Public opinion survey on the functioning of the telecommunications service market and consumer preferences

Report from the survey carried out among institutional customers

Warsaw, Gdańsk, 29 November 2019

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UKE

Basic information

Basic information

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Title	Public opinion survey on the functioning of the telecommunications service market and consumer / institutional customer preferences
Procurer	Office of Electronic Communications UKE
Contractor	Danae Sp. z o.o. and Realizacja Sp. z o.o DANAE realizacja
Sample size	N = 400 institutional customers
Sample selection	Random quota sampling, stratified by location and employment
Technique	CAPI – Computer Assisted Personal Interviewing
Location	Nation-wide survey
Date	November 2019

Characteristics of the sample

Characteristics of the sample

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Respondents by gender

■ women ■ men

47.1%   52.9%

Respondents by age

■ 35 and younger
■ 36–40
■ 41–50
■ over 50

13.0%   19.7%   48.3%   19.1%
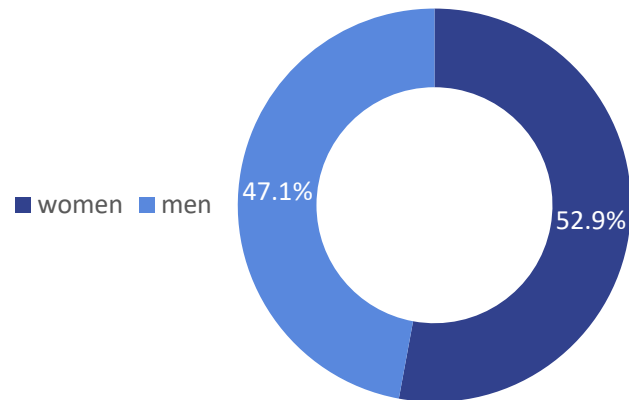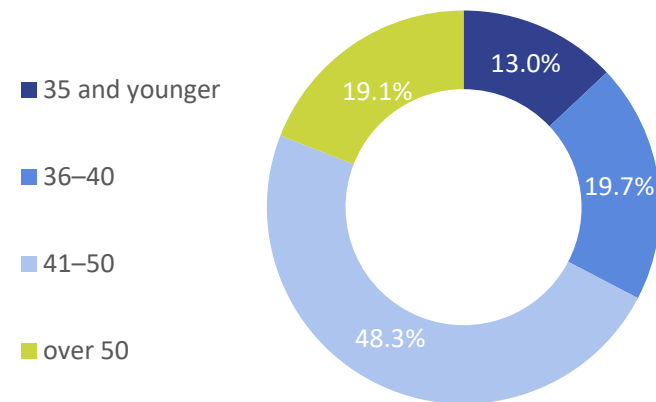
People aged 41–50 formed the largest group surveyed, accounting for almost half of the respondents (48.3%). Second largest group were people aged 36–40, followed by slightly smaller group of people aged 35 and less.

There were slightly more female (52.9%) than male respondents (47.1%).

Characteristics of the sample
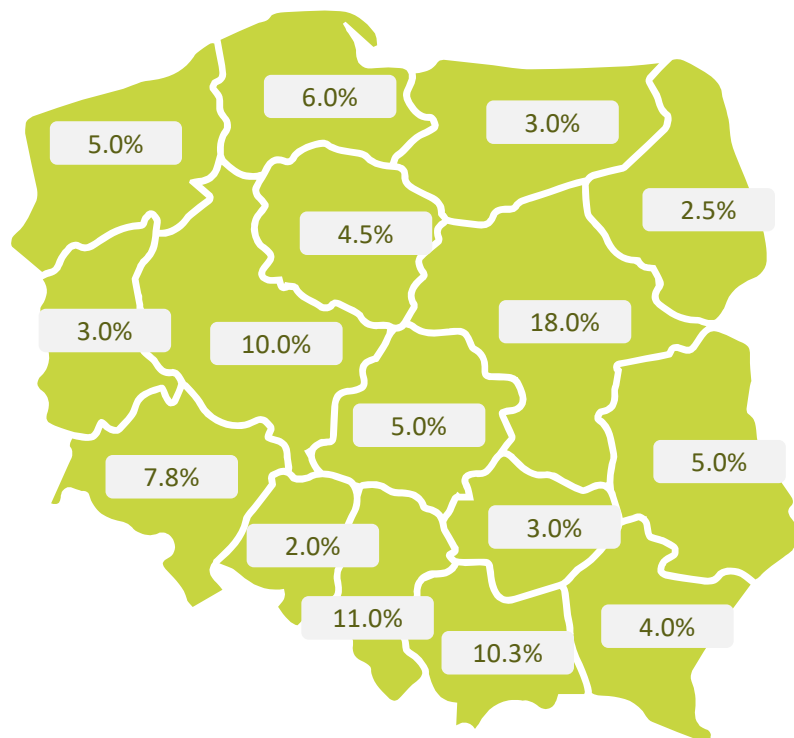
Voivodeship

VOIVODESHIP	%	VOIVODESHIP	%
Dolnośląskie	7.8%	Podkarpackie	4.0%
Kujawsko-pomorskie	4.5%	Podlaskie	2.5%
Lubelskie	5.0%	Pomorskie	6.0%
Lubuskie	3.0%	Śląskie	11.0%
Łódzkie	5.0%	Świętokrzyskie	3.0%
Małopolskie	10.3%	Warmińsko-mazurskie	3.0%
Mazowieckie	18.0%	Wielkopolskie	10.0%
Opolskie	2.0%	Zachodniopomorskie	5.0%

Mazowieckie Voivodeship
had the largest representation (18%), followed by Śląskie (11%),
Małopolskie (10.3%)
 and Wielkopolskie (10.0%) Voivodeships.

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Institutions by size

- one employee
- 2 to 9 employees
- 10–49 employees
- 50 to 249 employees
- 250 and more

13.8%
52.3%
22.0%
9.5%
2.5%
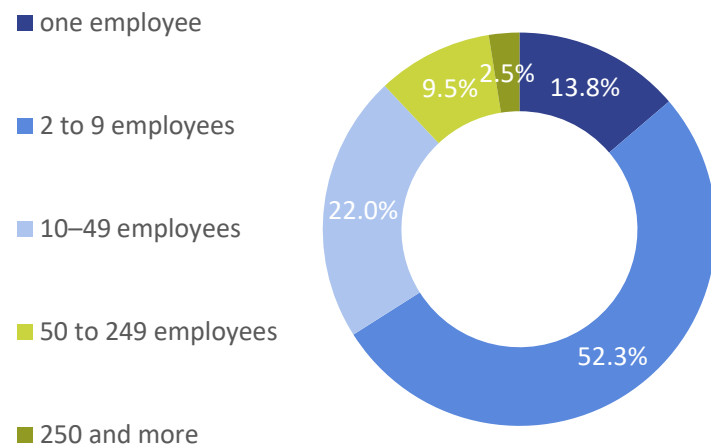
Respondents by position

- Owner/co-owner
- Director/manager
- Deputy director/manager
- Independent professional
- Other

0.5%
3.4%
5.3%
8.0%
82.8%
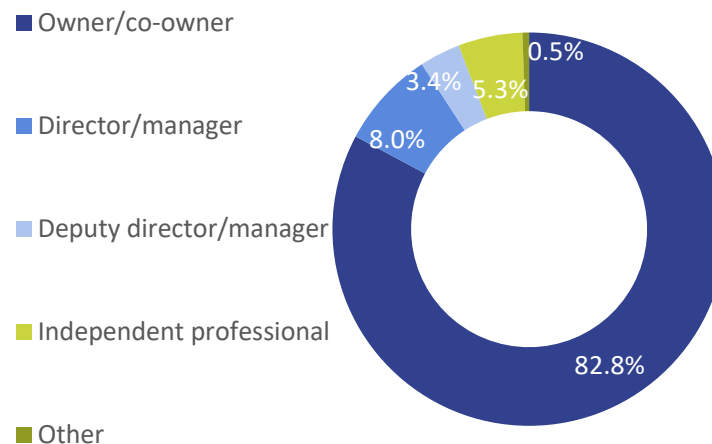
Most respondents run companies with 2 to 9 employees (52.3%). Almost 15% of respondents are self-employed, and 22.3% operate companies with 10 to 49 employees. Representatives of companies with 250 employees and more were the least numerous (2.5%).

Most respondents were owners or co-owners of the enterprises surveyed. 8% of the respondents were directors or managers. The sample also included a small share of deputy directors/managers and independent professionals.

Activities by sectors

Sector	%
Other service activities	34.4%
Wholesale and retail trade; repair of motor vehicles and motorcycles	19.3%
Construction	14.8%
Professional, scientific and technical activities	7.1%
Accommodation and food service activities	4.3%
Transportation and storage	3.8%
Manufacturing	3.4%
Financial and insurance activities	3.3%
Education	3.1%
Human health and social work activities	2.4%
Retail estate activities	2.3%
Arts, entertainment and recreation	2.3%
Administrative and support service activities	1.1%
Agriculture, forestry, hunting and fishing	0.8%
Information and communication	0.8%
Electricity air conditioning supply	0.7%
Water supply; sewerage, waste management and remediation activities	0.3%
Other	1.9%

Characteristics of the sample

Activities by markets

2.2% of companies are present in foreign markets

Activities by range

Local, i.e. town and surroundings	54.7%
National	35.9%
Regional, i.e. one or more voivodeships	34.0%
International European, i.e. EU states	3.1%
International global, i.e. non-EU states	0.7%
Don't know, difficult to say	0.8%
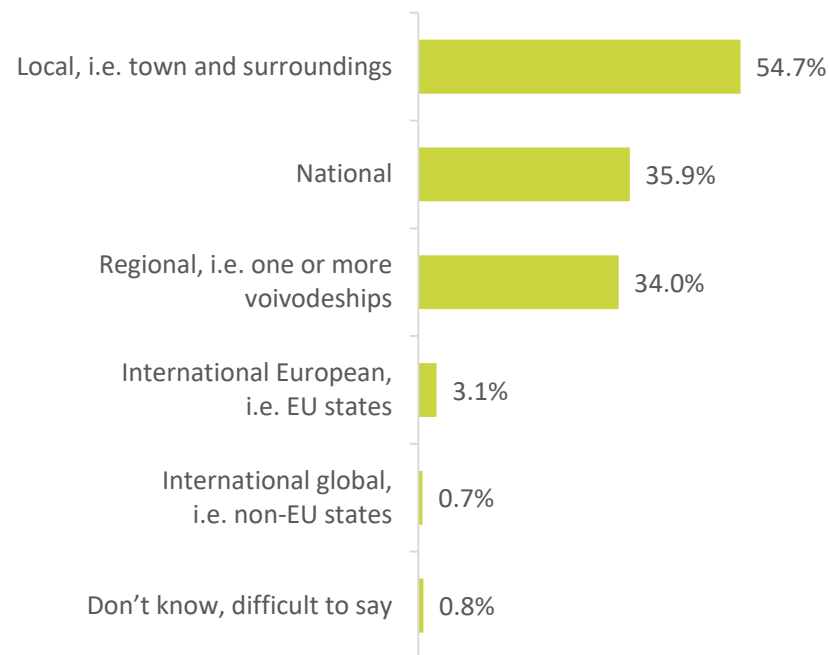
The companies surveyed mostly operate in the local market (54.7%). 34.0% of respondents declared operation in the regional market, while 35.9% – in the national market. Companies active in the international global market, i.e. non-EU market, had the smallest representation (0.7% declarations).

Only 2.2% of organisations are active in foreign markets.

Reference group: All respondents, N=400

Organisations by turnover

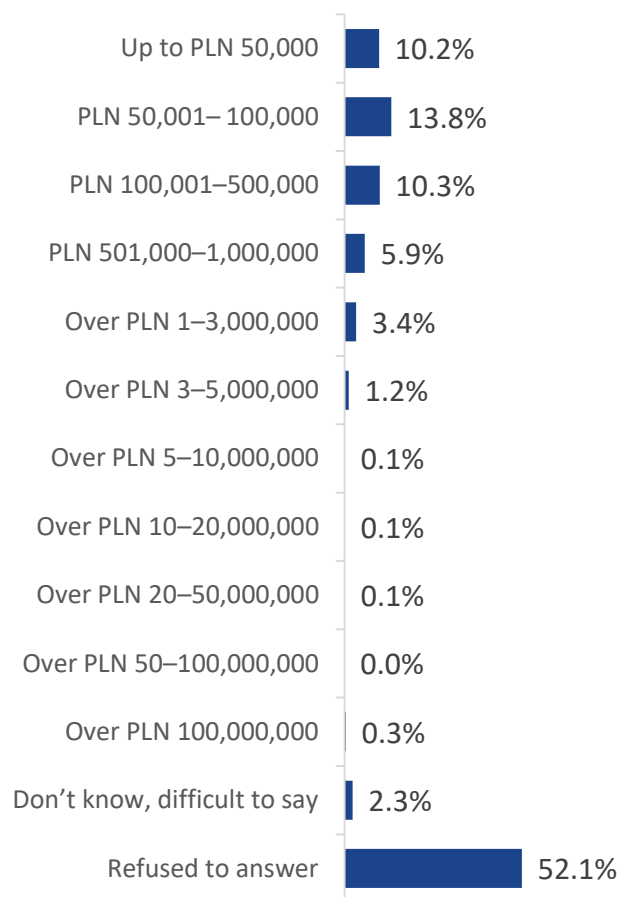| Category	Value
Up to PLN 50,000	10.2%
PLN 50,001– 100,000	13.8%
PLN 100,001–500,000	10.3%
PLN 501,000–1,000,000	5.9%
Over PLN 1–3,000,000	3.4%
Over PLN 3–5,000,000	1.2%
Over PLN 5–10,000,000	0.1%
Over PLN 10–20,000,000	0.1%
Over PLN 20–50,000,000	0.1%
Over PLN 50–100,000,000	0.0%
Over PLN 100,000,000	0.3%
Don't know, difficult to say	2.3%
Refused to answer	52.1%

Time of operation

- less than 1 year
- 1–5 years
- 6–10 years
- 11–20 years
- over 20 years
- don't know, difficult to say
- refused to answer

Pie: 2.6%, 2.0%, 26.9%, 21.6%, 32.0%, 13.4%, 1.5%
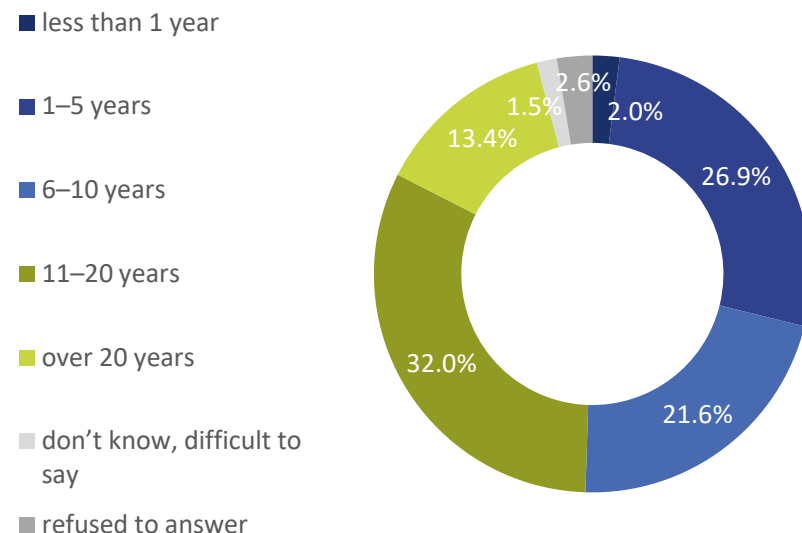
A considerable share of respondents refused to state their turnover (52.1%). Among those willing to reveal their revenues, most indicated turnover between PLN 50,001 and PLN 100,000.

Almost one in three companies has been active in the market for 11 to 20 years, and one in four – for 1 to 5 years. Every fifth company has operated for 6 to 10 years.

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Use of services

Mobile phone
97.7%

Fixed-line phone
23.1%

Internet
83.4%

I don't use any
0.8%

fixed-line internet
52.1%

mobile internet
28.4%

mobile phone internet
67.8%

other
0.3%
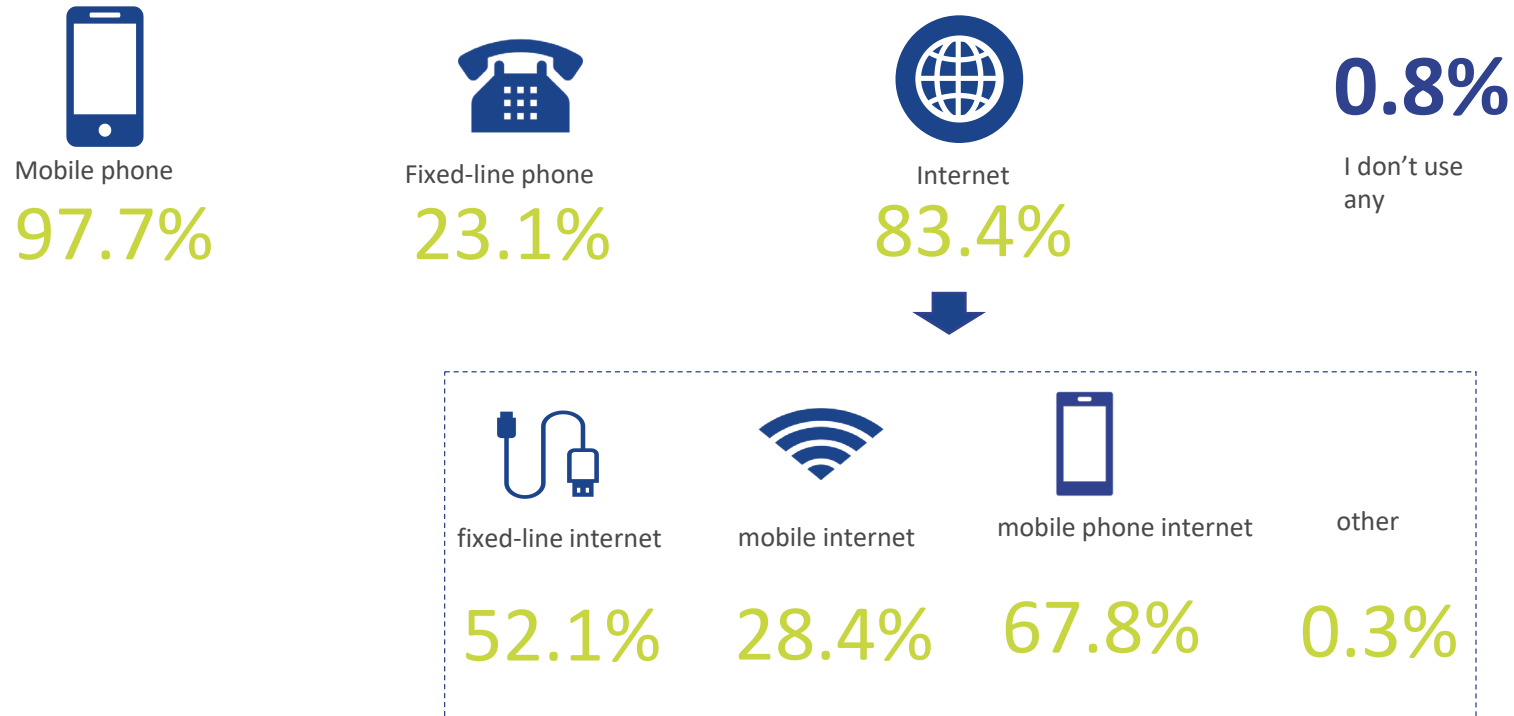
Almost all of the respondents (97.7%) use mobile phones. As for the internet, the share is 83.4%. It should be noted, though, that companies tend to access the internet more often via mobile phones (67.8%) than via fixed-line services (52.1%). Here, the least popular form of access is mobile internet (28.4%).

Mobile telephony

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Companies by number of active SIM cards

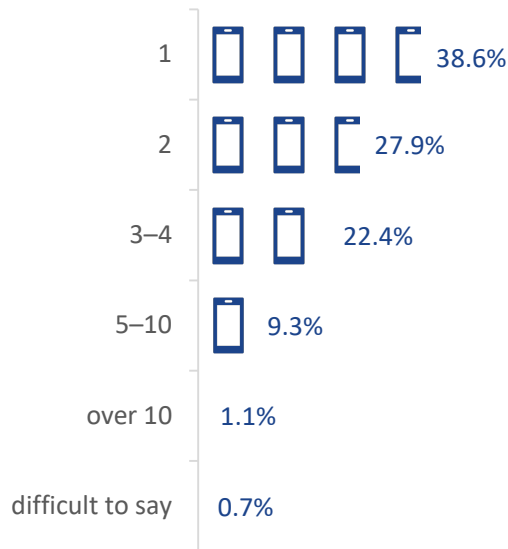How many active SIM cards for voice services are there in your company?

1　38.6%

2　27.9%

3–4　22.4%

5–10　9.3%

over 10　1.1%

difficult to say　0.7%

Companies usually have no more than 4 active SIM cards (38.6% − 1 card, 27.9% − 2 cards and 22.4% − 3 to 4 cards).

2.6 average number of active SIM cards for voice services

1.3 average number of SIM cards for voice services in companies with **one employee**

2.6 average number of SIM cards for voice services in companies with **2 to 9 employees**

6.1 average number of SIM cards for voice services in companies **with 10 to 49 employees**

16.3 average number of SIM cards for voice services in companies **with 50 to 249 employees**

42.8 average number of SIM cards for voice services in companies with **250 employees and more**

Cost of using mobile telephony

How much are your company's total monthly mobile phone bills?

PLN 93.1 — average monthly mobile phone bills in companies with **one employee**

PLN 197.7 — average monthly mobile phone bills in companies with **2 to 9 employees**

PLN 372.8 — average monthly mobile phone bills in companies with **10 to 49 employees**

PLN 967.5 — average monthly mobile phone bills in companies with **50 to 249 employees**

PLN 1,588.4 — average monthly mobile phone bills in companies with **over 250 employees**

Reference group: Corporate users of mobile phones, N=391

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Mobile phone operators

What is your mobile phone operator?

Operator	%
Orange	34.3%
Play	32.8%
Plus	19.8%
T-Mobile	16.5%
difficult to say	0.7%
Virgin Mobile	0.4%
Lycamobile	0.4%
Netia	0.0%
Other	0.0%

NPS – Net Promoter Score

How likely is it that you would recommend this operator to your family or friends?

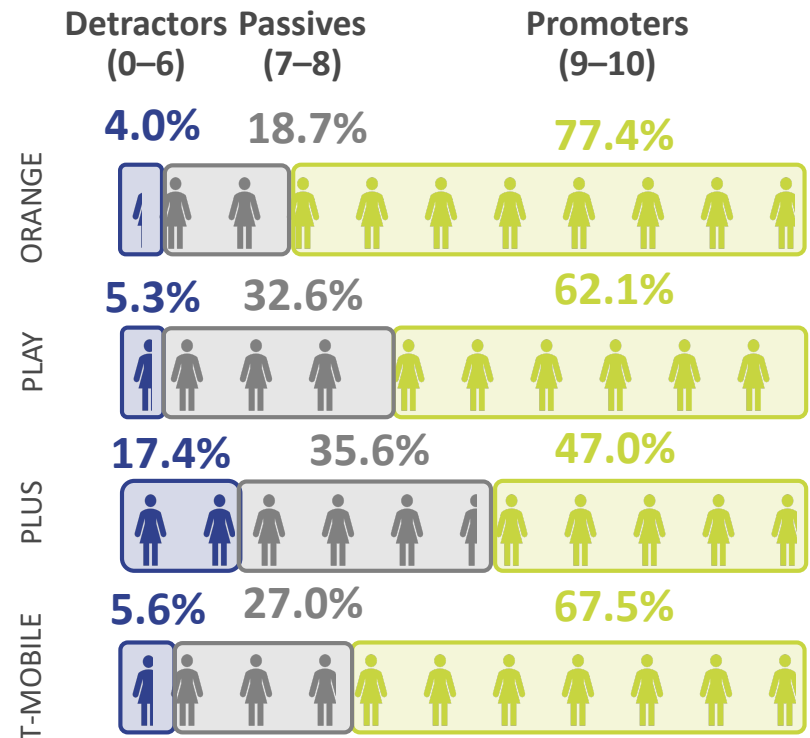|	Detractors (0–6)	Passives (7–8)	Promoters (9–10)
ORANGE	4.0%	18.7%	77.4%
PLAY	5.3%	32.6%	62.1%
PLUS	17.4%	35.6%	47.0%
T-MOBILE	5.6%	27.0%	67.5%

Most mobile telephony users choose services provided by Orange (34.3%), Play (32.8%) and Plus (19.8%). Orange users are most likely to recommend the operator (77.4% promoters). Plus has the highest number of detractors (17.4%).

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Net Promoter Score (NSP) indicator
General operator evaluation

How likely is it that you would recommend your mobile phone operator to your family or friends?

Detractors	**Passives**	**Promoters**
(0–6)	**(7–8)**	**(9–10)**
6.6%	**27.2%**	**66.2%**

% promoters - % detractors =

NPS*

59.7%
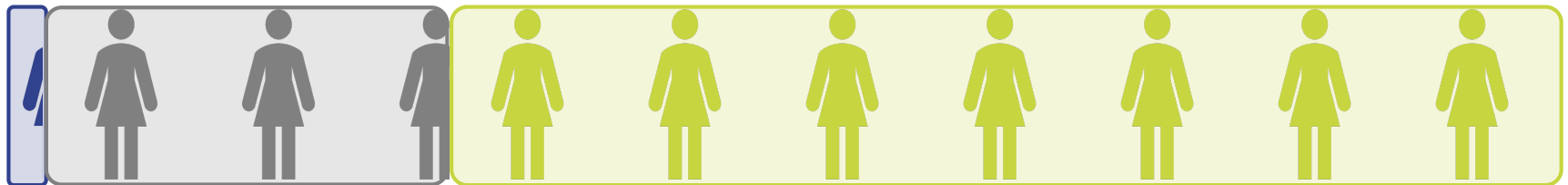
The NPS for the whole mobile telephony market is 59.7%. The share of detractors, who are reluctant to recommend their operator, is 6.6%. More than half would recommend the services of their provider to family or friends (66.2%), while more than 27% may be considered "passive" (27.2%).

*more about NPS can be found in the Note on the methodology.

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this provider's services, taking into account the following:

Orange

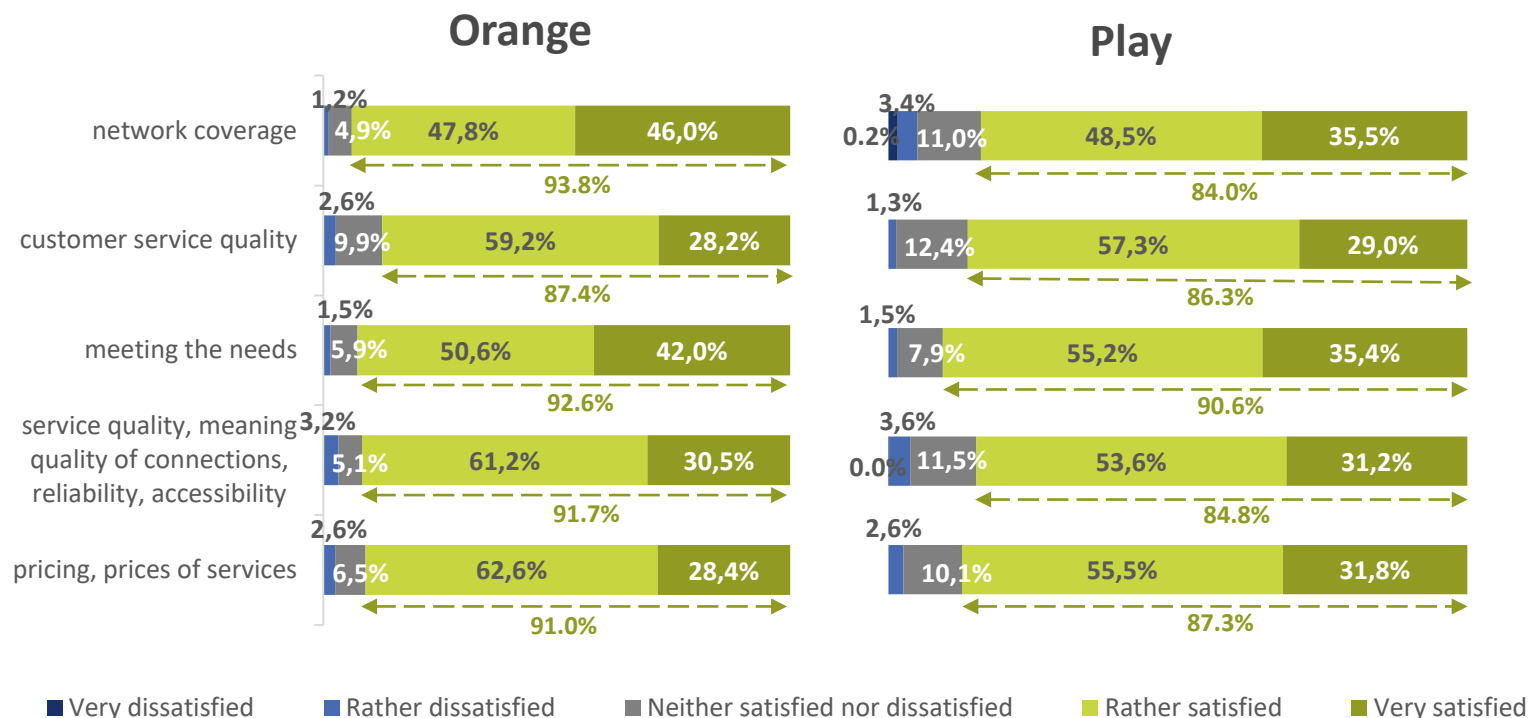|	Very dissatisfied	Rather dissatisfied	Neither satisfied nor dissatisfied	Rather satisfied	Very satisfied	Total satisfied
network coverage		1,2%	4,9%	47,8%	46,0%	93.8%
customer service quality		9,9%	2,6%	59,2%	28,2%	87.4%
meeting the needs		5,9%	1,5%	50,6%	42,0%	92.6%
service quality, meaning quality of connections, reliability, accessibility		5,1%	3,2%	61,2%	30,5%	91.7%
pricing, prices of services		6,5%	2,6%	62,6%	28,4%	91.0%

Play

	Very dissatisfied	Rather dissatisfied	Neither satisfied nor dissatisfied	Rather satisfied	Very satisfied	Total satisfied
network coverage	0,2%	3,4%	11,0%	48,5%	35,5%	84.0%
customer service quality		1,3%	12,4%	57,3%	29,0%	86.3%
meeting the needs		1,5%	7,9%	55,2%	35,4%	90.6%
service quality, meaning quality of connections, reliability, accessibility	0,0%	3,6%	11,5%	53,6%	31,2%	84.8%
pricing, prices of services		2,6%	10,1%	55,5%	31,8%	87.3%

Legend: ■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied

Most companies using Orange or Play mobile telephony services usually declare that they are satisfied with this operator when it comes to network coverage (respectively: 93.8%, Play – 84%), customer service quality (87.4%; 86.3%), meeting the needs (92.6%; 90.6%), service quality, meaning quality of connections, reliability, accessibility (91.7%; 84.4%) as well as pricing and prices of services (91%; 87.3%).
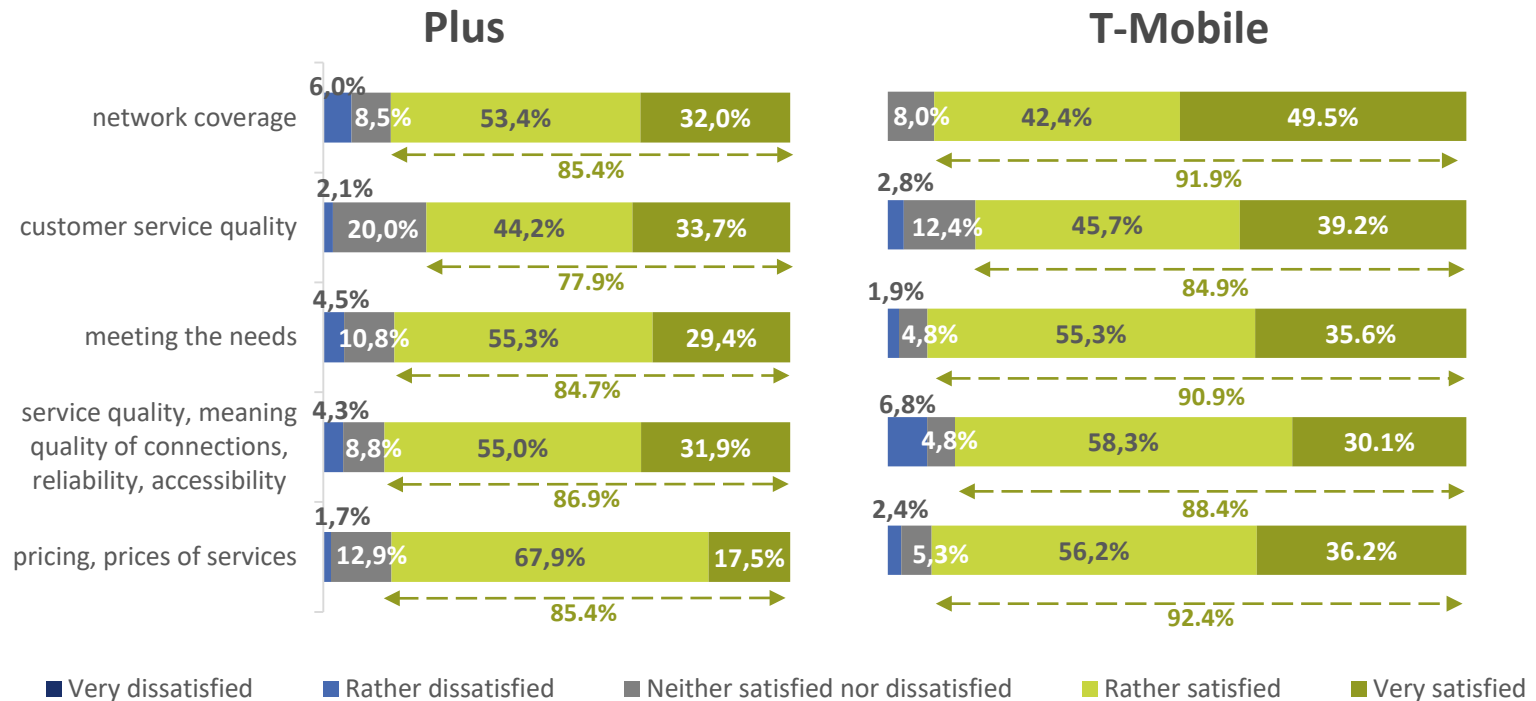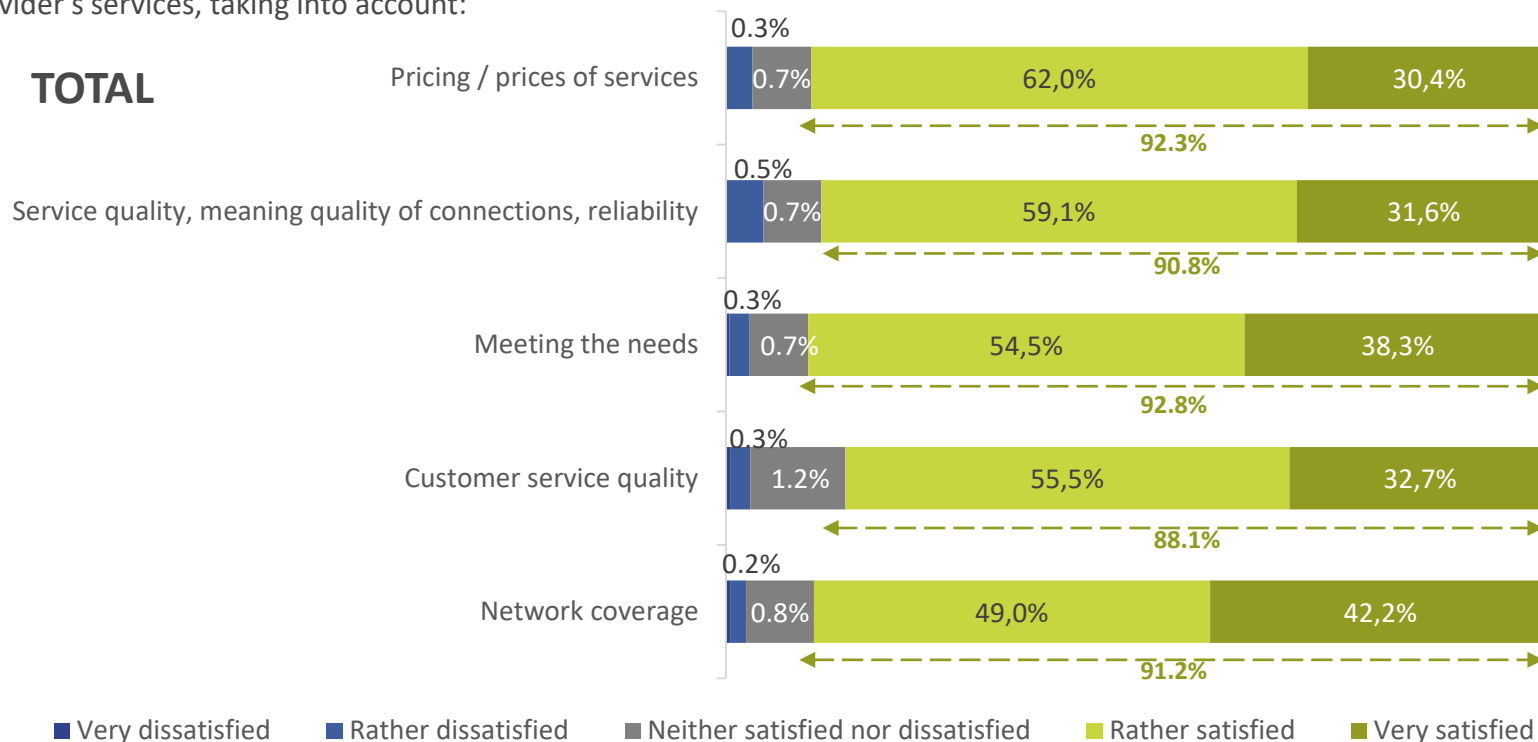
Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this provider's services, taking into account the following:

Plus

	Very dissatisfied	Rather dissatisfied	Neither satisfied nor dissatisfied	Rather satisfied	Very satisfied	
network coverage	6.0%		8,5%	53,4%	32,0%	85.4%
customer service quality	2,1%		20,0%	44,2%	33,7%	77.9%
meeting the needs	4,5%		10,8%	55,3%	29,4%	84.7%
service quality, meaning quality of connections, reliability, accessibility	4,3%		8,8%	55,0%	31,9%	86.9%
pricing, prices of services	1,7%		12,9%	67,9%	17,5%	85.4%

T-Mobile

network coverage	8,0%			42,4%	49.5%	91.9%
customer service quality	2,8%	12,4%		45,7%	39.2%	84.9%
meeting the needs	1,9%	4,8%		55,3%	35.6%	90.9%
service quality	6,8%	4,8%		58,3%	30.1%	88.4%
pricing, prices of services	2,4%	5,3%		56,2%	36.2%	92.4%

Legend: ■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied

As for Plus, the users are most dissatisfied with the network coverage (6.0%), while T-Mobile was rated the lowest in service quality (6.8%).

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Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with the provider's services, taking into account:

TOTAL

Pricing / prices of services — 0.3% / 0.7% / 62,0% / 30,4% — 92.3%

Service quality, meaning quality of connections, reliability — 0.5% / 0.7% / 59,1% / 31,6% — 90.8%

Meeting the needs — 0.3% / 0.7% / 54,5% / 38,3% — 92.8%

Customer service quality — 0.3% / 1.2% / 55,5% / 32,7% — 88.1%

Network coverage — 0.2% / 0.8% / 49,0% / 42,2% — 91.2%

■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied

Corporate users of mobile telephony highly rate their service providers in every aspect surveyed. Meeting the needs scored the highest (92.8%). Similar rating was also given to pricing / prices of services (92.3%), network coverage (91.2%) and service quality (90.8%). Only the customer service quality remains below 90%.

Reference group: Users of mobile phones, N=380 (excluding answers 'Don't know, difficult to say'); the results do not sum up to 100% because the respondents rated each of their operators (and often they use the services of more than one operator).

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your provider's services, taking into account:

	Orange	T-Mobile	Play	Plus
Network coverage	4.4	4.4	4.2	4.1
Customer service quality	4.1	4.2	4.2	4.1
Meeting the needs	4.3	4.2	4.3	4.1
Service quality	4.2	4.1	4.1	4.1
Pricing, prices of services	4.2	4.3	4.2	4
NPS	**73**	**62**	**57**	**30**

The four main operators do not differ much as regards average satisfaction ratings for the different aspects. As for customer satisfaction, Plus scored the lowest average in every analysed aspect. On the other hand, customers of Orange and T-Mobile show the highest level of satisfaction.

Orange scored best as regards Net Promoter Score (NPS), with 73 points. Here, Plus received the worst rating (30 points).

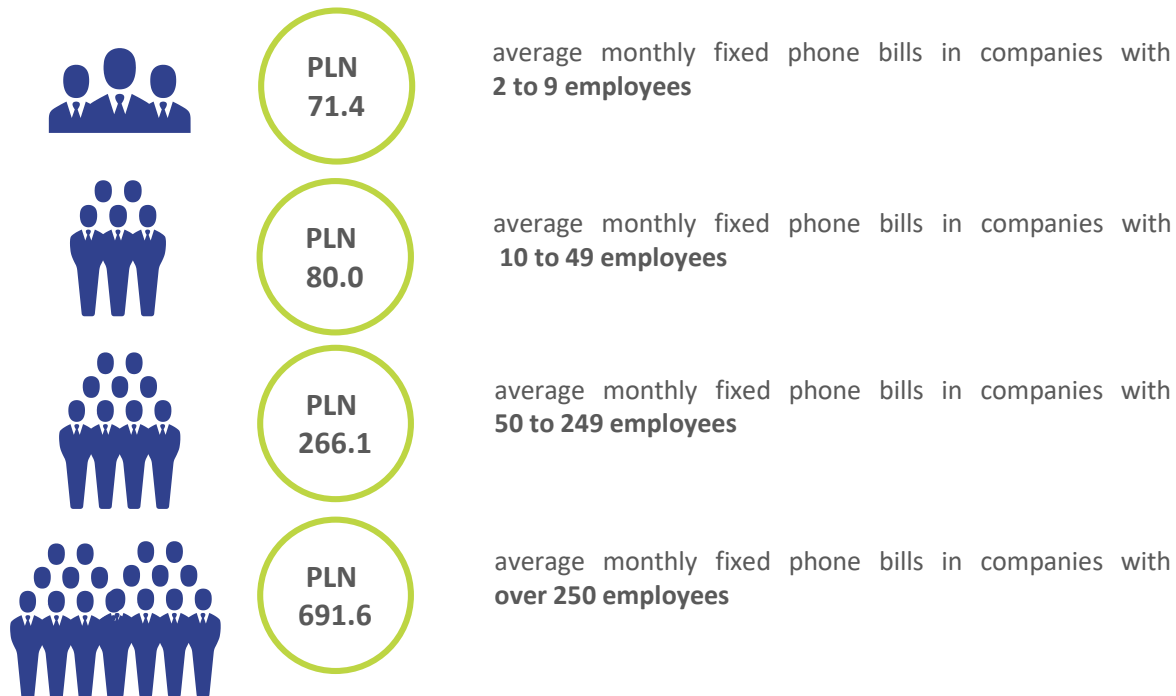Reference group: Service users of the different operators

Fixed telephony

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Motivation

Why does your company use fixed telephony?

Reason	%
Fixed-line number increases the company's credibility	53,5%
Out of habit	47,8%
It facilitates the functioning of the company	45,1%
Fixed-line phone provided in a bundle with another service	30,0%
Fixed telephony allows us to use internal telephone network	12,3%
The company needs a phone and we don't have company mobile phones	10,1%
Fixed-line phones are cheaper than mobile phones	8,2%
Fixed-line phones provide better quality of connection than mobile phones	1,3%
Other	1,4%
Don't know, difficult to say	0,0%

Half of the corporate users of fixed-line telephony indicate that having a fixed-line number increases the company's credibility (53.5%). 47.8% say they choose the service largely out of habit, while only slightly fewer respondents (45.1%) declare that it facilitates the functioning of the company. Respondents quite often indicated that they received a fixed-line phone in a bundle with another service (30.0%). By contrast, the possibility of using internal telephone network, not having mobile phones or lower cost of fixed-line phones than mobile phones were all much less frequently indicated.

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Cost of fixed telephony

How much are your company's total fixed-line hone bills from your service operator?

PLN 71.4 — average monthly fixed phone bills in companies with **2 to 9 employees**

PLN 80.0 — average monthly fixed phone bills in companies with **10 to 49 employees**

PLN 266.1 — average monthly fixed phone bills in companies with **50 to 249 employees**

PLN 691.6 — average monthly fixed phone bills in companies with **over 250 employees**

Use of fixed telephony

Which of the following phone services does your company use?

35.8% of companies use fixed telephony
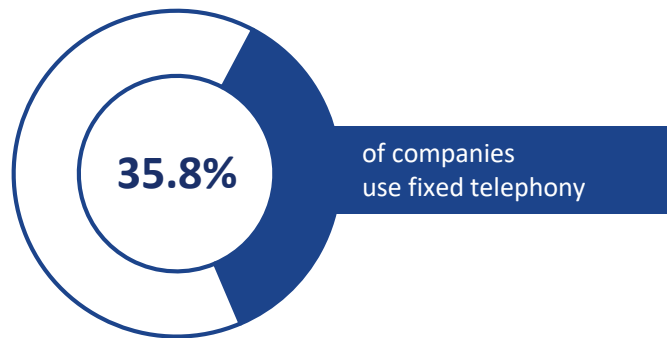
51.4% of corporate users of fixed telephony indicated that they would not quit using these services in favour of
mobile telephony. 4% of companies do not know
what might convince them to give up
fixed-line phone services. By contrast, almost 34% of the companies surveyed indicate that they would be willing to stop using
fixed telephony if the prices went up;
14.6% –
if such services did not include free bundles
and unlimited minutes; and 10.3% – if there was a more attractive mobile telephony service plan available.

Giving up fixed telephony services

What would convince you to quit using
fixed telephony services in favour of mobile telephony?
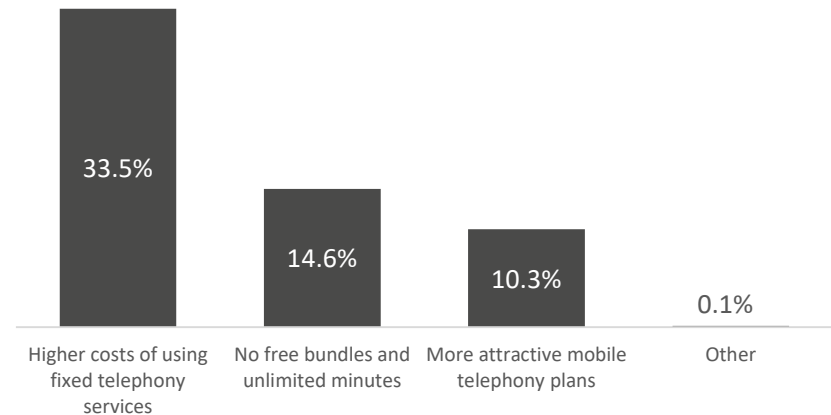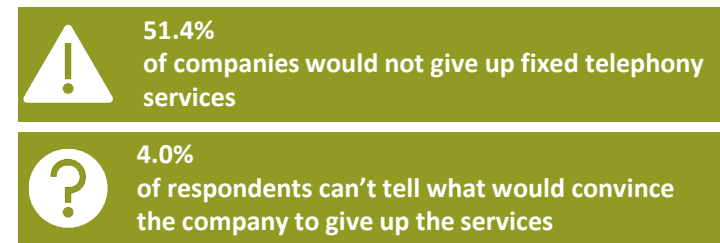
⚠️ **51.4%**
of companies would not give up fixed telephony services

❓ **4.0%**
of respondents can't tell what would convince the company to give up the services

33.5%	14.6%	10.3%	0.1%
Higher costs of using fixed telephony services	No free bundles and unlimited minutes	More attractive mobile telephony plans	Other

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Mobile phone operators

What is your fixed-line phone operator?

Operator	Percentage
Orange	71,1%
Netia	7,9%
T-Mobile	6,3%
Play	3,8%
Vectra	3,2%
UPC	1,9%
Other	1,7%
Multimedia	1,5%
difficult to say	1,5%
Plus	0,9%
Dialog	0,2%
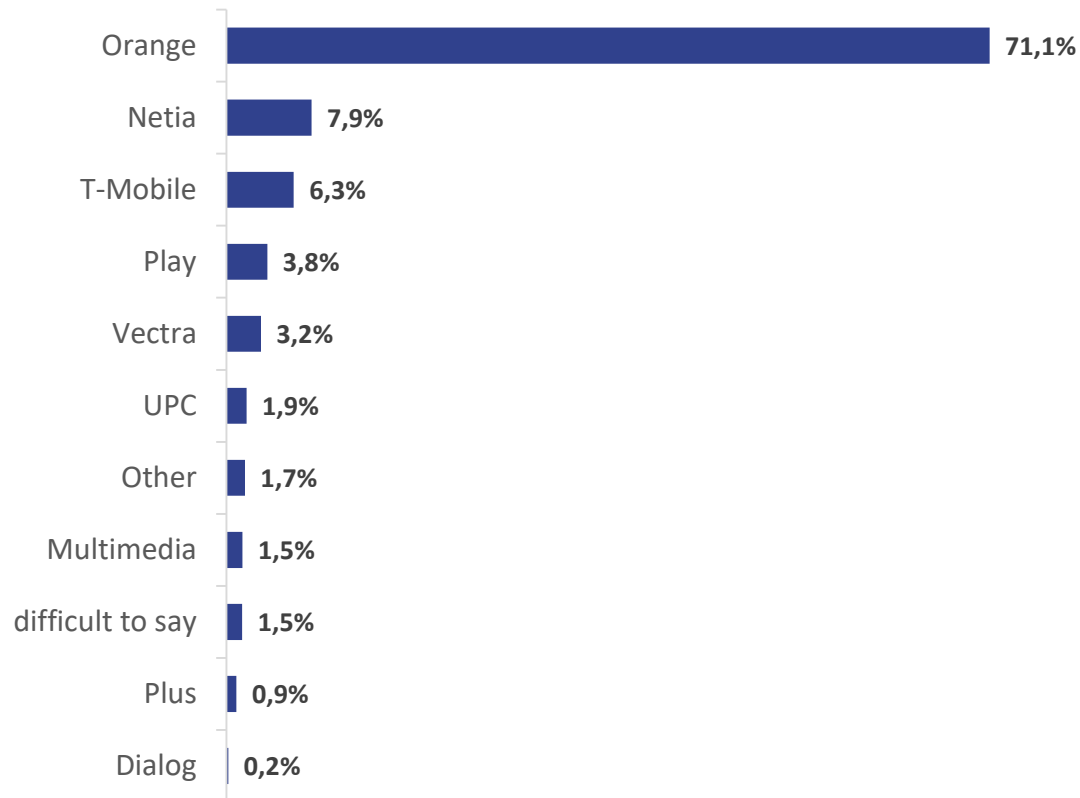
Corporate users of fixed telephony usually declare that they use Orange services (71.1%).

Reference group: Corporate users of fixed telephony, N=137

Orange

NPS

How likely is it that you would recommend this operator to other companies? Use the scale of 0 to 10.

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:

2.4% **24.1%**   **73.5%**
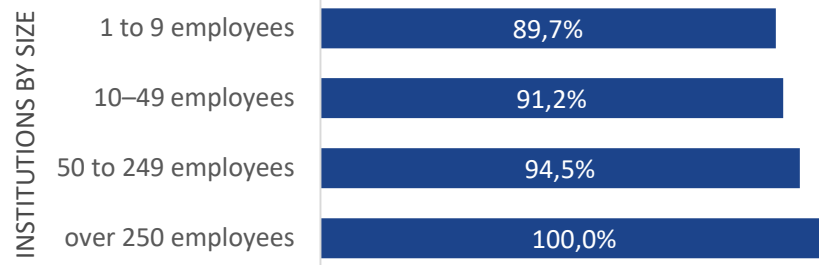
NPS
73.5% − 2.4% =   **71.1%**
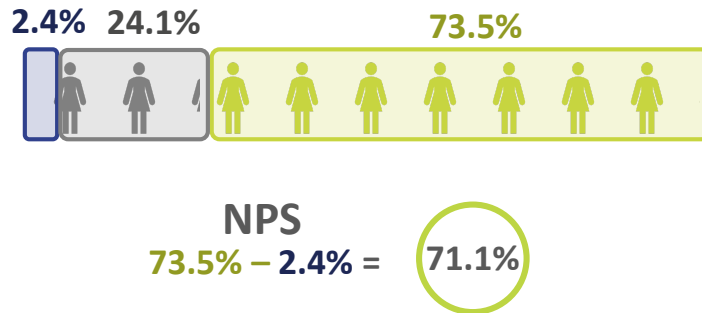
Corporate users of fixed telephony delivered by Orange usually declare that they are satisfied with this operator as regards such aspects as customer service quality (97%), meeting the needs (99.8%), service quality, meaning quality of connections, reliability, accessibility (88.8%)
as well as pricing and prices of services (92.7%). Orange scored 71.1% in NPS.

customer service quality	0,1% 2,8%	57,3%	39,7%
		97.0%	
meeting the needs	0,2%	63,1%	36,7%
		99.8%	
service quality meaning quality of connections, reliability, accessibility	1,9% 9,4%	43,2%	45,5%
		88.7%	
pricing, prices of services	0,1% 7,2%	62,5%	30,2%
		92.7%	

■ Very dissatisfied
■ Rather dissatisfied
■ Neither satisfied nor dissatisfied
■ Rather satisfied
■ Very satisfied
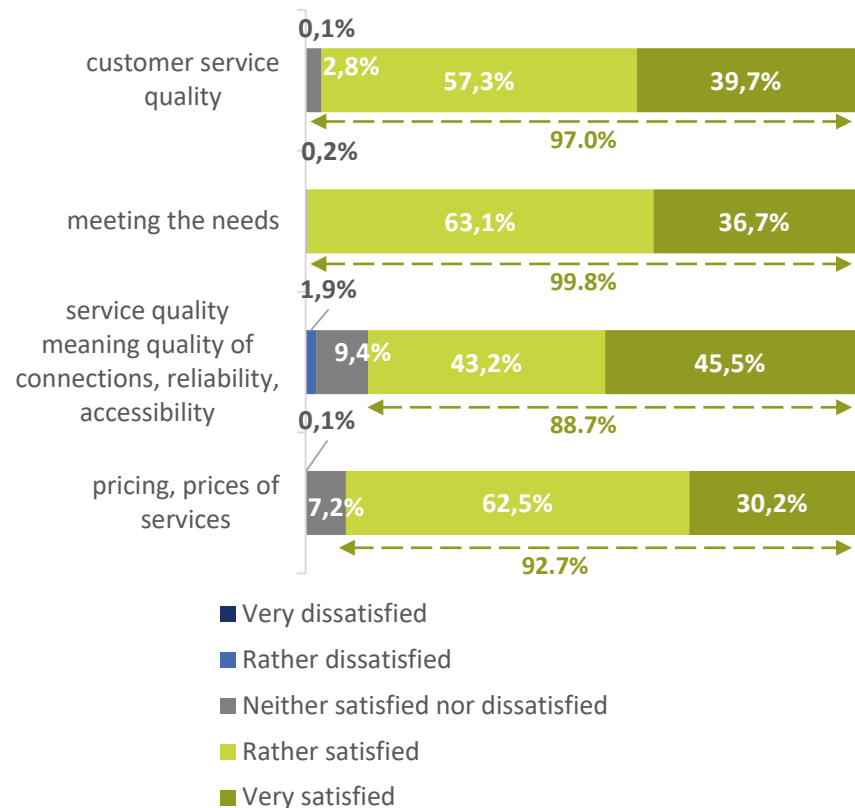
Net Promoter Score (NSP) indicator
General operator evaluation

How likely is it that you would recommend your fixed phone operator to your family or friends?

Detractors (0–6)	Passives (7–8)	Promoters (9–10)
3.5%	**23.9%**	**72.6%**

% promoters - % detractors =

NPS*
69.1%

The NPS for the whole mobile telephony market is 69.1%. The share of detractors, who are reluctant to recommend their operator, is small, i.e. 3.5%. A vast majority would recommend the services of their provider to family or friends (72.6%), while almost 24% may be considered 'passive'.

*more about NSP can be found in the Note on the methodology.

Reference group: Corporate users of fixed-line phones, N=138 (excluding answers 'Don't know, difficult to say')

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Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with the provider's services, taking into account:

TOTAL

Pricing / prices of services	0,1% 5,4% — 59,7% — 34,8%	94.5%
Service quality, meaning quality of connections, reliability	1,7% 6,8% — 48,4% — 43,1%	91.5%
Meeting the needs	0,0% 0,3% — 63,3% — 36,4%	99.7%
Customer service quality	0,2% 5,4% — 57,3% — 37,1%	94.4%

■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied
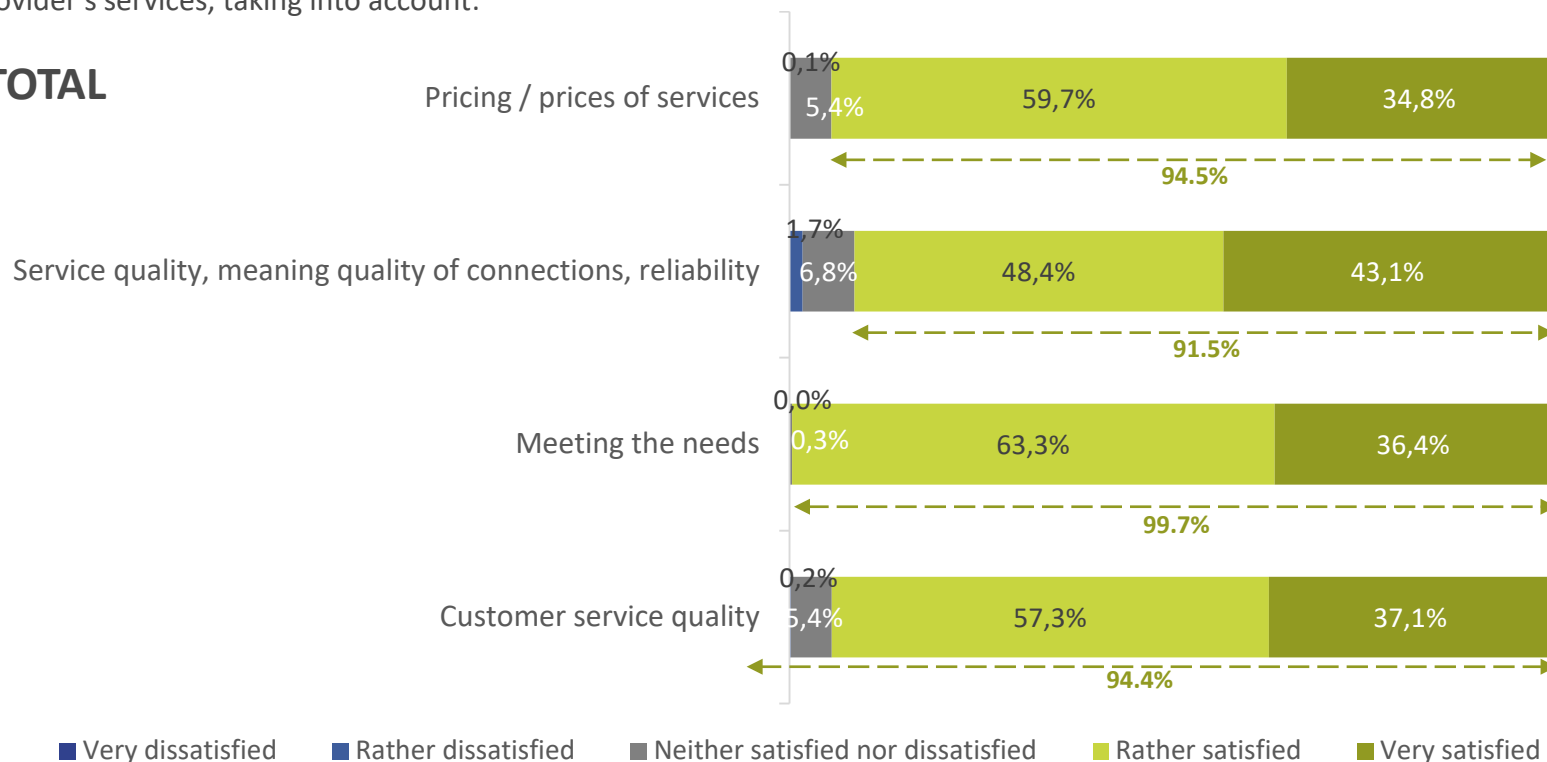
Corporate users of mobile telephony highly rate their service providers in every aspect surveyed. Meeting the needs scored the highest (99.7%). Similar rating was also given to customer service quality (94.4%), price (94.5%) and service quality (91.5%).

Reference group: Corporate users of fixed-line phones, N=138 (excluding answers 'Don't know, difficult to say')

Internet access

UKE

Internet access

Does your company have internet access?

89.8% of companies have internet access

INSTITUTIONS BY SIZE

1 to 9 employees	89,7%
10–49 employees	91,2%
50 to 249 employees	94,5%
over 250 employees	100,0%

9 in 10 companies have internet access. Most of them (67.8%) access the mobile internet via phone. More than half indicate fixed-line access. Nearly 3 in 10 entities indicated mobile internet.

The bigger the institution, the larger the share of companies with internet access.

Type of access

What type of internet access do you have?
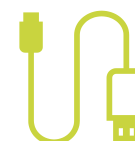
Fixed-line internet
52.1%

Mobile internet
28.4%

Mobile internet on the phone
67.8%

Other
0.3%

UKE

Use of internet

What does your company use the internet for?

Access to necessary information	78,7%
Using news sites	68,7%
Communication with customers	68,5%
Attracting new customers / advertising	61,2%
Internal communication	59,5%
Other	2,1%
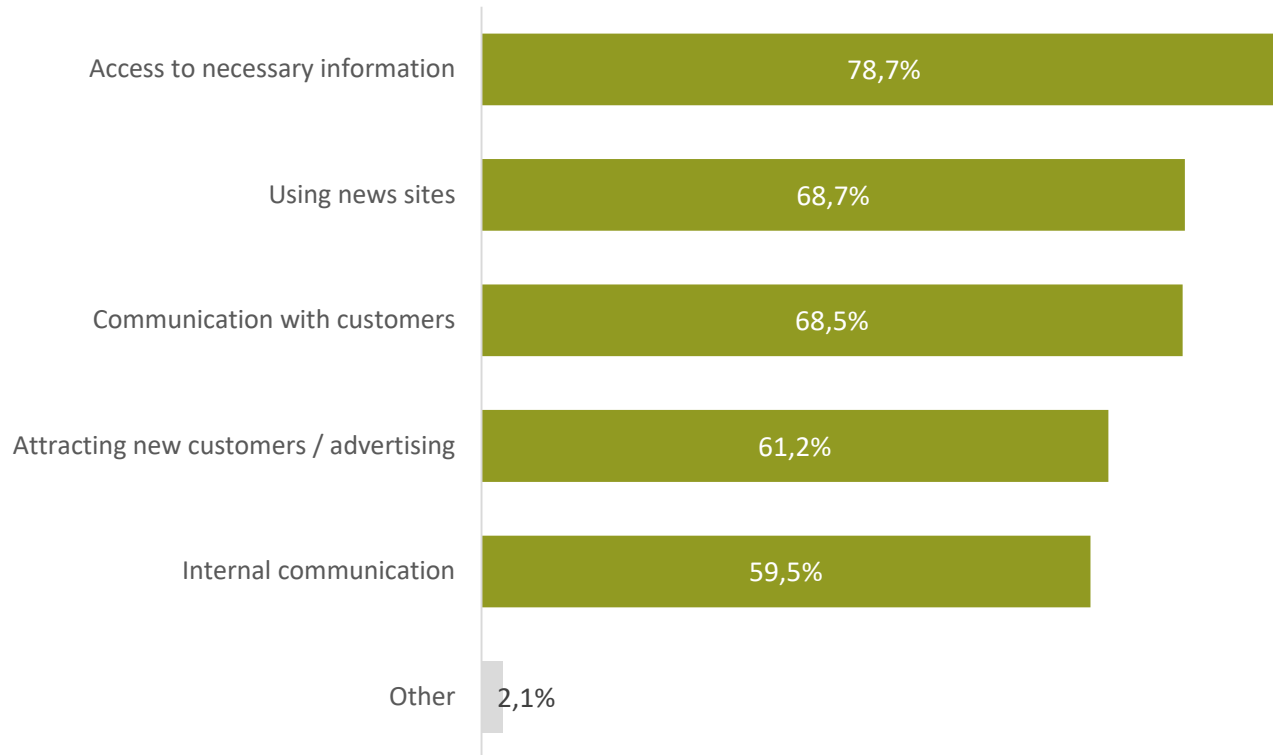
Most companies with internet access use it to access necessary information (78.7%).
2 in 3 companies declare using news sites, and also 2 in 3 use the internet to communicate with their customers. Slightly fewer respondents use the internet to attract new customers (61.2%) and/or communicate internally (59.5%).

Reference group: Companies with internet access, N=361

Relevance of using the internet

How relevant is the internet to the functioning of your company?

| 30,1% | 40,8% | 24,0% | 0,1% 5,0% |

■ Key to the main business

■ Important but ancillary to the main business

■ Useful but not directly relevant to the business

■ Marginally relevant

■ Not relevant at all to the business
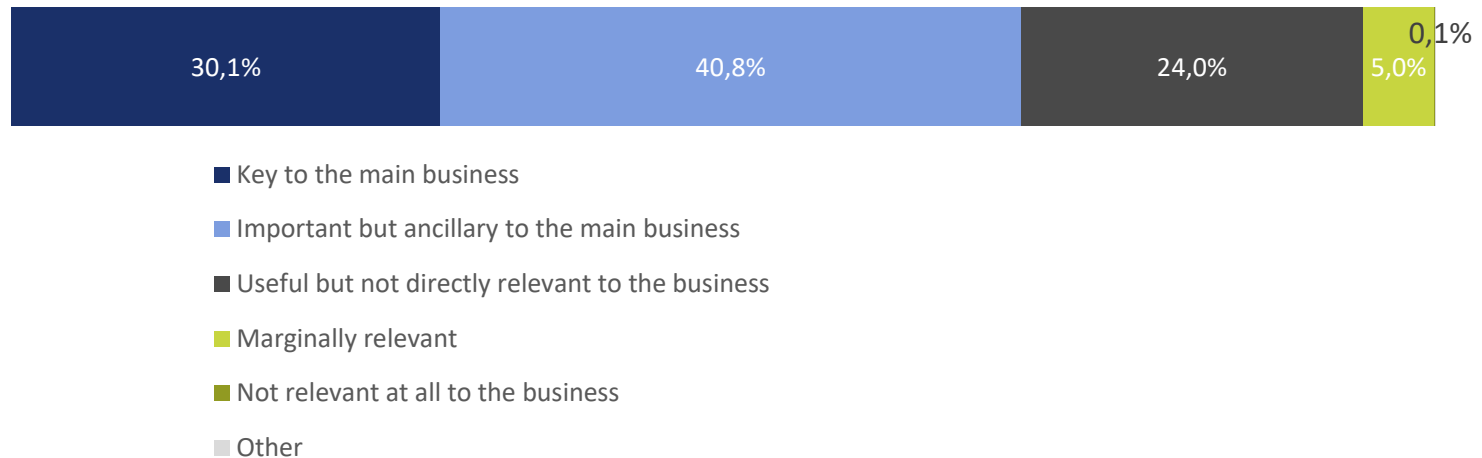
■ Other

4 in 10 respondents with internet access highlight that the internet is important but rather ancillary to the main business. Meanwhile, 3 in 10 indicated that it is key to the main business. 24% of the companies surveyed indicated that while the internet may be useful, it is not directly
relevant to the business. 5% of respondents believe using the internet is of marginal relevance to the business.

UKE

Access cost

Do you agree that the cost of accessing the following services is a considerable burden for the company, considering other monthly operating costs?

- ■ Strongly agree
- ■ Probably agree
- ■ No opinion
- ■ Rather disagree
- ■ Strongly disagree
- ■ Don't know, difficult to say

MOBILE PHONE
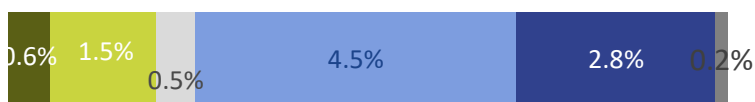
| 0.6% | 1.5% | 0.5% | 4.5% | 2.8% | 0.2% |

72.4%

Reference group: Corporate users of mobile phones, N=391

FIXED-LINE PHONE

| 2,5% | 10,3% | 4,9% | 42,1% | 40,1% |

82.2%
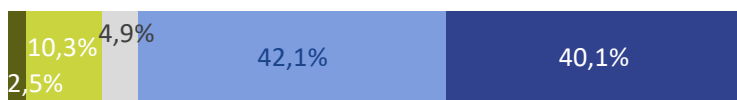
Reference group: Corporate users of fixed-line phones, N=143

INTERNET

| 7,7% | 12,3% | 3,6% | 44,5% | 31,9% |

76.4%
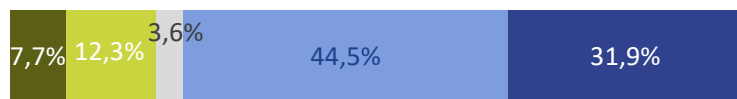
Reference group: Corporate users of the internet, N=336

PAY CABLE OR SATELLITE TV

| 9,2% | 11,6% | 66,3% | 12,9% |

79.2%
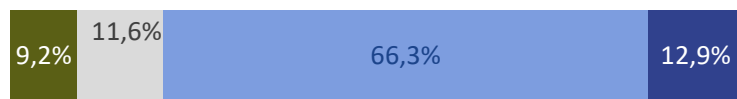
Reference group: Corporate users of pay cable or satellite TV, N=15

Corporate users of the different services usually believe that the corresponding access costs are not a considerable burden, considering other monthly operating costs.

Mobile phones
and the internet impose the largest burden. Every fifth corporate user admits that these costs are quite burdensome.
For fixed-line phones this share is 12.8% and 9.2% for pay TV.

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Bundle purchase

Would you be willing to purchase a bundle including fixed-line phone and basic internet services if the price was affordable?
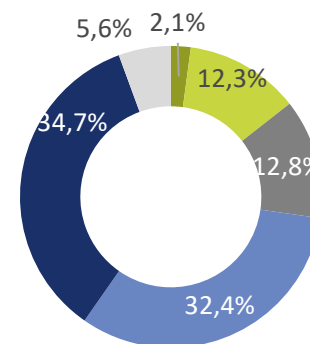
4,9%
5,9%
26,1%
14,0%
32,7%
16,5%
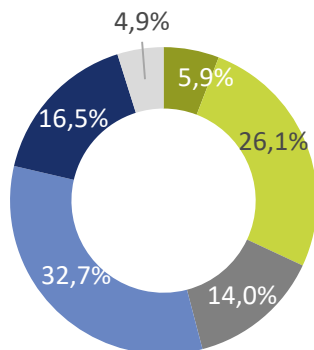
- Yes, definitely
- Yes, probably
- Neither yes nor no
- Probably not
- Definitely not
- Don't know, difficult to say

Nearly one in three companies would be willing to purchase a bundle including fixed-line phone and basic internet services if the price was affordable. By contrast, nearly half declared that they would not be willing to do so.
14.0% of respondents had no opinion in this regard, and 4.9% answered *don't know, difficult to say*.

Giving up the internet

Would you quit using the internet connection service if you retained access to the fixed-line phone
at a lower cost (irrespective of the technology of the two services)?
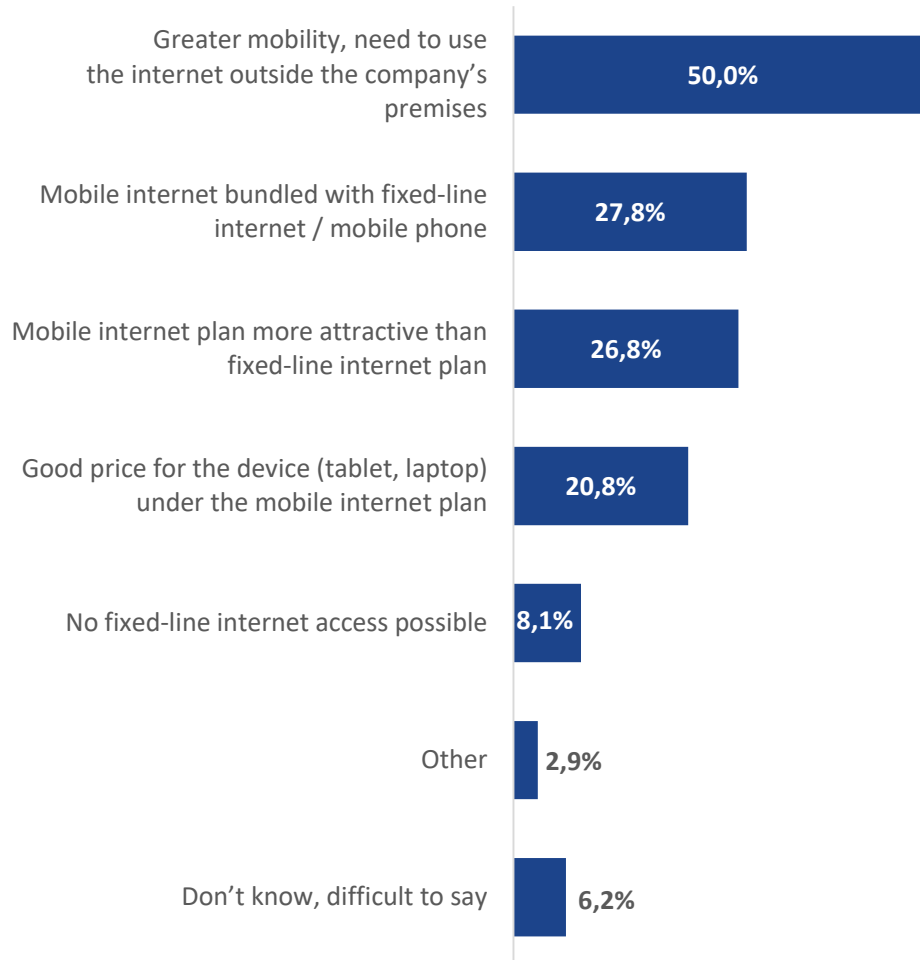
5,6% 2,1%
12,3%
34,7%
12,8%
32,4%

- Yes, definitely
- Yes, probably
- Neither yer nor no
- Probably not
- Definitely not
- Don't know, difficult to say

A vast majority of companies surveyed (67.1%) would not quit using the internet connection service if they retained access to the fixed-line phone at a lower cost. Such a change would be acceptable only for 14.4% of institutions.

UKE

Motivation to use mobile internet

Why has your company decided to use mobile internet?

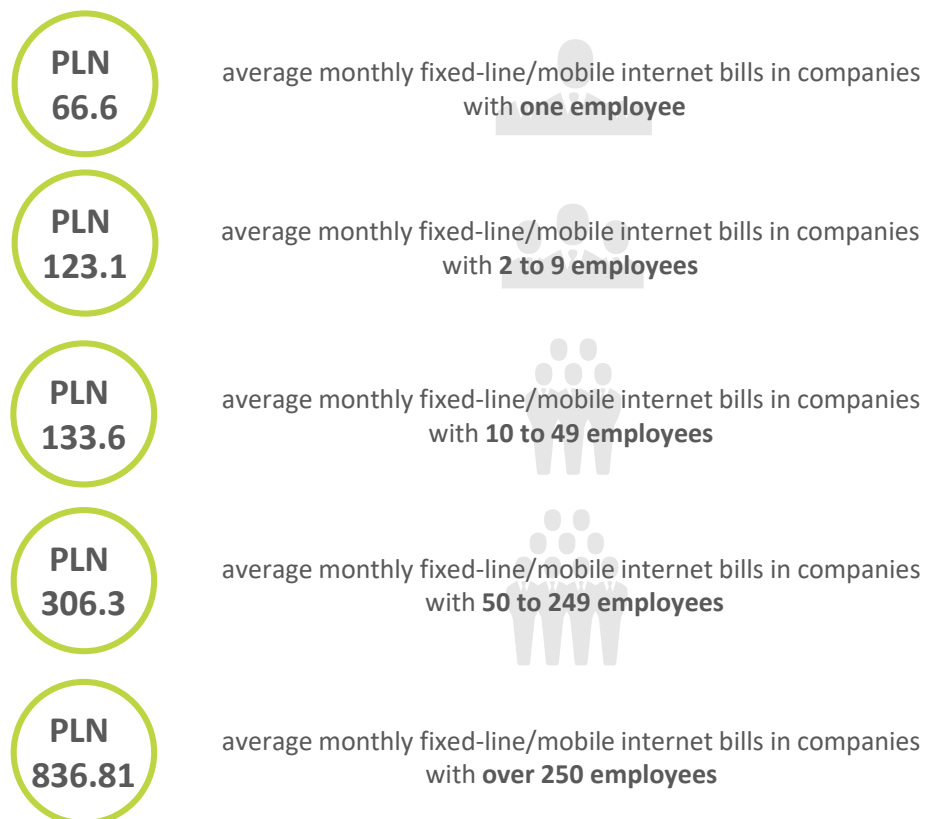| Motivation	Percentage
Greater mobility, need to use the internet outside the company's premises	**50,0%**
Mobile internet bundled with fixed-line internet / mobile phone	**27,8%**
Mobile internet plan more attractive than fixed-line internet plan	**26,8%**
Good price for the device (tablet, laptop) under the mobile internet plan	**20,8%**
No fixed-line internet access possible	**8,1%**
Other	**2,9%**
Don't know, difficult to say	**6,2%**

Half of the companies with access to mobile internet stated that they had chosen this type of connection mainly to gain greater mobility and be able to use the internet outside the company's premises.

27.8% of companies got mobile internet in bundle with fixed-line internet or a mobile phone, while 26.8% stated that they used mobile connection because the mobile internet plan offered was more attractive compared to the fixed-line internet plan.

Every fifth entity indicated that they had chosen mobile internet due to good price of the device (tablet, laptop) under mobile internet plan, while 8.1% did so because it was not possible to get fixed-line internet access.
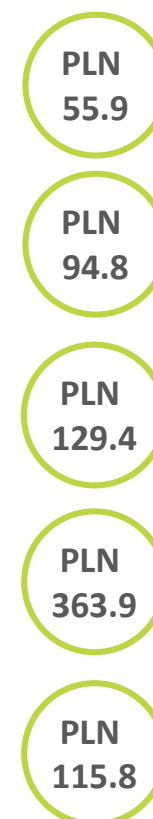
UKE

Cost of using fixed-line internet

Cost of using mobile internet

How much are your company's total monthly fixed-line internet bills?

How much are your company's total monthly mobile internet bills?

PLN 66.6	average monthly fixed-line/mobile internet bills in companies with **one employee**	PLN 55.9
PLN 123.1	average monthly fixed-line/mobile internet bills in companies with **2 to 9 employees**	PLN 94.8
PLN 133.6	average monthly fixed-line/mobile internet bills in companies with **10 to 49 employees**	PLN 129.4
PLN 306.3	average monthly fixed-line/mobile internet bills in companies with **50 to 249 employees**	PLN 363.9
PLN 836.81	average monthly fixed-line/mobile internet bills in companies with **over 250 employees**	PLN 115.8

Reference group: Corporate users of fixed-line internet (excluding answers 'Don't know, difficult to say'), N=173
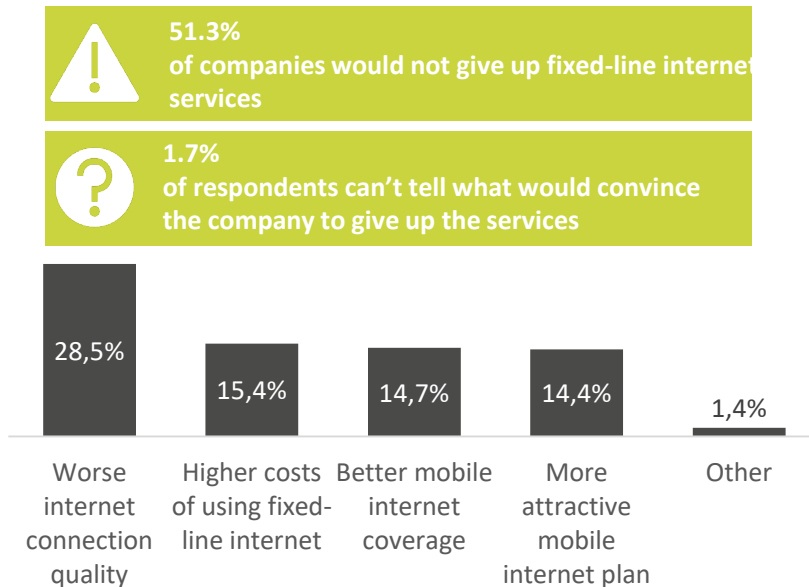
Reference group: Corporate users of mobile internet (excluding answers 'Don't know, difficult to say'), N=142

UKE

Giving up fixed-line internet

What would convince you to quit using
fixed-line internet in favour of mobile internet?

> ⚠ **51.3%**
> **of companies would not give up fixed-line internet services**

> ❓ **1.7%**
> **of respondents can't tell what would convince the company to give up the services**

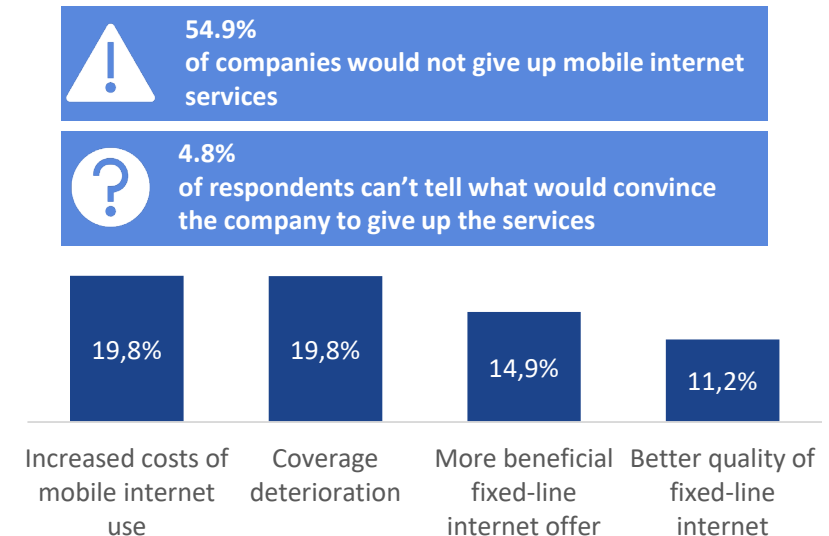| 28,5%	15,4%	14,7%	14,4%	1,4%
Worse internet connection quality	Higher costs of using fixed-line internet	Better mobile internet coverage	More attractive mobile internet plan	Other

More than half of the companies with access to fixed-line internet connection would not quit using fixed-line internet services in favour of mobile internet. By contrast, nearly 3 in 10 respondents would consider switching from fixed-line internet
to mobile internet if the connection quality deteriorated. 15.4% of companies would do so if the costs of fixed-line internet went up, 14.7% – if the mobile internet coverage was better, and 14.4% – if the mobile internet plan was more attractive.

Reference group: Corporate users of fixed-line internet, N=215

Giving up mobile internet

What would convince you to quit using
mobile internet in favour of fixed-line internet?

> ⚠ **54.9%**
> **of companies would not give up mobile internet services**

> ❓ **4.8%**
> **of respondents can't tell what would convince the company to give up the services**

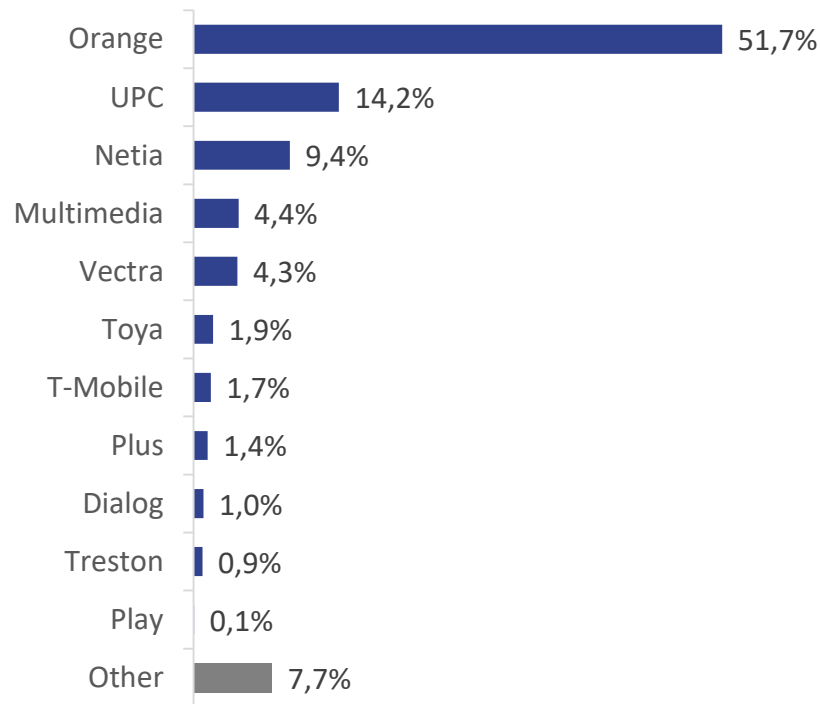| 19,8%	19,8%	14,9%	11,2%
Increased costs of mobile internet use	Coverage deterioration	More beneficial fixed-line internet offer	Better quality of fixed-line internet

More than half of the entities with access to mobile internet service declare that they would not quit using mobile internet services and switch to fixed-line internet. In turn, every fifth company would consider giving up mobile internet and switching to fixed-line internet if the costs of the former went up or its coverage deteriorated. A more attractive fixed-line internet plan would convince 14.9% of companies, and better quality of mobile internet connection – 11.2%.

Reference group: Companies with mobile internet access, N-253

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UKE

Fixed-line internet operators

What is your fixed-line internet operator?

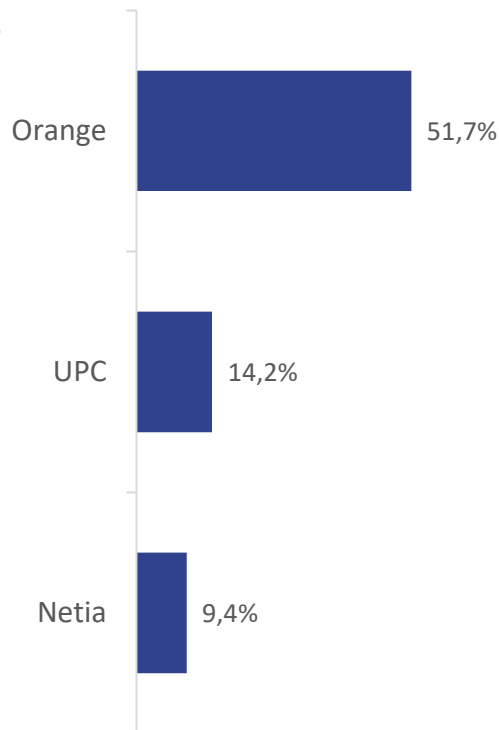| Operator	Percentage
Orange	51,7%
UPC	14,2%
Netia	9,4%
Multimedia	4,4%
Vectra	4,3%
Toya	1,9%
T-Mobile	1,7%
Plus	1,4%
Dialog	1,0%
Treston	0,9%
Play	0,1%
Other	7,7%

Orange is the leading fixed-line internet operator. They provide services to more than half of the companies. Second best is UPC, with a considerably lower score though (14.2%), followed by Netia (9.4%). The other operators are not very popular among institutional customers.
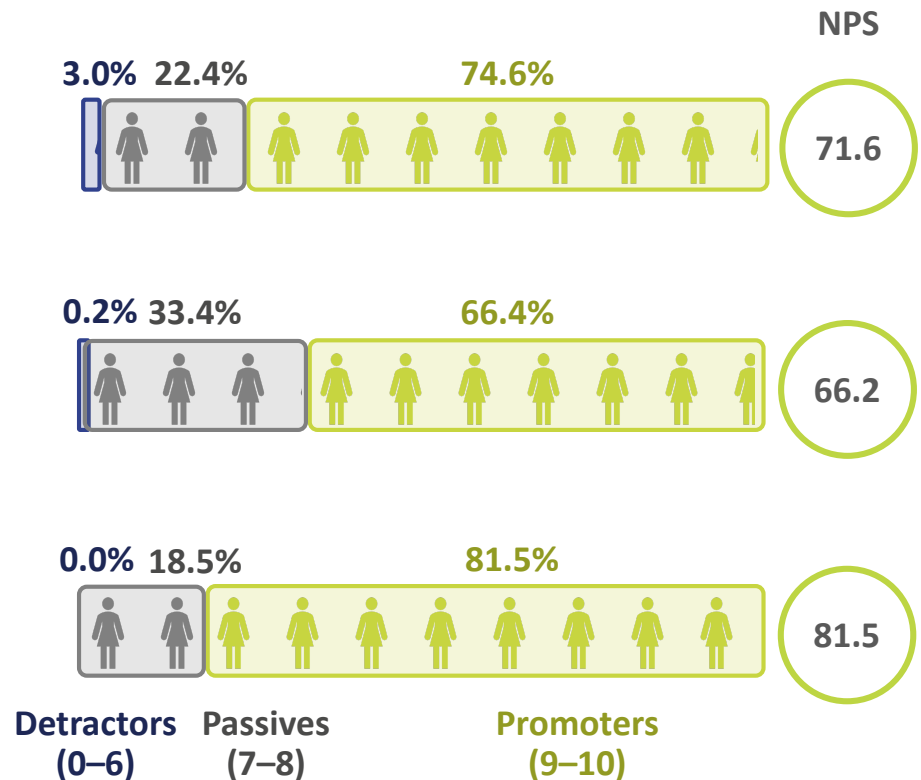
Reference group: Corporate users of fixed-line internet, N=215

Fixed-line internet operators

What is your fixed-line internet operator?

TOP 3

- Orange — 51,7%
- UPC — 14,2%
- Netia — 9,4%

NPS

How likely is it that you would recommend this operator to other companies? Use the scale of 0 to 10.

NPS

Orange: 3.0% Detractors, 22.4% Passives, 74.6% Promoters — NPS **71.6**

UPC: 0.2% Detractors, 33.4% Passives, 66.4% Promoters — NPS **66.2**

Netia: 0.0% Detractors, 18.5% Passives, 81.5% Promoters — NPS **81.5**

Detractors (0–6) | **Passives (7–8)** | **Promoters (9–10)**

In the case of top 3 fixed-line internet operators, promoters are in the majority, i.e. people willing to recommend their operator to other companies (ratings 9 and 10). Their NPS is very high, indicating good service quality. As for NPS, Netia scored best with 81.5. Orange scored 71.6 and UPC – 66.2.

Reference group: Corporate users of the different fixed-line internet operators: Orange - N=119, UPC – N=23, Netia – N=18

UKE

Net Promoter Score (NSP) indicator
General fixed-line internet operator evaluation

How likely is it that you would recommend this operator to other companies? Use the scale of 0 to 10.
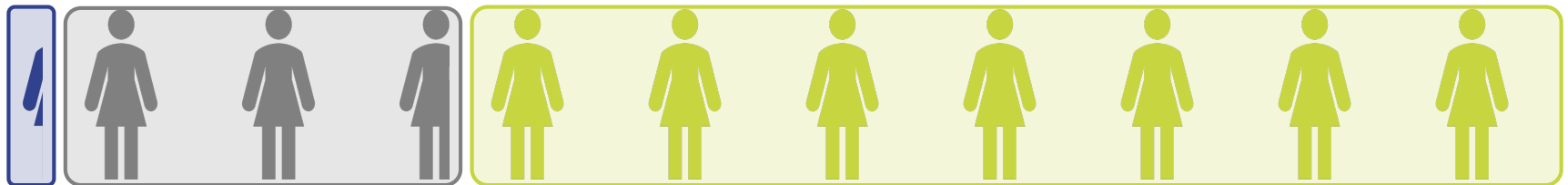
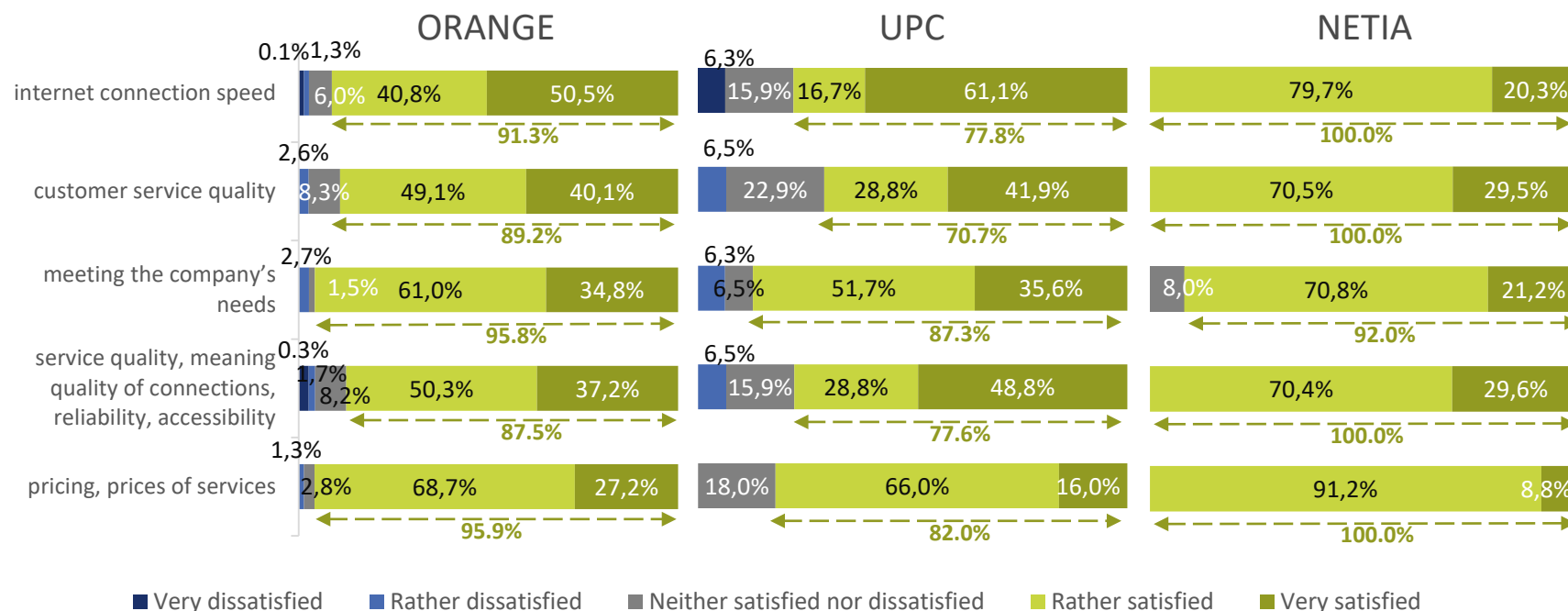| Detractors (0–6)	Passives (7–8)	Promoters (9–10)
3.9%	**25.8%**	**70.2%**

% promoters - % detractors =

NPS*
66.3%

The NPS for the whole fixed-line internet market is 66.3%. The share of detractors, who are reluctant to recommend their operator, is only 3.9%. 7 in 10 companies would recommend their operator, while every fourth organisation surveyed is passive in this regard.

*more about NPS can be found in the Note on the methodology.

Reference group: Corporate users of the different internet service providers, N=204 (excluding answers 'Don't know, difficult to say')

Evaluation of fixed-line internet components

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:

	ORANGE	UPC	NETIA
internet connection speed	0.1% 1,3% 6,0% 40,8% 50,5% — 91.3%	6,3% 15,9% 16,7% 61,1% — 77.8%	79,7% 20,3% — 100.0%
customer service quality	2,6% 8,3% 49,1% 40,1% — 89.2%	6,5% 22,9% 28,8% 41,9% — 70.7%	70,5% 29,5% — 100.0%
meeting the company's needs	2,7% 1,5% 61,0% 34,8% — 95.8%	6,3% 6,5% 51,7% 35,6% — 87.3%	8,0% 70,8% 21,2% — 92.0%
service quality, meaning quality of connections, reliability, accessibility	0.3% 1,7% 8,2% 50,3% 37,2% — 87.5%	6,5% 15,9% 28,8% 48,8% — 77.6%	70,4% 29,6% — 100.0%
pricing, prices of services	1,3% 2,8% 68,7% 27,2% — 95.9%	18,0% 66,0% 16,0% — 82.0%	91,2% 8,8% — 100.0%

■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied
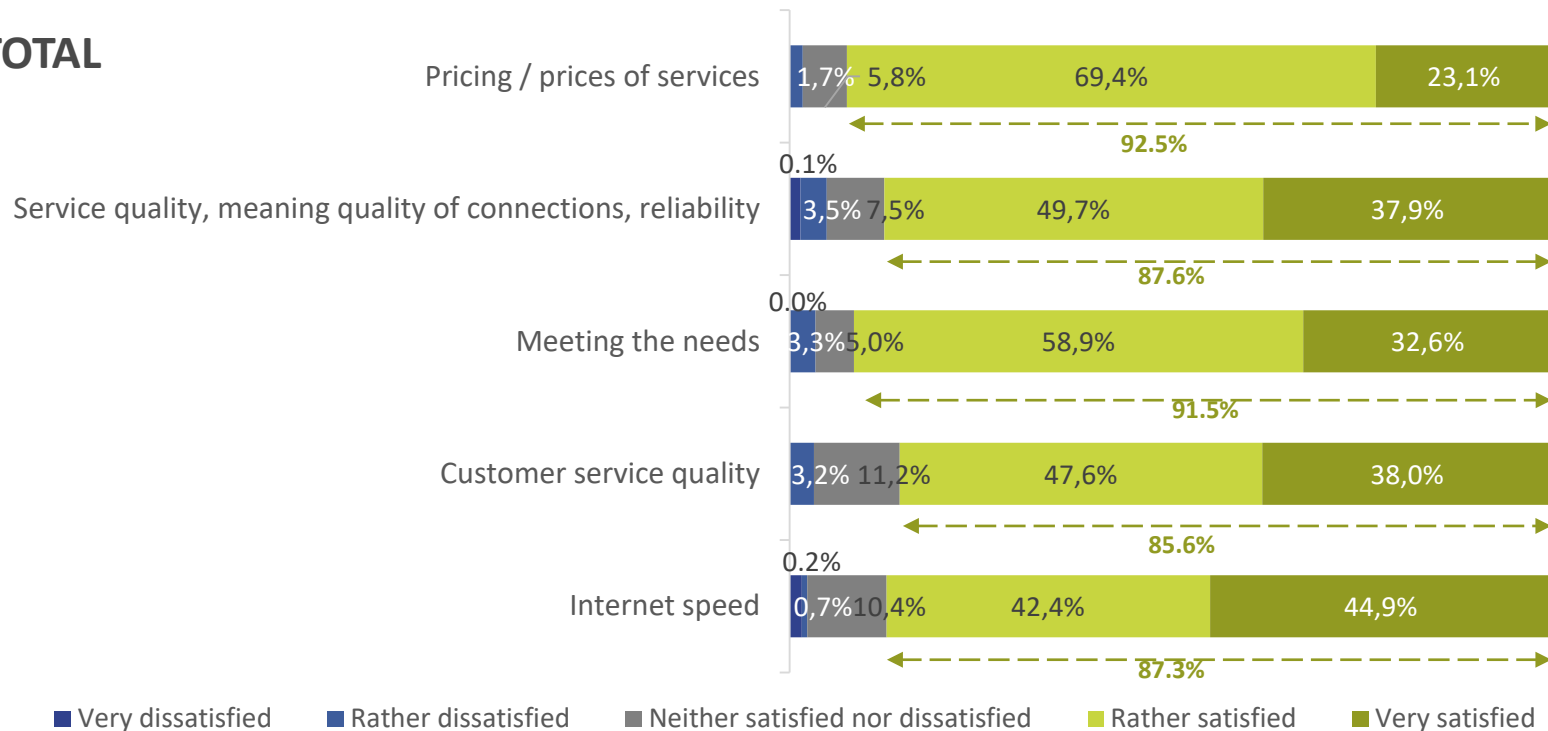
Companies surveyed that use fixed-line internet in their business operations positively rate their operator's services in all the aspects: internet connection speed, customer service quality, meeting the company's needs, service quality and prices of services. The share of dissatisfied companies is low.

Reference group: Corporate users of the different fixed-line internet operators: Orange - N=119, UPC – N=23, Netia – N=18

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Evaluation of fixed-line internet components

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:
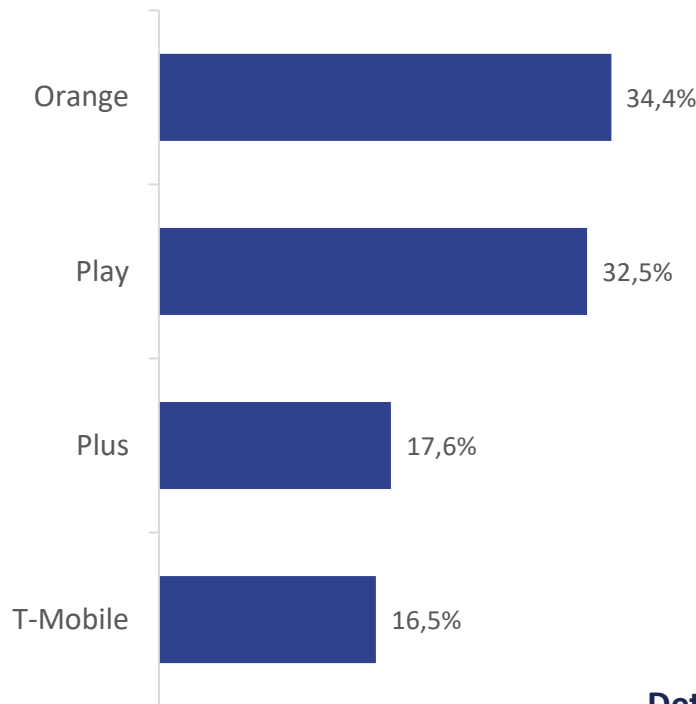
TOTAL

Pricing / prices of services
- 1,7% | 5,8% | 69,4% | 23,1%
- 92.5%

0.1%

Service quality, meaning quality of connections, reliability
- 3,5% | 7,5% | 49,7% | 37,9%
- 87.6%

0.0%

Meeting the needs
- 3,3% | 5,0% | 58,9% | 32,6%
- 91.5%

Customer service quality
- 3,2% | 11,2% | 47,6% | 38,0%
- 85.6%

0.2%

Internet speed
- 0,7% | 10,4% | 42,4% | 44,9%
- 87.3%

■ Very dissatisfied   ■ Rather dissatisfied   ■ Neither satisfied nor dissatisfied   ■ Rather satisfied   ■ Very satisfied

Companies surveyed that use fixed-line internet in their business operations highly rate their operator's services in all the aspects. However, the 'prices of services / pricing' got the most positive rating (92.5%), followed by 'meeting the company's needs' (91.5%). The other aspects also scored high with the share of positive answers above 80%.
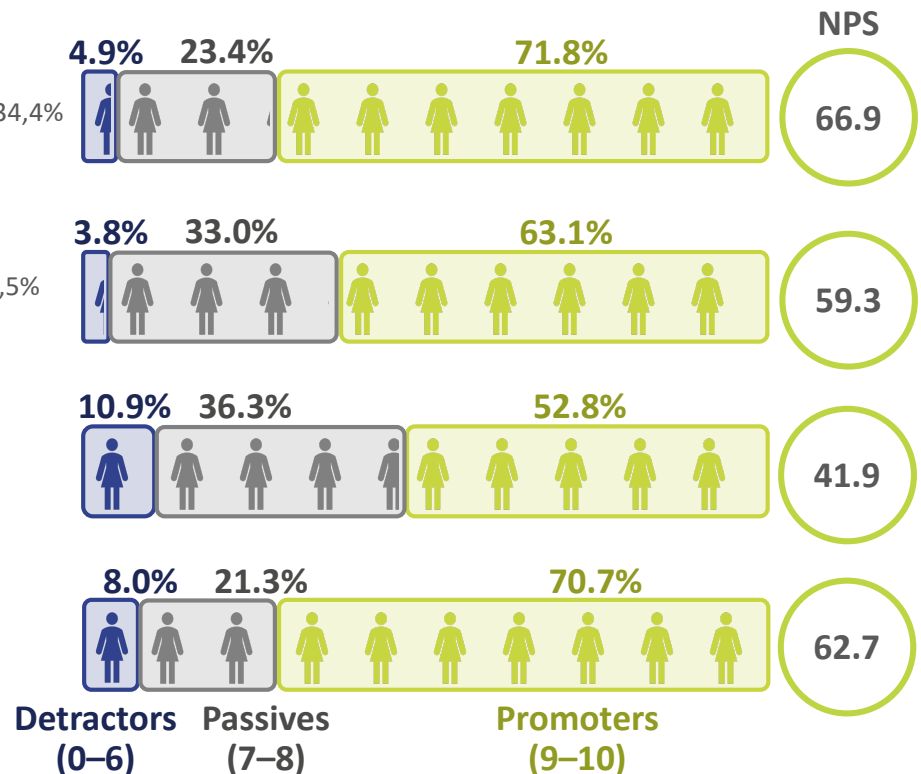
Reference group: Corporate users of the different internet service providers, N=204 (excluding answers 'Don't know, difficult to say')

UKE

Mobile internet operators

What is your mobile internet operator?

Operator	Share
Orange	34,4%
Play	32,5%
Plus	17,6%
T-Mobile	16,5%

NPS

How likely is it that you would recommend this operator to other companies? Use the scale of 0 to 10.

NPS

Orange: 4.9% / 23.4% / 71.8% — NPS 66.9

Play: 3.8% / 33.0% / 63.1% — NPS 59.3

Plus: 10.9% / 36.3% / 52.8% — NPS 41.9

T-Mobile: 8.0% / 21.3% / 70.7% — NPS 62.7

Detractors (0–6)   **Passives (7–8)**   **Promoters (9–10)**

Orange (34.7%) and Play (32.8%) are the two most popular mobile internet operators. The companies surveyed also used services provided by Plus (17.8%) and T-Mobile (16.6%). In the case of each of the operators, promoters are in the majority, i.e. people willing to recommend their operator to other companies (ratings 9 and 10). Their NPS is very high, indicating good service quality. As for NPS, the two top operators are Orange (66.9%) and T-Mobile (62.7%). Play scored 59.3 and Plus – 41.9.

UKE

Net Promoter Score (NSP) indicator
General mobile internet operator evaluation

How likely is it that you would recommend this operator to other companies? Use the scale of 0 to 10.

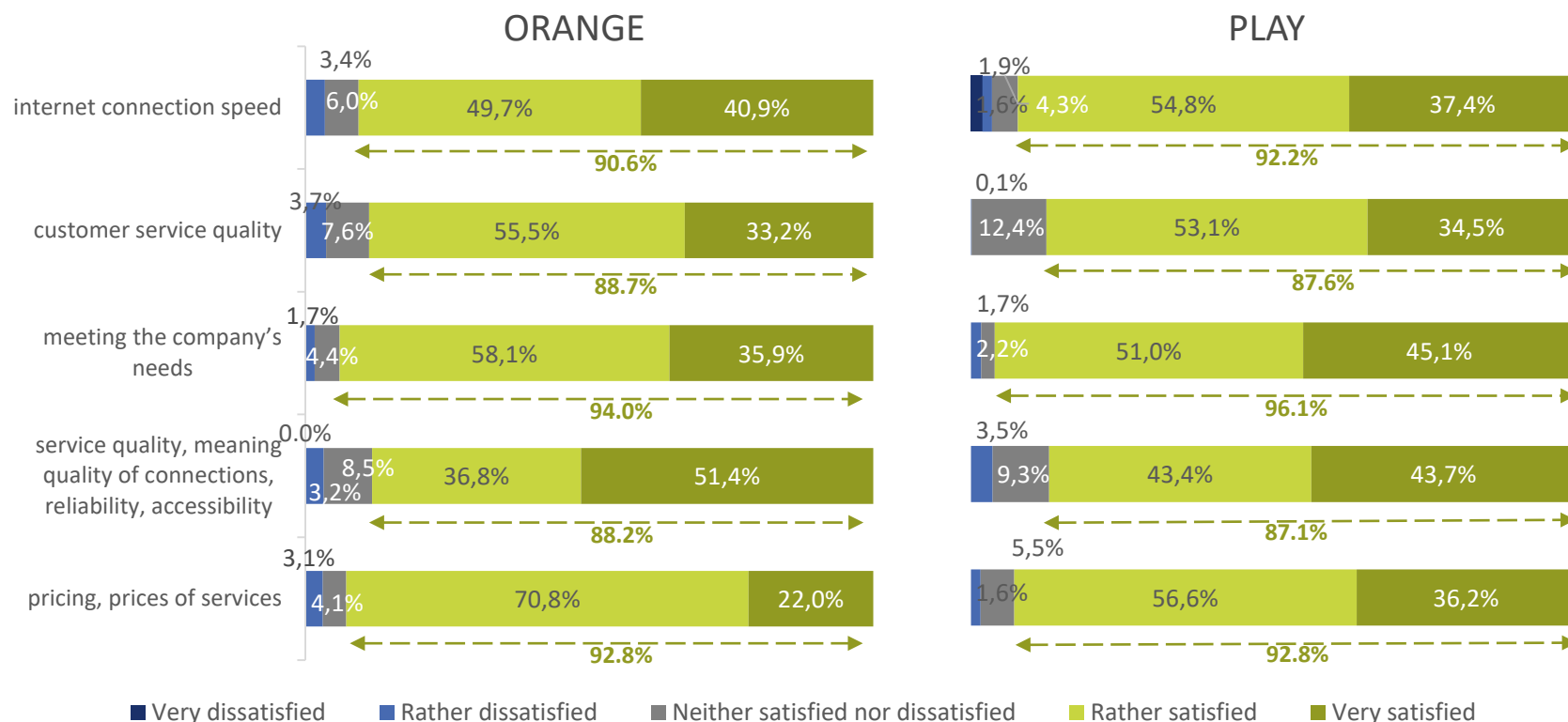| **Detractors (0–6)**	**Passives (7–8)**	**Promoters (9–10)**
5.8%	**28.6%**	**65.6%**

% promoters - % detractors =

NPS*
59.7%

The NPS for the whole mobile internet market is 59.7%. The share of detractors, who are reluctant to recommend their operator, is only 5.8%. 2 in 3 companies would recommend their operators to other companies, while nearly 3 in 10 companies may be considered as 'passive'.

*more about NPS can be found in the Note on the methodology.

UKE

Evaluation of mobile internet components

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:
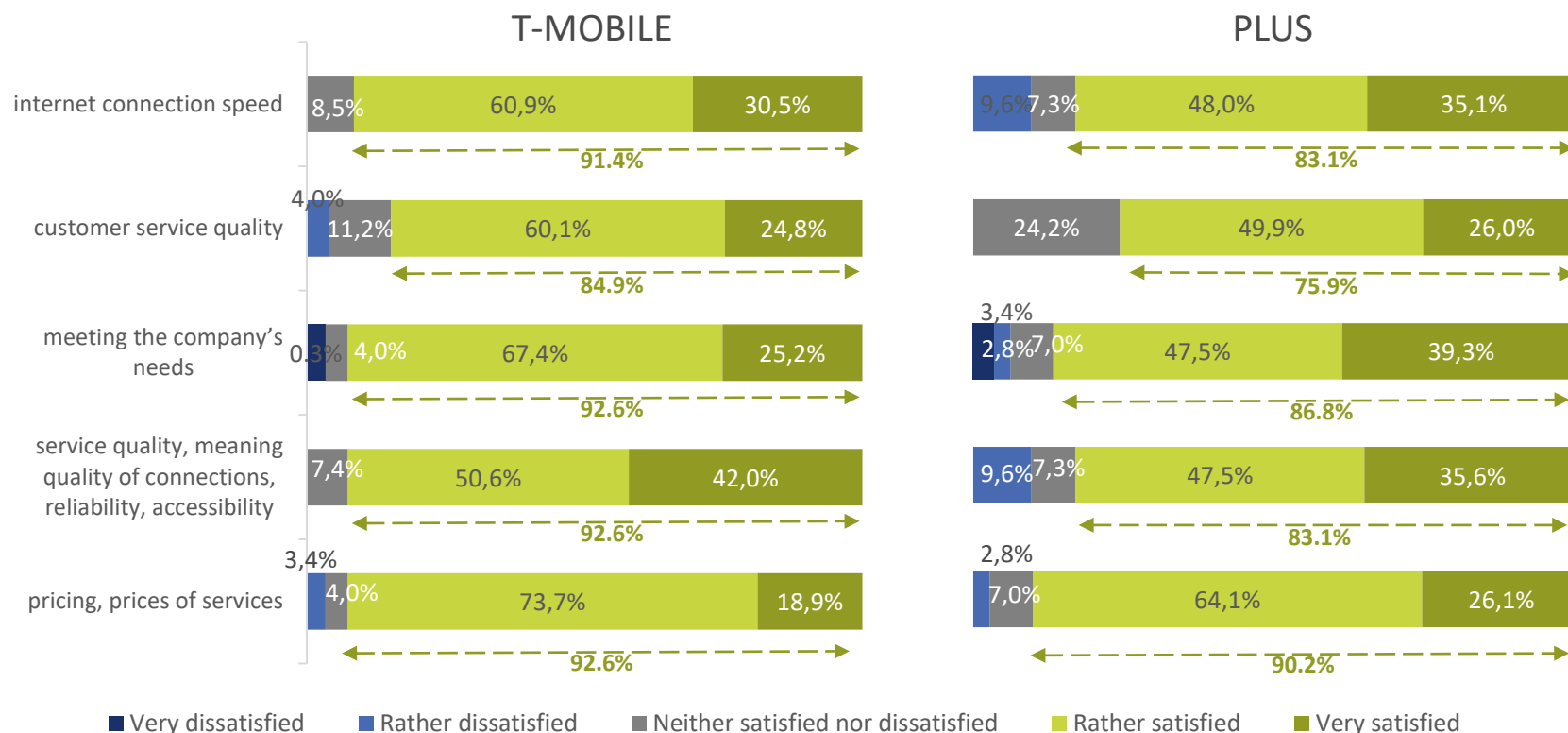

ORANGE / PLAY

	ORANGE				PLAY		
internet connection speed	3,4% / 6,0%	49,7%	40,9%	90.6%	1,9% / 1,6% / 4,3%	54,8%	37,4%	92.2%
customer service quality	3,7% / 7,6%	55,5%	33,2%	88.7%	0,1% / 12,4%	53,1%	34,5%	87.6%
meeting the company's needs	1,7% / 4,4%	58,1%	35,9%	94.0%	1,7% / 2,2%	51,0%	45,1%	96.1%
service quality, meaning quality of connections, reliability, accessibility	0,0% / 3,2% / 8,5%	36,8%	51,4%	88.2%	3,5% / 9,3%	43,4%	43,7%	87.1%
pricing, prices of services	3,1% / 4,1%	70,8%	22,0%	92.8%	5,5% / 1,6%	56,6%	36,2%	92.8%

■ Very dissatisfied ■ Rather dissatisfied ■ Neither satisfied nor dissatisfied ■ Rather satisfied ■ Very satisfied
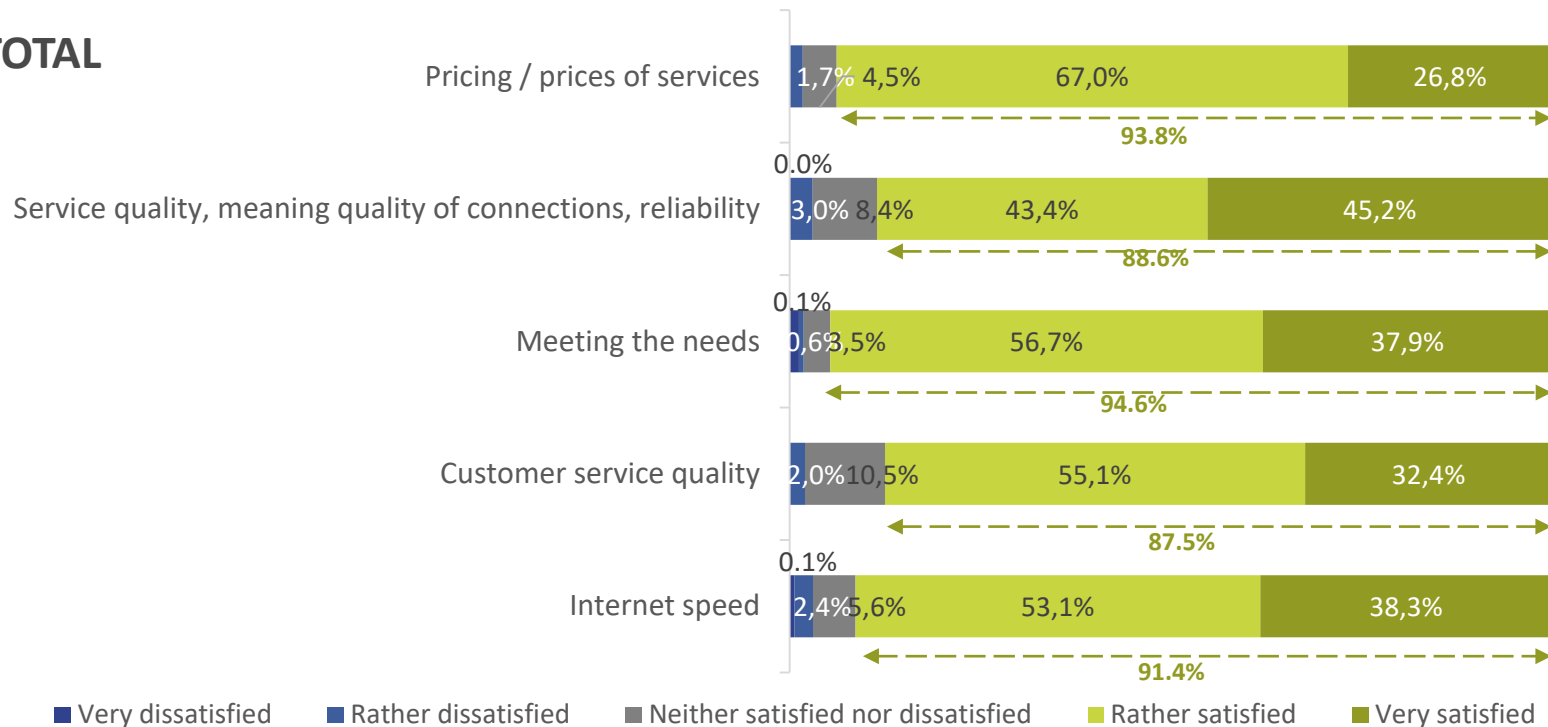
Companies surveyed that use mobile internet in their business operations positively rate their operator's services in all the aspects: internet connection speed, customer service quality, meeting the company's needs, service quality and prices of services. The share of dissatisfied companies is low.

Reference group: Corporate users of the different mobile internet operators: Orange – N=87, Play – N=69

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Evaluation of mobile internet components

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:

Companies surveyed that use mobile internet in their business operations positively rate their operator's services in all the aspects: internet connection speed, customer service quality, meeting the company's needs, service quality and prices of services. The share of dissatisfied companies is low.

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Evaluation of mobile internet components

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied the company is with this provider's services, taking into account the following:

TOTAL

	Very dissatisfied	Rather dissatisfied	Neither satisfied nor dissatisfied	Rather satisfied	Very satisfied	Total
Pricing / prices of services		1,7%	4,5%	67,0%	26,8%	93.8%
Service quality, meaning quality of connections, reliability	0.0%	3,0%	8,4%	43,4%	45,2%	88.6%
Meeting the needs	0.1%	0,6%	3,5%	56,7%	37,9%	94.6%
Customer service quality	2,0%	10,5%		55,1%	32,4%	87.5%
Internet speed	0.1%	2,4%	5,6%	53,1%	38,3%	91.4%

■ Very dissatisfied   ■ Rather dissatisfied   ■ Neither satisfied nor dissatisfied   ■ Rather satisfied   ■ Very satisfied

Companies using mobile internet highly rate the operators' services. The top rated aspects included: 'meeting the company's needs' (94.6%), 'prices of services / pricing' (93.8%) and internet connection speed (91.4%).

Reference group: Corporate users of mobile internet, N=234 (excluding answers 'Don't know, difficult to say')

Over-the-Top (OTT) services

UKE

Use of Over-the-Top services

Does your company use Over-the-Top services?

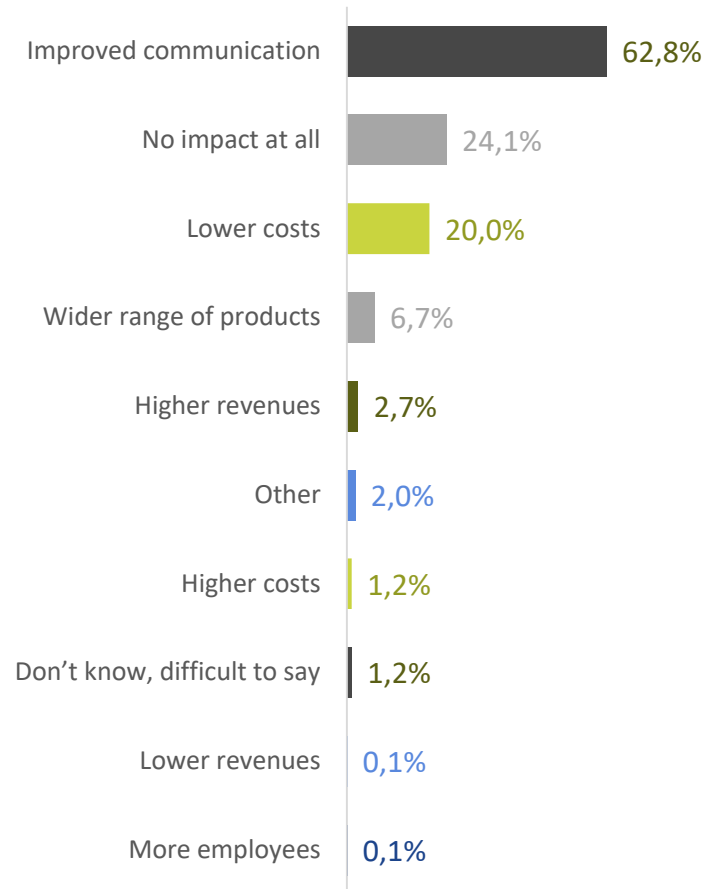**36.1%** of companies use Over-the-Top services

Over-The-Top Service (OTT) is the provision of contents, services
or applications via the internet without direct engagement of network operator or internet service provider.
Examples of OTT services: Skype (voice and video calls), WhatsApp (text massages), Google (search engine) Spotify (music) and Netflix (video content).

36.1% of companies declared using OTT services. 6 in 10 respondents admitted that OTT development had improved communication in the company (62.8%). However, 1 in 4 indicated that OTT services had had
no impact on their company's functioning (24.1%). The most frequent answers also included lower costs (20.0%).
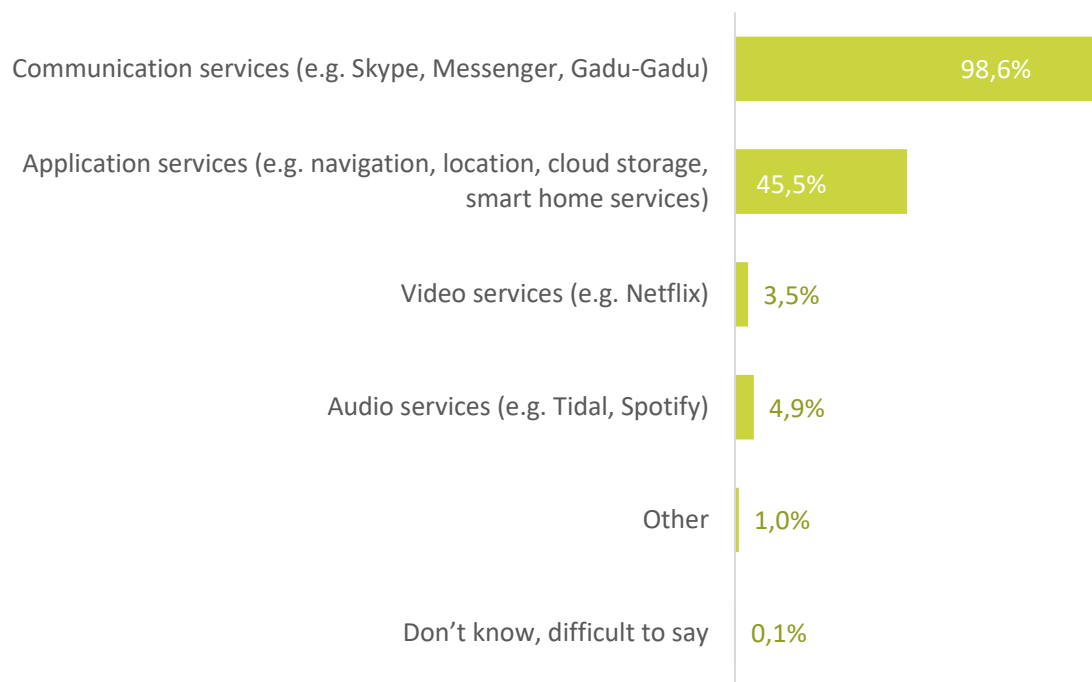
Impact of Over-the-Top services

What is the effect of OTT development on your company?

Improved communication	62,8%
No impact at all	24,1%
Lower costs	20,0%
Wider range of products	6,7%
Higher revenues	2,7%
Other	2,0%
Higher costs	1,2%
Don't know, difficult to say	1,2%
Lower revenues	0,1%
More employees	0,1%

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Use by companies

What kind of Over-the-Top services do you use?

Service	Percentage
Communication services (e.g. Skype, Messenger, Gadu-Gadu)	98,6%
Application services (e.g. navigation, location, cloud storage, smart home services)	45,5%
Video services (e.g. Netflix)	3,5%
Audio services (e.g. Tidal, Spotify)	4,9%
Other	1,0%
Don't know, difficult to say	0,1%

The survey shows that the OTT services most frequently used are the communication services (98.6%). Application services, such as navigation or cloud storage, are also quite popular and were indicated by 45.5% of respondents. Video or audio services are definitely less frequently used.

UKE

Giving up telecommunications services

Will or would your company be willing to give up your current telecommunications services and
switch to OTT solutions?

12,0%	48,1%	18,5%	2,1% 6,9%	12,4%

- ■ Yes, definitely
- ■ Yes, probably
- ■ Neither yes nor no
- ■ Probably not
- ■ Definitely not
- ■ Don't know, difficult to say

More than half of the respondents whose company uses OTT services
would not be willing to switch from telecommunications services to OTT services (60.1%). Only 9% of the respondents would switch from telecommunications services used by the company to OTT solutions.

Nearly 10% of the companies which have not used OTT services so far are considering using OTT services in the future. The respondents indicated that they intend to use mainly communication
and application services. Video and audio services were mentioned less frequently.

Reference group: Respondents who do not use OTT services, N=233

Future use of services

Is your company considering using such services in the future?

9.9% of companies are considering using OTT services in the future

Reference group: Respondents who do not use OTT services, N=233

Which of the services do you intend to use in the future?

71.1% Communication services

27.0% Application services
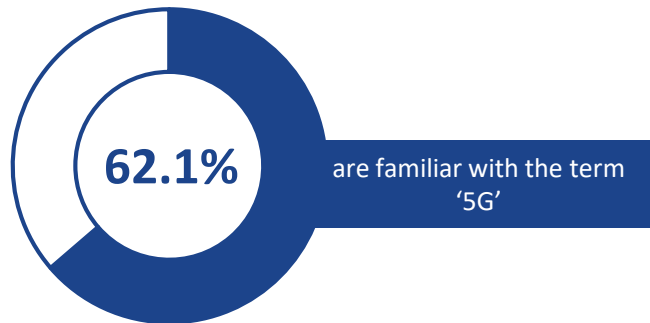
14.0% Video services

7.4% Audio services

Reference group: Respondents who consider using OTT services, N=23

5G

UKE

5G awareness

As a company, have you heard of '5G'?

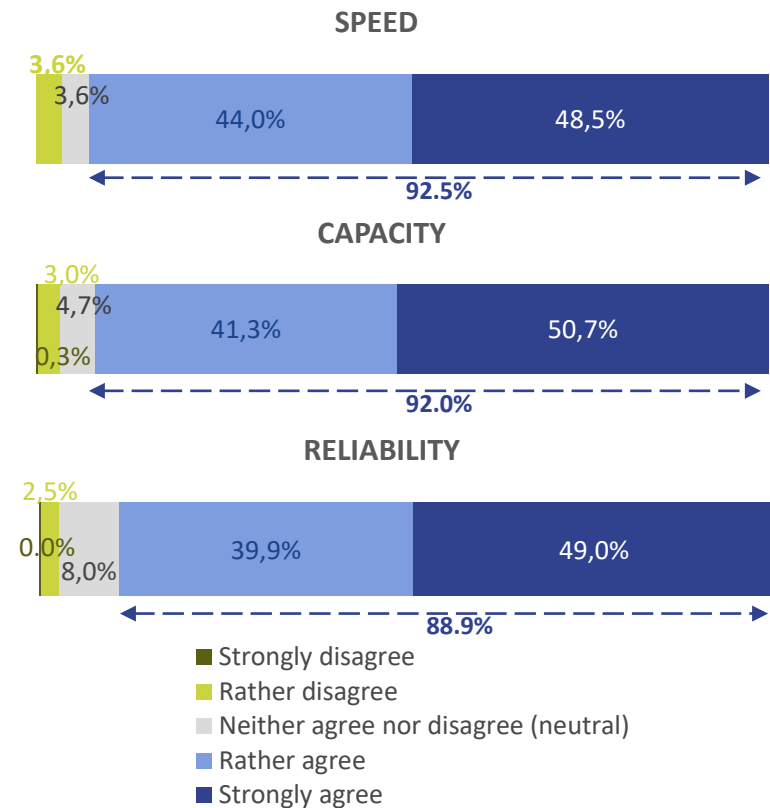**62.1%** are familiar with the term '5G'

More than 60% of the respondents are familiar with the term '5G'.

A vast majority admit that their current internet access parameters are sufficient for their business operations. This is true for such aspects as speed (92.5%), capacity (92%) and reliability (88.9%).

Evaluation of internet access parameters

Do you agree that your current internet access parameters are sufficient for your business operations?

SPEED

3.6% | 3,6% | 44,0% | 48,5%

92.5%

CAPACITY

3.0% | 4,7% | 0,3% | 41,3% | 50,7%

92.0%

RELIABILITY

2.5% | 0.0% | 8,0% | 39,9% | 49,0%

88.9%

■ Strongly disagree
■ Rather disagree
□ Neither agree nor disagree (neutral)
■ Rather agree
■ Strongly agree

Online safety

UKE

Use of safety measures

Privacy

Does your company use online privacy solutions?

73.8% of companies use anti-virus software, anti-spyware, etc.

84.3% of companies use up-to-date software

19.8% The use of online privacy solutions among companies
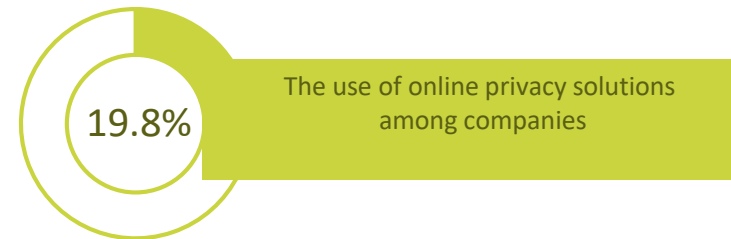
Which online privacy solutions do you use?

VPN	Proxy	Tor	Inne
63,4%	37,3%	7,5%	3,6%

Reference group: Respondents using online privacy solutions, N=92

More than 70% of all the companies surveyed use anti-virus software, spyware, etc., and over 80% declared using up-to-date software. Every fifth company also uses online privacy solutions. Among such solutions, VPN ranks first (63.4%), while proxy is much less common (37.3%). Companies rarely declare using Tor (7.5%).

UKE
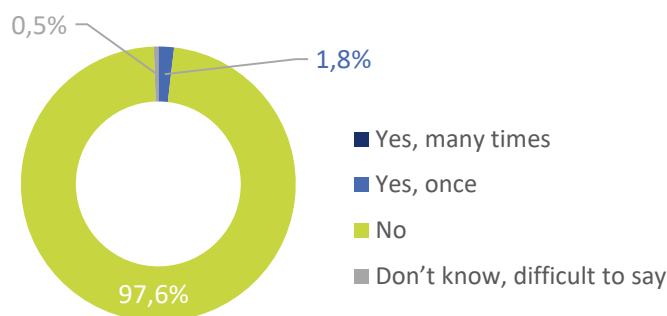
Uploading data

Has your company fallen victim to fraudulent use of the data that the company makes available?

0,5%

1,8%

97,6%

- Yes, many times
- Yes, once
- No
- Don't know, difficult to say

A vast majority of respondents have never fallen victim to any fraudulent use of the data they make available (97.6%).

Over the last year, only 1% experienced a phishing attempt, which was aimed at employees and customers.

Among companies with internet access, almost 16% employ a network protection and data security specialist.

Phishing

Did your company experience phishing attacks used to steal employee or customer personal information over the last year?

1.0%
YES

99.0%
NO

Reference group: Companies with internet access, N=361

PHISHING ATTEMPS WERE AIMED AT EMPLOYEES AND CUSTOMERS
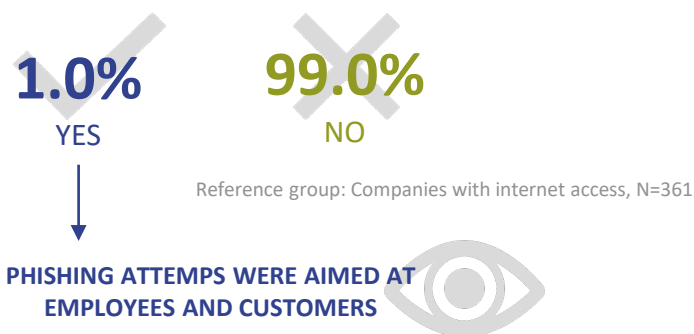
Reference group: Respondents whose companies have fallen victim to phishing attempts, N=8; N too small to present data in %

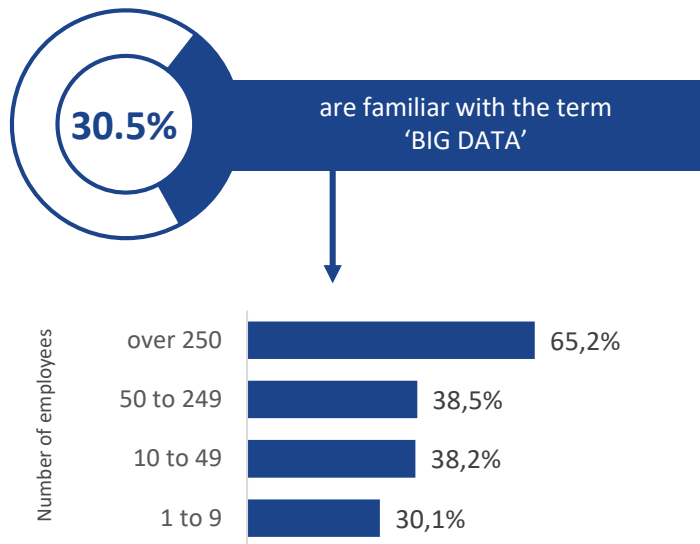Does your company employ a network protection and data security specialist?

15,7%	84,3%

- Yes
- No
- Don't know, difficult to say
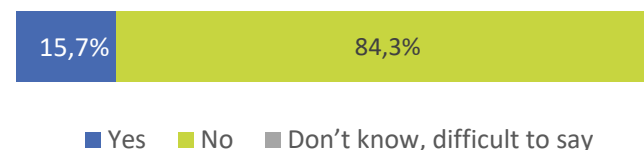
Big Data Processing

Awareness

As a company, have you heard of 'Big Data'?

30.5% are familiar with the term 'BIG DATA'

Number of employees

Number of employees	
over 250	65,2%
50 to 249	38,5%
10 to 49	38,2%
1 to 9	30,1%

Use

Does your company make use of Big Data processing?

11.1% of companies make use of Big Data processing

7.8% Use their own infrastructure

3.3% Use external infrastructure

30% of the respondents are familiar with the term 'Big Data Processing'. The bigger the company, the greater the awareness. More than 11% of all the companies with internet access use
Big Data. However, companies tend to use their own infrastructure rather than external infrastructure.

UKE

Benefits

In what way do you think using Big Data services benefits your company?

67.5% see the benefits of using Big Data by companies

Reference group: All respondents whose company uses Big Data, N=40

77.8%	Data reliability	✓
37.0%	Lower costs	✓
37.0%	In-depth product or service market analysis	✓
33.3%	Higher satisfaction level among end customers – understanding their needs	✓
25.9%	Better corporate management system	✓
18.5%	Precise company's strategy planning	✓

Risks

What do you think are the risks of using Big Data to your company?

7.5% see the risks of using Big Data by companies

Reference group: All respondents whose company uses Big Data, N=40

Among users of Big Data, 7.5% see the corresponding risks. The risks indicated include:

⚠ privacy invasion,

⚠ risk of errors,

⚠ risks of frauds among data holders.

More than 67% of respondents see the benefits of using Big Data by companies. Most common benefits include: data reliability (77.8%), lower costs and in-depth product market analysis (37.0% each) and higher level of satisfaction among end customers (33.3%).

Cloud computing

Awareness

As a company, have you heard of cloud computing?

52.0% — are familiar with the term cloud computing
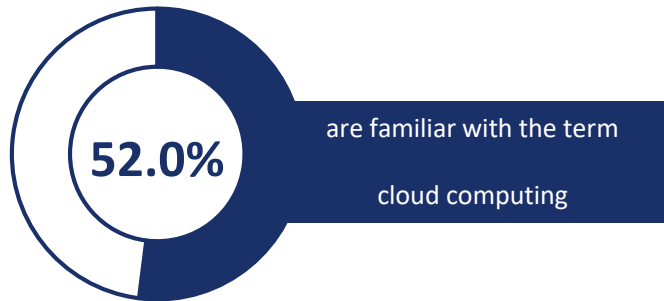
More than half of the respondents (52%) are familiar with the term 'cloud' or 'cloud computing'.

21.6% of the companies using the internet also use cloud computing. Companies slightly more often use external infrastructure rather than their own (10% vs 11.6%).

Use

Does your company make use of cloud computing?

21.6% of companies use cloud computing

10% Use their own infrastructure

11.6% Use external infrastructure

Cloud computing

Benefits

In what way do you think cloud computing benefits your company?

93.7% see the benefits of cloud computing

Reference group: All respondents whose company uses cloud computing, N=79

71.6%	Protection against data loss ✓
52.7%	Cost savings ✓
51.4%	Efficiency and reliability ✓
43.2%	User friendliness ✓
37.8%	Ongoing monitoring of processes ✓

Risks

What do you think are the risks of using a cloud to your company?

20.3% see the risks of cloud computing

Reference group: All respondents whose company uses cloud computing, N=79

⚠ data leakage following a breakdown,

⚠ possible access to data by service owner or third parties,

⚠ uneven access to cloud services depending on the operator,

⚠ data leakage due to hacking,

⚠ risks related to cloud privacy and security due to legal gaps.

Nearly 94% of the respondents can see the benefits of cloud computing. Most commonly indicated benefits include: protection against data loss (71.6%), cost savings (52.7%), and efficiency and reliability (51.4%).

However, every fifth respondent also sees the cloud-related risks. Here, respondents usually indicated the risk of data leakage due to a breakdown, possible access to data or uneven access to cloud services.

Reference group: All respondents who find using the cloud beneficial, N=74

Reference group: All respondents who can see cloud-related risks, N=16

Digital single market

UKE

Sales in foreign markets

Does your company sell goods or services in foreign markets?
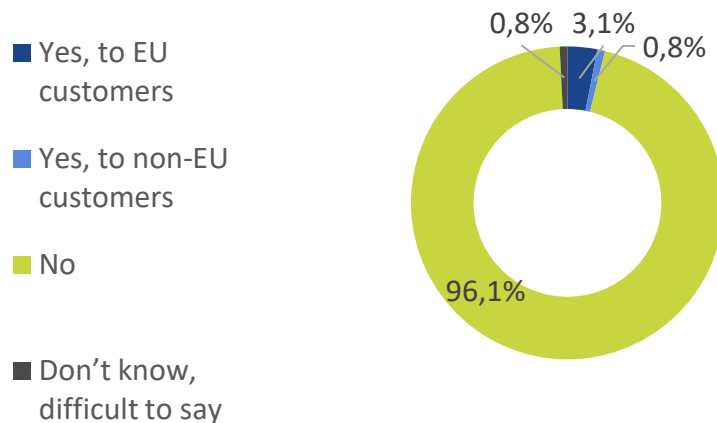
- ■ Yes, to EU customers
- ■ Yes, to non-EU customers
- ■ No
- ■ Don't know, difficult to say

0,8% 3,1% 0,8%

96,1%

A vast majority of the companies surveyed do not sell goods or services in foreign markets (96.1%).
In this group, the respondents stress that if they were to deal with foreign customers, they would firstly have to change the procedures (76.4%) and employ foreign language speakers (53.8%). More than half of the respondents were not able to identify specific changes this would require.

Changes required to deal with foreign customers

What needs to change in your company for it to be able to deal with foreign customers?

Changes in procedures	76,4%
Hiring foreign language speakers	53,8%
Opening a foreign branch	18,8%
Hiring foreign language speakers	14,7%
Implementing payment system	12,8%
Changes in procedures	10,0%
Hiring a law firm	7,8%
Better understanding of copyright	4,1%
Other	4,1%
Don't know, difficult to say	58,2%

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Online sales in other EU states

Has your company ever sold, attempted to sell or considered selling its goods and/or services online in other EU states?
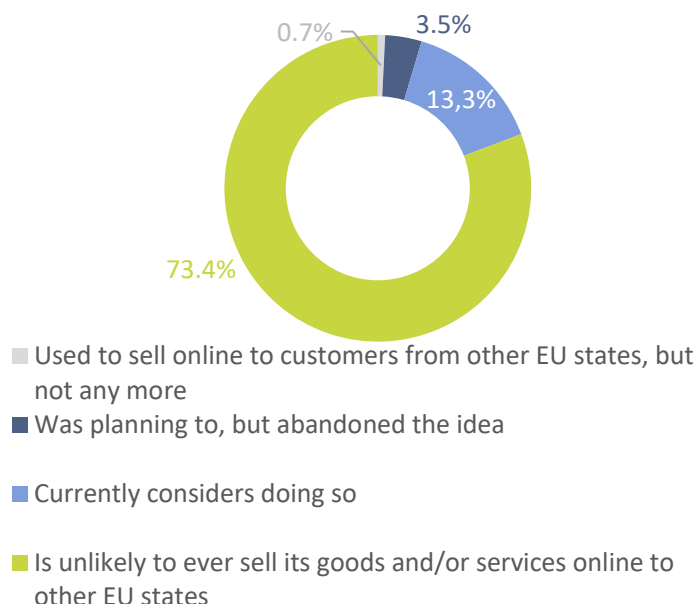
0.7% 3.5%
13,3%
73.4%

■ Used to sell online to customers from other EU states, but not any more
■ Was planning to, but abandoned the idea
■ Currently considers doing so
■ Is unlikely to ever sell its goods and/or services online to other EU states

More than 73% of the respondents are rather unlikely to ever sell their goods and/or services online in other EU states. About 13% are currently considering this possibility. Companies that sell their goods and/or services abroad have dealt with their customers on average for 6 years. About 84% of the respondents don't sell online.

Online sales worldwide

Please indicate which of the following statements are true for you:

I don't sell goods and/or services online.	83,7%
I sell goods and/or services online to customers in Poland.	13,1%
I sell goods and/or services online to customers in other EU states.	1,1%
I sell goods and/or services online to customers in other, non-EU states.	0,7%
Don't know, difficult to say	2,8%
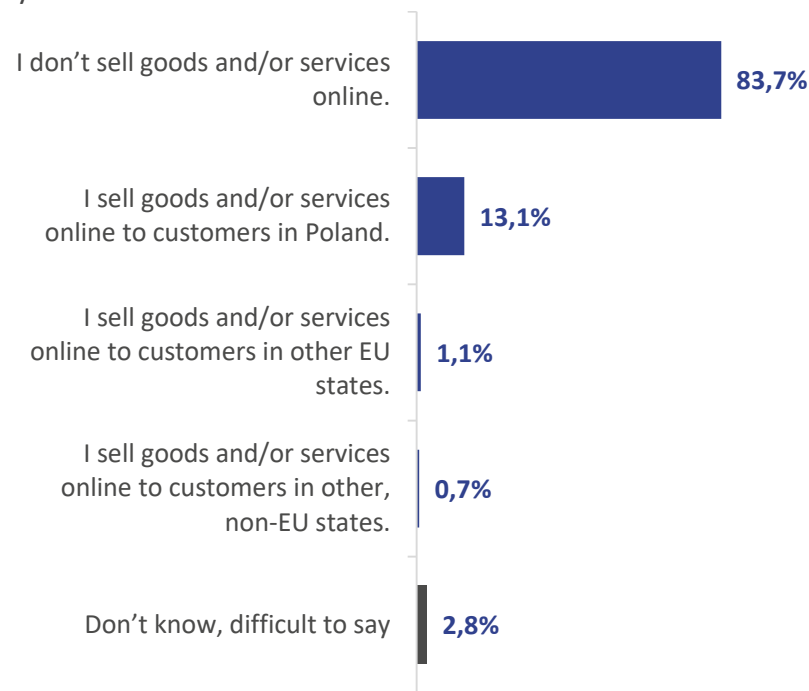
on average for 6 years

companies have dealt with foreign customers

UKE

Sales value

Online sales states

What share of your company's online sales value in 2019 came from ...?

On average 75.6% — of the sales value came from Poland

Reference group: All respondents whose companies sell online to customers from Poland, N=58

On average 24.4% — of the sales value came from other EU states

Reference group: All respondents whose companies sell online to customers from other EU states, N=5

On average 10.5% — of the sales value came from other, non-EU states

Reference group: All respondents whose companies sell online to customers from non-EU states, N=7

Germany

United Kingdom

Belarus

Czech Republic

Slovakia

Reference group: Respondents whose companies sell online to customers in other EU states and non-EU states, N=12

For companies which sell online, 76% of their sales value comes from Polish customers.

As for EU states, their share in the sales value is only 24.4%, while for companies selling to non-EU customers, this is 10.5%.

Companies sell online mainly to Germany and the UK as well as such states as Belarus, Czech Republic and Slovakia.
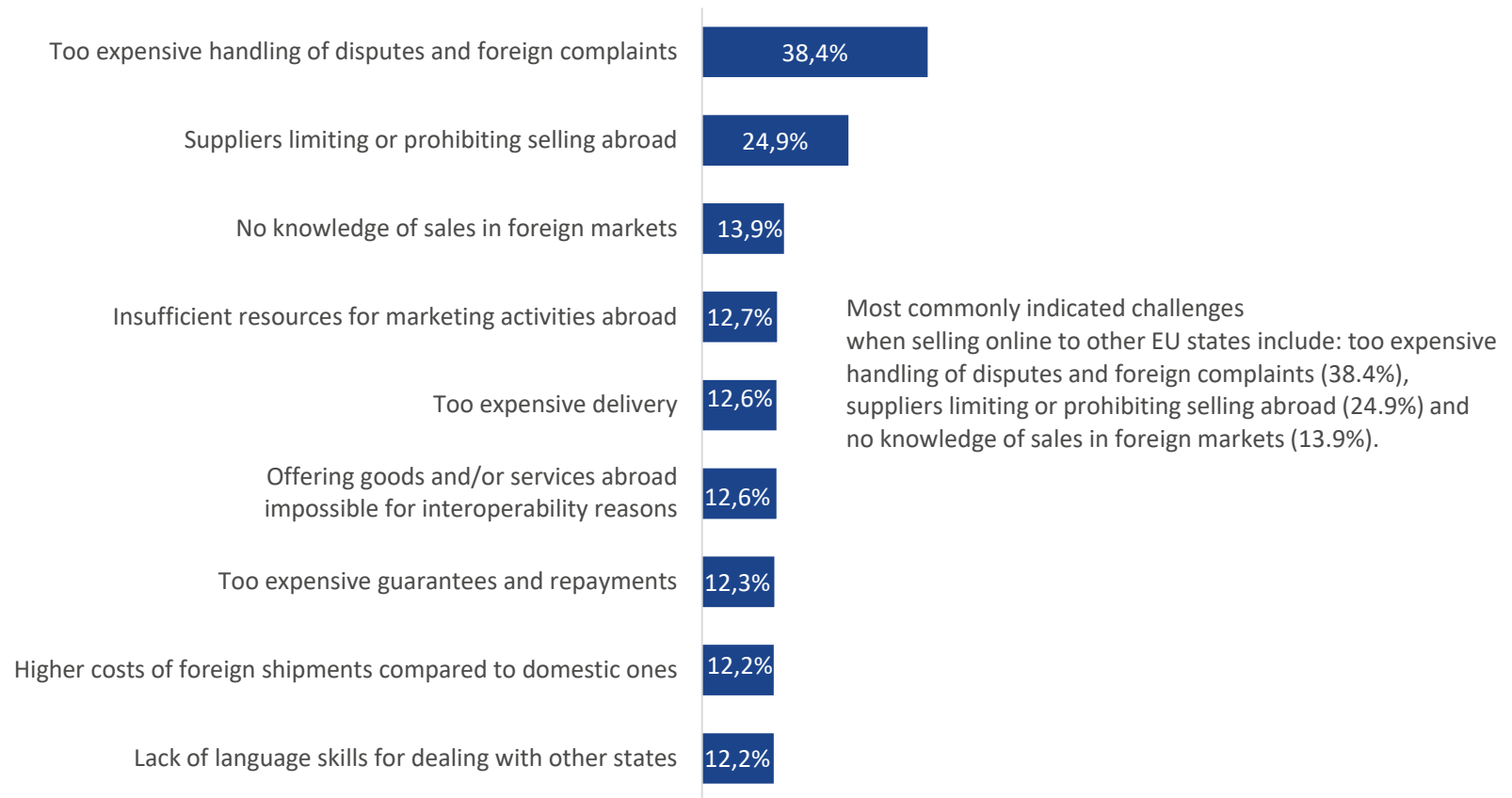
UKE

Future challenges with online sales

In each case, please indicate if the given challenge that may occur when selling or trying to sell online to other EU states is actually a problem? *(The chart continues on the next slide)*

Challenge	Percentage
Too expensive handling of disputes and foreign complaints	38,4%
Suppliers limiting or prohibiting selling abroad	24,9%
No knowledge of sales in foreign markets	13,9%
Insufficient resources for marketing activities abroad	12,7%
Too expensive delivery	12,6%
Offering goods and/or services abroad impossible for interoperability reasons	12,6%
Too expensive guarantees and repayments	12,3%
Higher costs of foreign shipments compared to domestic ones	12,2%
Lack of language skills for dealing with other states	12,2%

Most commonly indicated challenges when selling online to other EU states include: too expensive handling of disputes and foreign complaints (38.4%), suppliers limiting or prohibiting selling abroad (24.9%) and no knowledge of sales in foreign markets (13.9%).

Reference group: All respondents whose company sells goods and/or services in foreign markets, N=18

UKE

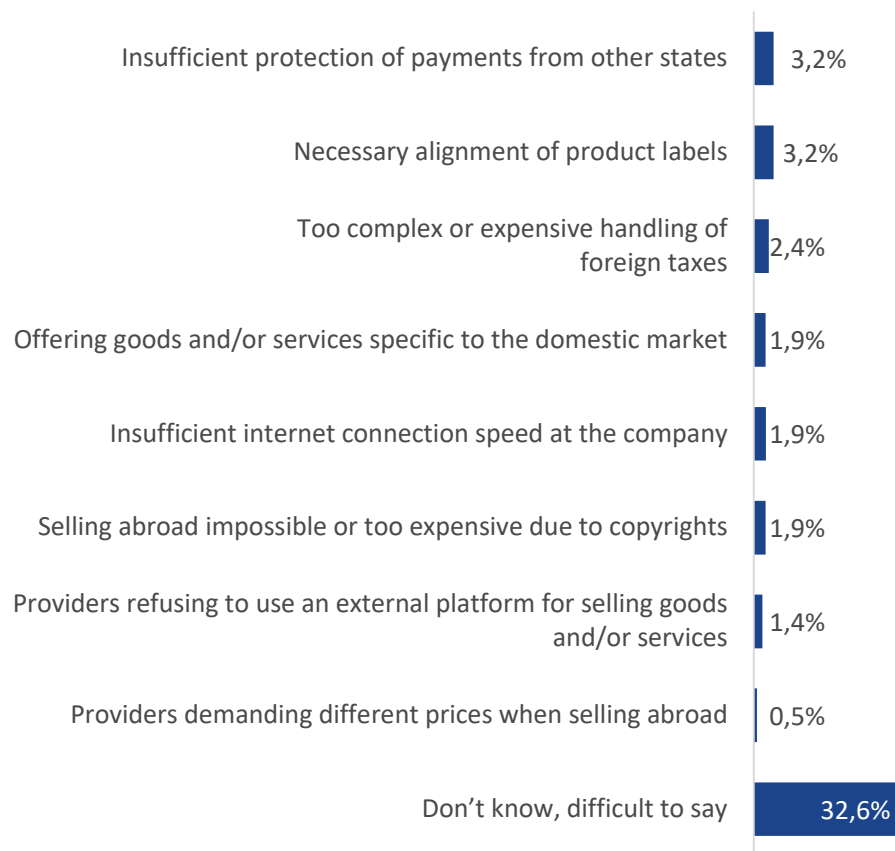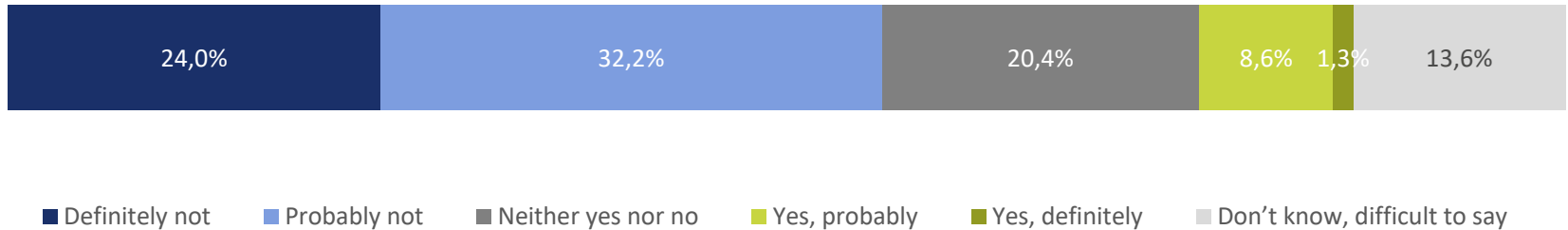## Future challenges with online sales
(chart continued)

In each case, please indicate if the given challenge that may occur when selling or trying to sell online to other EU states is actually a problem?

Challenge	Value
Insufficient protection of payments from other states	3,2%
Necessary alignment of product labels	3,2%
Too complex or expensive handling of foreign taxes	2,4%
Offering goods and/or services specific to the domestic market	1,9%
Insufficient internet connection speed at the company	1,9%
Selling abroad impossible or too expensive due to copyrights	1,9%
Providers refusing to use an external platform for selling goods and/or services	1,4%
Providers demanding different prices when selling abroad	0,5%
Don't know, difficult to say	32,6%

The least frequently indicated challenges when selling online to other EU states include: providers refusing to sell abroad at different prices (0.5%), providers refusing to use an external platform for selling goods and/or services (1.4%), as well as selling abroad being impossible or too expensive due to copyrights, insufficient internet connection speed at the company, offering goods and/or services specific to the domestic market (1.9% each).
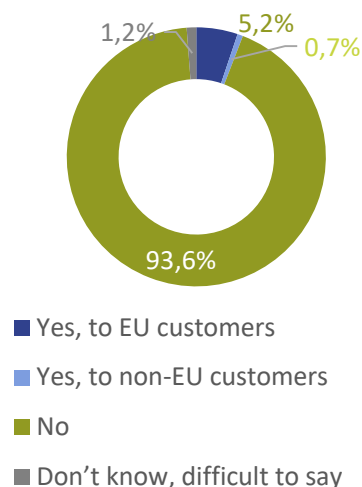
UKE

Future challenges with online sales

Do you think that your company would start selling or increase its sales to other EU states
if all EU Member States followed the same online trade rules applicable to trading
between your company and your customers?

| 24,0% | 32,2% | 20,4% | 8,6% | 1,3% | 13,6% |

■ Definitely not　■ Probably not　■ Neither yes nor no　■ Yes, probably　■ Yes, definitely　■ Don't know, difficult to say

More than half of the respondents (56.2%) declare that they would not start selling or increase their sales to the EU if all EU Member States
followed the same online trade rules.

UKE

Foreign sales

Did your company purchase goods from a foreign supplier over the last year?

1,2%   5,2%   0,7%

93,6%

- ■ Yes, to EU customers
- ■ Yes, to non-EU customers
- ■ No
- ■ Don't know, difficult to say

A vast majority of companies did not purchase any goods and/or services in the foreign market (93.6%).

In 2019, on average 22.8% of companies purchased services and/or goods online in non-EU states. Meanwhile, on average about 27% of goods and/or services were purchased in Member States.

On average, companies have been purchasing goods and/or services
abroad for 5 years.

On average 22.8% of goods and/or services purchased online by companies in 2019 came from other EU states

On average 26.6% of goods and/or services purchased online by companies in 2019 came from non-EU states

Companies have been purchasing goods and/or services abroad **on average for 5 years.**

Online shopping

Please indicate which of the following statements are true for you:

I don't shop online — 54,2%

I buy online from Polish suppliers — 42,3%

I buy online from other EU suppliers — 4,5%

I buy online from suppliers from other, non-EU states — 1,5%

Don't know, difficult to say — 2,9%

More than half (54.2% of answers) of the respondents representing a company declared that their company doesn't do online shopping. 42.3% of respondents bought online from Polish providers.
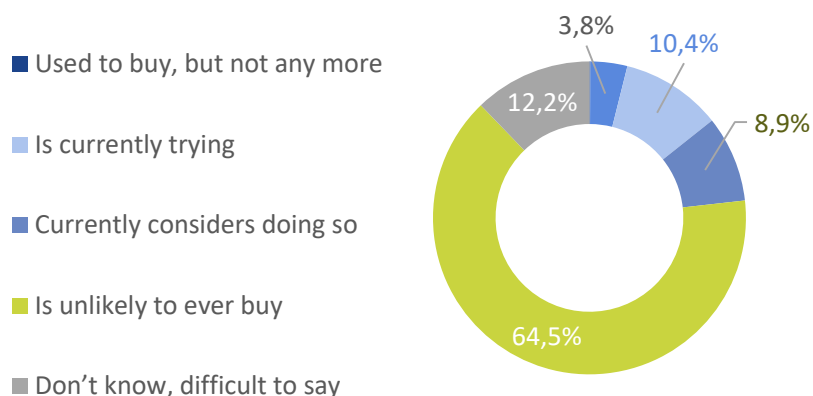
It should be noted that companies with at least 250 employees far more often declare that they do not shop online.
The fewer the employees, the higher the purchases from non-EU providers.

I don't shop online — 33,4% / 44,4% / 46,0% / 37,0% / 64,1%

I buy online from Polish suppliers — 3,3% / 4,6% / 7,0% / 9,5% / 11,4%

I buy online from other EU suppliers — 1,8% / 1,3% / 2,0% / 11,2%

I buy online from suppliers from other, non-EU states — 65,2% / 51,7% / 49,4% / 48,3% / 24,5%

Don't know, difficult to say — 1,4% / 3,1% / 4,8% / 6,2%

■ One employee ■ 2 to 9 employees
■ 10 to 49 employees ■ 50 to 249 employees
■ 250 and more

Digital single market

Online shopping

Reasons for buying from a supplier from another EU state

Has your company ever purchased, attempted to purchase or considered purchasing goods and/or services online in other EU states?

Why did your company decide to buy online from a provider located in an EU state other than Poland?

- ■ Used to buy, but not any more
- ■ Is currently trying
- ■ Currently considers doing so
- ■ Is unlikely to ever buy
- ■ Don't know, difficult to say

3,8%
10,4%
8,9%
12,2%
64,5%

Large selection or goods and/or services — 73,3%

Lower costs — 41,5%

The goods not available in Poland — 32,8%

Business relationship with a foreign supplier — 21,2%

Reference group: All respondents whose companies don't shop online, N=381

Reference group: All respondents whose company has decided to buy online from a provider in an EU state other than Poland, N=22

64.5% of the respondents who do not shop online declared that their company wasn't likely to ever buy goods and/or services online, 8.9% of the respondents stated that their company considered such a possibility, and 10.4% were trying to do so.

Companies which did some online shopping in another EU state usually did so due to a large selection of products and/or services (73.3% of answers) and lower costs (41.5% of answers).

UKE

Companies that do not purchase online

Which of the following tools does your company use when purchasing goods and/or services online?

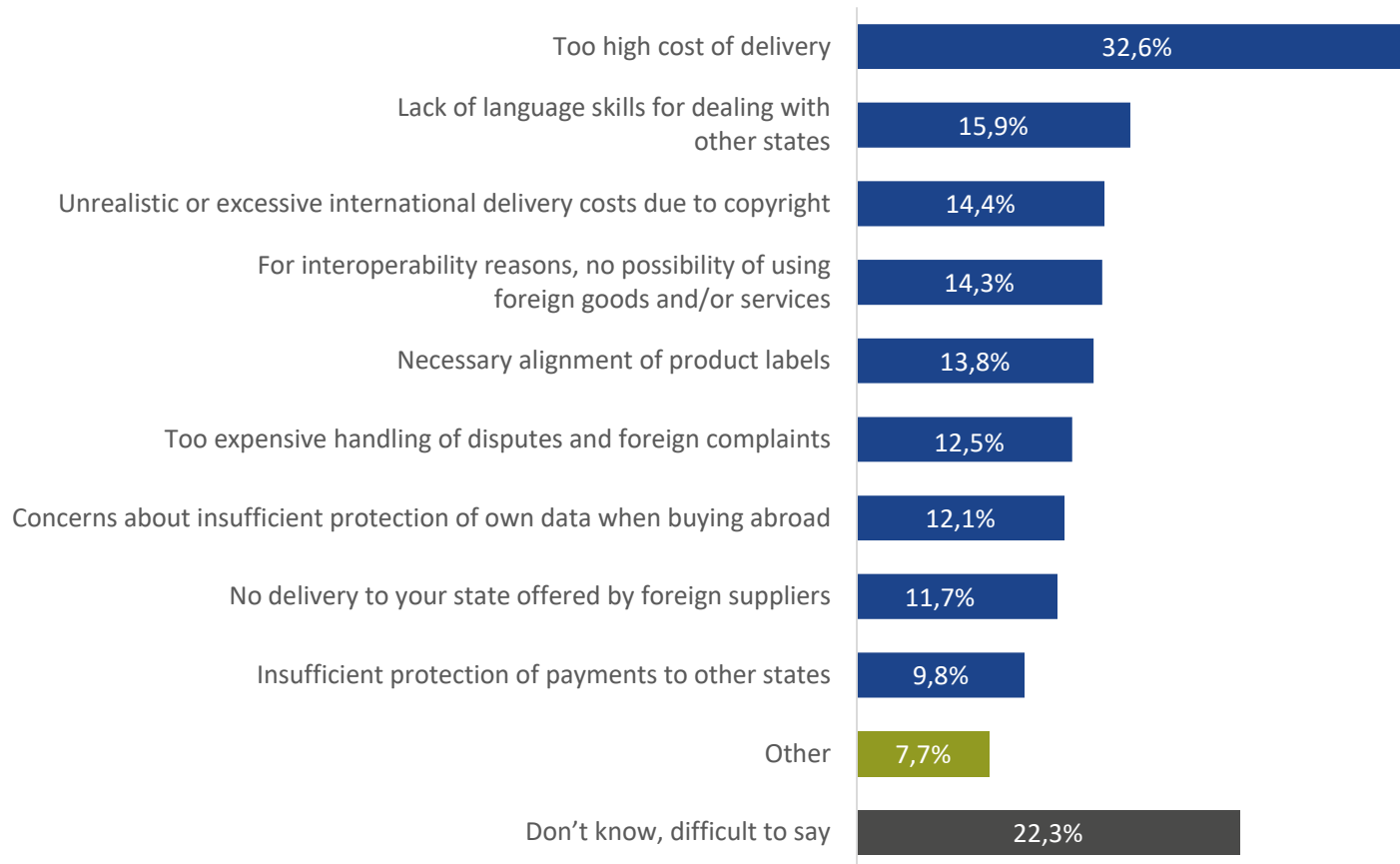| Tool	%
Supplier's websites or applications	63,7%
Small commercial platform (e.g. a dedicated website or a website with limited number of products and/or brands)	21,0%
Large commercial platform (e.g. a general website with a large selection of products and/or brands)	19,3%
EDI transactions (Electronic Data Interchange, e.g. XML)	1,7%
Don't know, difficult to say	16,2%
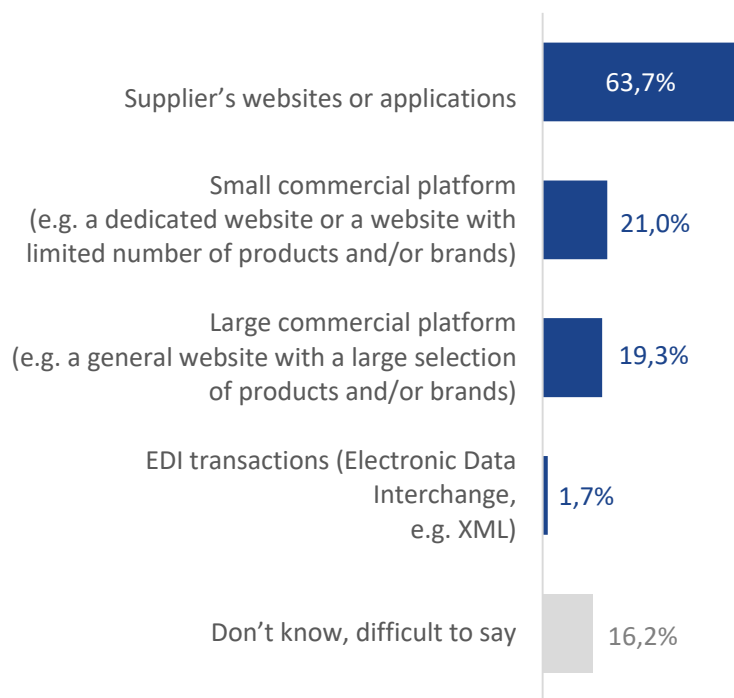
On average 80.1% of goods and/or services purchased online by companies in 2019 came from Poland

Most companies purchasing online (63.7%) use websites or applications made available by the supplier. 21.0% declared that their company used a small commercial platform. EDI transactions are the least popular (1.7% of answers).
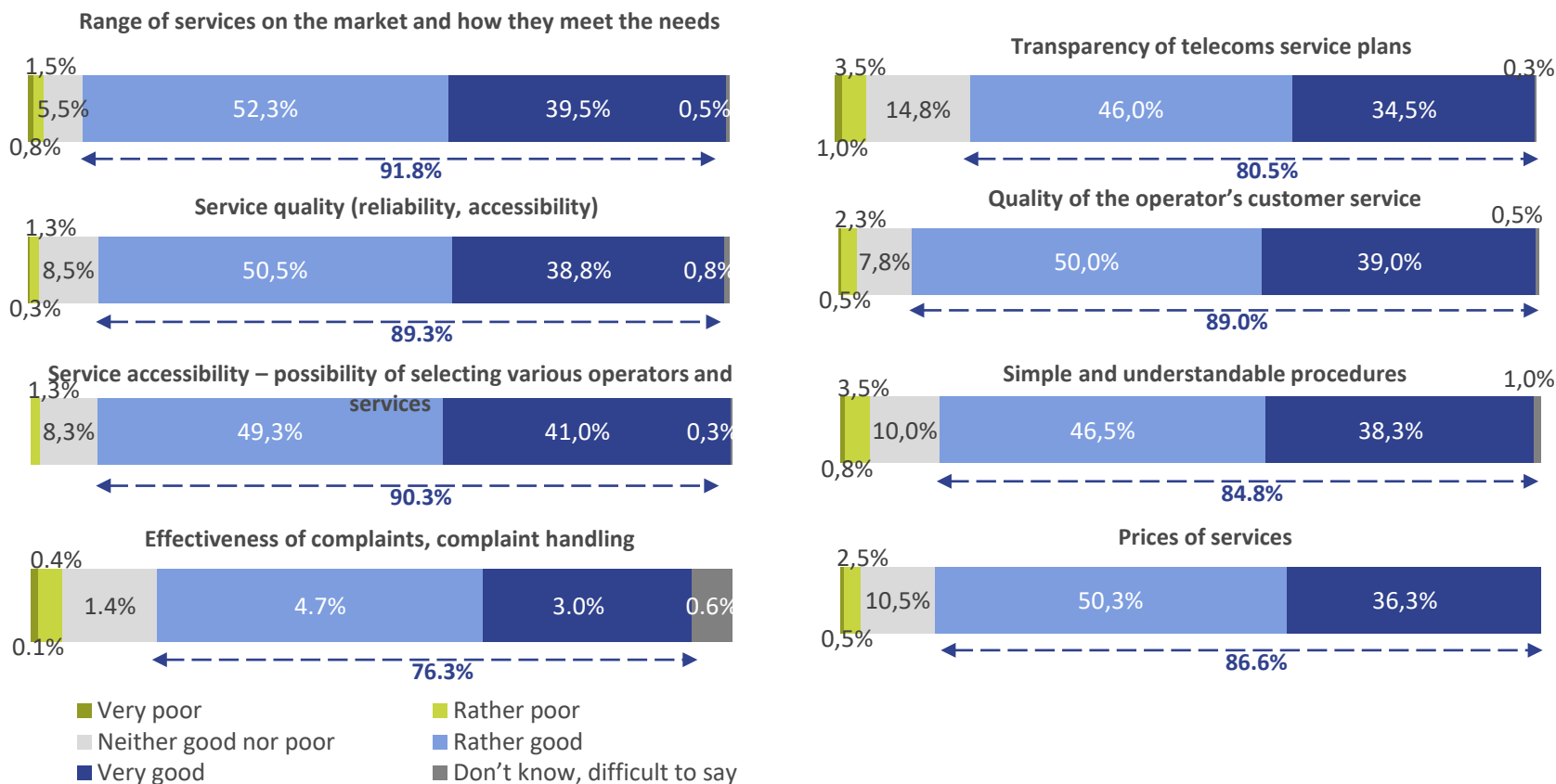
Challenges with online shopping

In each case please indicate if the given challenge that may occur when buying
or trying to buy online from other EU states is actually a problem?

Challenge	%
Too high cost of delivery	32,6%
Lack of language skills for dealing with other states	15,9%
Unrealistic or excessive international delivery costs due to copyright	14,4%
For interoperability reasons, no possibility of using foreign goods and/or services	14,3%
Necessary alignment of product labels	13,8%
Too expensive handling of disputes and foreign complaints	12,5%
Concerns about insufficient protection of own data when buying abroad	12,1%
No delivery to your state offered by foreign suppliers	11,7%
Insufficient protection of payments to other states	9,8%
Other	7,7%
Don't know, difficult to say	22,3%

General telecoms market evaluation

Evaluation of functioning

Please rate the following aspects of the Polish telecoms market:

Range of services on the market and how they meet the needs

1,5%
5,5%
0,8%
52,3%
39,5%
0,5%
91.8%

Transparency of telecoms service plans

3,5%
14,8%
1,0%
46,0%
34,5%
0.3%
80.5%

Service quality (reliability, accessibility)

1,3%
8,5%
0,3%
50,5%
38,8%
0,8%
89.3%

Quality of the operator's customer service

2,3%
7,8%
0,5%
50,0%
39,0%
0,5%
89.0%

Service accessibility – possibility of selecting various operators and services

1,3%
8,3%
49,3%
41,0%
0,3%
90.3%

Simple and understandable procedures

3,5%
10,0%
0,8%
46,5%
38,3%
1,0%
84.8%

Effectiveness of complaints, complaint handling

0.4%
1.4%
0.1%
4.7%
3.0%
0.6%
76.3%

Prices of services

2,5%
10,5%
0,5%
50,3%
36,3%
86.6%

- Very poor
- Rather poor
- Neither good nor poor
- Rather good
- Very good
- Don't know, difficult to say

The companies surveyed are positive about the functioning of the Polish telecoms market in these aspects. Meeting the company's needs (91.8%) and accessibility (90.3%) were the top rated aspects.

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Positive market evaluation

As a company, did you
notice any positive developments in the telecoms service
market in the last year?

26.0% noticed **positive developments** in the telecoms service market in the last year
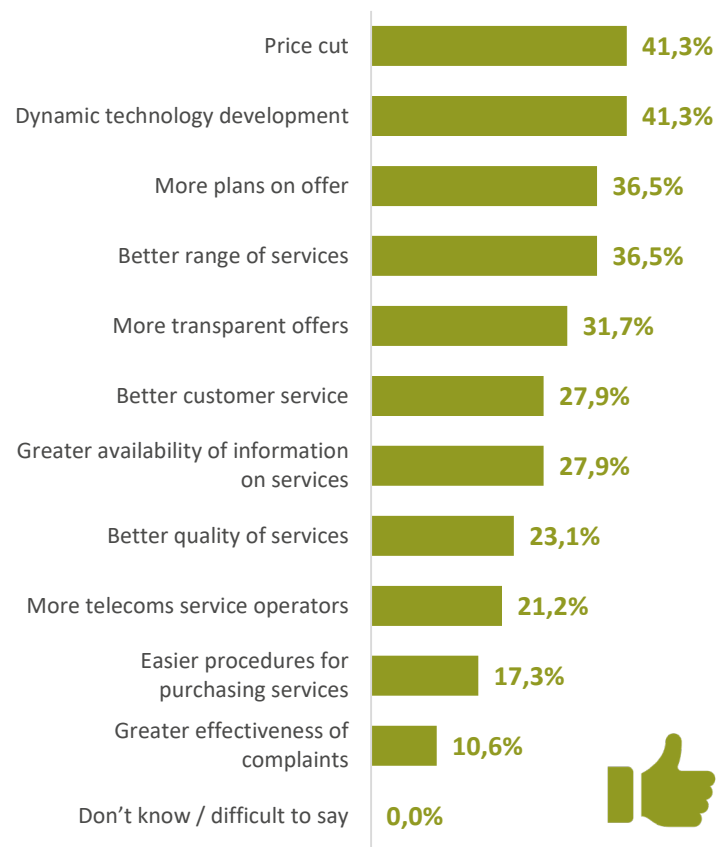
26% of the respondents noticed positive developments in the telecoms service market in the last year.

The positive developments observed mainly include: price cut (41.3%), dynamic technology development (41.3%), more plans on offer (36.5%), as well as better range of services (36.5%).

Positive developments

What positive developments in the telecoms service market did you notice for your company in the last year?

Price cut	41,3%
Dynamic technology development	41,3%
More plans on offer	36,5%
Better range of services	36,5%
More transparent offers	31,7%
Better customer service	27,9%
Greater availability of information on services	27,9%
Better quality of services	23,1%
More telecoms service operators	21,2%
Easier procedures for purchasing services	17,3%
Greater effectiveness of complaints	10,6%
Don't know / difficult to say	0,0%

UKE

Negative market evaluation

As a company, did you
notice any negative developments in the telecoms service market in the last year?

3.3% noticed **negative developments** in the telecoms service market in the last year

Only 3.3% or the respondents noticed negative developments in the telecoms service market in the last year.

The negative developments observed mainly include: higher prices, poorer customer service quality and poorer range of services.

Negative developments

What negative developments in the telecoms service market did you notice in the last year?

Most frequent answers:

52.5% higher prices

41.0% less transparent offers

33.6% poorer customer service quality

Cooperation among companies

Do you think that competing telecoms operators may also cooperate with one another?
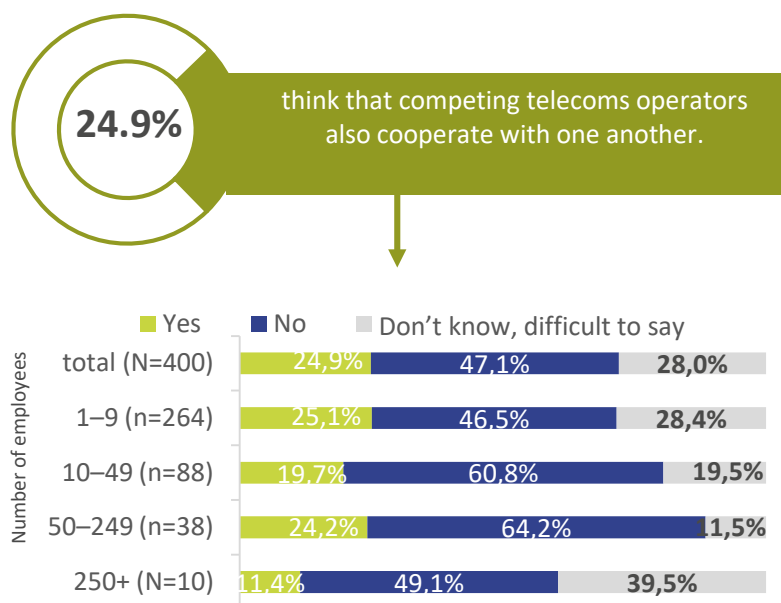
24.9% think that competing telecoms operators also cooperate with one another.

■ Yes　■ No　■ Don't know, difficult to say

Number of employees

	Yes	No	Don't know
total (N=400)	24,9%	47,1%	28,0%
1–9 (n=264)	25,1%	46,5%	28,4%
10–49 (n=88)	19,7%	60,8%	19,5%
50–249 (n=38)	24,2%	64,2%	11,5%
250+ (N=10)	11,4%	49,1%	39,5%

Every forth company surveyed indicates that competing telecoms operators also cooperate with one another. That cooperation mostly covers combining products or services into bundles (46.7%) or introducing new services into the offer (41.3%). Most respondents are positive about such actions, as they allow the companies to better respond consumer needs (73.9%).

Reference group: All respondents, N=400

Cooperation among companies

In what way can they cooperate?

Combining products or services into bundles	46,7%
Introduction of new services into the offer	41,3%
Determining the costs of services	39,1%
Improving the quality of provided services	35,9%
Sharing technical infrastructure	21,7%
Joint development projects	17,4%
Don't know, difficult to say	1,1%
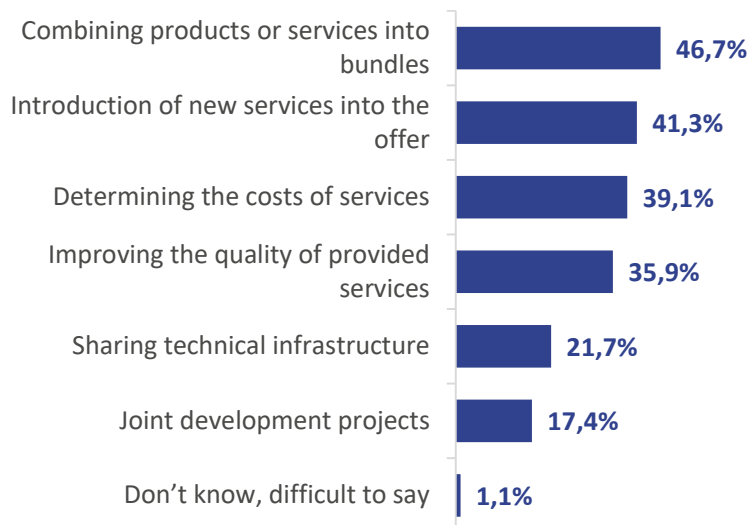
Do you think that such actions:

Allow for a better response to customer needs	73,9%
Have no impact on consumer needs	20,7%
Don't know, difficult to say	5,4%
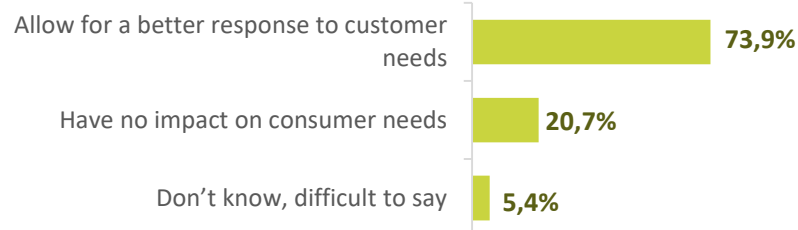
Reference group: Respondents who think that telecoms companies cooperate with one another, N=92

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Knowledge of UKE

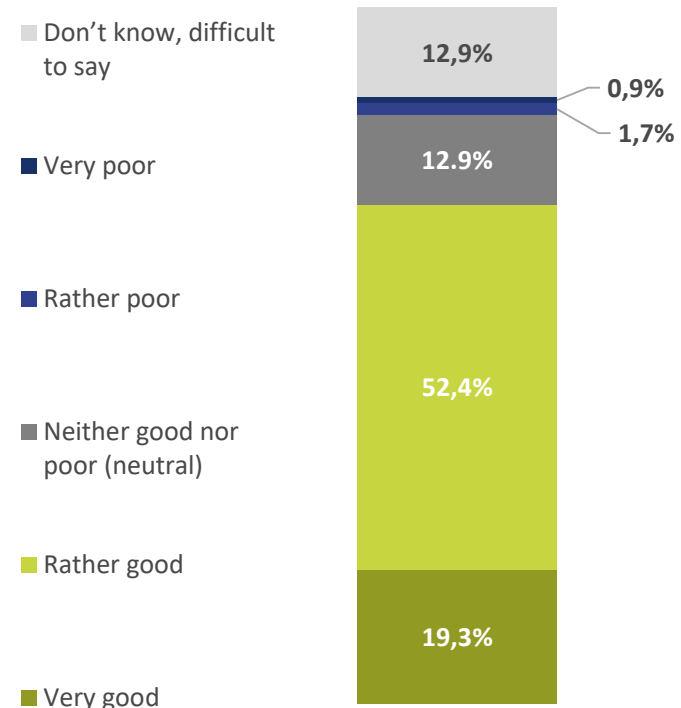As a company, are you familiar with the activities of the Office of Electronic Communications?

41.5% are familiar with the activities of the Office of Electronic Communications

Legend: ■ Yes ■ No ■ Don't know, difficult to say

Number of employees	Yes	No	Don't know, difficult to say
total (N=400)	41,5%	54,6%	3,9%
1–9 (n=264)	41,0%	55,1%	4,0%
10–49 (n=88)	52,7%	45,3%	2,0%
50–249 (n=38)	57,3%	42,7%	
250+ (N=10)	74,5%	21,2%	4,4%
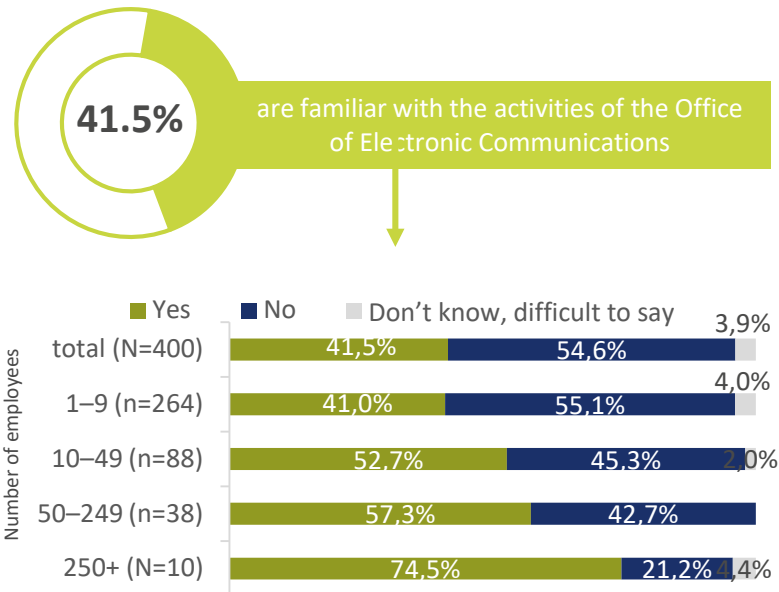
Nearly 42% of the respondents are familiar with the activities of the Office of Electronic Communications.

The vast majority (71.7%) are positive about the current activities taken by UKE. Nearly 13% of the respondents are neutral ('Neither good nor poor'). Only 2.5% are negative about the activities taken. Companies with over 250 employees tend to be most familiar with UKE's activities (74.5%).

Evaluation of UKE

How would you rate the current activities of the Office of Electronic Communications?

Legend:
- ■ Don't know, difficult to say
- ■ Very poor
- ■ Rather poor
- ■ Neither good nor poor (neutral)
- ■ Rather good
- ■ Very good

Category	%
Don't know, difficult to say	12,9%
Very poor	0,9%
Rather poor	1,7%
Neither good nor poor (neutral)	12.9%
Rather good	52,4%
Very good	19,3%

Summary

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Mobile telephony

They usually have no more than 4 active SIM cards (38.6% – 1 card, 27.9% – 2 cards and 22.4% – 3 to 4 cards). The more employees, the higher the average monthly mobile phone bills.

Corporate users of mobile telephony are very positive about the services provided by the operators. Prices of services and meeting the company's needs ranked the highest.

Fixed telephony

Nearly 36% of companies use fixed telephony. Half of them stress that a fixed-line number increases the company's credibility. And 49.3% state that it facilitates the functioning of the company.

As much as 51.4% indicate that they would not quit using fixed-line phone services in favour of mobile telephony.

Corporate users of fixed telephony highly appreciate the operators in all the aspects. However, meeting the company's needs scored the highest – all the respondents were positive about this aspect (99.7%). In the case of pricing, quality of customer service or services, the share of positive answers was above 90% each.

Internet access

9 in 10 companies have internet access. Most of them (67.8%) access the mobile internet via phone. More than half indicate fixed-line access. Nearly 3 in 10 entities indicated mobile internet.

The internet is used mainly to access necessary information and news sites,
and to communicate with customers. Internet is most often either ancillary (40.8%) or key (30.1%) to the main business operations. Corporate users of the telecommunications services usually believe that the corresponding access costs are not a considerable burden, considering other monthly operating costs.

Businesses choose mobile internet mainly to gain greater mobility and be able to use the internet outside the company's premises. Companies are usually satisfied with their fixed-line and mobile internet operators.

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NPS

Six in ten respondents would be willing to recommend their fixed-line internet provider to family or friends (59.7%).
In the case of fixed-line telephony, the share was slightly higher; here, seven in ten companies should be considered as promoters (69.1%).

In the case of internet operators, promoters, i.e. people willing to recommend their operator to other companies, are in the majority among their customers. The NPS for fixed-line internet operators was 66.3%, and for mobile internet operators – 59.7%.

Online safety

More than half of the respondents use anti-virus software, anti-spyware, etc. More than 80% of the companies surveyed also use up-to-date software, while only 19.8% introduce online privacy solutions.

A vast majority of the respondents have never fallen victim to any fraudulent use of the data they make available. In addition, companies usually do not employ
network protection and data security specialists; only 15.7% have such an employee.

Over-the-Top services

Over 60% of the respondents admitted that OTT development improved communication in the company. However, almost 1 in 4 indicated that OTT services had had no impact on their company's functioning.

The respondents mainly use communication and application services. Most of them do not imply additional fees.

60% of the respondents whose company uses OTT services would not be willing to switch from telecommunications services to OTT services. Only 9% of the respondents were of opposite opinion.

Only 9.9% of the companies which have not used OTT services so far are considering using OTT services in the future. The respondents indicated that they intend to use mainly communication and application services.

5G 5G

More than 60% of the respondents are familiar with the term '5G'.

Companies confirm that their current
internet access parameters are sufficient for their business operations as regards speed (92.5%), capacity (92%) and reliability (88.9%).

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Big Data Processing

About 30% of the respondents are familiar with the term 'Big Data'. More than 11% of all the companies with internet access use Big Data.

More than 67% of respondents see the benefits of using Big Data by companies. The benefits include: data reliability (77.8%), lower costs and in-depth product market analysis (37.0% each) and a higher level of satisfaction among end customers (33.3%).

Cloud computing

More than half of the respondents are familiar with the term 'cloud' or 'cloud computing'.

10% of the companies using the internet also use cloud computing. Companies slightly more often use external infrastructure rather than their own.

Nearly 94% of the respondents can see the benefits of cloud computing. Most commonly indicated benefits include: protection against data loss, cost savings as well as efficiency and reliability.

Every fifth cloud user sees the risks of cloud computing.

Digital single market

A vast majority of the companies surveyed do not sell goods or services in foreign markets (96.1%). In this group, the respondents stress that if they were to deal with foreign customers, they would firstly have to change the procedures (76.4%).

More than 73% of the respondents are rather unlikely to ever sell their goods and/or services online in other EU states.

About 84% of the respondents don't sell online.

For companies which sell online, 76% of their sales value comes from Polish customers. As for EU states, their share in the sales value is only 24%, while for companies selling to non-EU customers, this is 10.5%.

Most commonly indicated challenge when selling online to other EU states was too expensive handling of disputes and foreign complaints (38.4%).

A vast majority of companies did not purchase any goods and/or services in the foreign market (93.6%).

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👍 **General telecoms market evaluation**

The companies surveyed are positive about the functioning of the Polish telecoms market. Meeting the company's needs (91.8%) and accessibility (90.3%) were the top rated aspects.

26% of the respondents noticed positive developments in the telecoms service market in the last year. The positive developments observed mainly include: price cut (41.3%), dynamic technology development (41.3%), more plans on offer (36.5%), and better range of services (36.5%).

Every fourth company surveyed indicates that competing telecoms operators
also cooperate with one another. That cooperation mostly covers combining products or services into bundles (46.7%) or introducing new services into the offer (41.3%).

The vast majority (71.7%) are positive about the current activities taken by UKE.

Explanations

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Note on the methodology

- The data presented in the report were subjected to the analytical weighing procedure to correct the structure of the sample for population.

- The percentage data presented in the report are weighed values. The numerical data (N) are non-weighed data.

- An exception to the above are the socio-demographic data, for which the percentages are also non-weighed data.

- In the column and bar graphs, the sum of the values may exceed 100% – it was possible to indicate more than one answer.

- In pie charts and cumulative charts, the sum of individual percentages can be 99.9% or 100.1%. This is the result of the rounding used for decimal numbers.

- Net Promoter Score (NPS) – a tool for assessing customer loyalty. To calculate the indicator, aggregate the 0–6 and 9–10 ratings. The result is the difference between the aggregate 9–10 and 0–6 rating.

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