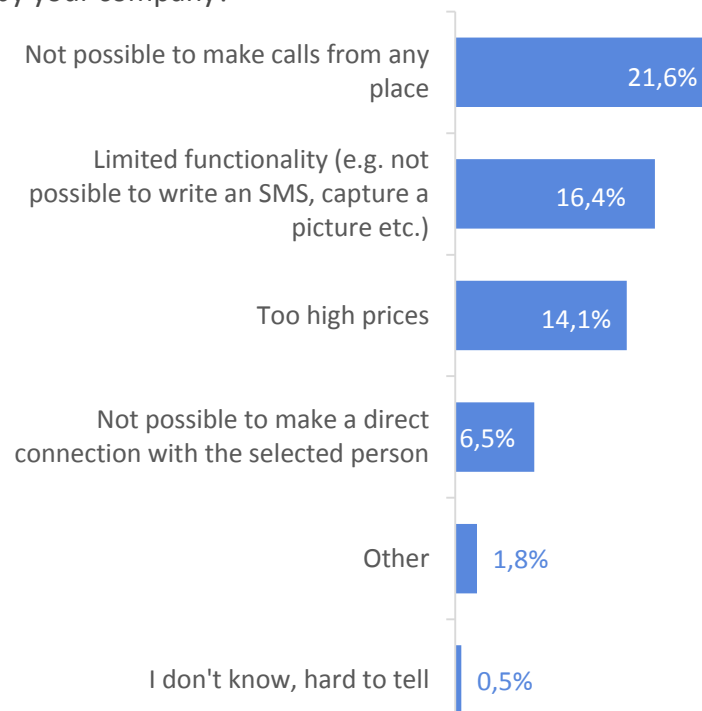
Most of the surveyed companies declared that they did not use fixed line telephony (76.7%).

The most frequently reported reasons for departing from fixed line telephony in business include: no possibility to make calls from any place (21.6%), limited functionality, e.g. no SMS, picture capturing, etc. (16.4%) and too high prices (14.1%). As many as 59.0% of the surveyed companies do not need to use fixed line telephony.

Basis: All respondents, N = 400

Reasons for not using the service

What are the reasons for not using the fixed line telephony by your company?

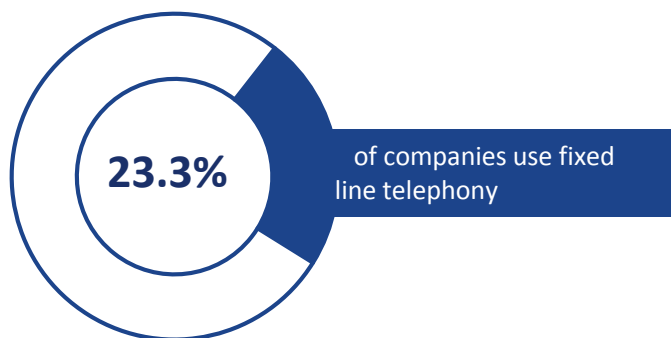


Basis: Companies using mobile telephony, N = 264

Fixed line telephony

Using fixed line telephony

Which of the listed services of fixed line telephony does your company use?

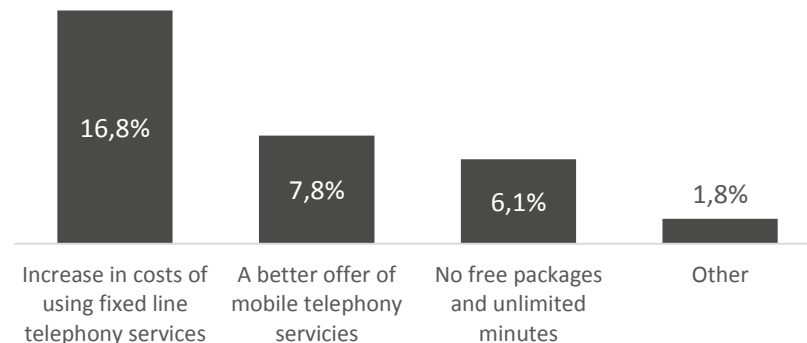
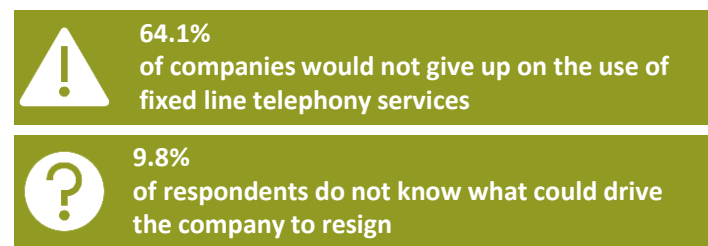


Among the companies using fixed line telephony, as many as 64.1% indicated that they would not give up using the services and use mobile telephony instead. Nearly every tenth company is unable to indicate a reason that could drive them to the resignation from fixed line telephony services. Approximately 17% of the surveyed entrepreneurs indicate that an increase in costs would drive them to resign from fixed line telephony. 7.8% of the surveyed enterprises would be willing to give up on fixed line telephony in the case of a more advantageous offer of mobile telephony services. In contrast, 6.1% would give up on fixed line telephony in a situation where the services would not offer free and unlimited minutes.

Basis: All respondents, N = 400

Resignation from fixed line telephony

What would drive your company to give up using fixed line telephony services?

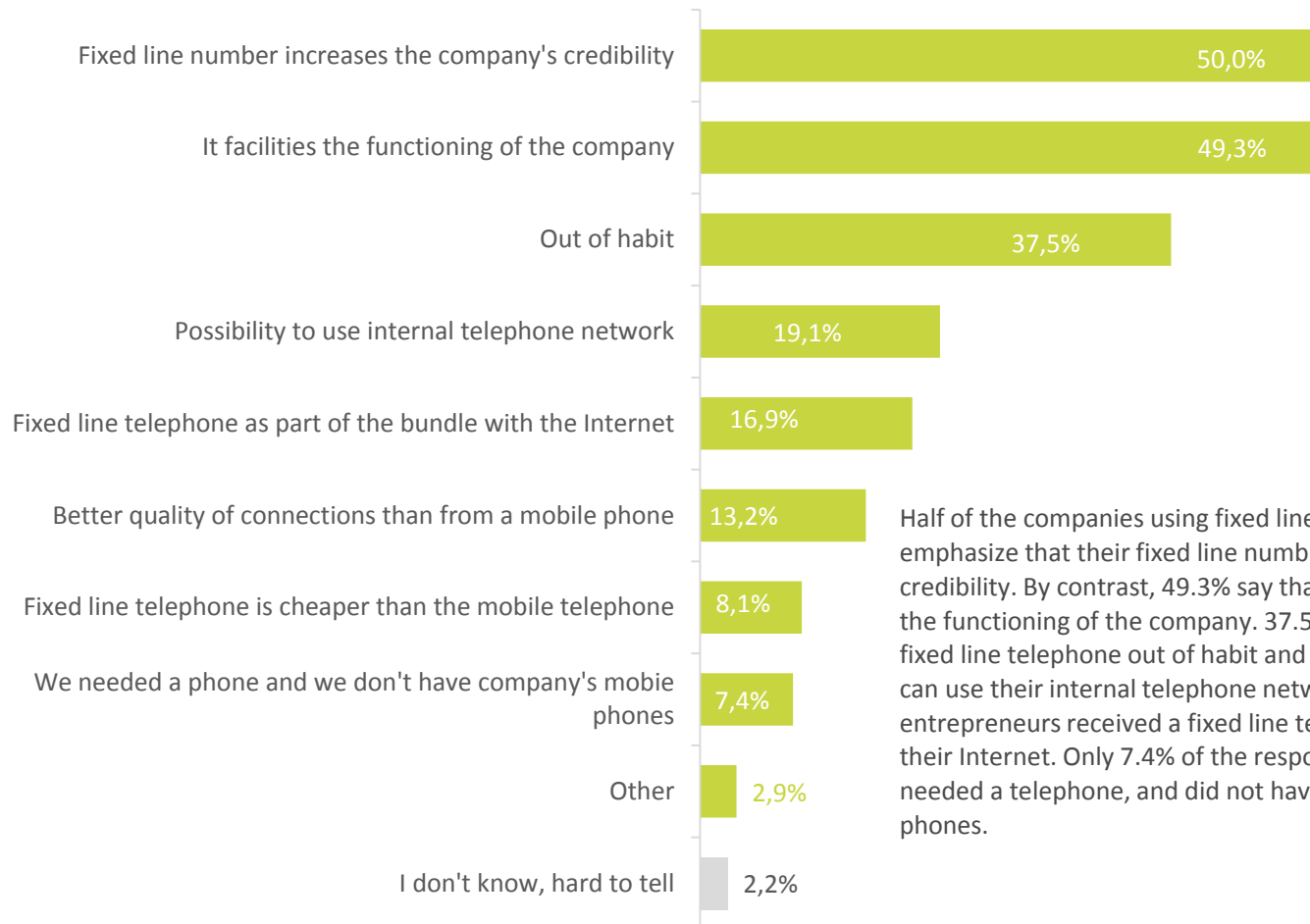


Basis: Companies using fixed line telephony, N = 136

Fixed line telephony

Reasons for using

Why does your company use fixed line telephony?

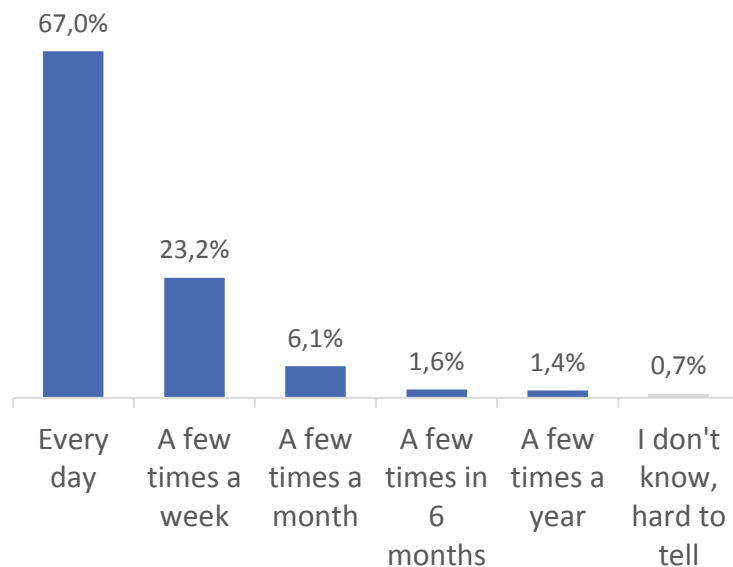


Half of the companies using fixed line telephony in their activities emphasize that their fixed line number increases the company's credibility. By contrast, 49.3% say that this telephony facilitates the functioning of the company. 37.5% of these companies use a fixed line telephone out of habit and 19.1% indicate that they can use their internal telephone network. Nearly 17% of entrepreneurs received a fixed line telephone in a bundle with their Internet. Only 7.4% of the respondents indicated that they needed a telephone, and did not have any corporate mobile phones.

Fixed line telephony

Frequency of using fixed line telephony

How often did your company use fixed line telephony in the past year?



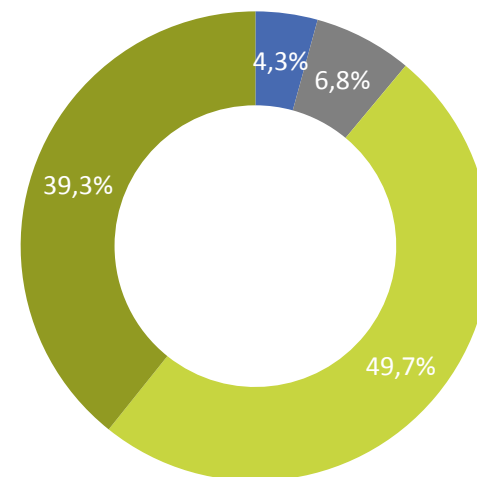
Companies using fixed line telephony usually declare that they use such services on a daily basis (67.0%). Moreover, for the vast majority of them, as many as 89.0%, having a fixed line telephone is important (cumulative "definitely important" and "rather important" responses). This suggests a relatively high attachment to this type of services among the representatives of the companies.

Basis: Companies using fixed line telephony, N = 136

The need for using the telephony

On a scale of 1 to 5, please rate how important it is to have a fixed line telephone in your company?

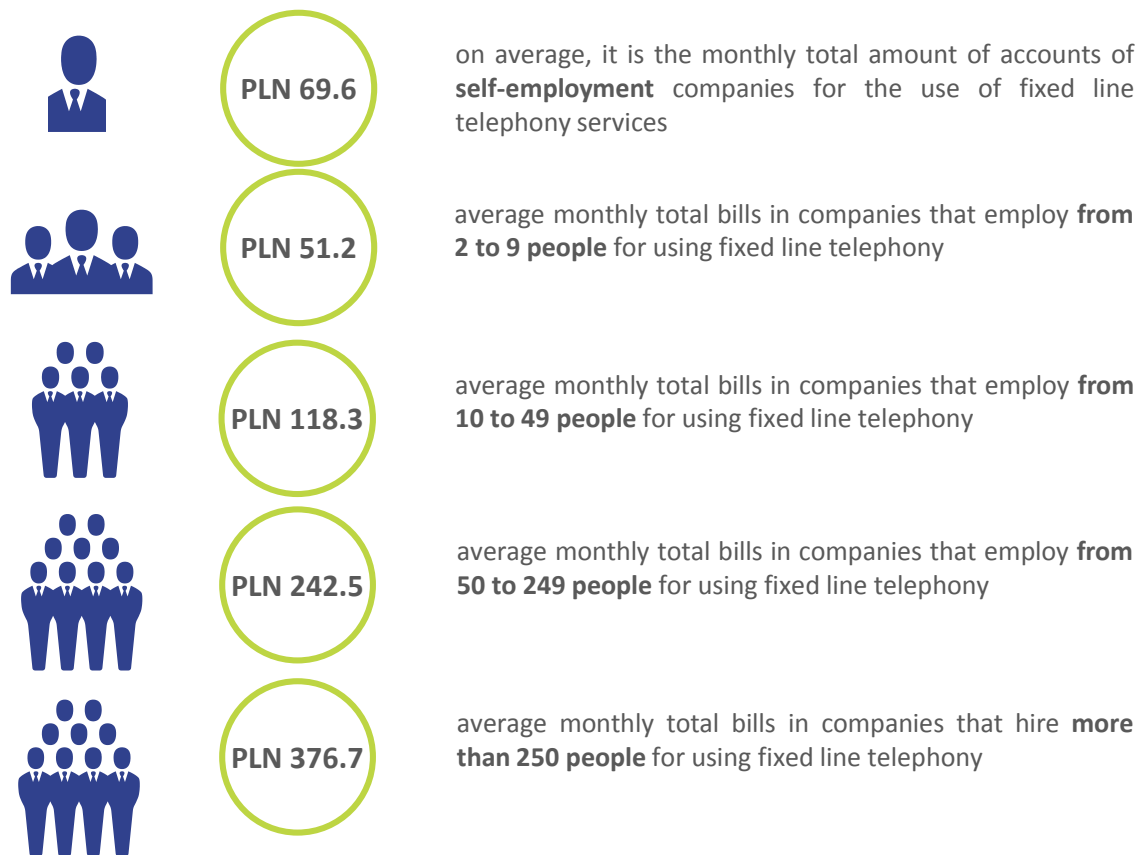
- Definitely important
- Rather unimportant
- Neither important nor unimportant
- Rather important
- Definitely important



Fixed line telephony

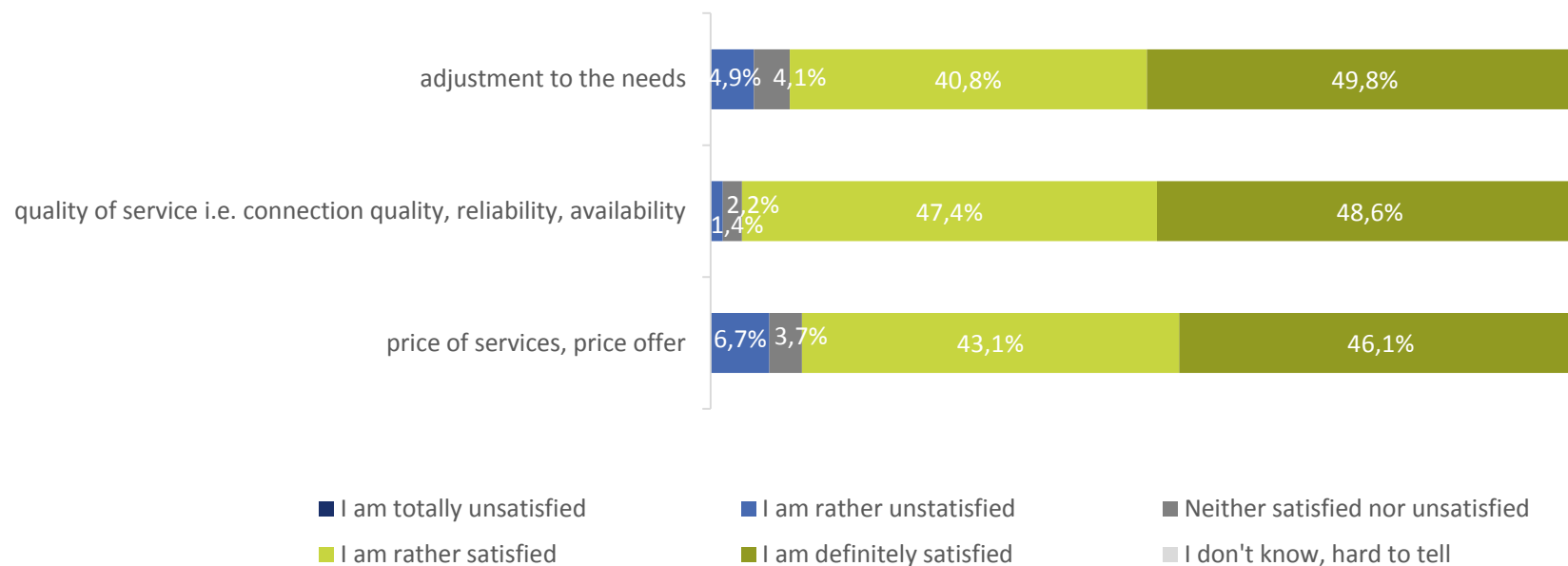
Expenses on the use of fixed line telephony

What is the average total monthly bill of your company for using fixed line telephony services?



Evaluation of the elements of the fixed line telephony service

How do you evaluate the following elements of the fixed telephony service?

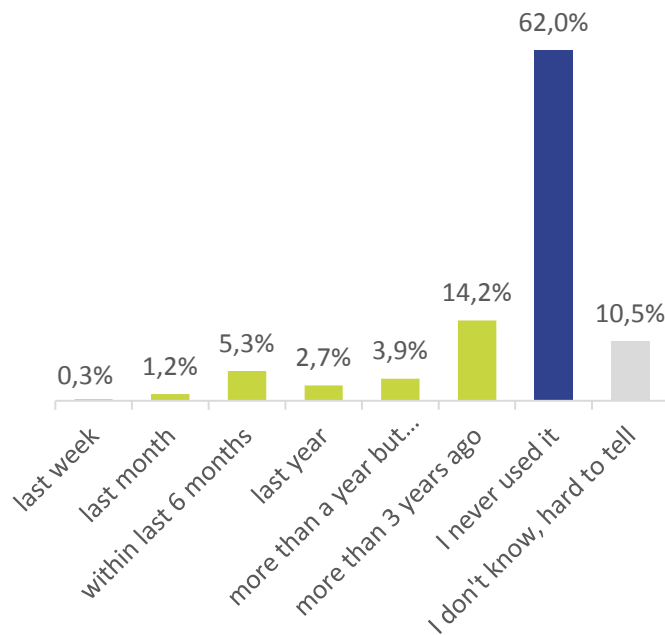


The surveyed enterprises that use fixed line telephony while conducting business activities evaluate it well in terms of such aspects as: adjustment to the needs (90.6%), quality of services, i.e. connection quality, reliability, availability (96.0%) and service prices. (89.2%).

Use of selected elements of the
universal service (OBN and OSA)

The use

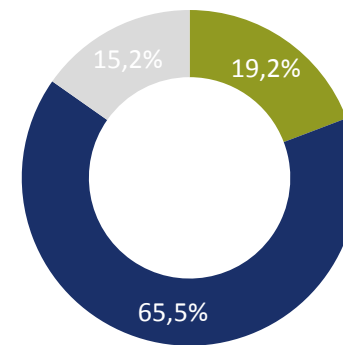
When was the last time that your company used the National Numbers Office (OBN)?



Basis: Respondents whose company uses a fixed line or mobile telephone, N = 400

The need

Does your company have the need for using the National Numbers Office?



■ yes ■ no ■ I don't know, hard to tell

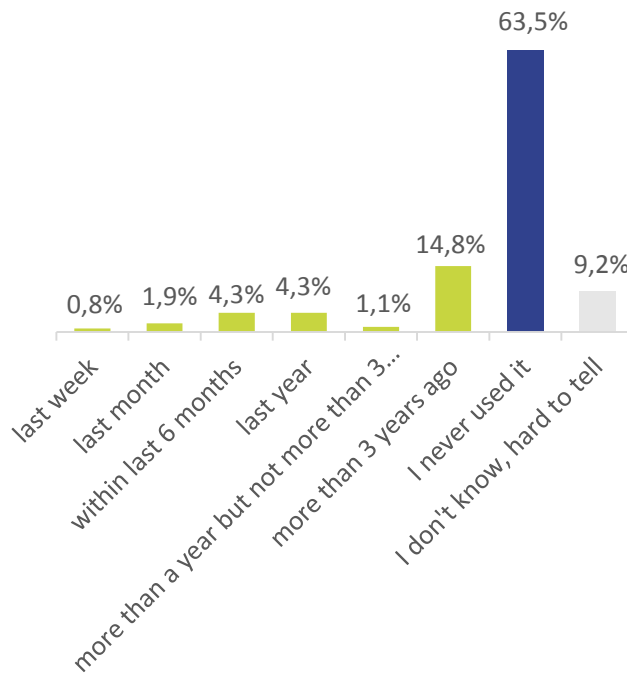
Most of the surveyed companies, i.e. 62%, never used the National Numbers Office (OBN). Companies rarely use OBN, over 14% of them used it more than 3 years ago.

Only one fifth of companies have the need to use OBN. The vast majority (65.5%) think that this type of service is unnecessary.

Basis: Companies using OBN, N = 161

The use

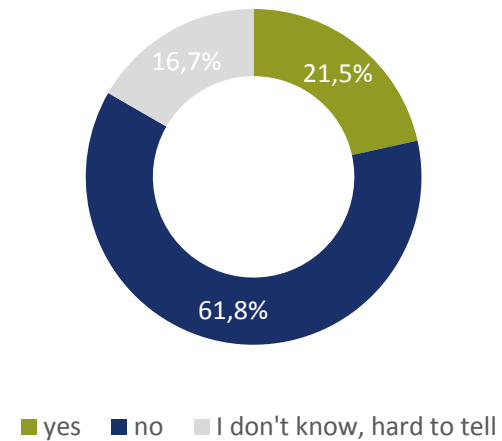
When was the last time that your company used the National Directory of Subscribers (OSA)?



Basis: Respondents whose company uses a fixed line or mobile telephone, N = 400

The need

Does your company have the need for using the National Directory of Subscribers?



Most of the surveyed companies, i.e. 63.5%, never used the National Directory of Subscribers (OSA). The largest percentage of companies (14.8%) used OSA for the last time three years ago or earlier.

As in the case of the National Directory of Subscribers (OBN), the vast majority of companies indicate that this type of information is unnecessary. Approximately one fifth of companies indicated that OSA is useful (21.5%).

Basis: Companies using OSA, N = 157

Internet access

Internet access

Internet access

Does your company have access to the Internet?

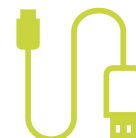


Nearly 86% of companies have access to the Internet. Over half of them declare that this is a fixed line access. Almost one third of the entities indicated a mobile Internet access. However, less than 63% have mobile Internet on the phone. Only 0.7% of companies with the Internet access use a dial-up Internet.

Basis: All respondents, N = 400

Type of access

What type of Internet access do you have?



Fixed line
Internet

53.3%



Mobile Internet

31.4%



Mobile Internet
on the phone

62.7%



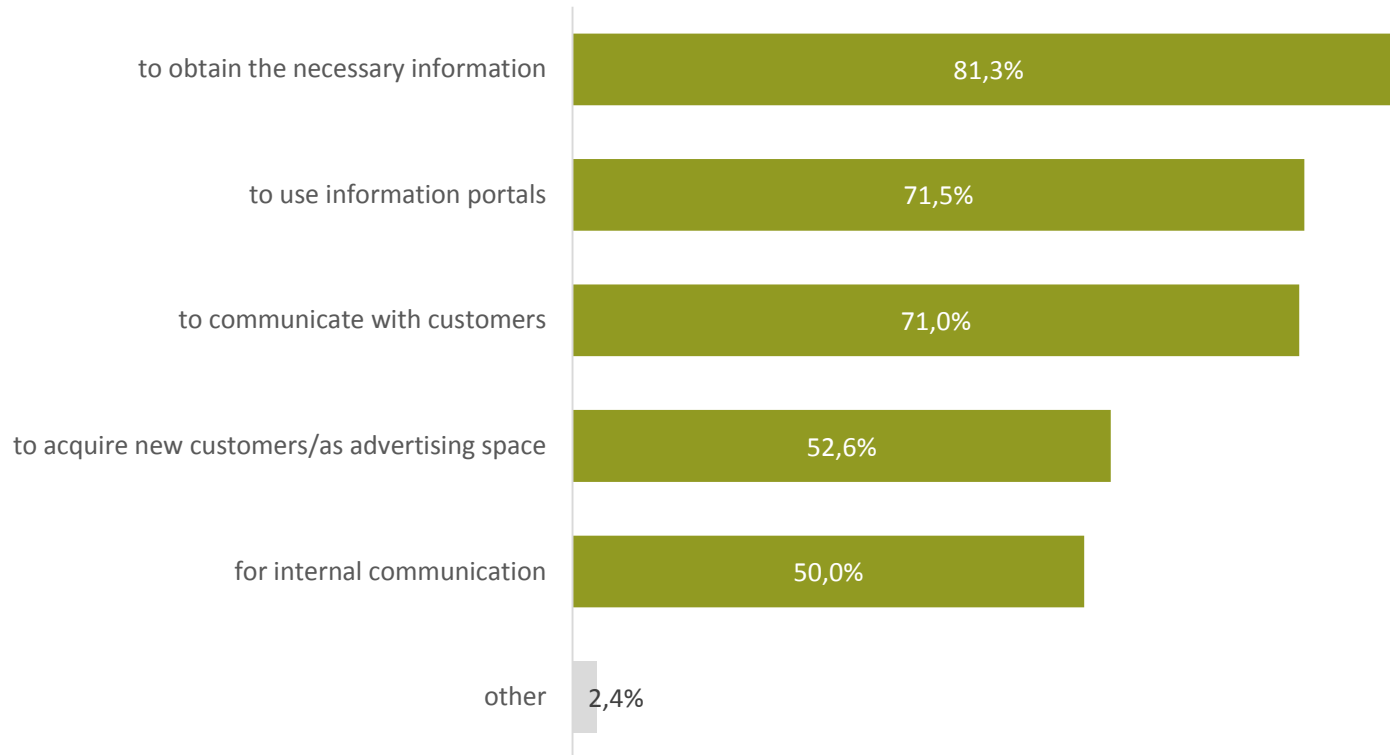
Internet
dial-up

0.7%

Basis: Companies with Internet access, N = 353

Internet use

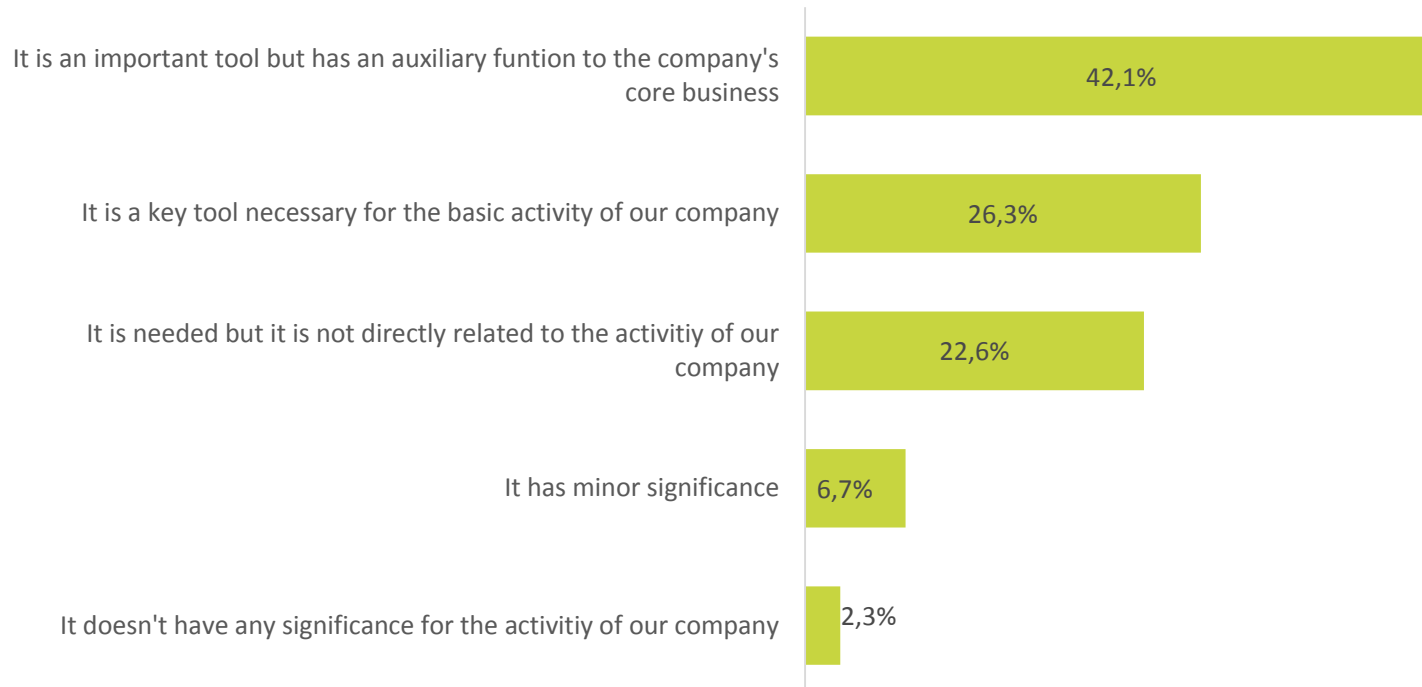
For what purpose is the Internet used in your company?



The vast majority of companies having access to the Internet use it to obtain the necessary information (81.3%). 71.5% of companies declare to use information portals and 71.0% communicate via the Internet with their customers. On the other hand, half of the respondents acquire new customers thanks to the Internet (using the Internet as an advertising space) and use the Internet to conduct internal communication.

Importance of Internet use

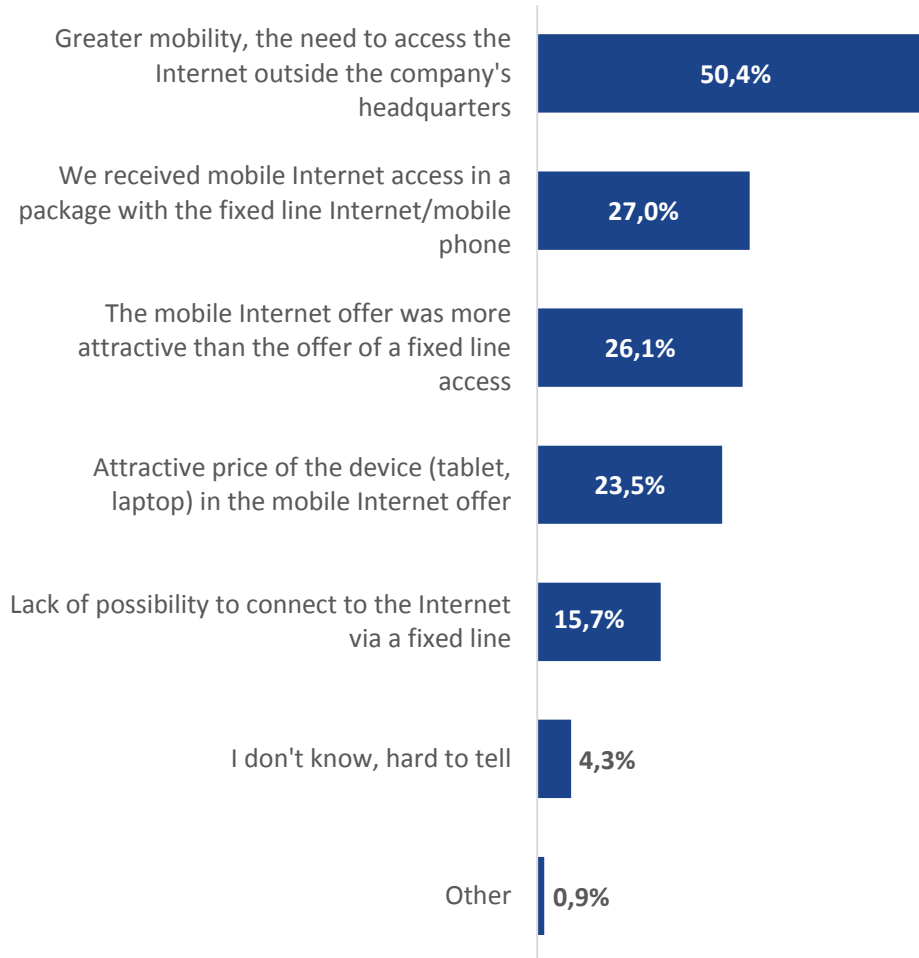
What is the importance of using the Internet in the functioning of your company?



Over 42% of respondents who have access to the Internet, emphasize that it is an important work tool, but has an auxiliary function to the company's core business. Over 26% of the surveyed entities showed that it is a key tool from the perspective of their business activity. Nearly 23% of the surveyed companies indicated that although the Internet is needed, it is not directly related to the company's operations. For approximately 7% of the respondents, it has minor significance for the conducted activities.

Reasons for using mobile Internet

Why did your company decide to use mobile Internet?



Among the companies having access to mobile Internet, half of them indicate that they chose this type of connection mainly due to the need for greater mobility, using the Internet outside the company's headquarters (50.4%).

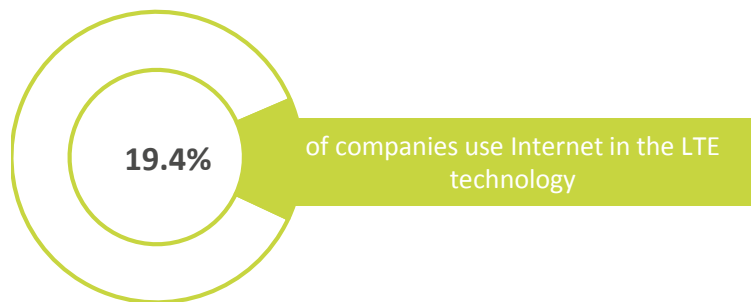
Approximately a quarter of the companies received mobile Internet in their package with fixed line Internet or mobile phone, and 26.1% mentioned a more advantageous offer of mobile Internet in relation to the fixed line Internet offer as a reason for using the mobile connection.

23.5% of the entities indicated that their choice of mobile Internet was influenced by the attractive price of the device (tablet, laptop) in the mobile Internet offer, while 15.7% of the companies decided to benefit from the mobile Internet offer due to the lack of any possibility to connect to the Internet via a fixed line.

Internet access

Using the LTE Internet

Does your company use Internet in the LTE technology?

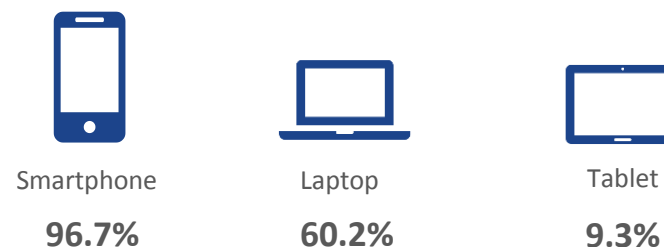


The vast majority of companies that have access to mobile Internet (including mobile Internet on the phone) use the LTE technology.

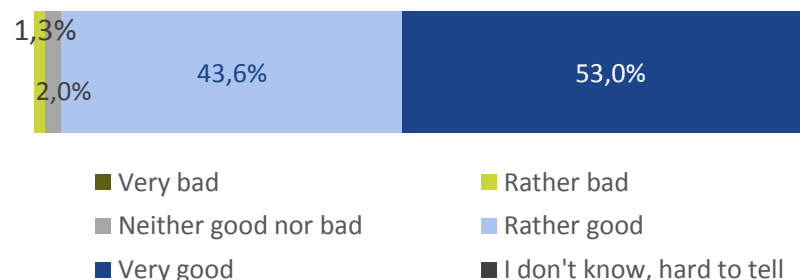
In order too use mobile Internet in the LTE technology, respondents mainly use smartphones (96.7%), as well as laptops (60.2%). Almost all respondents positively evaluate the quality of the mobile Internet service in LTE (96.6% - the total of the answers "rather good" and "definitely good").

Devices and evaluation

On what devices does your company use Internet in the LTE technology?



How do you rate the quality of mobile Internet service in the LTE technology?



Internet access

Expenses on the use of fixed line Internet

What is the total amount of your company's monthly bills for using fixed line Internet?

PLN 70.3

on average, it is the monthly total amount of bills of companies employing **one person** for the use of fixed line Internet / mobile Internet

PLN 69.3

on average, it is the monthly total amount of bills of companies employing **from 2 to 9 people** for the use of fixed line Internet / mobile Internet

PLN 94.7

on average, it is the monthly total amount of bills of companies employing **from 10 to 49 people** for the use of fixed line Internet / mobile Internet

PLN 167.4

on average, it is the monthly total amount of bills of companies employing **from 50 to 249 people** for the use of fixed line Internet / mobile Internet

PLN 190.0

on average, it is the monthly total amount of bills of companies employing **more than 250 people** for the use of fixed line Internet / mobile Internet

Expenses on the use of mobile Internet

What is the total amount of your company's monthly bills for using mobile Internet?

PLN 60.3

PLN 60.4

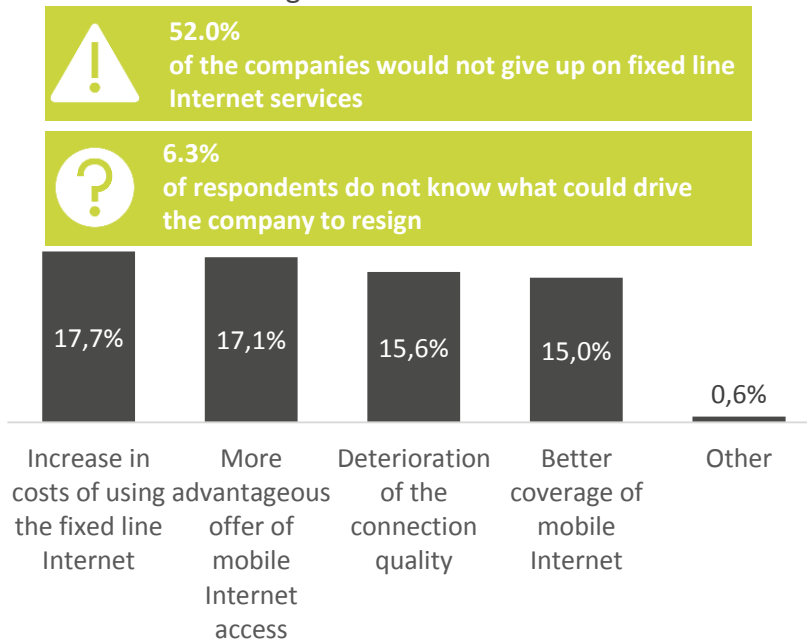
PLN 89.5

PLN 312.7

PLN 1244.2

Resignation from fixed line Internet

What would drive your company to give up using fixed line Internet and start using mobile Internet?

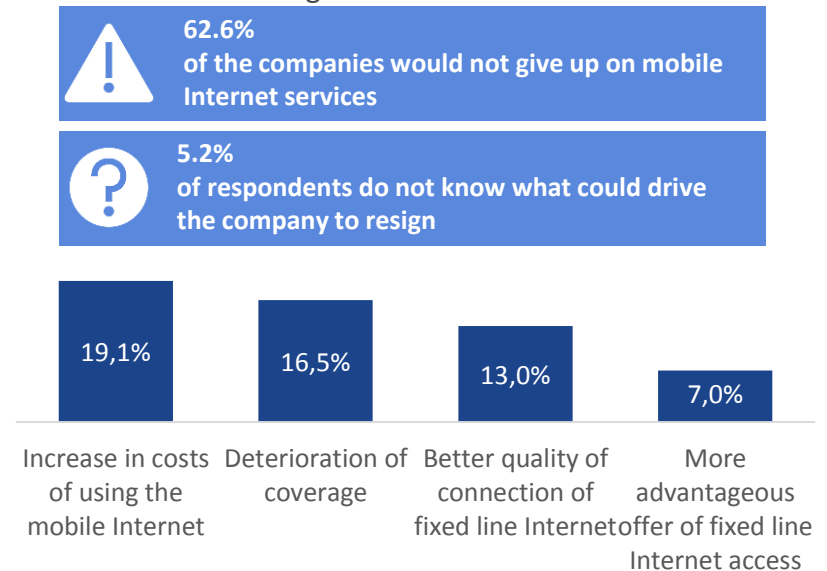


More than half of the companies with access to fixed line Internet will not give up on their fixed line Internet services in exchange for mobile Internet, and 6.3% of the surveyed entities are unable to provide a factor that could make their company stop using their fixed line Internet connection. Meanwhile, approx. 17% of the surveyed entities would consider abandoning their fixed line Internet, if its costs increased significantly or if the mobile Internet offer was more favourable.

Basis: Companies using fixed line Internet, N = 218

Resignation from mobile Internet

What would drive your company to give up using mobile Internet and start using fixed line Internet?



Almost 63% of the entities having access to mobile Internet declare that they would not give up on mobile Internet services in exchange for a fixed line one, and over 5% of such companies do not know what could lead them to switching to fixed line Internet. 19.1% of the entities indicate, however, that the change to a fixed line connection would be caused by an increase in costs of the mobile service.

Basis: Companies with mobile Internet access, N = 115

Over-The-Top Services (OTT)

Over-The-Top Services

Using Over-The-Top

Does your company use "Over-The-Top" services?



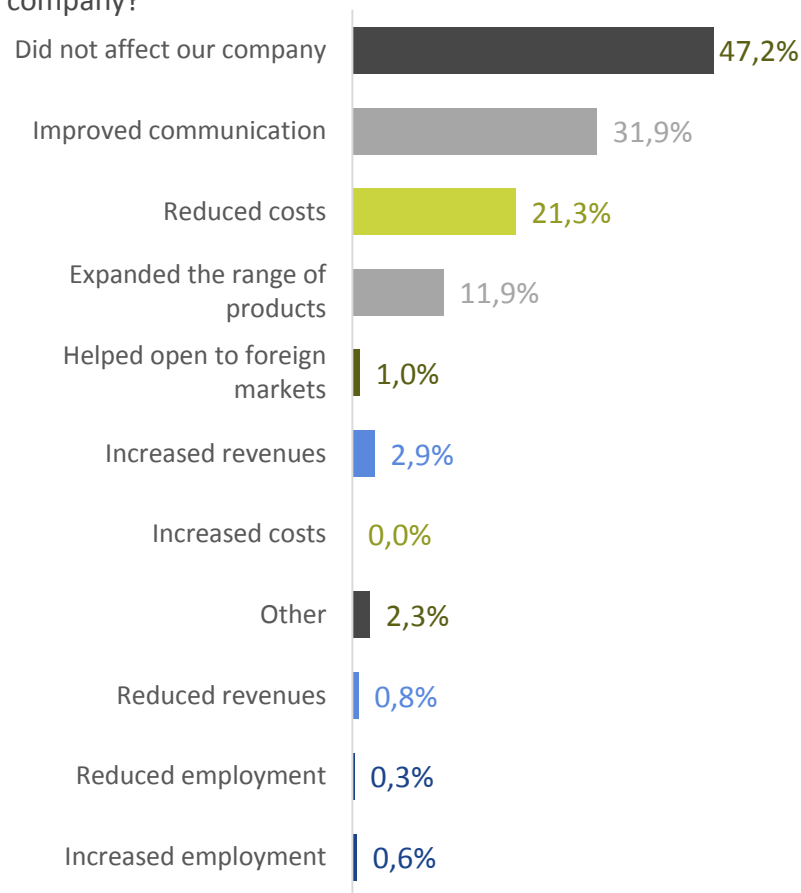
Over-The-Top Services (OTT) - delivering content, services or applications over the Internet without the direct involvement of the network operator or ISP.

Examples of OTT services include: Skype (voice and video calls), WhatsApp (messages), Google (search), Spotify (music) and Netflix (video content).

More than 30% of the respondents admitted that the development of OTT services improved communication in the company (31.9%). In turn, almost half of the respondents stated that OTT services did not affect the functioning of the company they work in in any way. More than 20% of the respondents indicated that OTT services reduced costs, while 11.9% that they helped expand their range of products.

Impact of Over-The-Top

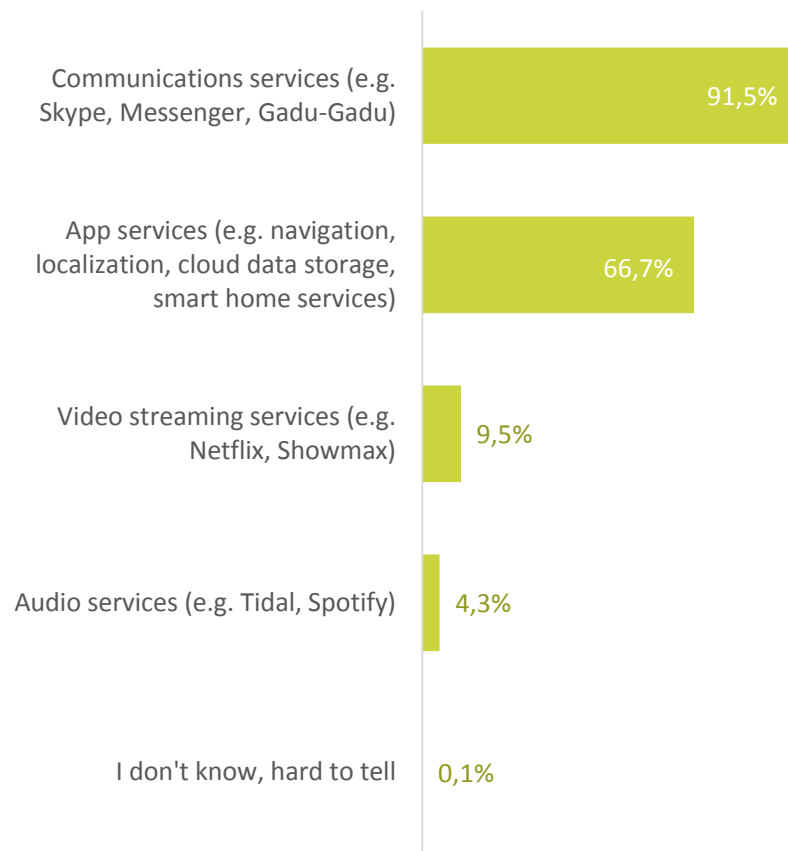
How did the development of OTT services affect your company?



Over-The-Top Services

Usage in the company

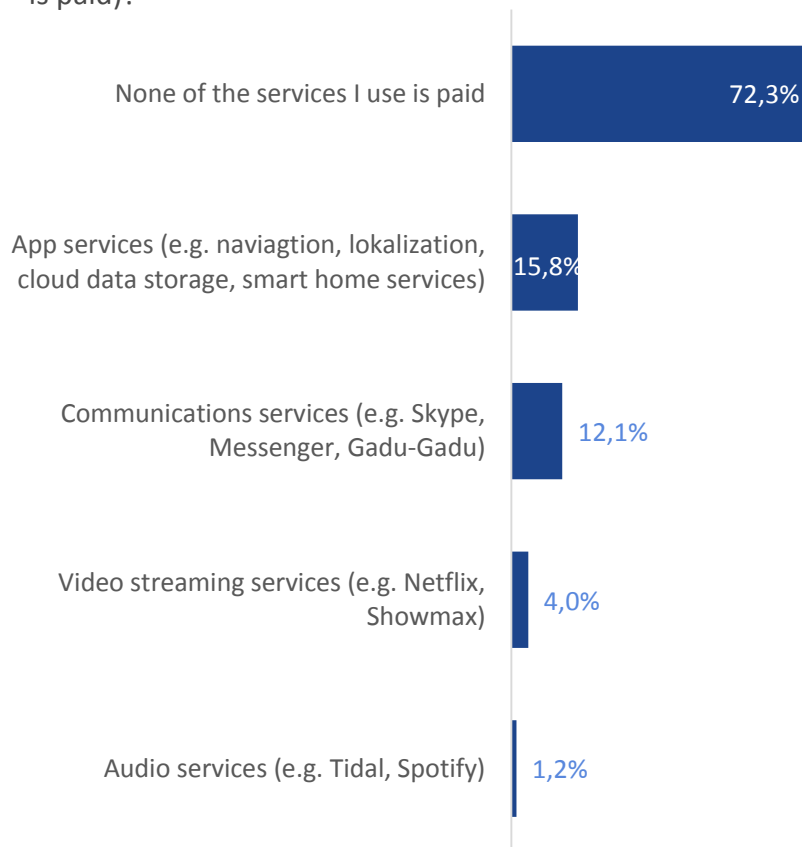
What are the Over-The-Top services that you use?



Basis: Companies using OTT services, N = 115

Paid services

Which of the OTT services that you use are paid (please tick the category if at least one of the services in a given category is paid)?



Basis: Companies using OTT services (excluding the respondents who do not know exactly what services the company uses), N = 113

Over-The-Top Services

Resignation from telecommunications services

Is/would your company be capable of resigning from the currently used telecommunications services in the company in exchange for OTT solutions?



- Definitely not
- Rather not
- Neither yes nor no
- Rather yes
- Definitely yes
- I don't know, hard to tell

Almost half of the respondents whose company already uses OTT services would not be capable of resigning from the telecommunications services in exchange for OTT services in the company (48.8%). Only 13% of the respondents would be capable of exchanging telecommunications services in the company with OTT solutions.

Only 5.9% of the enterprises not using OTT services so far are considering using them in the future. Respondents indicated that they are planning to use communications and video services. Other respondents mentioned application and audio services.

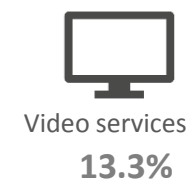
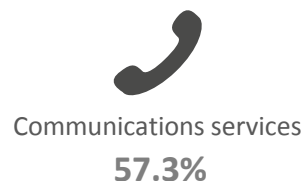
Basis: Companies using OTT services, N = 115

Using the services in the future

As a company, do you consider using this type of services in the future?



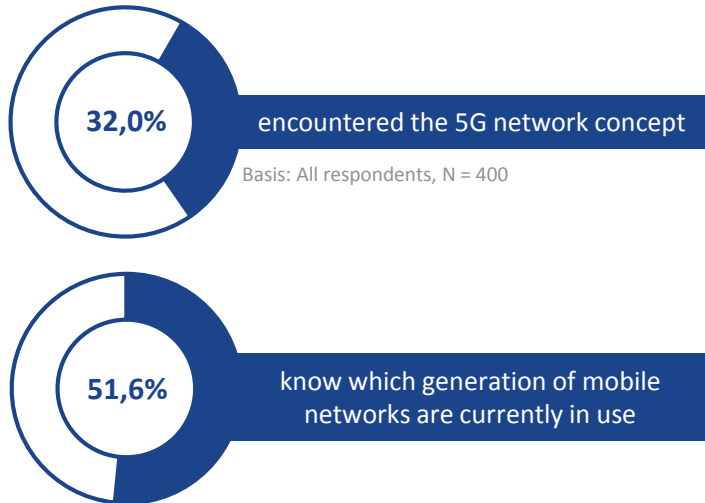
What kind of services do you plan to use in the future?



Basis: Respondents who are considering using OTT, N = 13

5G network

Knowledge of 5G network



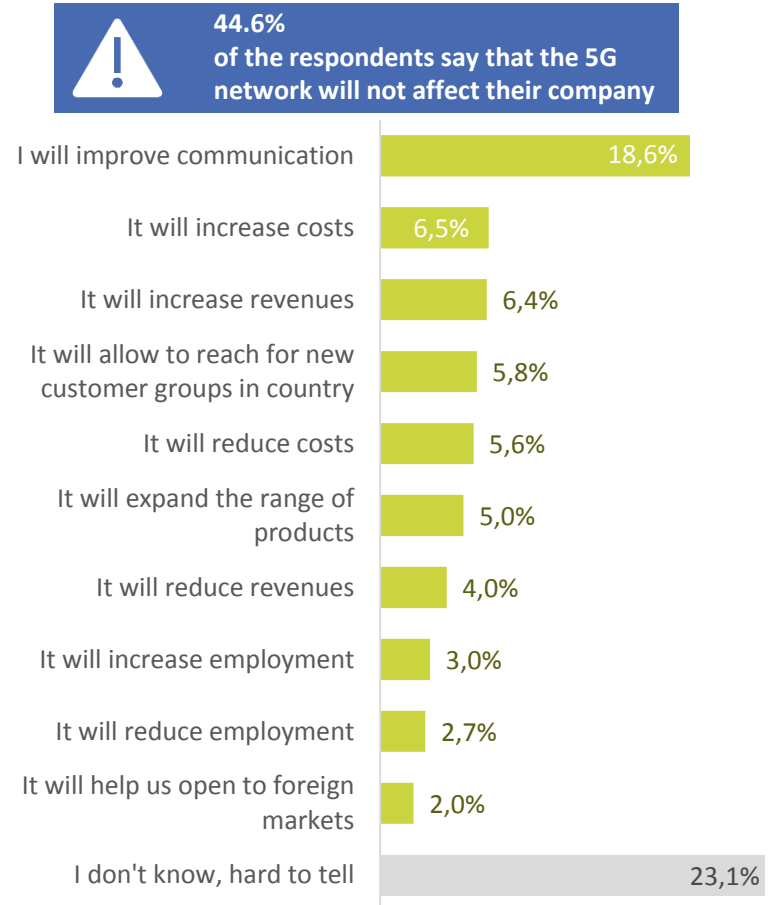
More than 30% of respondents are familiar with the "5G network" term. On the other hand, 51.6% know which generation of mobile networks are currently in use.

Almost half of the respondents (44.6%) declared that the development of the 5G network would not affect the development of their company. As positive results the respondents indicate that the 5G network will improve communication (18.6%).

Basis: Companies with Internet access, N = 353

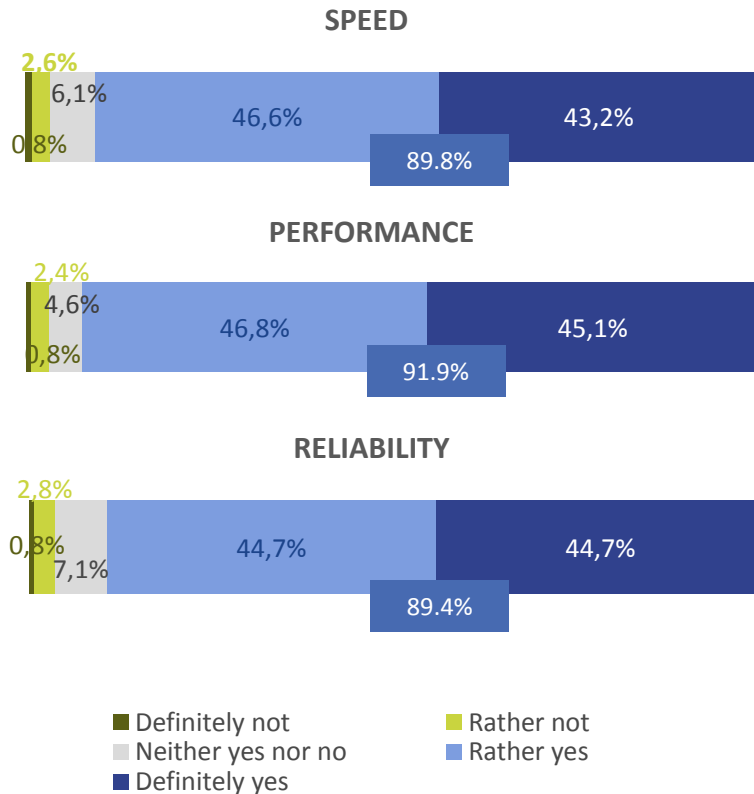
Impact of 5G network development

How do you evaluate the impact of 5G network development on your company?



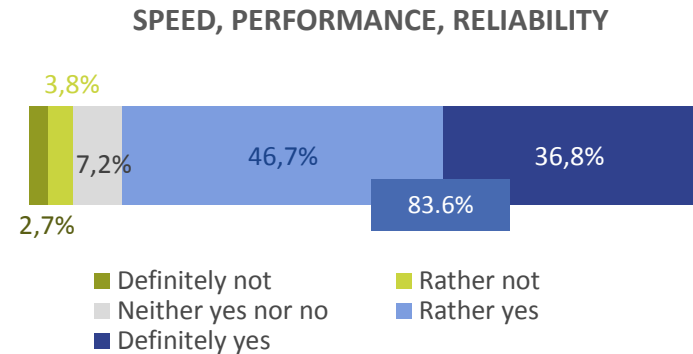
Today

Do you think that today the current parameters of Internet access in your company are sufficient to run the company?



Tomorrow

Do you think the current access parameters (speed, performance, reliability) to the Internet in your company are sufficient to run the company in the coming years?



The vast majority of respondents are of the opinion that the current parameters of Internet access in their company (speed, performance, reliability) are sufficient to conduct business.

A high percentage of respondents (83.6%) also indicate that the current parameters are sufficient to conduct their business in the coming years.

Barriers

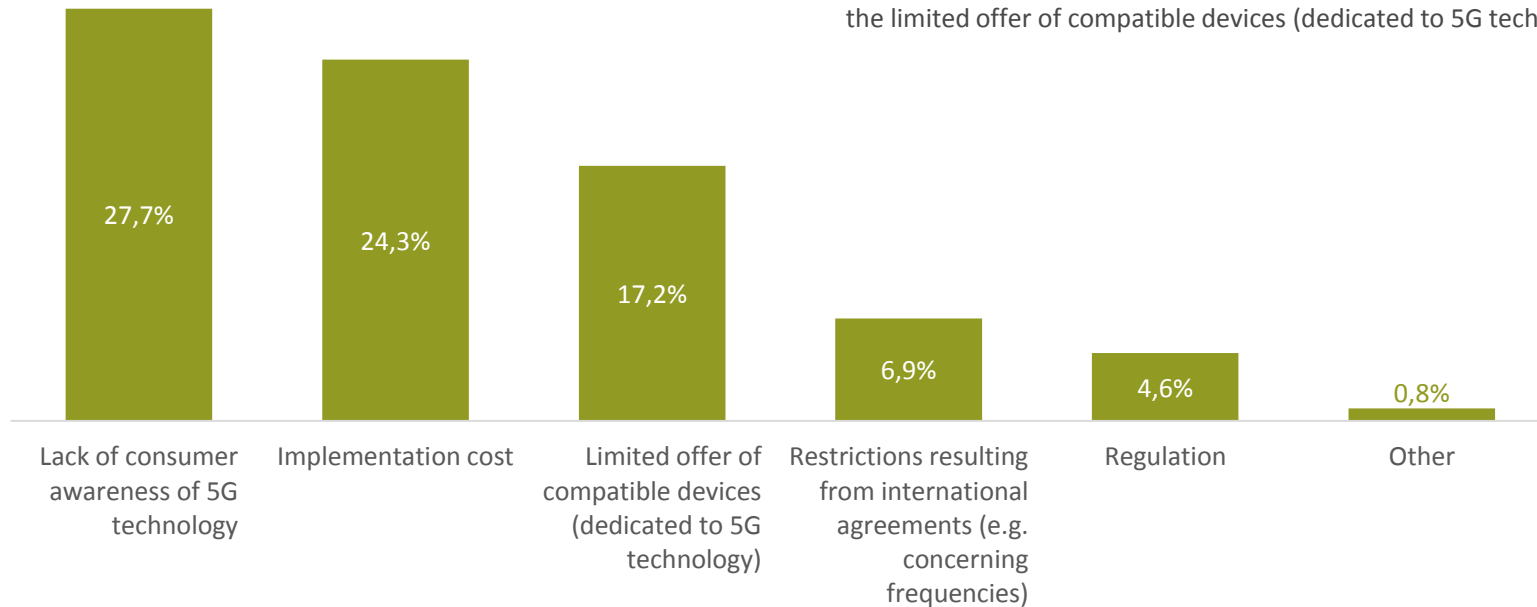
What barriers do you see in the introduction of 5G in Poland?



46.1% of responses are "I do not know, it's hard to tell"

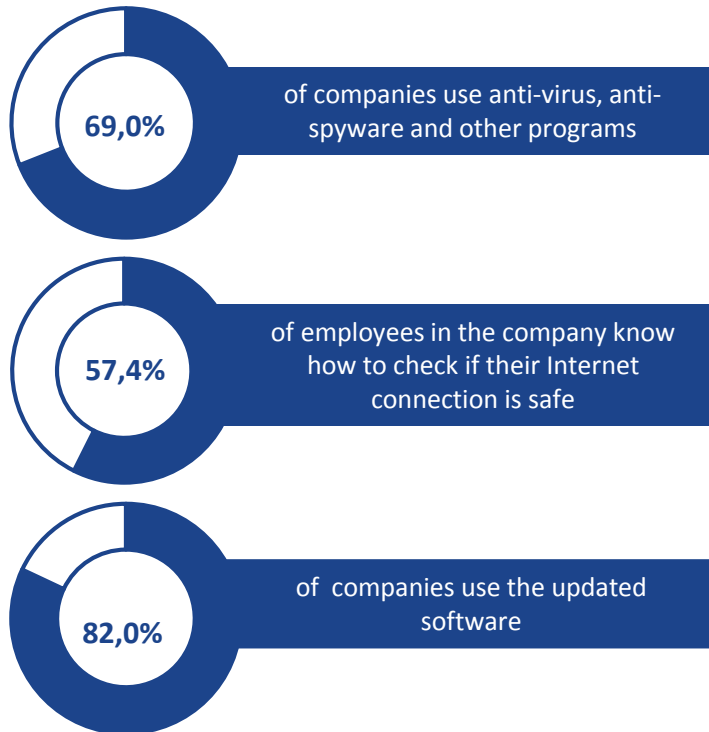
More than 46% of the companies using Internet were not able to indicate barriers to the introduction of the 5G network in Poland.

One of the greatest barriers that respondents notice in the context of the introduction of 5G in Poland is the consumer's lack of the awareness of 5G technology (27.7%) and the cost of implementation (cost-benefit ratio) - 24.3%. More than 17% of indications concerned the limited offer of compatible devices (dedicated to 5G technology).



Safety on the web

Using safety measures



Almost 70% of all of the surveyed companies use anti-virus, anti-spyware or other such programs, but only less than 60% of employees in the company know how to check if their Internet connections are safe. More than 80% of the surveyed companies declared that they use updated software. One quarter of the companies use solutions that increase the level of network privacy. The most popular of this type of solutions is VPN (56.4%), proxy is used less frequently (52.8%). Companies rarely use the Tor network (6.8%). The remaining percentage of companies use other solutions (2.1%).

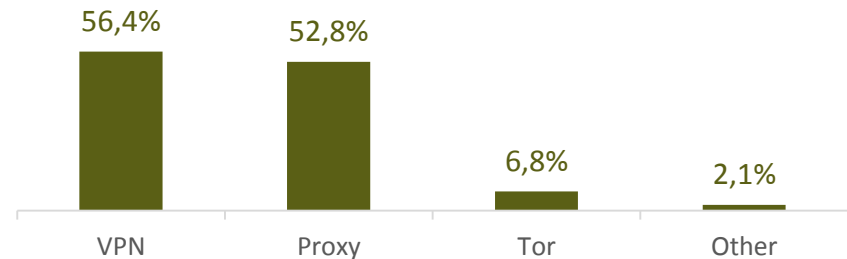
Basis: Companies with Internet access, N = 353

Privacy

Does your company use solutions that increase the level of privacy in your network?



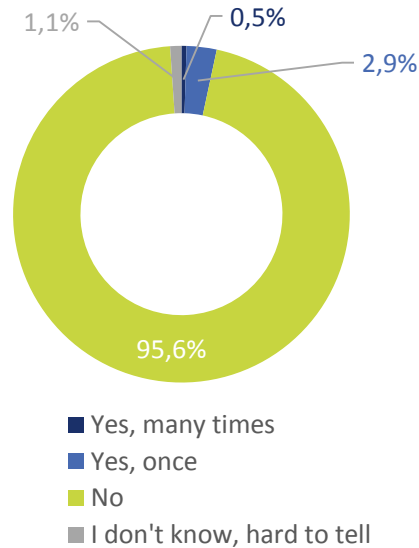
Which solutions increase the level of privacy in the network you use?



Basis: Respondents using solutions that increase the level of privacy in the network, N = 114

Data sharing

Has your company been a victim of abuse related to the use of any data provided by the company?



The vast majority of the surveyed respondents never fell victim to abuses related to the use of the data they provide (95.6%). Among the companies surveyed, only 2.1% during the year encountered an attempt of data extortion, 42.7% concerned customers, 28.7% concerned employees, and 28.7% concerned employees and customers. Among the companies with Internet access, almost 12% employ a person responsible for network safety and data security in the company.

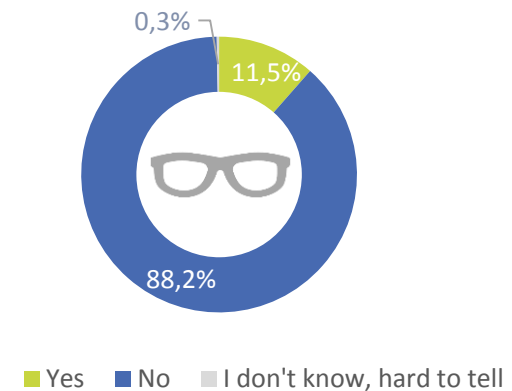
Basis: Companies with Internet access, N = 353

Data extortion

In the past year, were there cases of personal data extortion of employees or customers in your company?



Does your company employ people responsible for network safety and data security?



Processing large data sets

Processing large data sets

Knowledge

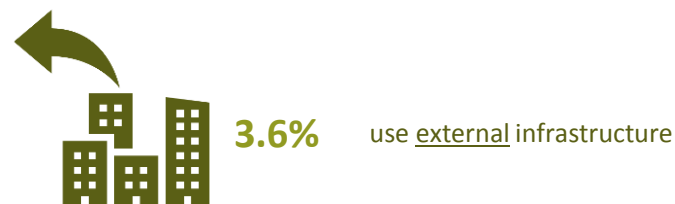
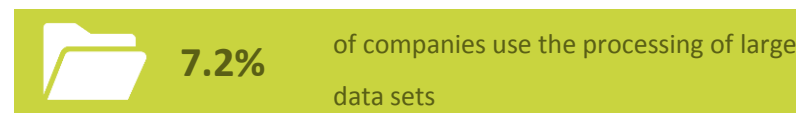
Have you encountered the concept of "Big Data" from the perspective of the company?



Over 20% of the respondents encountered the concept of processing large data sets (Big Data). More than 7% of all enterprises that have access to the Internet use Big Data. Companies use their own infrastructure to the same extent as external infrastructure.

Usage

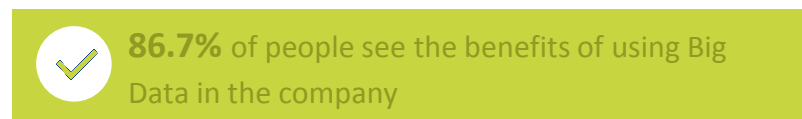
Do you use the processing of large data sets in your company?









Processing large data sets

Benefits

What are the benefits of Big Data services for your company?



Basis: All respondents whose company uses Big Data, N = 41

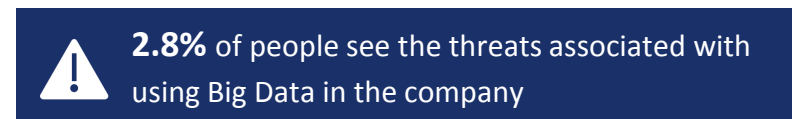
- 36.3%** In-depth analysis of the product or service market 
- 35.0%** Lowering costs 
- 34.2%** Reliability of data 
- 32.8%** Precise planning of the company's strategy 
- 29.0%** Improving the management system in the company 
- 22.8%** Increased end customer satisfaction - understanding their needs 

More than 86% of the respondents see the benefits of using Big Data in the company. The most frequently mentioned benefits are in-depth market analysis (36.3%), cost reduction (35.0%) and data reliability (34.2% of indications).

Basis: All respondents who see the benefits of Big Data, N = 39

Threats

In your opinion, what are the threats associated with Big Data services in the context of your company?



Basis: All respondents whose company uses Big Data, N = 41



Among those using Big Data, less than 3% see any threats. The possible threats indicated include:

- ▲ deepening economic inequalities in the market,
- ▲ weakening the competition-based economy,
- ▲ limiting the basic civil rights by interfering in the detailed data of human activities.

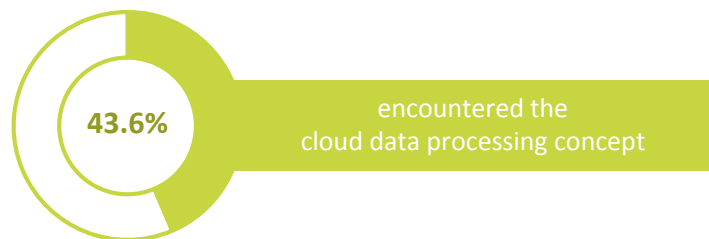
Basis: All respondents who see the threats, N = 3

Cloud computing

Cloud computing

Knowledge

Have you encountered the concept of cloud data processing (Cloud) from the perspective of your company?

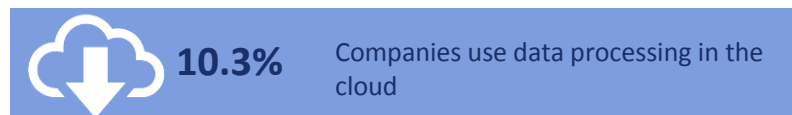


Almost half of the respondents (43.6%) encountered the concept of "cloud" or cloud data processing.

Among the companies using the Internet, 10.3% also use cloud computing. External infrastructure is used more often than their own (5.7% vs. 4.6%).

Usage

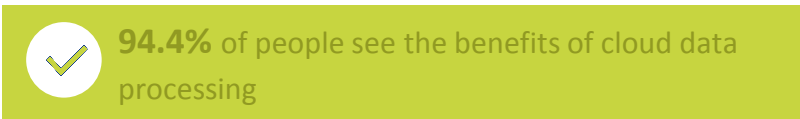
Do you use cloud data processing in your company?




Processing large data sets

Benefits

What are the benefits of cloud data processing for your company?



Basis: All respondents whose company uses cloud data processing, N = 59

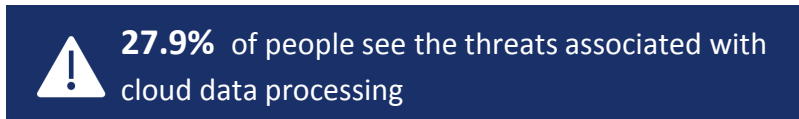
- 60.0%** Security against data loss 
- 50.9%** Ease of use 
- 49.5%** Efficiency and reliability 
- 34.5%** Saving costs 
- 31.7%** Ongoing process monitoring 

Nearly 95% of the respondents see the benefits of cloud data processing. The most frequently indicated benefits include security against data loss (60.0%), followed by the ease of use (50.9%) and efficiency and reliability (49.5%).

Basis: All respondents who see the benefits of clouds, N = 54

Threats

What are your threats related to using the cloud in the context of your company?



Basis: All respondents whose company uses cloud data processing, N = 59

Only 27.9% of those using clouds notice the threats associated with cloud data processing.



The possible indicated threats include:

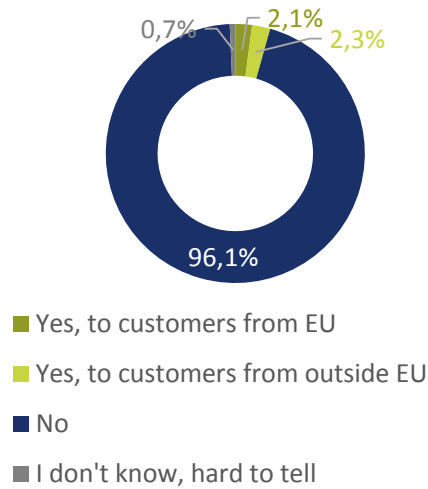
- ▲ data leak due to a failure,
- ▲ potential insight into data by the service owner or third parties,
- ▲ varied level of the availability of services in the cloud, depending on its operator,
- ▲ data leak due to hackers' activity,
- ▲ the privacy and cloud safety threats associated with the inadequate legal settlement of the issues.

Basis: All respondents who see the threats, N = 12

Digital Single Market

Foreign sales

Does your company sell goods on foreign markets?

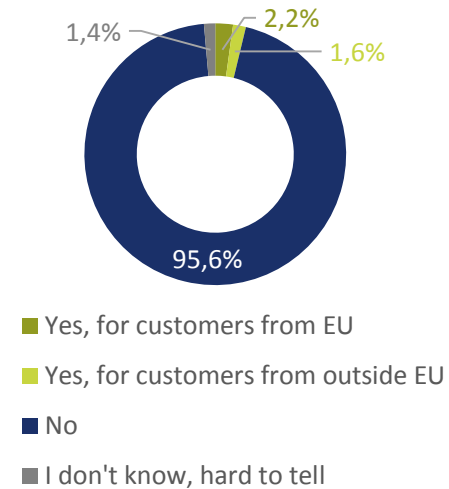


The vast majority (96,1%) of companies do not sell goods on foreign markets. 2.1% of companies sell products to EU Member States and 2.3% to non-EU countries.

Similarly, 95.6% of companies do not provide services on foreign markets. Such services for non-EU countries are provided by 1.6% of the respondents and for EU countries - 2.2%.

Foreign services

Does your company provide services on foreign markets?

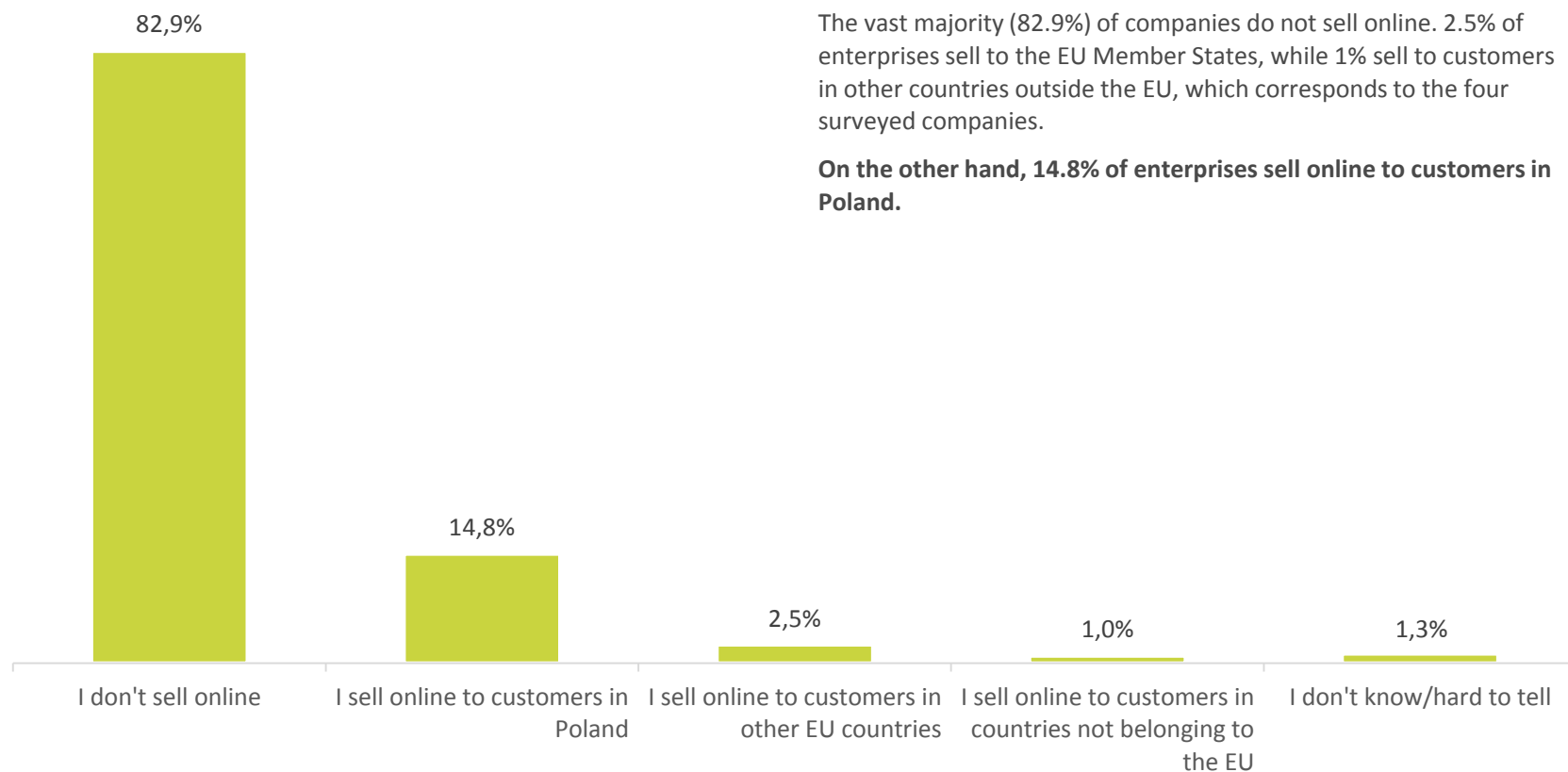


for 6 years on average

companies have had foreign customers

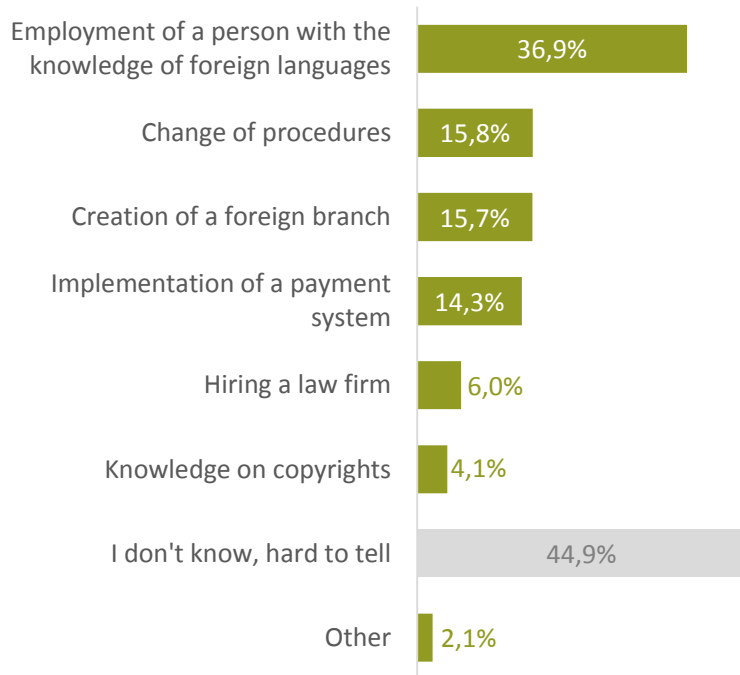
Online sales

Please tell me which of the following statements relate to your situation:



Services for foreign customers

What kind of changes have occurred in your company so that you can provide services to foreign customers?



The companies that provide services to foreign customers had to employ people who speak foreign languages (36.9%). They also modified procedures (15.8%) and created a foreign branch (15.7%).

Basis: All respondents whose company provide services to foreign customers, N = 36

Lack of services for foreign customers

What kind of changes would have to take place in your company so that you could provide services to foreign customers?

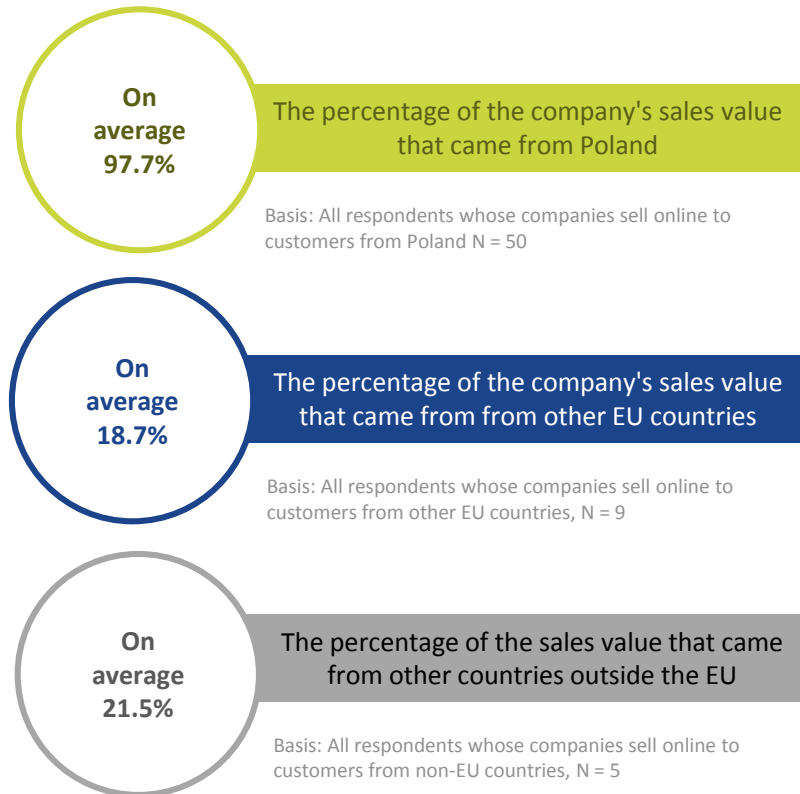


In order to provide services to foreign customers, respondents most often indicated that they would have to establish a foreign branch (14.9%) and employ people who know foreign languages (14.6%).

Basis: All respondents whose company does not provide services to foreign customers, N = 383

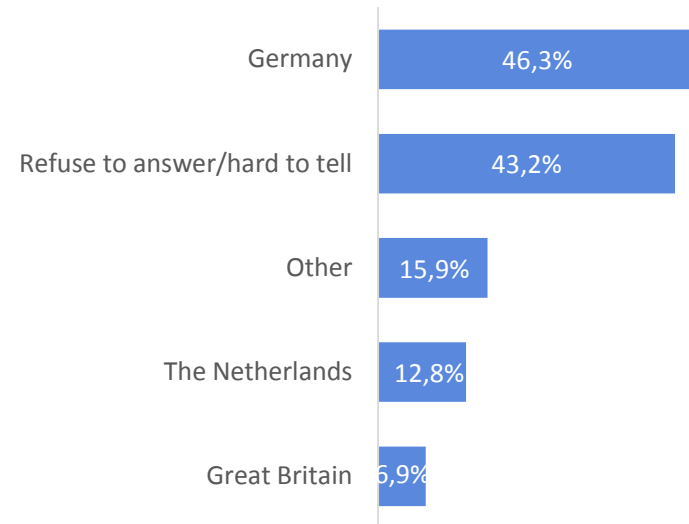
Value of sales

What percentage of your company's online sales in 2017 came from?



Online sales countries

In which countries did your company sell products and / or services online in 2017?

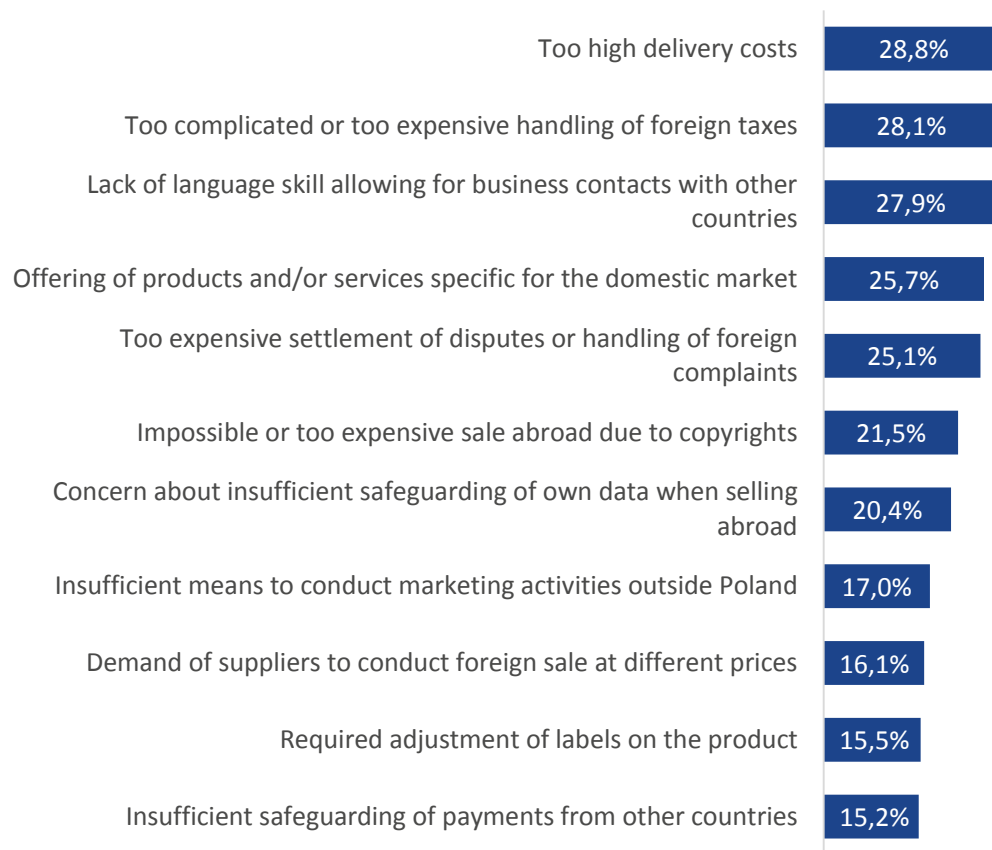


Online sales companies achieve more than half of the sales value from buyers from Poland.

Among the EU countries, it is only 18.7% of the value of sales, and in the case of companies selling outside the EU, it is 22.1% of the value of online sales.

Difficulties in online sales - in the future

For each of the following difficulties that may arise when selling online to other EU countries or attempting to perform such a sale, can you please tell if the issue is a problem? *(The second part of the chart is on the following slide)*

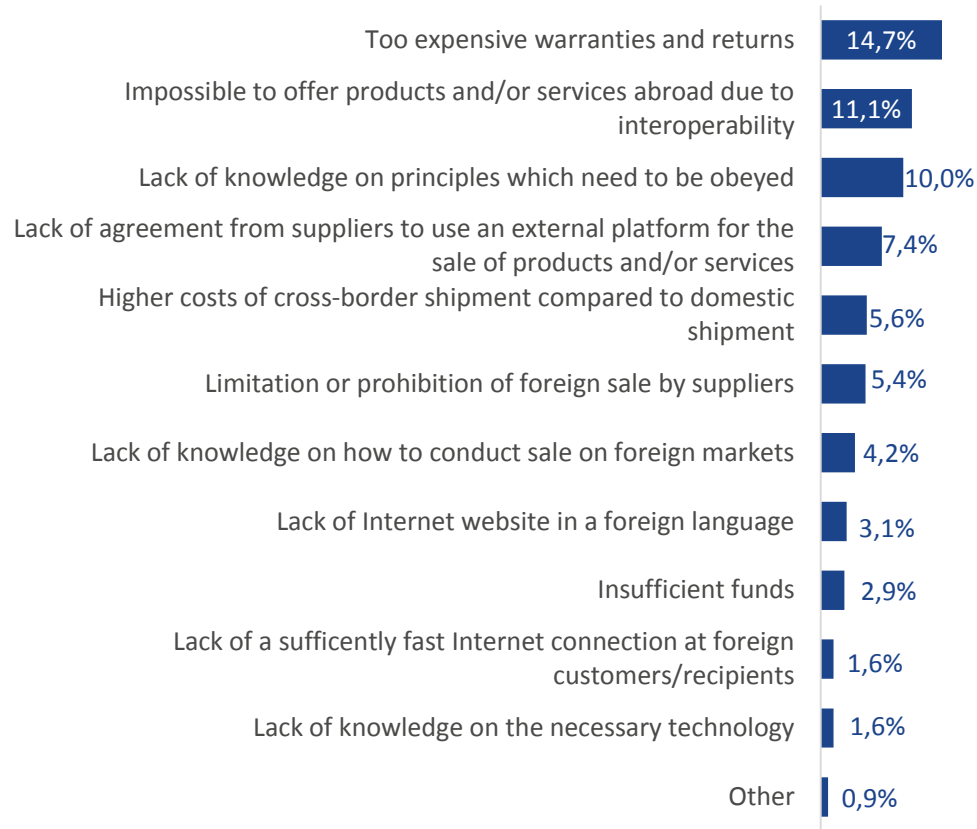


The most frequently indicated difficulties in conducting Internet sales to other EU countries were: too high delivery costs (28.8% of responses), too complicated or too costly handling of foreign taxes (28.1%) and lack of language skills allowing business contacts with other countries (27.9%).

Difficulties in online sales - in the future

(second part of the chart)

For each of the following difficulties that may arise when selling online to other EU countries or attempting to perform such a sale, can you please tell if the issue is a problem?



The least frequently indicated difficulties in conducting Internet sales to other EU countries included: lack of sufficient funds (2.9%), lack of fast Internet connection at foreign customers / recipients (1.6%) and lack of the knowledge of necessary technologies (1.6%).

Difficulties in online sales - in the future

If all EU Member States had the same Internet trading rules between your company and the customer, do you think that your company would start selling or increase sales to other EU countries?

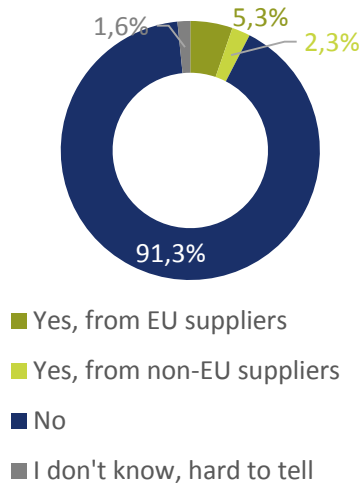


■ Definitely not ■ Rather not ■ Neither yes nor no ■ Rather yes ■ Definitely yes ■ I don't know, hard to tell

Hypothetically, if all EU Member States had the same principles of e-commerce, almost half of the respondents would not decide to start selling or increase sales (46.1%) to EU countries.

Foreign sales

Did your company make purchases from a foreign supplier in the past year?



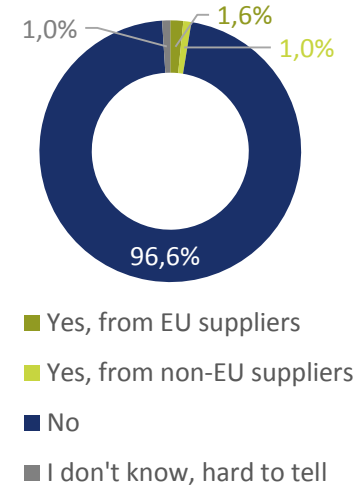
Most companies in the past year did not purchase goods or services on the foreign market (91.3% and 96.6%, respectively).

Purchases of goods and services from outside the EU concern respectively 2.3% and 1% of enterprises. On the other hand, the purchase of goods and services from the EU Member States concerns respectively 5.3% and 1.6% of companies.

Basis: All respondents, N = 400

Foreign services

Does your company purchase services on foreign markets?

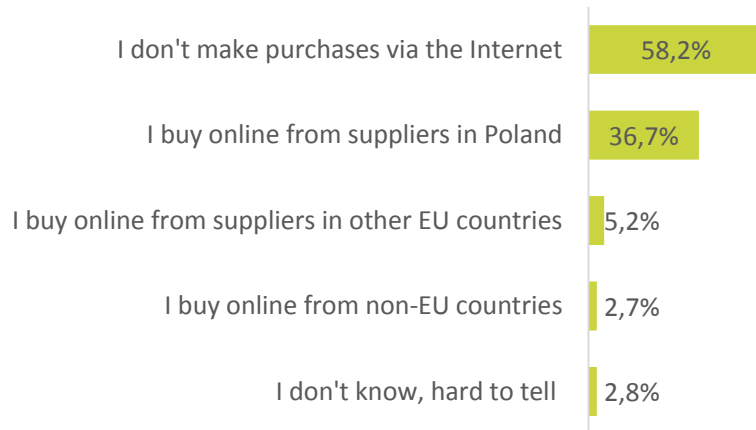


for 6 years on average

companies have been purchasing goods or services abroad.

Country of purchase

Please tell me which of the following statements relate to your situation:



Over half (58.2% of indications) of respondents representing the companies stated that their company does not make purchases via the Internet. Every third researcher (36.7%) bought online from a Polish supplier.

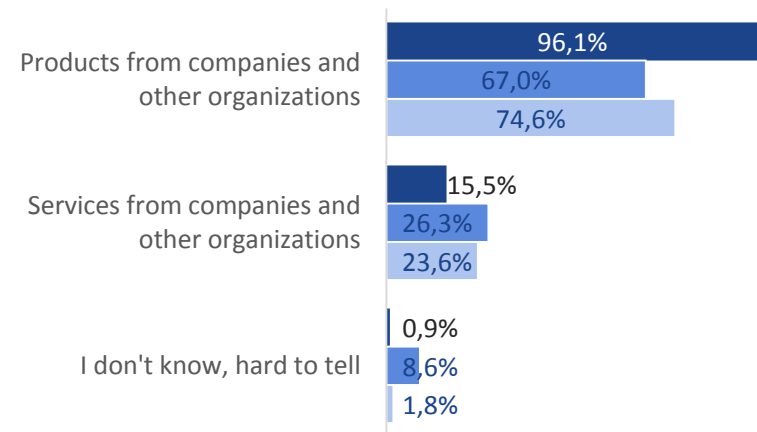
Both companies buying from Polish suppliers and companies buying from suppliers from other EU countries most often purchased goods and less frequently services.

Basis: All respondents, N = 400

Subject of purchase

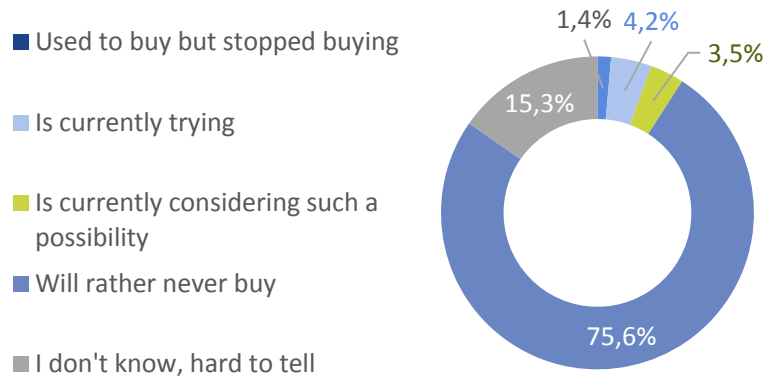
Please complete:

- I buy online from suppliers in Poland (N=163)
- I buy online from suppliers in other EU countries (N=30)
- I buy online from suppliers in non-EU countries (N=11)



Internet shopping

Has your company ever bought, tried to buy or considered purchasing products and / or services online in other EU countries?



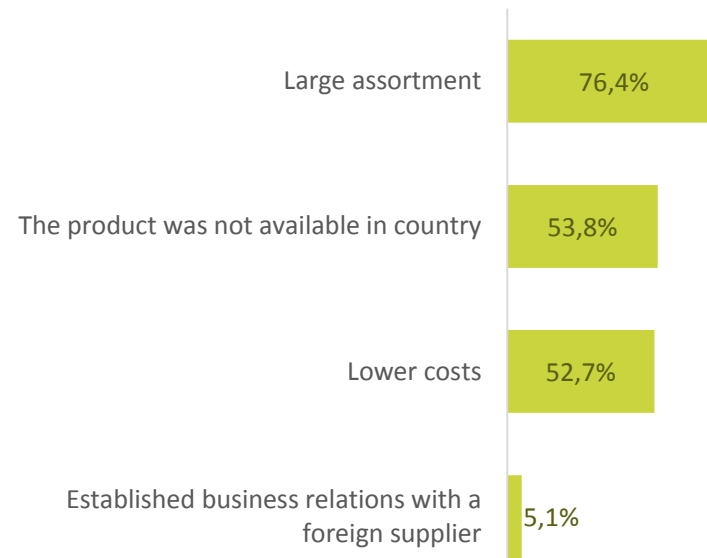
Basis: All respondents whose company does not buy online, N = 214

75.6% of respondents who do not buy via the Internet declared that the company would rather never buy their products, services via Internet, only 3.5% of respondents said that the company currently considered such a possibility.

Enterprises that decided to buy something online in another EU country most often did it due to a large assortment (76.4% of indications), and every second company needed a product that was not available in the country (53.8% of indications).

Reasons for buying from a supplier from another EU country

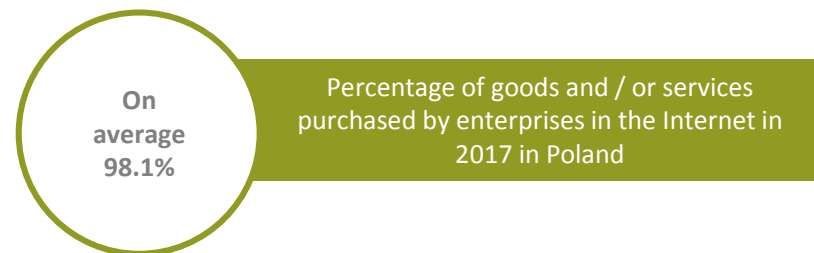
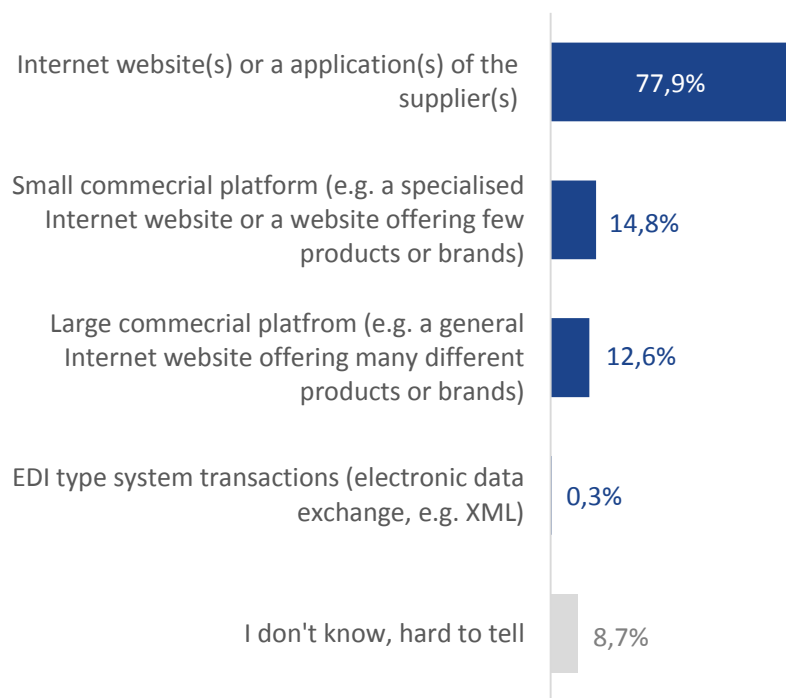
Why did your company decide to buy online from a supplier located in a different EU country than Poland?



Basis: All respondents whose company decided to purchase online from a supplier located in a different EU country than Poland, N = 30

Companies that buy online

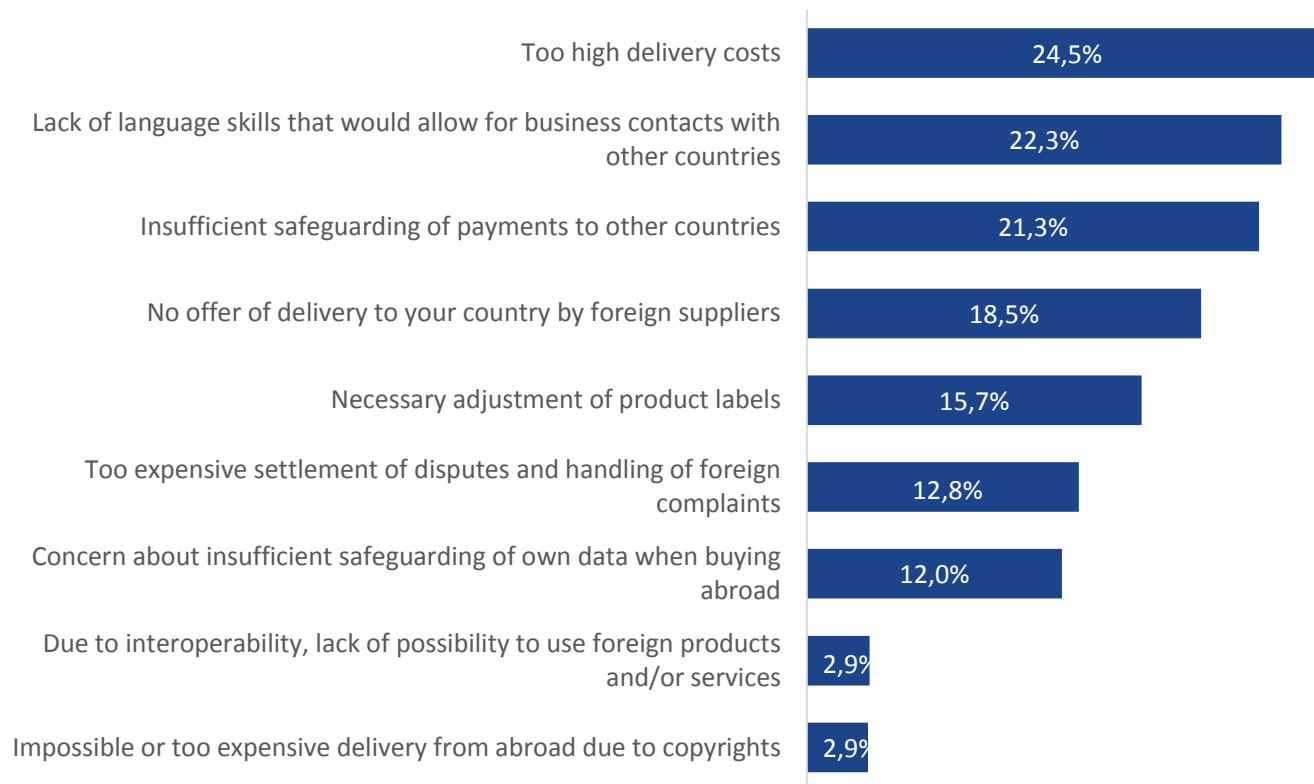
Which of the following does your company use when purchasing products and / or services in the Internet?



The majority of online buyers (77.9%) purchase through a website or supplier application. 14.8% declared that their company use a small commercial platform. EDI transactions were the least popular form (0.3% of indications).

Difficulties when purchasing online

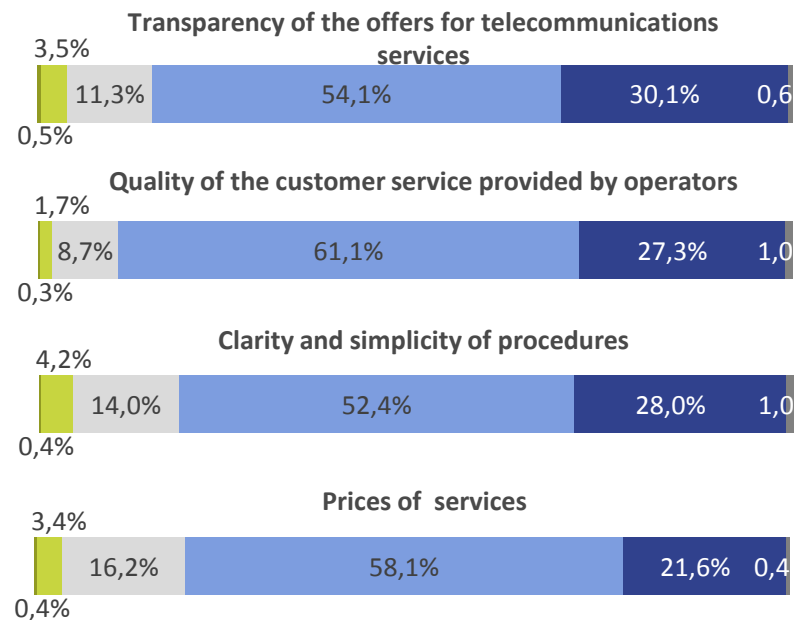
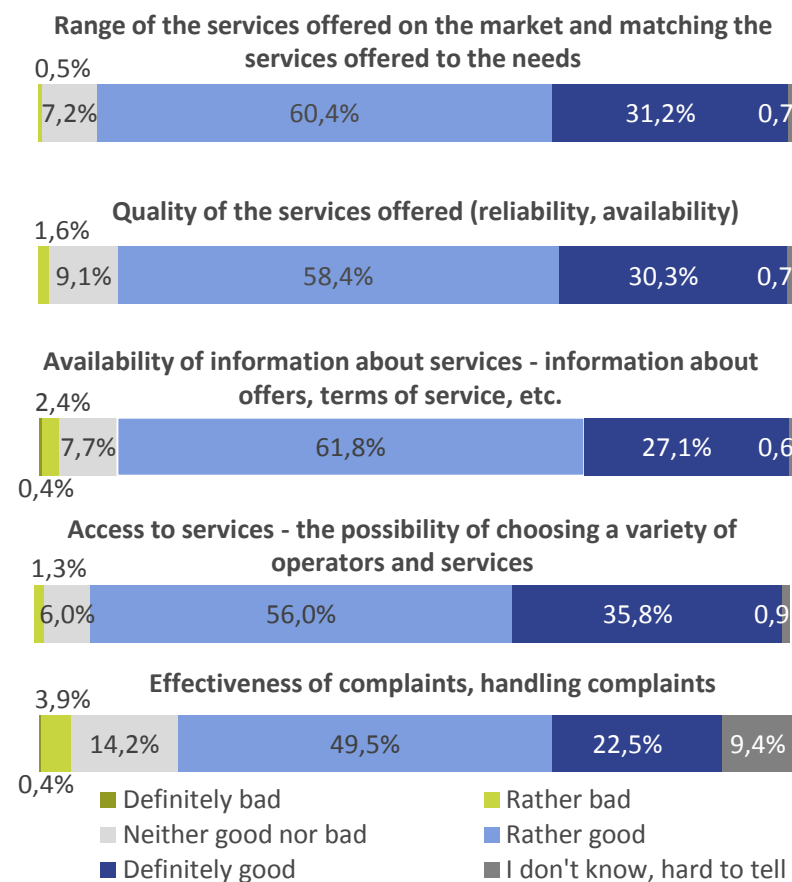
For each of the following difficulties that may arise when making purchases online from other EU countries or when trying to make such purchases, please tell whether the given issue was a problem?



General evaluation of the telecommunications market

Functioning evaluation

Please evaluate the following aspects of the functioning of the telecommunications market in Poland



The surveyed companies positively assess the indicated aspects of the functioning of the telecommunications market in Poland. Access to services, i.e. the possibility of choosing various operators and services is the highest-assessed aspect of the functioning of the telecommunications market (aggregated "definitely good" and "rather good" - 91.8%). The worst evaluated aspect is the effectiveness of complaints, handling complaints (aggregated: "definitely bad" and "rather bad" - 4.3%).

Knowledge of UKE

Have you heard about the activities of the Office of Electronic Communications from the company's perspective?

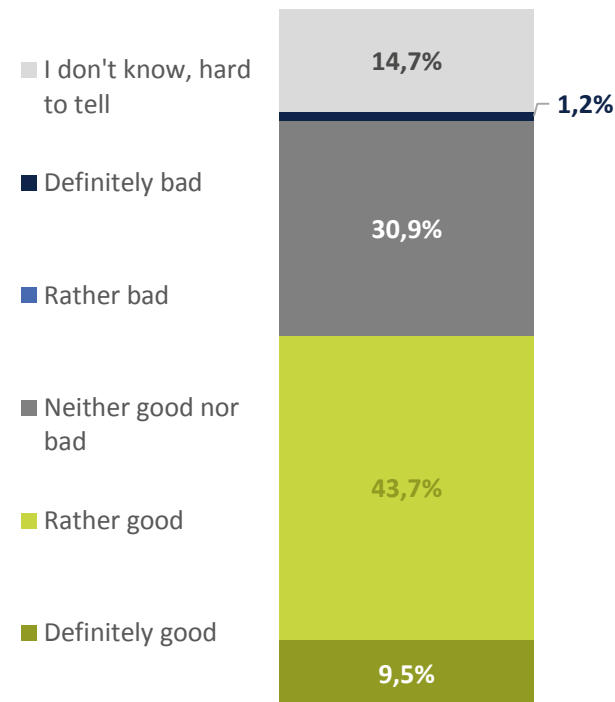


Almost 26% of the respondents heard about the activities of the Office of Electronic Communications.

Over a half of respondents (53.2%) positively assess the current activities of UKE. Almost 31% of respondents take a neutral attitude ("neither good nor bad"). Only 1.2% negatively evaluate the activities taken.

UKE evaluation

How do you evaluate the previous actions of the Office of Electronic Communications?



Positive market evaluation

Did you notice any positive changes in the telecommunications services market over the past year from the company's perspective?



Over 28% of respondents noticed positive changes in the telecommunications services market over the past year.

Positive changes that were noticed included mainly a larger number of offers (49.2% of indications), a better range of offers (46.8%), lower prices (45.4%) as well as dynamic development of technologies (41.5%).

Positive changes

What positive changes did you notice in the telecommunications services market over the past year from the company's perspective?



Negative market evaluation

Did you notice any negative changes in the telecommunications services market over the past year from the company's perspective?



Only 3.3% of respondents noticed negative changes in the telecommunications services market over the past year.

The negative changes that have been noticed mainly include the increase in prices, the deterioration of the quality of customer service and the low effectiveness of complaints.

Negative changes

What negative changes did you notice in the telecommunications services market over the past year from the company's perspective?

Most often indicated:



price increase



deterioration in the quality of customer service



low effectiveness of complaints

Summary

Summary



Mobile telephony

Companies usually have no more than 5 active SIM cards (46.1% - 1 card and 46.5% - between 2 and 5 cards). On average, companies use nearly 3 SIM cards (2.7).

The most commonly used mobile telephony services are voice calls to mobile numbers (75.6% of indications - "several times a day"), internet connection in the telephone (62.0% of indications - "several times a day") and an SMS service (54.3% of indications - "several times a day"). The international are the least frequently used.



Use of selected elements of the universal service

The vast majority of companies do not use such sources of information as the National Number Office (OBN) or the National Directory of Subscribers (OSA). Among those who use this type of information, only one out of five companies deem it necessary. Companies using this type of information most often used them more than 3 years ago.



Fixed line telephony

The vast majority of the surveyed enterprises have left fixed line telephony (nearly 77%), indicating mostly, that fixed line telephone is unnecessary for them (59.0%). The companies also demonstrate non-functionality of fixed line telephony, i.e. the impossibility to make calls from anywhere (nearly 22%) and its limited capacity (over 16%).

The companies that have remained at fixed line telephony stress that the fixed line number increases the company's credibility (50.0%). Over 64% of the companies also indicate that they would not give up on fixed line telephony services in exchange for mobile telephony. It is also worth noting that companies using fixed line telephony benefit from the services with high intensity (67.0% daily use a fixed line telephone in the business). What is more, fixed line telephony is important from the perspective of the enterprises that use it.



Internet access

Nearly 86% of companies have access to the Internet. Over half of them declare that this is a fixed line access. Over 42% of respondents who have access to the Internet, emphasize that it is an important work tool, but it is auxiliary to the company's core business. Among the companies having access to mobile Internet, half of them indicate that they chose this type of connection mainly due to the need for greater mobility, using the Internet outside the company's headquarters (50.4%). The vast majority of companies that have access to mobile Internet (including mobile Internet on the phone) use the LTE technology.

5G 5G network

More than 30% of respondents are familiar with the "5G network" term. On the other hand, 51.6% know which generation of mobile networks are currently in use. For most companies (83.6%), the current parameters (speed, efficiency, reliability) are sufficient to conduct business in the coming years.

More than 46% of the companies using Internet were not able to indicate barriers to the introduction of the 5G network in Poland. One of the greatest barriers that respondents notice in the context is the consumer's lack of the awareness of 5G technology (27.7%) and the cost of implementation (cost-benefit ratio) - 24.3%.



Over-The-Top services

More than 30% of the respondents admitted that the development of Over-The-Top services improved communication in the company (31.9%). In turn, almost half of the respondents stated that OTT services did not affect the functioning of the company they work in in any way.

Companies most often use communication and application services. Among the used ones, most of them do not involve additional fees.

Almost half of the respondents whose company already uses OTT services would not be capable of opting out of telecommunications services in exchange for OTT services in the company (48.8%). Only 13% of the respondents would be capable of exchanging telecommunications services in the company with OTT solutions.

Only 5.9% of the enterprises so far not using OTT services are considering using them in the future. Respondents indicated that they are planning to primarily use communication and video services.



Safety on the web

Nearly 70% of the respondents use anti-virus, anti-spyware and other such programs, however only 57.4% of employees know how to check if their Internet connection is safe. More than 80% of the surveyed declared that they use updated software.

The vast majority (95,6%) of the surveyed never fell victim to abuses related to the use of the data they provide. Companies usually do not employ people responsible for network safety and data security, only 11.5% of them have people employed at such positions.



Cloud data processing

More than 40% of the respondents encountered the concept of "cloud" or cloud data processing.

Among the companies using Internet, 10.3% also use cloud computing. External infrastructure is used more often than their own.

Nearly 95% of the respondents see the benefits of cloud data processing. The most frequently indicated benefits include security against data loss (60.0%), followed by the ease of use (50.9%) and efficiency and reliability (49.5%).

Only 27.9% of those using clouds notice the threats associated with cloud data processing.



Processing large data sets

Over 20% of the respondents encountered the concept of processing large data sets (Big Data). 7.2% of companies use Big Data among all enterprises that have Internet access.

More than 86% of the respondents see the benefits of the usage of Big Data in the company. The most frequently mentioned benefits include in-depth market analysis (36.3%), cost reduction (35.0%) and data reliability (34.2% of indications). Less than 3% of those using Big Data are aware of the threats associated with the processing of large data sets.



Digital Single Market

The vast majority of the respondents do not sell goods and services on foreign markets (96.1%). Similarly, there is a percentage of respondents who do not sell online (82.9%). This can be due to the lack of knowledge of respondents concerning what changes could occur in their companies, so that they could serve foreign contractors (60.8%).

The most frequently mentioned difficulty that can occur when selling online to other EU countries include too high delivery costs (28.8%).

Almost half of the respondents would not decide to sell internationally even if the same principles of e-commerce as in Poland were in force in the EU.

Enterprises that decided to buy something online in another EU country most often did it due to a large assortment (76.4% of indications), and every second company needed a product that was not available in the country (53.8% of indications).



General evaluation of the telecommunications market

More than 28% of the respondents noticed positive changes that took place in the past year on the telecommunications services market. Negative changes were perceived by 3.3% of responders.

Access to services, i.e. the possibility of choosing various operators and services is the highest-assessed aspect of the functioning of the telecommunications market. The worst evaluated aspect is the effectiveness of complaints, handling complaints.

25.9% of the respondents have heard about the Office of Electronic Communications. This institution is evaluated positively by more than half of the respondents. 1.2% of the respondents are not satisfied with the activities of the office.

Clarifications (methodological note)

Methodological note

- The data presented in the report has been subjected to an analytical weighing procedure aimed at correcting the structure of the sample carried out against the population.
- The percentages presented in the report are weighted values. Numeric data (N) is unweighted data.
- Metric (socio-demographic) data is an exception, percentages there are also non-weighted data.
- In column and bar charts, the total of values can exceed 100% - more than one matching answer could be indicated.
- In pie charts and cumulative charts, the total of individual percentages can be 99.9% or 100.1%. This is the result of the rounding used in numerical values to two decimal points.

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