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| **OBSERVATÓRIO DAS TELECOMUNICAÇÕES****SERVIÇOS DE SMS****INDICADORES ESTATISTICOS****2018 - 2021** |  |
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**MERCADO DAS TELECOMUNICAÇÕES**

Nos termos do artigo 8.ºalínea n)**,** da Lei n.º 5/2010, de 27 de maio (Lei de Base das Tecnologias de Informação e Comunicação) compete, entre outras, a ARN, de proteger os interesses dos utilizadores, em coordenação com as entidades competentes, promovendo o esclarecimento dos utilizadores e assegurando a divulgação de informação relativas a utilização das telecomunicações e estabelece no artigo 108, da mesma lei, obrigatoriedade dos operadores licenciados de fornecerem regularmente a informação estatística a ARN.

Em cumprimento desta orientação legal, a ARN publicou em 2018, um Despacho que estabeleceu a forma, o grau de pormenor, os prazos e a periodicidade de envio da informação estatística à ARN pelos operadores e prestadores de serviços públicos.

Em cumprimento da sua atribuição, a ARN publica o presente observatório contendo as informações estatísticas de 2018 a 2021, recolhidas junto dos.

**UTILIZADORES DE SERVIÇOS DE SMS E ROAMING-OUT**

**SMS E ROAMING-OUT**

Nos últimos quatro anos (2018 a 2021), conforme demonstra a tabela 4, o mercado de serviços de SMS e Roaming-Out é incontestavelmente liderado pela Orange Bissau.

A mesma tabela ilustra as evoluções ocorridas em termos de utilização destes serviços, nos 4 últimos anos.

Tabela 1: Evolução de utilização de SMS, Roaming-out e distribuição por operador

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| **SMS** |
| Anos | Total | Quota de Mercado | Crescimento global anual |
| 2021 | 689 054 |  | 92% | 20% |
| 2020 | 572 704 |  | 71% | -9% |
| 2019 | 627 136 |  | 82% | 21% |
| 2018 | 519 755 |  | 85% | - |

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| **Roaming-out** |
| Anos | Total | Quota de Mercado | Crescimento global anual |
| 2021 | 95 429 |  | 96% | 40% |
| 2020 | 572 704 |  | 94% | 16% |
| 2019 | 627 136 |  | 93% | -23% |
| 2018 | 519 755 |  | 92% | - |

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**TRÁFEGO DE SMS**

Tabela 2: Volume global de tráfego de voz

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| --- | --- | --- | --- | --- |
| ~~Anos~~ | ~~2021~~ | ~~2020~~ | ~~2019~~ | ~~2018~~ |
| Tráfego global de SMS | 40 463 731 | 180 789 567 | 110 710 983 | 82 601 013 |
| Mensal | 3 371 978 | 15 065 797 | 9 225 915 | 6 883 418 |
| Diário  | 112 399 | 502 193 | 307 531 | 229 447 |
| Crescimento anual | -78% | 63% | 34% | ~~-~~ |

 | Em 2021, houve uma queda acentuada no envio de SMS, correspondendo a decréscimo de 78%, em relação ao mesmo período de 2020.  |

Tabela 3: Variação de quota de mercado de tráfego SMS

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|

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| --- |
| Variação anual de tráfego (Mil, SMS) |
| 2021 | 2020 | 2019 | 2018 |
| 2 562 | 2 798 | 2 426 | 2 029 |
| 86% | 68% | 83% | 82% |
|  |  |  |  |

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|  |
| --- |
| Trim. |
| Variação trimestral de tráfego(Mil SMS) |
| 2021 |  | 2020 |  | 2019 |  | 2018 |
| 1T | 580 |  | 639 |   | 563 |   | 540 |
| 2T | 656 |  | 996 |  | 623 |  | 457 |
| 3T | 637 |  | 590 |  | 613 |  | 512 |
| 4T | 689 |  | 573 |  | 627 |  | 520 |

 |

Tabela 4: variação de N.º médio de mensagem enviadas, por utilizador (mil)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| --- | --- | --- | --- | --- |
| Anos | 2021 | 2020 | 2019 | 2018 |
| SMS User | 689 054  | 572 704  | 627 136  | 519 755  |
| Mil SMS enviadas | 40 464 | 180 790 | 110 711 | 82 601 |
| **N.º médio de SMS enviadas por utilizador** | Anual | 59 | 316 | 177 | 159 |
| Mensal | 4,89 | 26,31 | 14,71 | 13,24 |
| Diário | 0,16 | 0,88 | 0,49 | 0,44 |

 | A tabela 20 demonstra a variação de número global de SMS enviadas por utilizador anual, mensal e diariamente. |

Tabela 5: Quota de mercado global de SMS originadas (enviadas), mil

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
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| --- | --- | --- | --- | --- |
| Anos | 2021 | 2020 | 2019 | 2018 |
| Tráfego SMS enviadas(mil) | 40 463 | 180 789 | 110 710 | 82 601 |
| Quota  | 82% |  | 84% |  | 73% |  | 85% |  |

 | A tabela 21 demonstra a incontestável liderança da Orange Bissau na prestação de serviços de SMS. |

Tabela 6: Quota de mercado de SMS terminadas, mil

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| --- | --- | --- | --- | --- | --- |
| Anos  | On-net |  | Of-net |  | Internacional |
| **N.º** | **%** |  |  | **N.º** | **%** |  |  | **N.º** | **%** |  |
| 2021 | 38 935 | 88% |  |  | 1 072 | 51% |  |  | 40 464 | 87% |  |
| 2020 | 177 136 | 68% |  |  | 1 886 | 66% |  |  | 180 790 | 68% |  |
| 2019 | 98 224 | 92% |  |  | 1 872 | 66% |  |  | 110 711 | 92% |  |
| 2018 | 79 184 | 94% |  |  | 1 894 | 65% |  |  | 82 601 | 93% |  |

 |

Tabela 7: mil sms enviadas para o Internacional

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Anos  | cedeao | Quota  | Palop | Quota  | cplp | Quota  | Resto\_Africa | Quota  | Resto\_mundo | Quota  |
| 2021 | 128 647 | 65% |  | 28 571 | 91% |  | 44 817 | 59% |  | 26 435 | 70% |  | 227 948 | 61% |  |
| 2020 | 324 076 | 81% |  | 21 852 | 57% |  | 109 292 | 80% |  | 24 712 | 65% |  | 1 287 197 | 86% |  |
| 2019 | 7 979 163 | 99% |  | 183 916 | 95% |  | 1 245 446 | 96% |  | 310 632 | 96% |  | 895 727 | 76% |  |
| 2018 | 446 038 | 79% |  | 9 082\* | 100% |  | 211 133 | 74% |  | 37 814 | 68% |  | 818 770 | 64% |  |

\* dados da Orange Bissau indisponível

Tabela 8: receitas de SMS & Roaming-Out, FCFA

|  |  |  |
| --- | --- | --- |
|  | Roaming\_Out | SMS |
| 2021 | 177 881 826 | 186 701 655 |
| 2020 | 182 688 421 | 230 110 030 |
| 2019 | 118 138 865 | 147 339 655 |
| 2018 | 316 014 358 | 233 509 216 |