



**SME & Corporate
ICT Research
H1 '06
May/June 2006**

Presentation of Findings

August, 2006

Presentation Outline

- Introduction
 - Research Objectives
 - Methodology
 - Sample profile
- Research Findings
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 - Mobile market
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- Key Findings
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Introduction

- This is the third wave of a business market tracking research programme being undertaken on behalf of ComReg by Millward Brown IMS, with previous research being conducted in May and October 2005. These waves are depicted in this report as H1 '05 and H2 '05 respectively.
- The main purpose of the research is to gain an in-depth understanding of current information and communication technology (ICT) usage and attitudes to ICTs among a representative sample of Irish SMEs and large Corporate businesses.
- The specific areas explored in this wave of research included:
 - Fixed line market
 - Mobile market
 - Internet and broadband communications
 - Awareness of ComReg
- The survey findings will be used by ComReg for market understanding, future planning and policy formulation, and public dissemination.

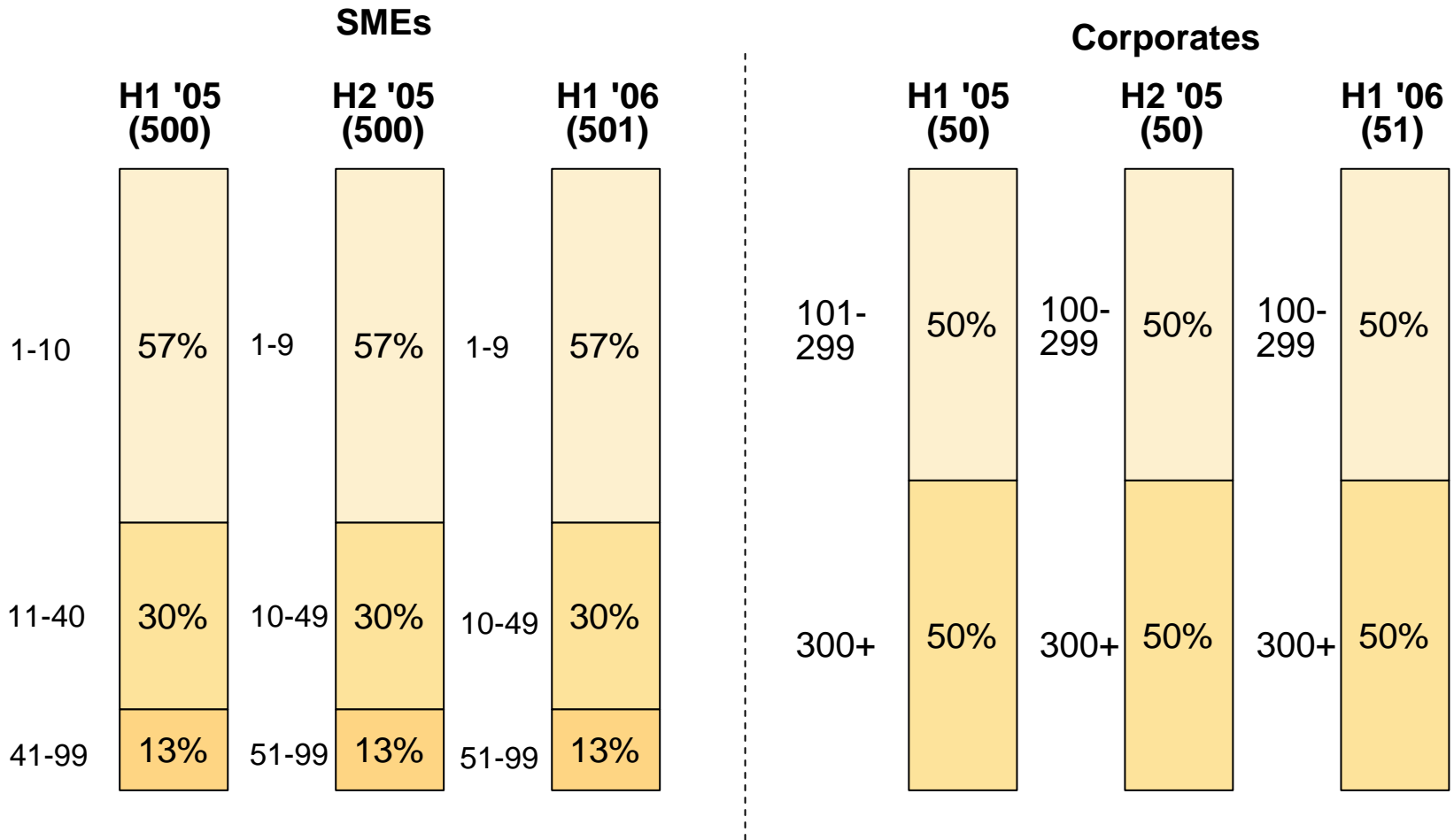


Methodology

- Telephone interviews were conducted among a sample of 501 SMEs and 51 Corporates.
- SMEs were defined as companies with less than 100 employees.
- Quota controls set for company size were based on the total number of employees each company size segment accounts for. Representative quota controls were also set for industry sector.
- Large Corporates were defined as companies employing 100 or more employees. Quota controls were set to ensure that 50% of the sample employed 100-299 employees, and 50% of the sample employed 300+ people. Representative quota controls were also set for industry sector.
- Where the final profile of respondents differed slightly to the quota controls originally set, minor weighting adjustments were made.
- Interviews were held with the person in the company responsible for decision-making in relation to telecommunication and IT services.
- The fieldwork for this survey (H1 '06) was conducted between the 11th May and the 9th June 2006.
- The 2006 sample structure replicates the sample structure adopted in 2005.



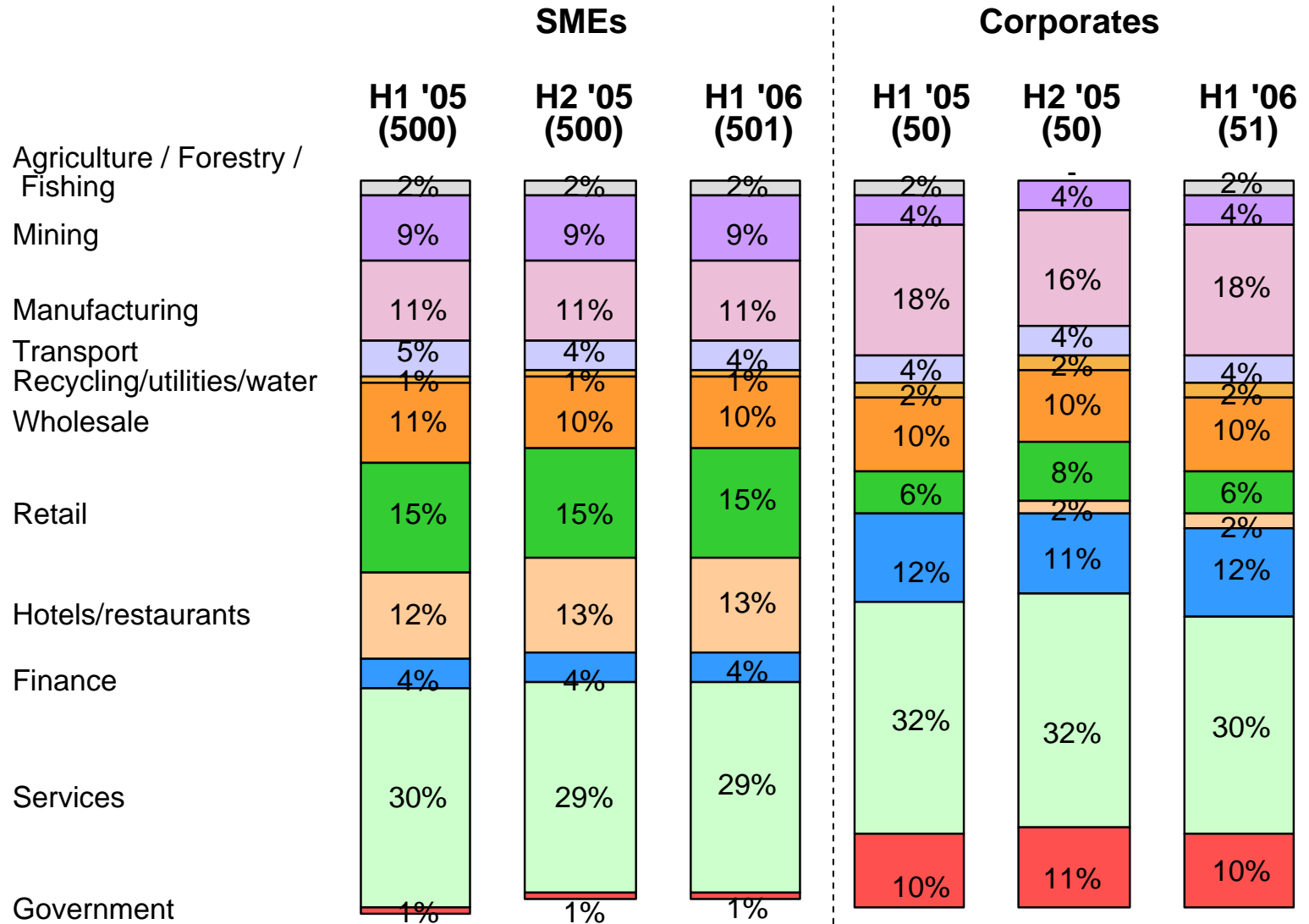
Sample Profile – Number of Employees



Base: All Respondents (n=501, 51)



Sample Profile – Industry Sector



Base: All Respondents (n=501, 51)





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Research Findings



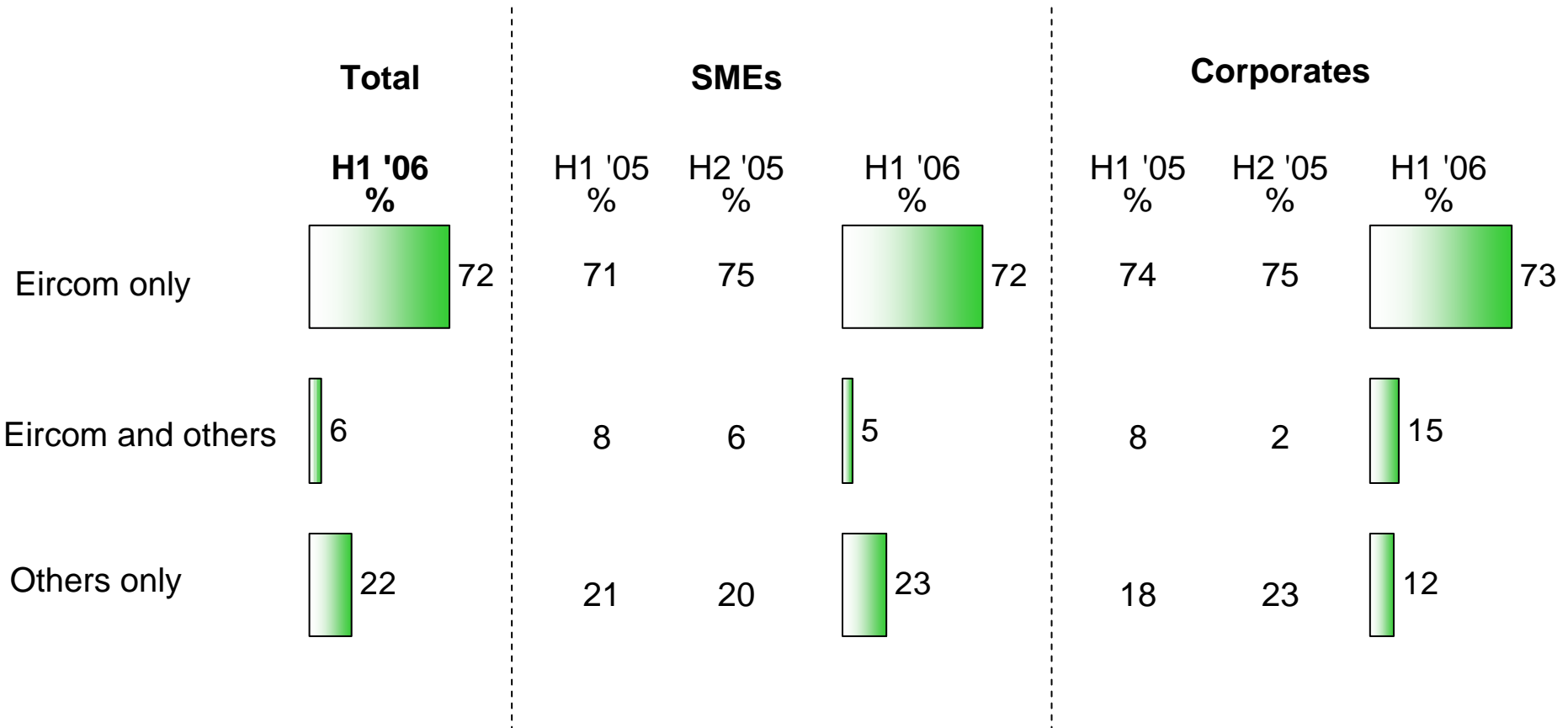
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Fixed Line Market

Main Fixed Line Supplier

Q. Which fixed line phone services provider does your company use for its voice calls?

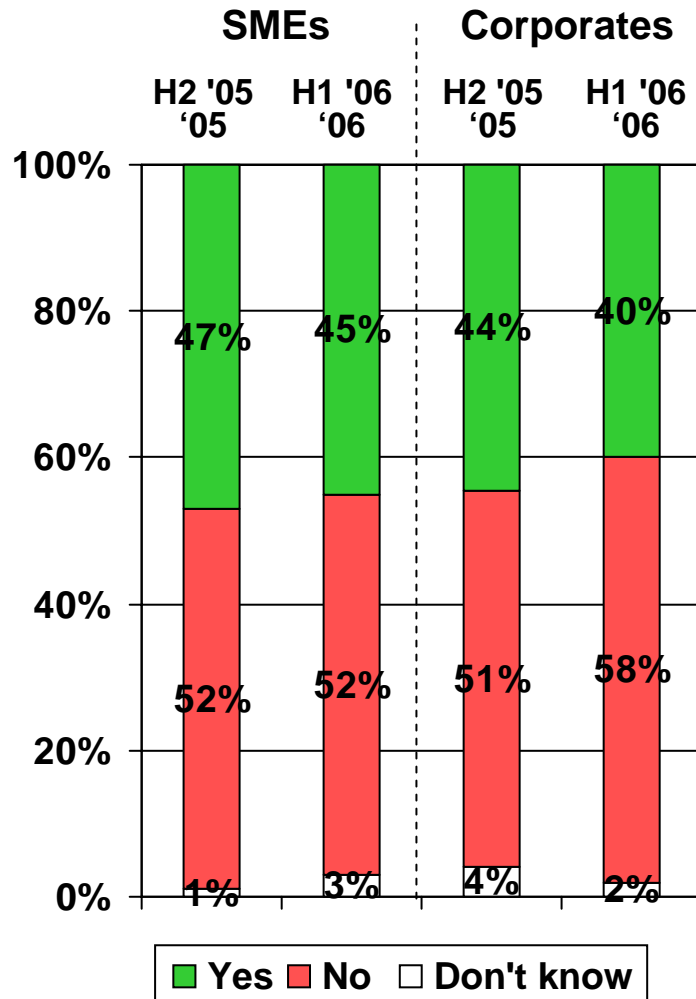


Of the small number of businesses using more than one fixed line provider, the vast majority used their main fixed line provider for both domestic and international calls



Switching Activity

Q. Have you **ever** switched supplier for any of your fixed line services?

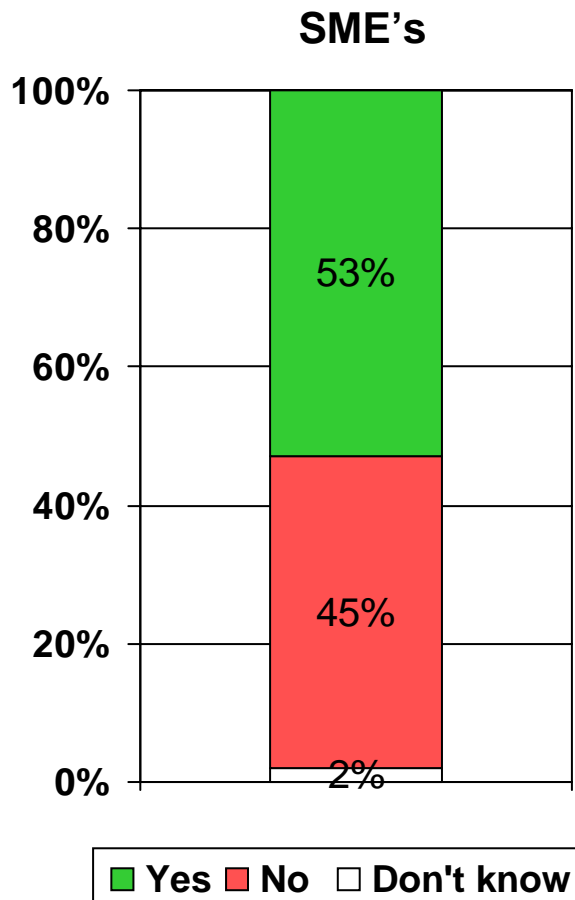


- Switching activity has remained quite constant since the last wave of research, with nearly half of SMEs claiming to have done so, and two in five Corporates also having switched.
- Over time switching activity has increased significantly. Only 16% of SMEs were found to have switched in 2004.
- Among both SMEs and Corporates, switching was highest in wholesale industries (65%) but lowest geographically in Dublin (37%). It was also higher among those aware of ComReg (48% vs 40%).



When Did They Switch?

Q. Did you switch in the last 12 months?

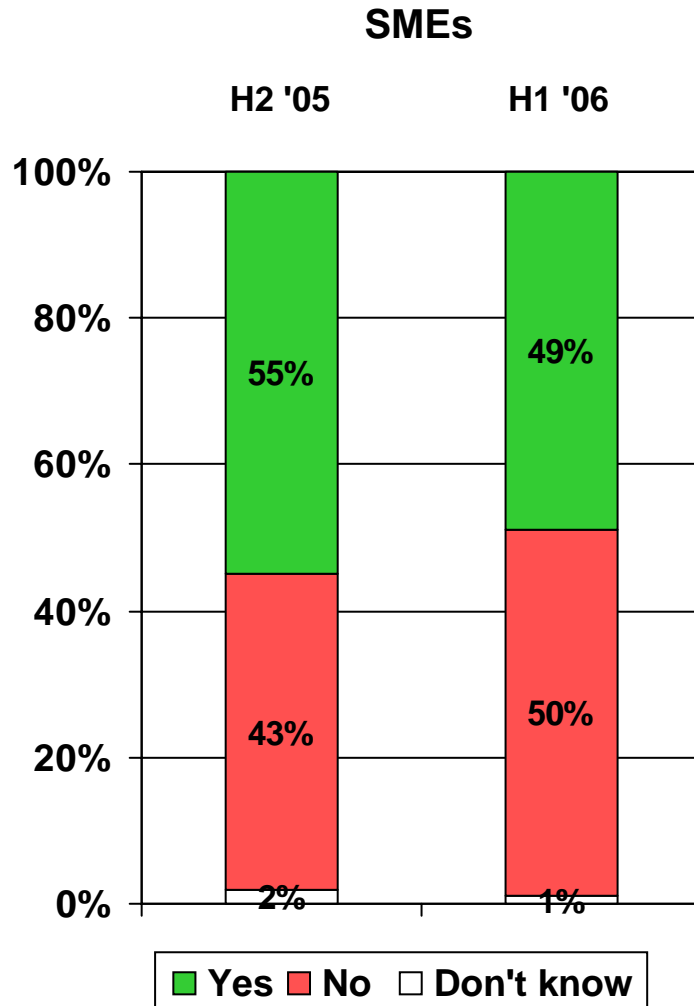


- Half of SMEs who have switched, have switched in the past 12 months. Of the 19 Corporates who have switched, almost half have switched in the last 12 months.
- Smaller companies (those employing less than 10 employees) are most likely to have switched recently.



Extent of Switching Back

Q. Did you switch back to your original supplier?



- Half of those SMEs who ever switched suppliers returned to their original supplier, a phenomenon less prevalent among Corporates, where six of the 19 companies have returned to their original supplier.
- Again it is smaller companies who are most likely to revert to their original supplier.

Base: All Who Have Switched (n=225, 19*)

* Caution Small base size



Millward Brown IMS

Reasons for Not Switching Fixed Line Provider

New

Q. In many instances there are cost savings to be made by switching your fixed line phone service provider. Are there any particular reasons why your company has not done so?

	SMEs %	Corporates %
Satisfied with current level of service	34	28
Too much hassle	19	12
Loyal to my current supplier	14	3
Satisfied with current prices/value for money	12	24
No time/resources to consider moving supplier	6	2
Costs of switching outweigh the savings made	4	6
Have not been approached/Not aware of other suppliers	3	-
Decision made else where/by head office	3	12
Other	6	8
Don't know	21	22

- The key driver in remaining with current fixed line providers is satisfaction with the present level of service received. This is particularly true of those with a medium fixed line spend.
- The perceived hassle of switching also features prominently, and is more of a factor among smaller companies with 1-9 employees.



Factors Important when Selecting a Fixed Line Provider – Summary

Q. Please rate how important each of the following are when selecting a fixed line phone service provider on a scale of 1-5, where 5 is very important and 1 is not at all important?

Note: Mean Scores

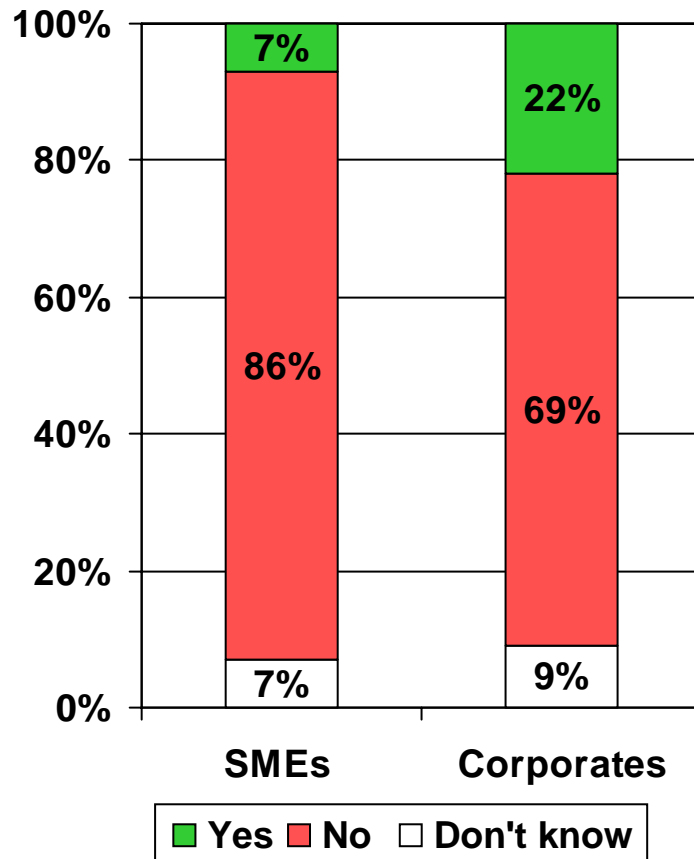
	SME's	Corporates
Reliable and resilient service	4.7	4.8
Good customer service/account management	4.5	4.4
Provision of an adequate Service Level Agreement	4.3	4.4
Getting the lowest price	4.2	4.2
The supplier can offer all services in a single bundle	4.2	4.0
Trustworthy brand name	3.9	3.6
The supplier offers cutting edge technology/services	3.9	3.8
Recommended by a trusted source	3.6	3.5

- Reliable service is the key motivator for selecting a fixed line provider, followed by good customer service/account management.
- Given that price appears to be less important than service, this may help explain some of the reluctance to switch when presented with cheaper pricing options.



Extent of Formal Tendering Processes

Q. Do you formally tender for your fixed line telecoms supplier?

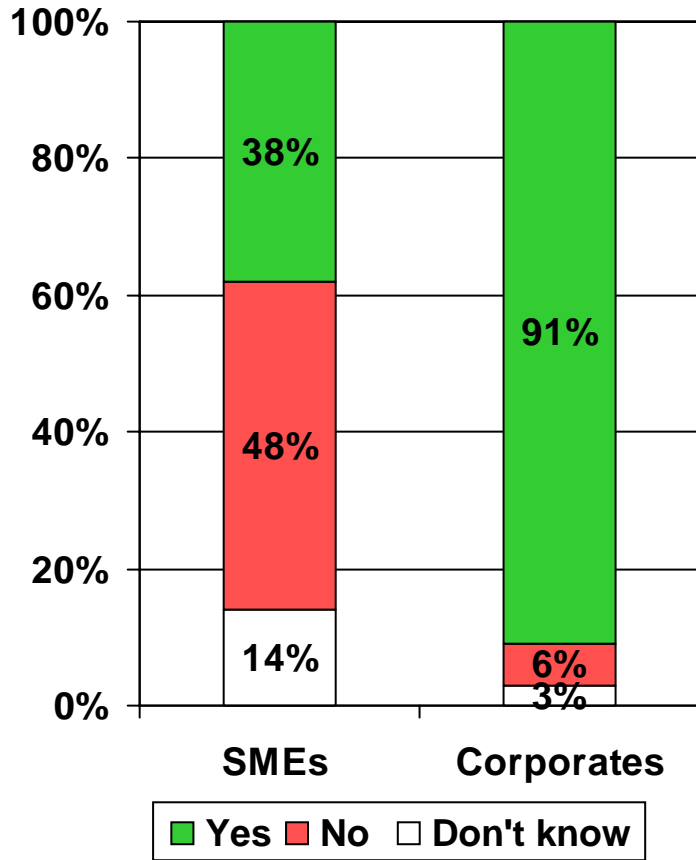


- The vast majority of companies do not put out formal tenders for a fixed line telecom supplier, and those who do are unsurprisingly more likely to be Corporates, and high fixed line spenders.
- Tendering processes were found to be highest in the Government sectors and among those operating in the retail industry.

Dedicated Account Management

New

Q. Does your fixed telecoms supplier provide a dedicated account manager?



- Over nine in ten Corporates claim to have a Dedicated Account Manager, with less than two in five SMEs concurring. However, it should be noted that it is possible that some SMEs have a dedicated account manager but are unaware of their existence.
- Having an account manager was most evident among businesses operating in the following sectors – Manufacturing, financial companies, and government.
- Having a dedicated Account Manager appears to be directly related to fixed line spend. All those with a high spend have an Account Manager, compared to 30% with a low spend.



Approximate Annual Spend on Fixed Line Telecommunications

New

Q. Approximately how much did your company spend on fixed line telecommunications over the last 12 months?

Note: Average Figures Shown#

€

	Total	15,600

Sector	SMEs	6,500
	Corporates	151,300

Number of Employees	1-9	2,600
	10-49	6,000
	50-100	27,800
	100+	151,300

Main Business Activities	Agriculture*	17,000
	Mining/construction	3,400
	Manufacturing	14,000
	Transport*	11,800
	Recycling/utilities/water*	11,600
	Wholesale	41,800
	Retail	8,600
	Hotel/restaurants	2,300
	Finance*	10,100
	Services	12,900
Government*	166,600	

- Forty-one percent of SMEs spend less than €3,000 annually on fixed line telecommunications, whilst one quarter of Corporates (24%) spend €50,000 + annually.
- Those using only eircom spend more on average than those who are only using other alternative operators/providers.

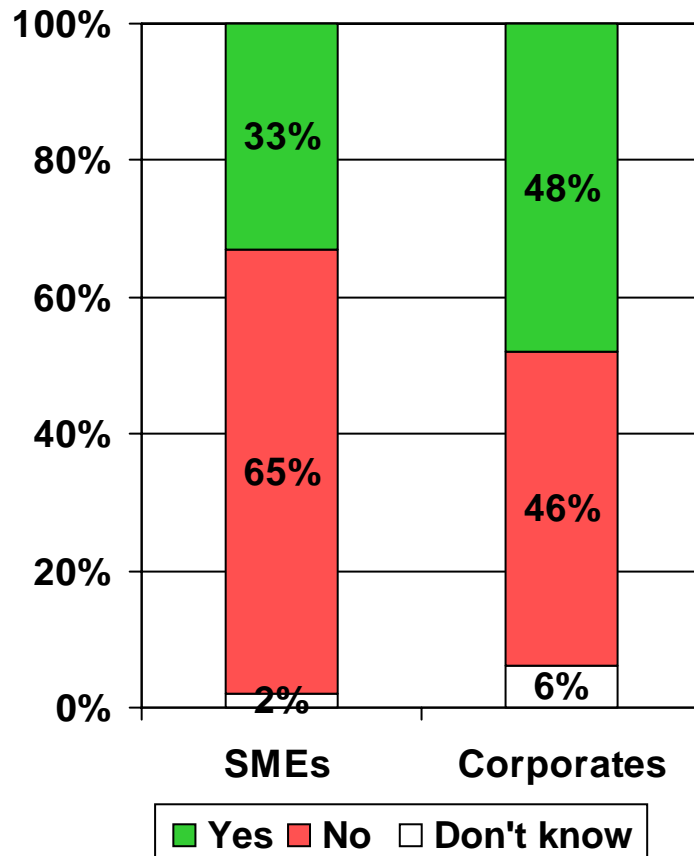
*Caution: Small base size

#Note: Figures rounded to nearest €100

Incidence of Complaints Made Against Fixed Line Provider

New

Q. Have you made a complaint to your service provider regarding a fault with your fixed line telecoms service in the last 12 months?



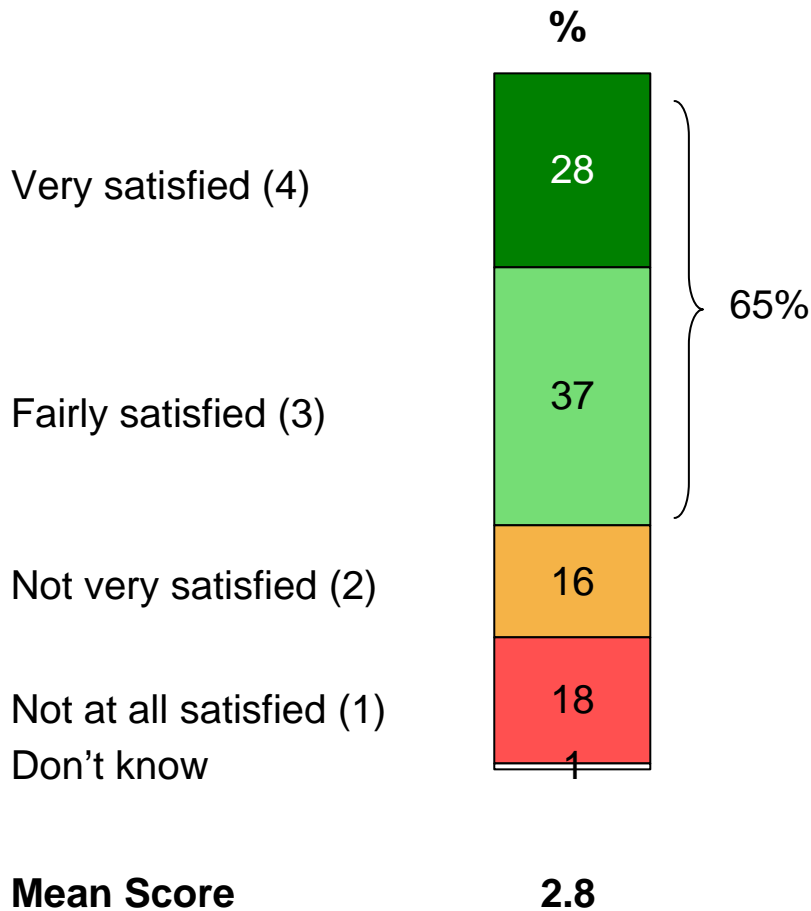
- Nearly half of all Corporates have made a complaint over the past year, compared to one third of SMEs.
- Those who have more than one fixed line supplier are more likely to have complained, along with those who have a medium to high fixed line spend.



Satisfaction With Time Taken to Correct a Fault

New

Q. How satisfied were you with the time taken to correct the fault?



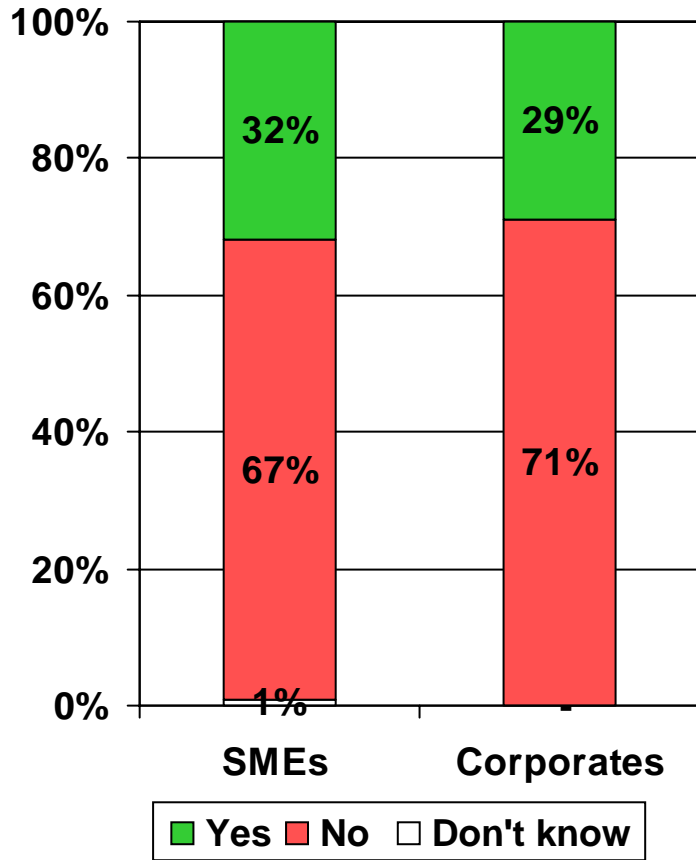
- Over 6 in 10 SMEs, having complained to their fixed line provider, were satisfied with the time taken to correct a fault.
- Those most dissatisfied were small companies (1-9 employees)
- Among the 24 Corporates who have made a complaint, a similar picture emerges, with just over two-thirds (67%) satisfied with the time taken to correct the fault.



Awareness of Code of Practice

New

Q. Are you aware of the code of practice your operator must follow in resolving complaints?



- A significant majority are unaware of mandatory code of practice when resolving complaints.
- Awareness of the code of practice is higher among those with between 50-100 employees, those operating in the manufacturing and wholesale industries, and those with a high fixed line spend.





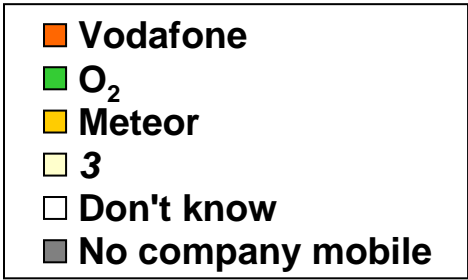
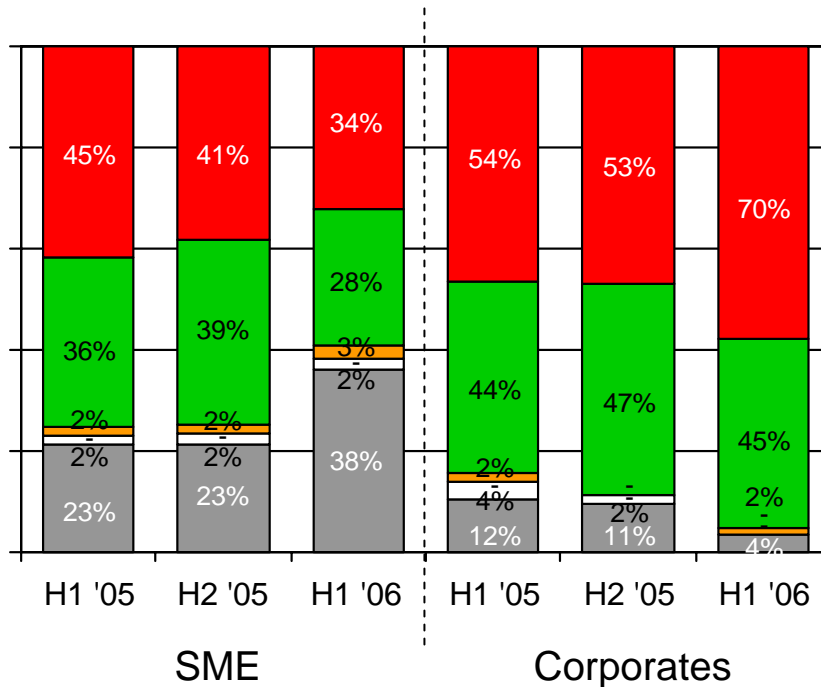
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Mobile Market

Mobile Phone Market Share*

• What company supplies your mobile telephone calls? (Multiple Answers Allowed)



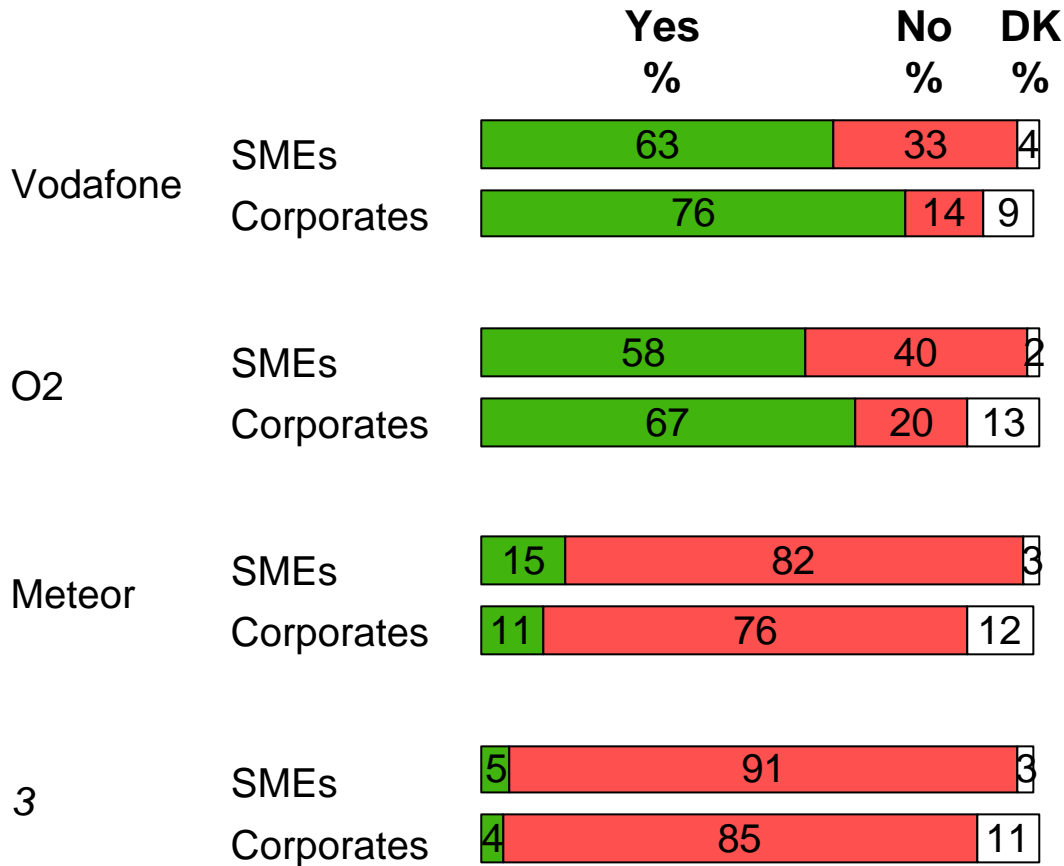
- Vodafone retains 38% of the total business market, leading O₂, who retain 29% of the overall sample. This wave of research saw a higher incidence of companies not having company mobile phones.
- Meteor remains a relatively small operator in the business sector. 3 has yet to make an impact in the business market and has focused on developing its consumer customer base.
- Thirty-five percent of companies claim not to have any company mobile phones, an increase from 22% in H2 '05 of this research
- 10% of companies with company mobile phones claim to use more than one mobile phone service supplier

*Note: Company Mobile Phone is defined as any phone used for business purposes, regardless of whether bills are pre-paid or post paid, or if employees are reimbursed for calls made from private phones

New

Assessing Mobile Packages

Q. When choosing a mobile phone provider did **you** make direct contact with any of the following operators **in order to assess the business tariff packages they were willing to offer?**



- Vodafone and O₂ were most likely to be contacted in order to assess the business tariff package they were willing to offer.
- About half of existing O2 users claimed to have contacted Vodafone and a slightly smaller number of existing Vodafone users claimed to have contacted O2.
- Corporates are generally more likely to assess packages across the marketplace.



Importance of Cost Related Factors when Choosing a Mobile Service – Summary

- On a scale of 1-5 where 5 means very important and 1 means not at all important, how would you rate the following cost related factors when initially choosing a mobile service for your company?

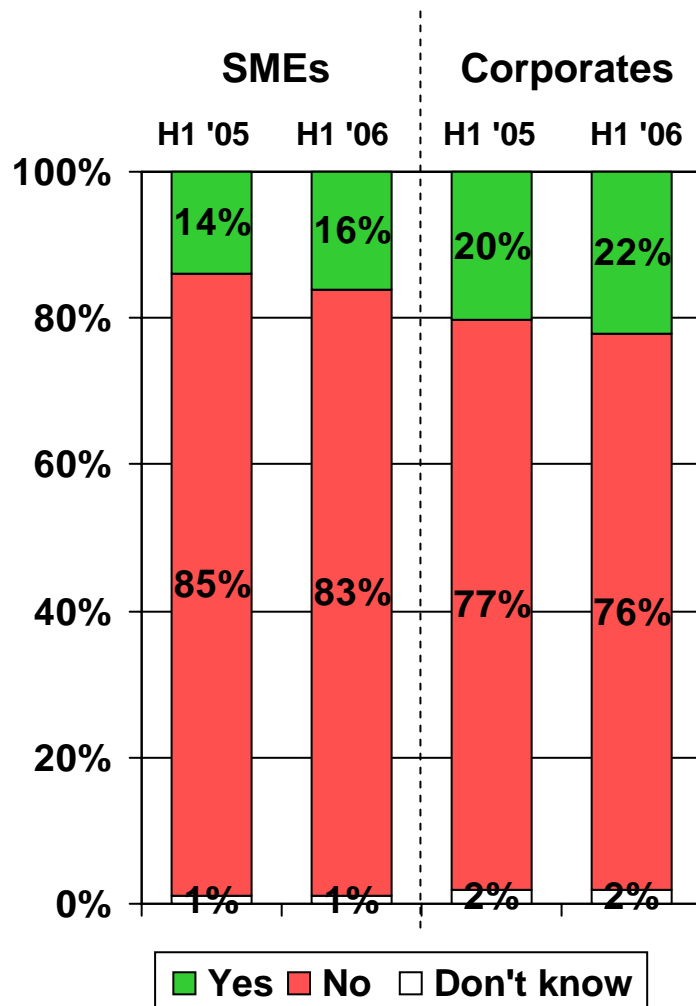
Note: Mean Scores	SMEs %	Corporates %
The cost of making calls to the same mobile network	4.3	4.3
The cost of calls to landlines	4.3	4.5
The cost of making calls to a different mobile network	4.1	4.0
The cost of accessing voicemail	3.6	3.2
The cost other individuals incur when they make calls to your company mobiles	3.4	2.8
The cost of international roaming while abroad	3.3	3.0
The cost of making international calls while in Ireland	3.2	3.1
The cost of text messages	3.2	2.8

- The cost of on-network calls and calls to landlines appear to be most important to both SMEs and Corporates when choosing a mobile provider.
- Of least importance to businesses when selecting a mobile service is the cost of text messages.



Mobile Provider Switching Activity

Q. Has your company switched supplier for any of its mobile services in the last 12 months?



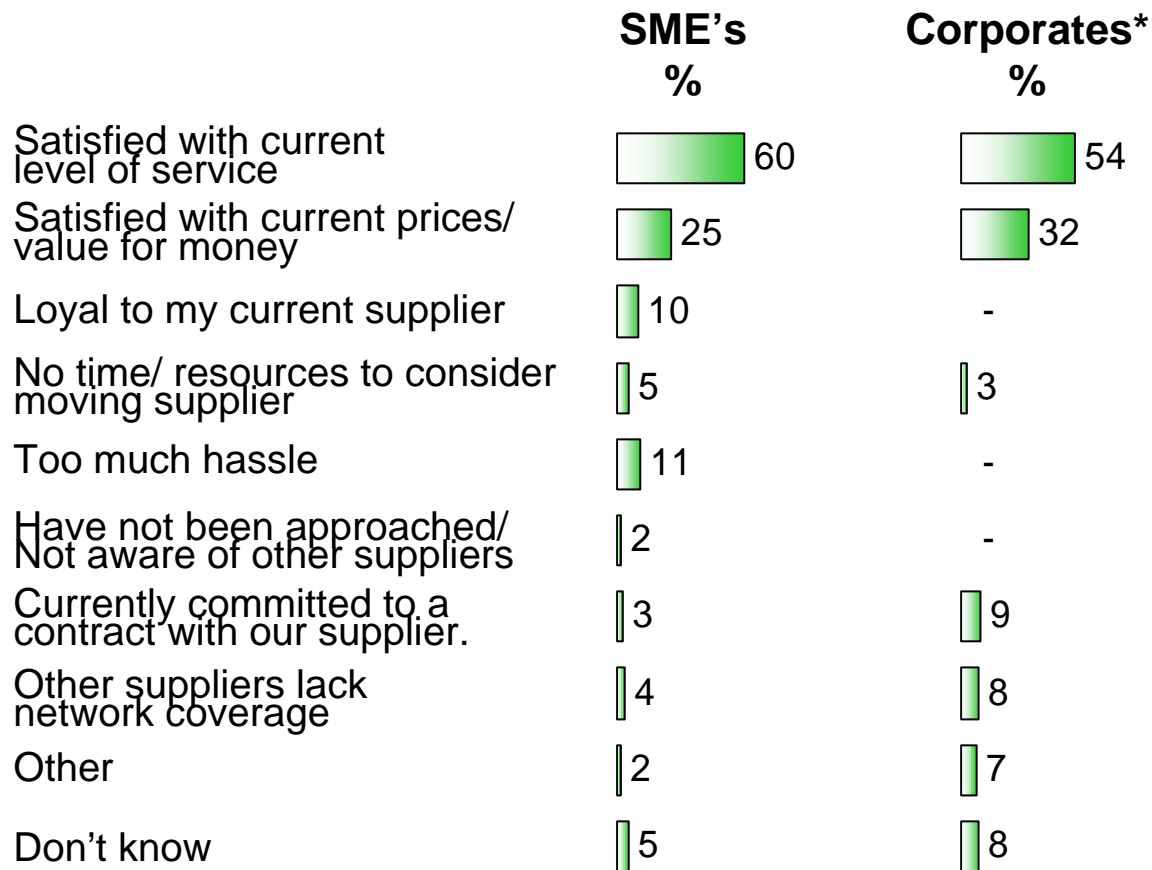
- 16% of SMEs and 22% of Corporates have switched mobile supplier in the last 12 months.
- Switching was found to be more prevalent among larger companies employing 100 employees+ (22%) and those in the mining/construction industries (24%).
- Those who have switched mobile service suppliers are slightly more likely to have switched fixed line supplier, possibly indicating a greater willingness to shop around.



Reasons for Not Switching Mobile Phone Supplier

New

Q. Why have you not switched mobile phone provider?



- Satisfaction with current levels of service received is by far the main reason for not switching.
- This is especially true among medium sized companies (50-100 employees, 66%) and the retail industry (69%).

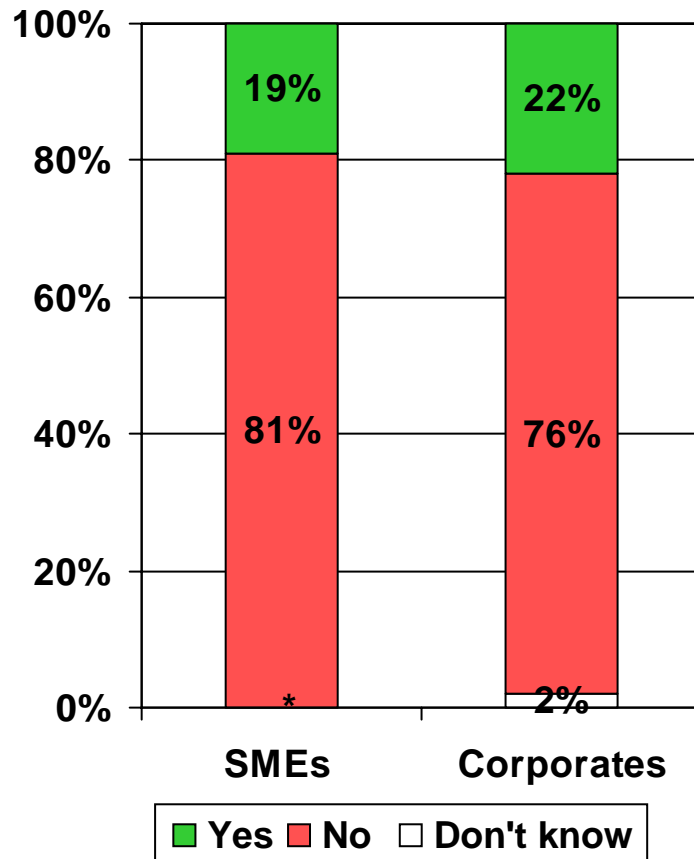
*Caution: Small base size



Complaint Made to Mobile Phone Service Provider

New

Q. Have you made a complaint to your mobile phone service provider in the last 12 months?



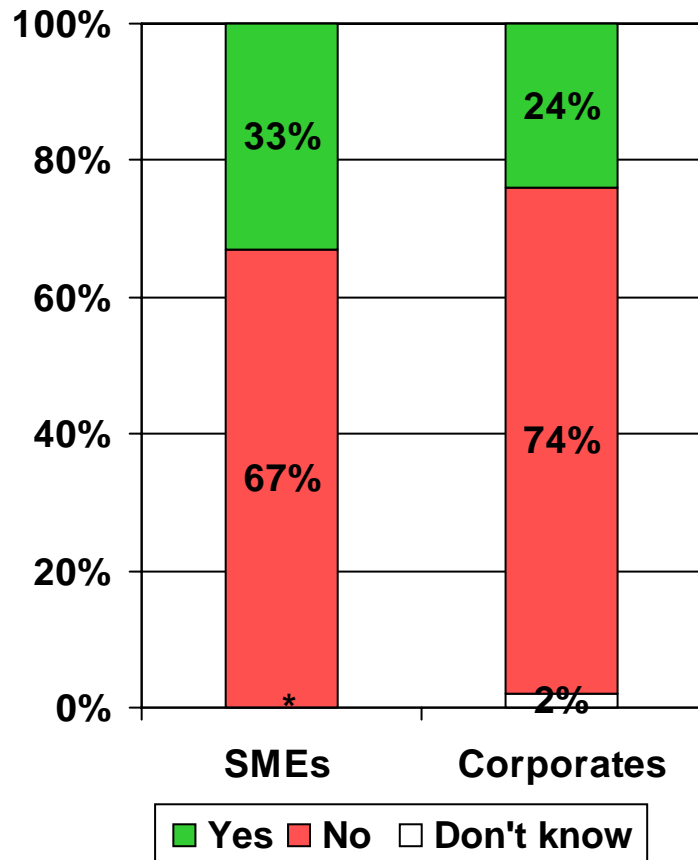
- Vast majority have not made a complaint over the past 12 months.
- Those operating in the Mining/construction industries are more likely to have issues, along with those who use their mobiles abroad. Those who claim not to be aware of ComReg are less likely to have made a complaint.
- Among SMEs, 42% claimed they were dissatisfied with the outcome, with three of the ten Corporates who complained expressing a similar opinion.



Awareness of Code of Practice

New

Q. Are you aware of the code of practice your operator must follow in resolving complaints?



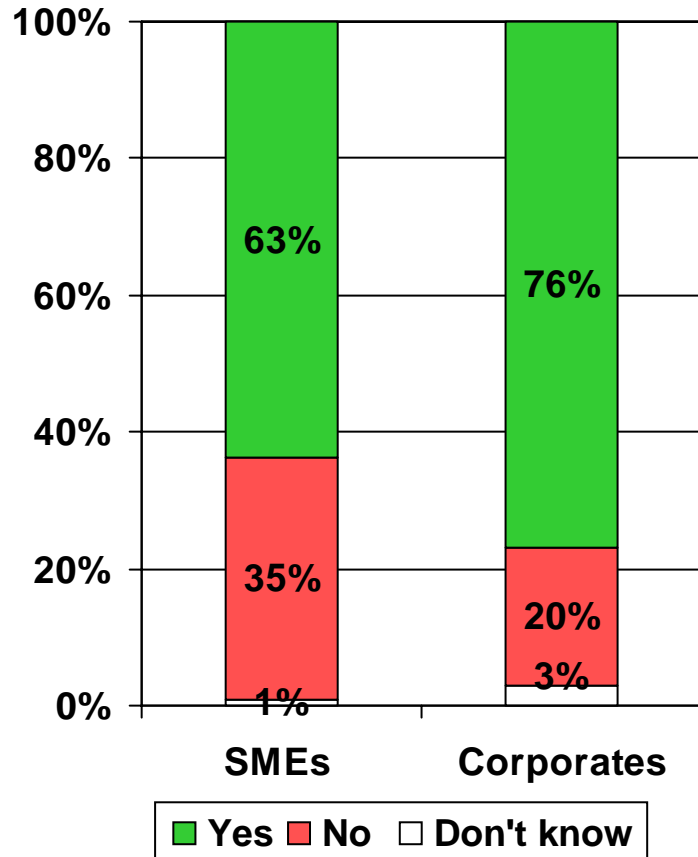
- Similar to the question asked about fixed line suppliers, a majority of companies are unaware of mobile phone suppliers' obligations when resolving complaints.
- SMEs are more likely to have knowledge of the code of practice than Corporates.



Usage of Company Mobile Phones While on Site

New

Q. Do employees in your organisation use their company mobile phones while on site or in the office when a fixed line phone is available to them?



- Two thirds of SMEs and three quarters of Corporates who have company mobile phones use their company mobiles on site when a fixed line is available to them.
- Those in the wholesale, financial and government sectors were most likely to use their mobiles when a fixed line was available
- Some businesses may avail of wireless office phone networks allowing free mobile calls between all mobile subscribers within the company.



Mobile Phone Services Provided

Q. Does your company currently provide any of the following mobile phone services to any of its employees?

	SMEs		Corporates	
	H2 '05 %	H1 '06 %	H2 '05 %	H1 '06 %
3G handsets	7	13	19	42
3G Data Cards	6	6	42	47
GPRS or 2.5G handsets	10	12	33	47
Wireless LAN cards	8	10	26	47
GPS systems	n/a	6	n/a	18
None of these	76	70	39	25
Don't know	4	1	-	1

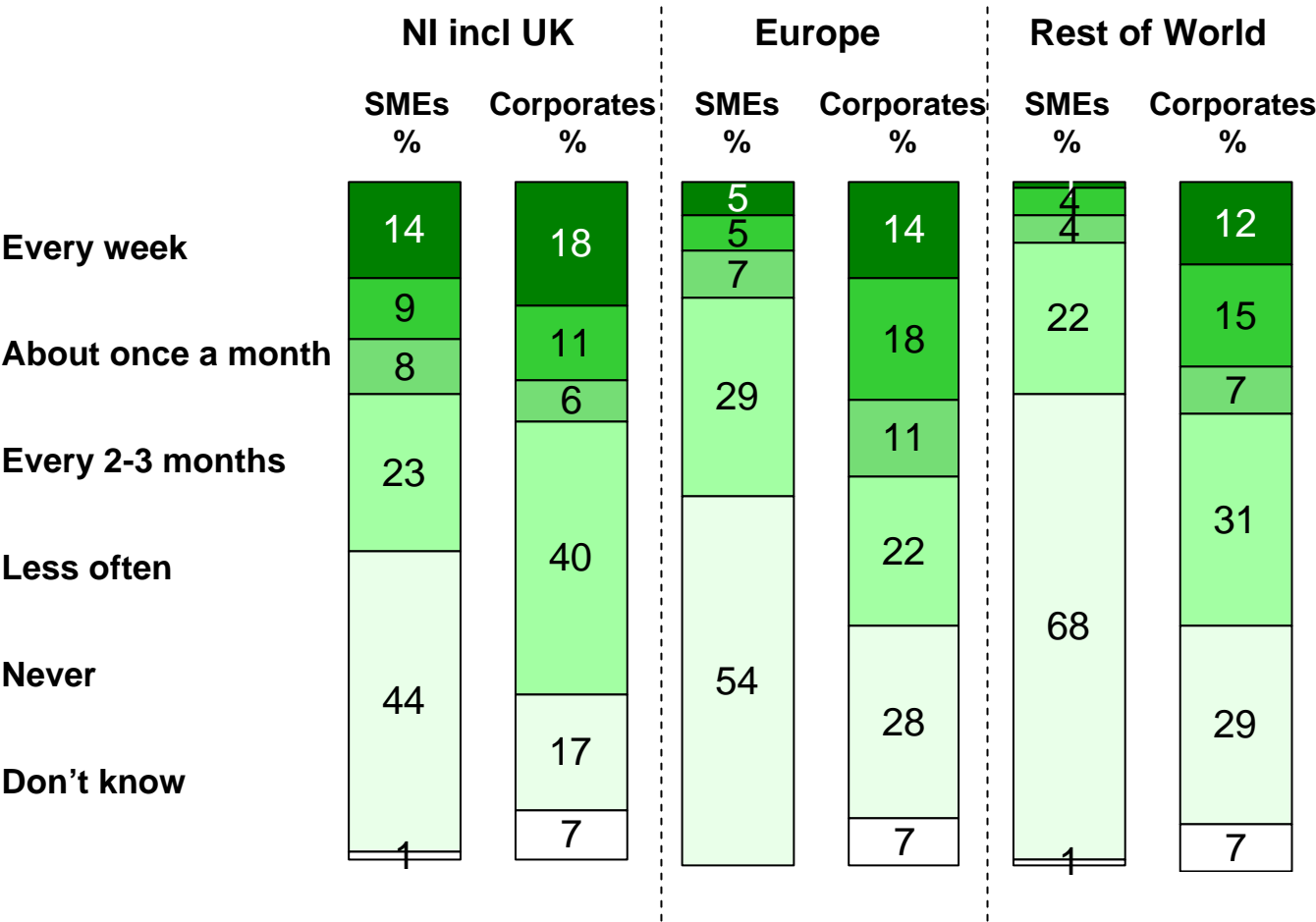
- There has been a large increase in the number of mobile phone services offered to employees, and this is driven by Corporates.
- The use of 3G handsets has doubled among SMEs and Corporates, with wireless LAN cards and 2.5g handsets also being more frequently used.
- Not surprisingly, use of 3G handsets is highest among existing Vodafone users.
- Those in the Mining/construction industries are more likely to avail of 3G handsets, with those in manufacturing industries being more frequent users of 2.5g handsets and Wireless LAN cards.



Use of Company Mobile Phones Abroad

New

Q. How often do company employees use company mobile phones in the following regions for business purposes?



- Overall 63% of companies with business mobiles use their company mobiles for international roaming.
- Corporates are more likely to use their company mobiles for international calls.
- Those with 50+ employees or involved in manufacturing industries are also more likely to use their company mobile phones abroad

Satisfaction With Current Roaming Charges

Q. How satisfied are you with the current cost of “roaming charges” your company pays when company mobiles are used abroad?



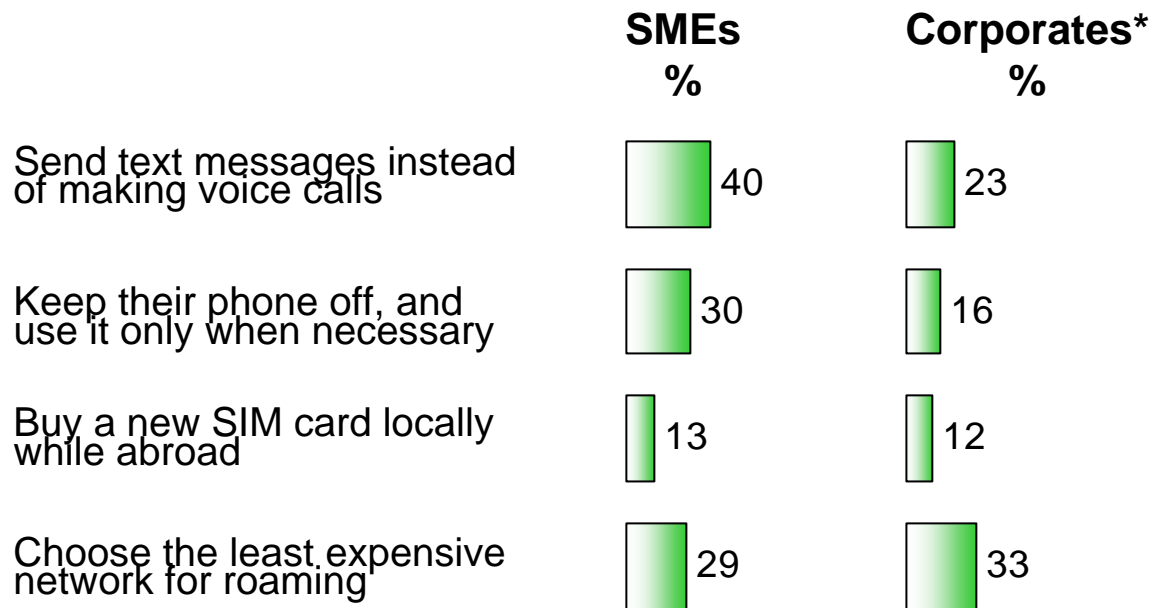
- SMEs are slightly more dissatisfied with cost of international roaming than Corporates.
- Corporates are likely to be in a better position to negotiate international rates, hence their marginally higher satisfaction levels.
- Those least satisfied are companies with 1-9 employees, Dublin based companies and those who have switched mobile provider.



Current Usage Procedures When Using Company Mobile Phones Abroad

New

Q. Does your company encourage employees to do any of the following when using a company mobile when abroad?



- 40% of companies have no cost control policy on using company mobile phones when abroad, rising to 56% among Corporates-those most likely to use phones abroad.
- SMEs are most likely to encourage employees to text rather than call, while Corporates are most likely to request that employees choose the least expensive network.
- Only a very small minority opt for buying/using a local SIM card when abroad.

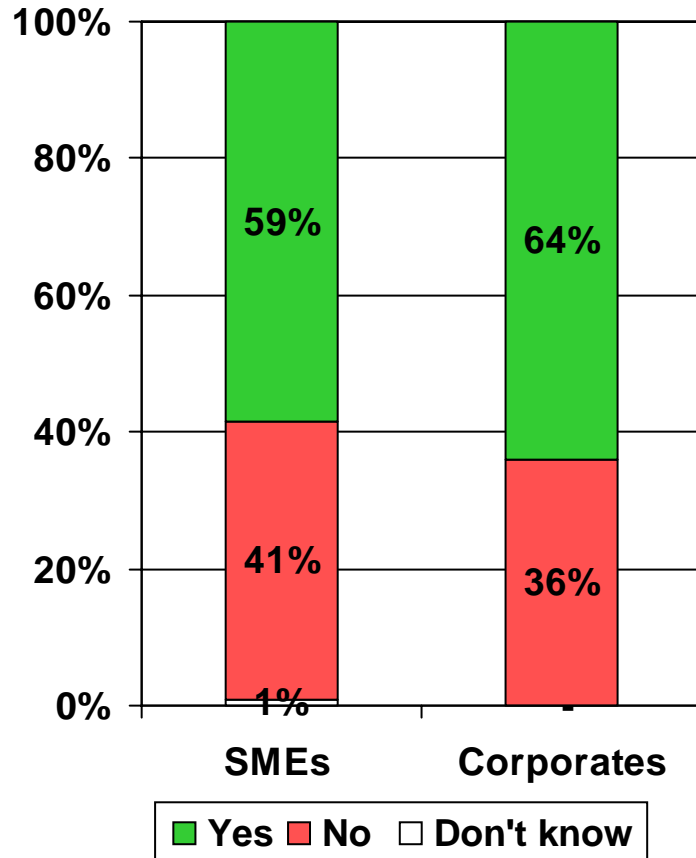
Base: All Who Use Company Mobile Phones Abroad (n=176, 36)

*NOTE SMALL BASE OF 36



Awareness of EU Plans to Legislate Roaming Charges

Q. Are you aware of EU plans to compel mobile phone operators to curb the level of Roaming charges they apply to customers when travelling within the 25 EU states?



- Majority are aware of plans to legislate roaming charges by the EU.
- Those most aware are medium to large companies (50 employees+) and both Dublin and Connaught/Ulster based companies.
- Those who use their company mobiles abroad are more aware of the proposed EU legislation (61%), along with those who are aware of ComReg (70%)



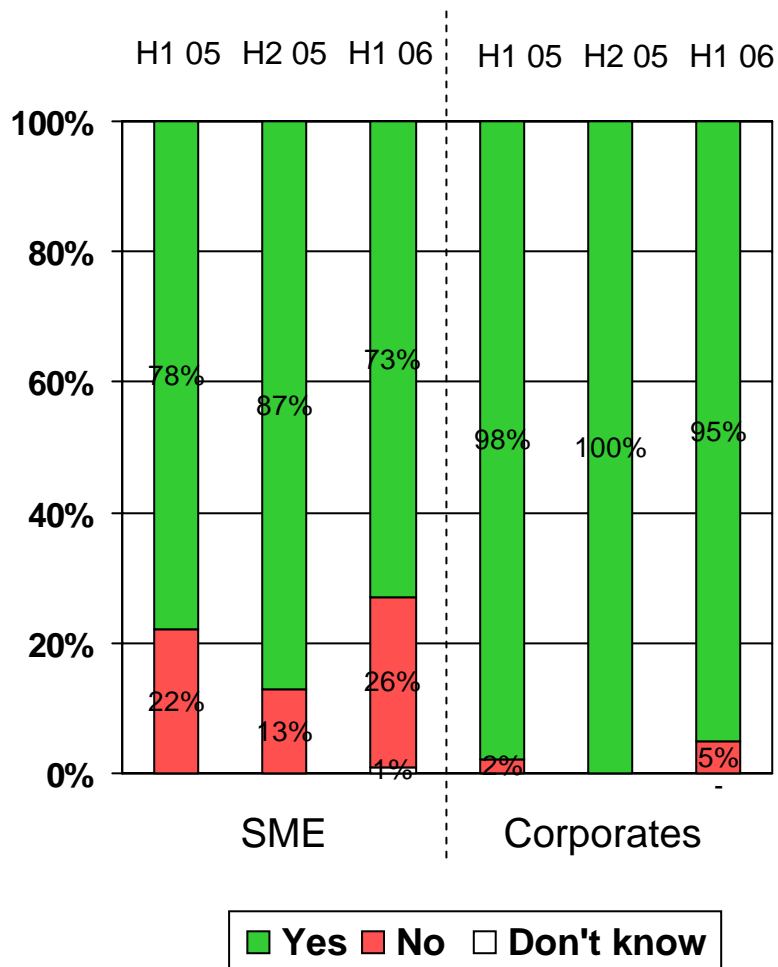
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**Internet & Broadband
Communications**

Internet Access

Q. Is your company connected to the Internet?



- Nearly all Corporates are connected to the Internet this wave and three quarters of SMEs are online.
- Those without internet access are most likely to be companies with less than 10 employees and similar to previous waves, those operating in the retail sector and the hotel restaurant sector.



Internet Supplier Used

Q. What Internet access provider does your company use for connecting to the Internet

	Total			SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
<i>eircom</i>	66	69	70	66	72	73	61	46	54
Other	34	31	30	34	28	27	39	54	46

- Overall *eircom* appears to be retaining its share of the Internet market.
- Alternative providers have a greater market share of the Corporate, rather than the SME sector.
- Use of other providers is most evident among companies with 50+ employees and those operating in the manufacturing sector.



Type of Internet Connection Used

Q. What type of internet connection does your company use?

	SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
DSL connection	49	57	59	51	67	57
Dial-up	27	24	19	2	6	2
ISDN line	15	13	9	8	13	4
Wireless broadband	4	2	4	2	6	4
Dedicated leased line	3	3	9	22	13	24
Satellite	1	1	2	-	2	-
Other	1	2	0	2	8	5
Don't know	4	4	6	14	6	14

- Among SMEs there has been an increase in use of DSL connections and use of dedicated leased lines. Dial-up connections have continued to fall.
- Currently 74% of SMEs and 85% of Corporates that have access to the Internet use broadband technology.
- Among Corporates, while DSL usage has declined compared to H2 '05, leased lines have increased.
- Dedicated leased lines are slightly more prevalent in the manufacturing and financial industries, and are utilised more in Dublin.



Broadband Access

Q. Are any of the following broadband services available in your area?

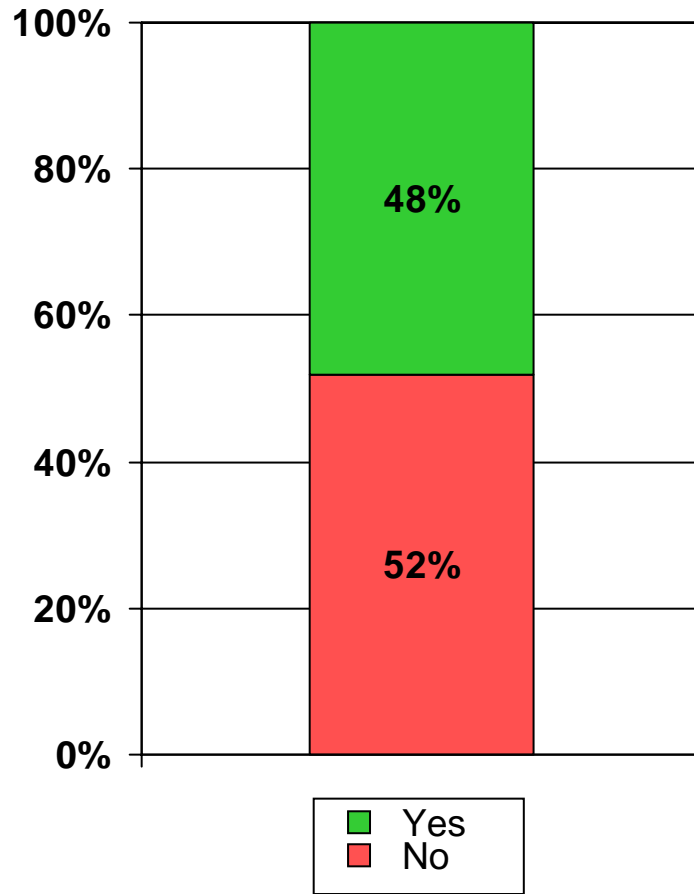
	H2 '05 Yes %	H1 '06 Yes %
DSL Lines	19	21
Satellite	17	20
Wireless Broadband	27	30
Leased Lines	9	16
Fibre optic cable	n/a	15

- Perceptions of access have improved across the board since H2 '05.
- Access to leased lines in particular seem to have improved.
- One in three (32%) of narrowband users claim that no broadband service is available to them. However, this could reflect lack of awareness more so than lack of access. This may be particularly true for satellite broadband which is available at any location nationally.
- Those who claimed no access to any broadband services were most likely to be based in a rural area or village and those based in Leinster (excluding Dublin).



Broadband Upgrade Attempts

Q. Has your business attempted to upgrade to broadband?

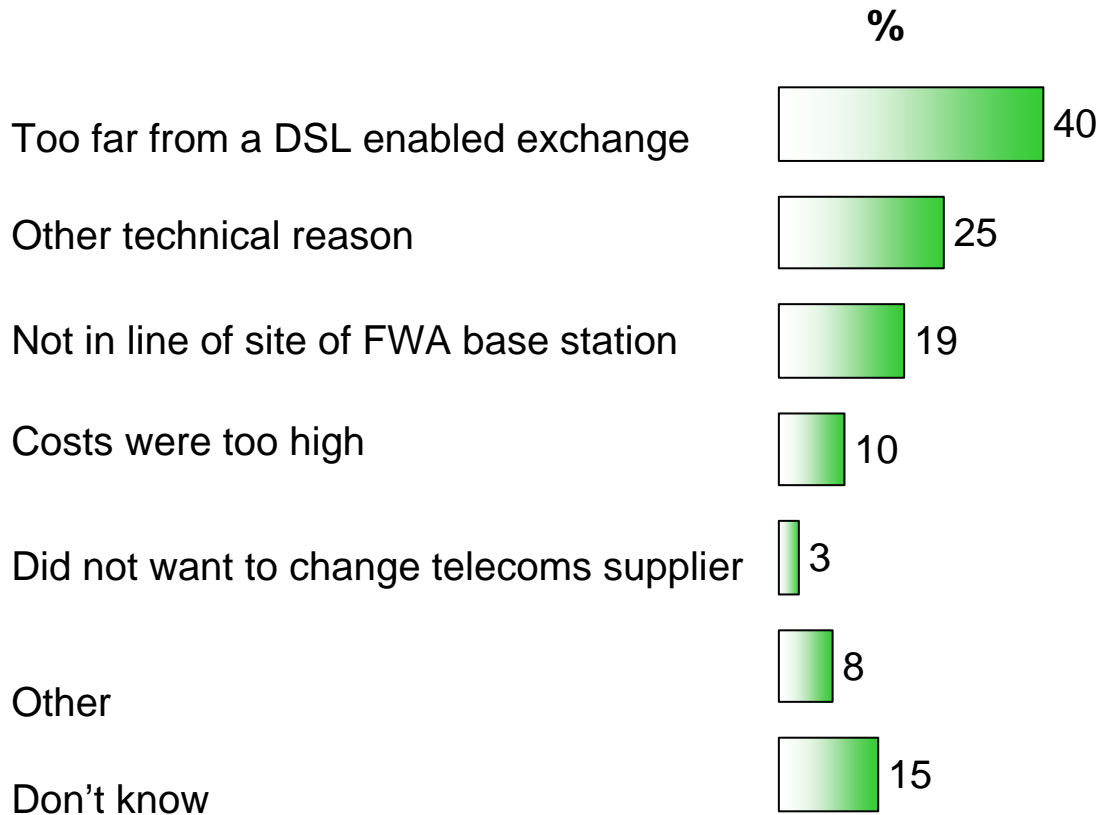


- Almost half of all SME dial-up users claim to have attempted to connect to broadband. Regionally, those in Connaught/Ulster and Leinster (excluding Dublin) are more likely to have tried to upgrade.
- Three quarters have attempted to upgrade within the past 6 months with half trying in the last month.

Reasons for Narrowband Users' Attempts to Upgrade to Broadband being Unsuccessful



Q. Why were you unsuccessful in upgrading to a broadband connection?



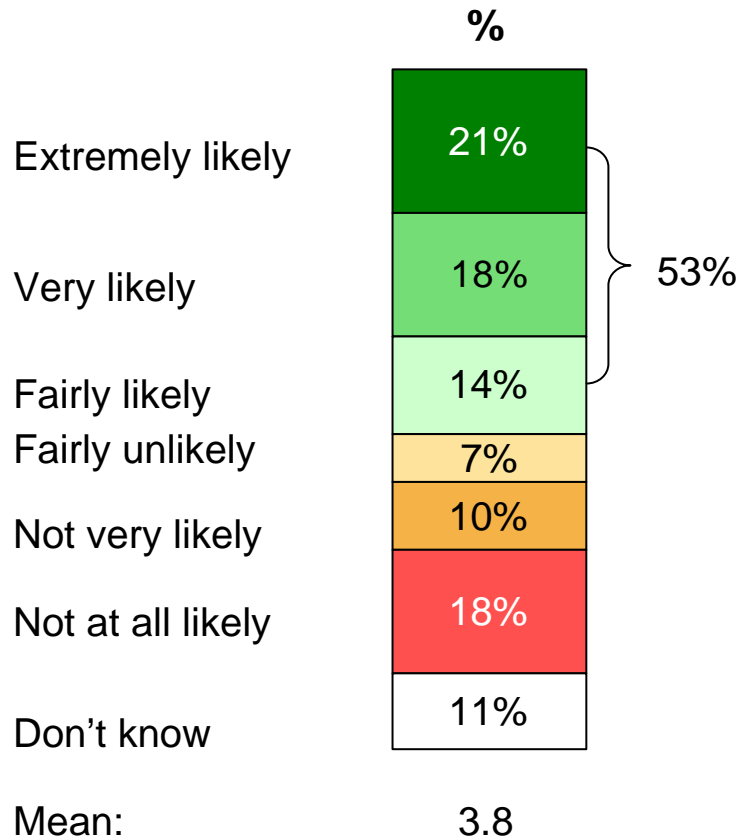
- Being too far away from a DSL exchange is the main barrier to dial-up users getting broadband.
- 13% of those who were unsuccessful in upgrading did so either because they perceived the cost, or switching operator to be a barrier to subscribing to broadband.
- This was particularly evident among those based in a rural area or village and among those living in Munster.



Likelihood of Connecting to Broadband

New

Q. How likely is your company to get a broadband connection in the next 12 months?

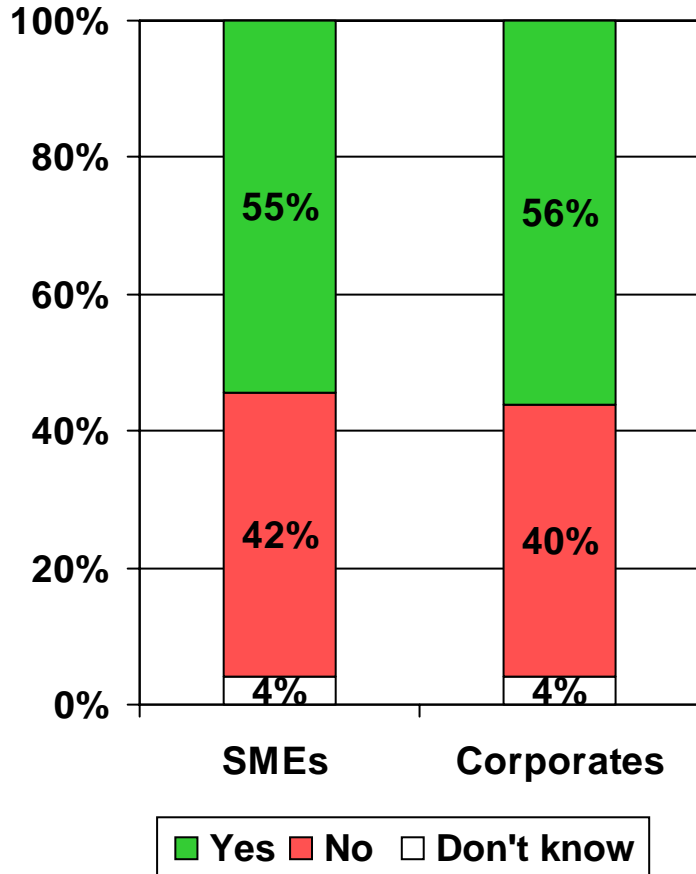


- Over half of SMEs not currently connected to broadband say they are likely to upgrade in the next 12 months.
- Likelihood was highest among those in a large town or city.
- While interest in getting broadband is reasonably high, there does exist a core of businesses who consider it highly unlikely that they will upgrade anytime soon.



Use of Business Applications That Require Broadband

Q. Are there any specific applications your business uses that require a broadband connection?

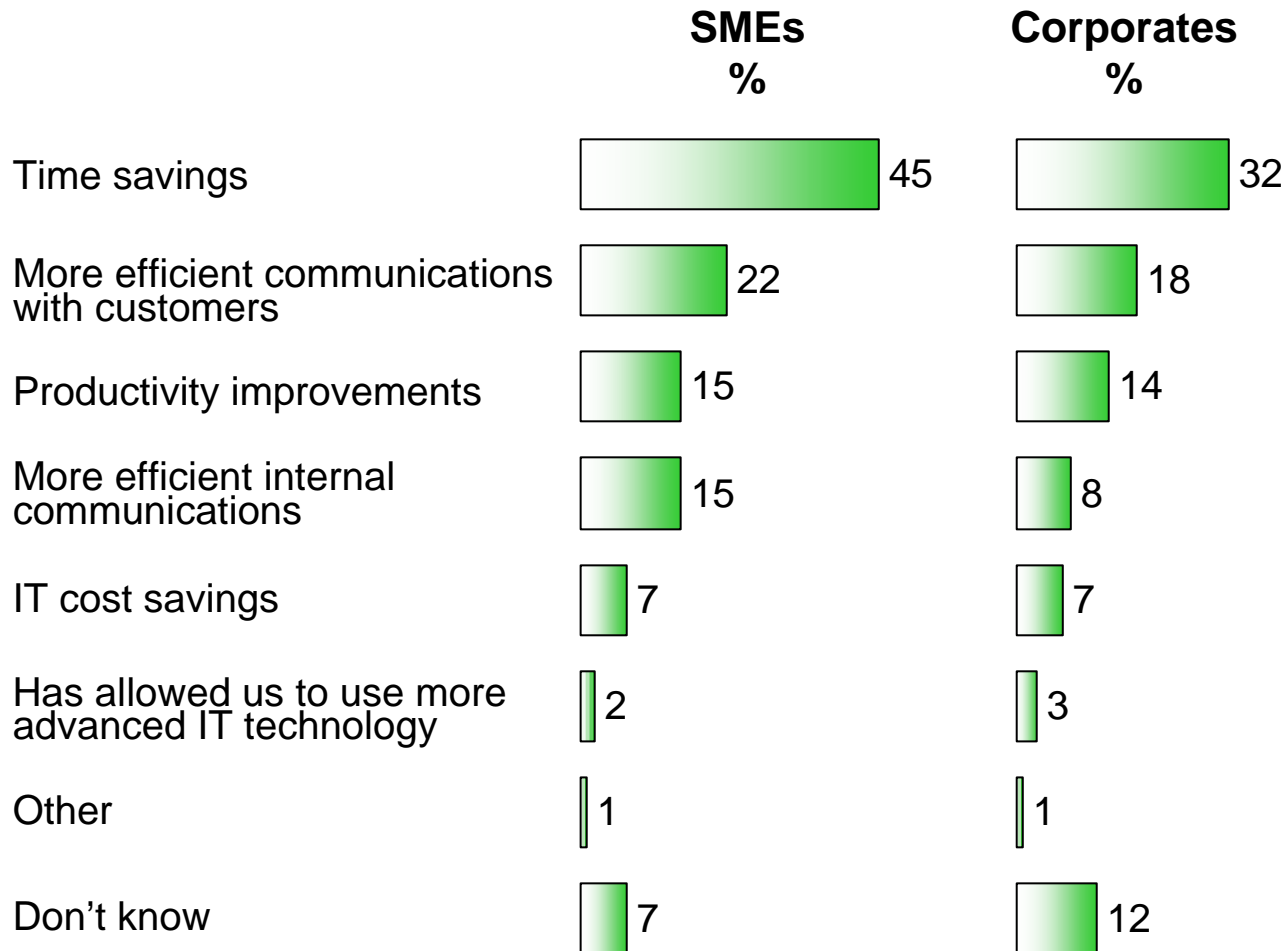


- Over half of both SMEs and Corporate broadband users require broadband for use of specific applications.
- This is particularly true of businesses trading in the wholesale and financial industries.
- Dublin based companies are also more dependent on broadband for specific business applications.



Impact of Broadband on Business

Q. How has broadband impacted on YOUR business?



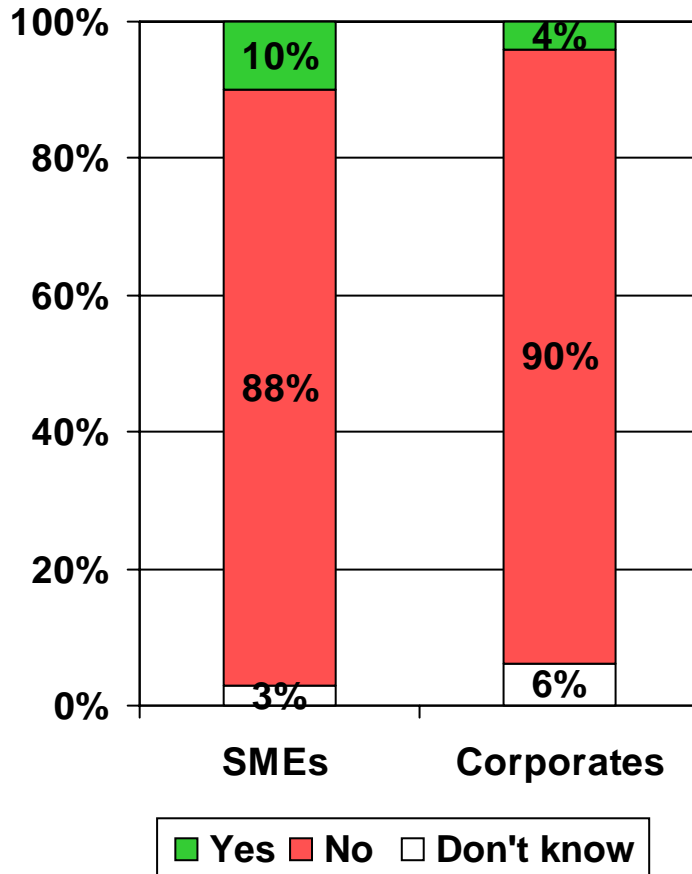
*Answers under 2% not shown

- Better efficiency and time savings are the key benefits offered by Broadband.
- Companies with 10-49 employees are most likely to cite “time savings” as a key benefit, along with manufacturing companies.
- More efficient communications with customers was most felt by smaller companies (1-9 employees).



Broadband Supplier Switched?

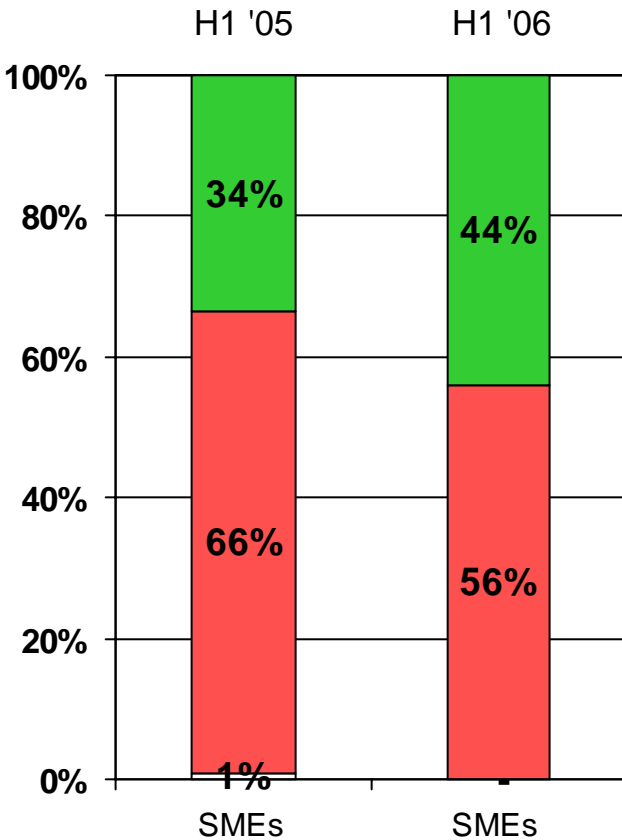
Q. Have you switched your broadband provider in the past 12 months?



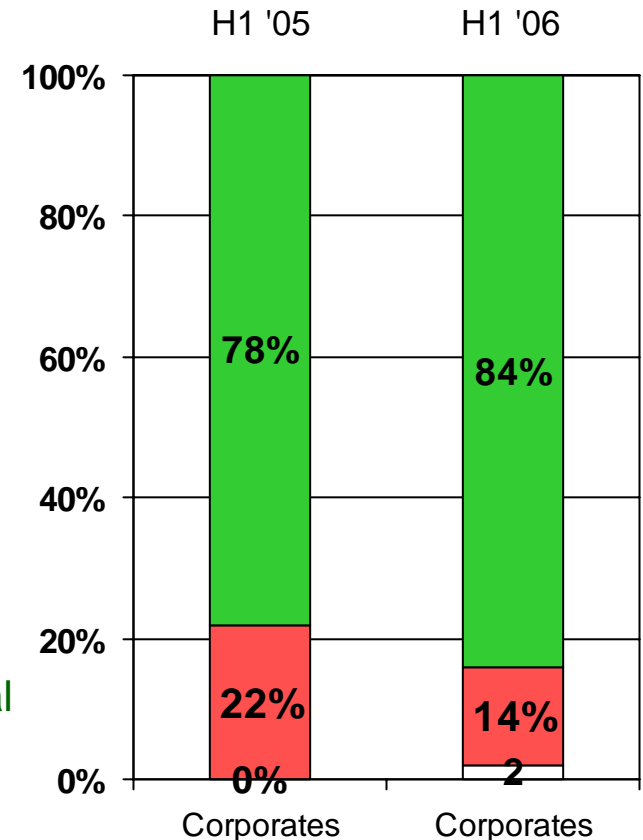
- Level of switching between broadband suppliers is low in both SMEs and Corporates.
- Those based in Munster or in manufacturing industries are slightly more likely to have switched.
- Of the 28 companies who have switched in the past 12 months, one in three (nine companies) were very satisfied with the process, whilst a further 13 companies were quite satisfied. Only five of the 29 companies were dissatisfied with the process.

Awareness of VoIP

Q. Have you heard of a service called Voice Over IP also known as 'VoIP'?



- Awareness of VoIP is very high among Corporates and rising among SMEs.
- Awareness was highest among Dublin based businesses and companies with 50+ employees.
- On an industry sector basis, awareness was highest among those operating in the financial sector.



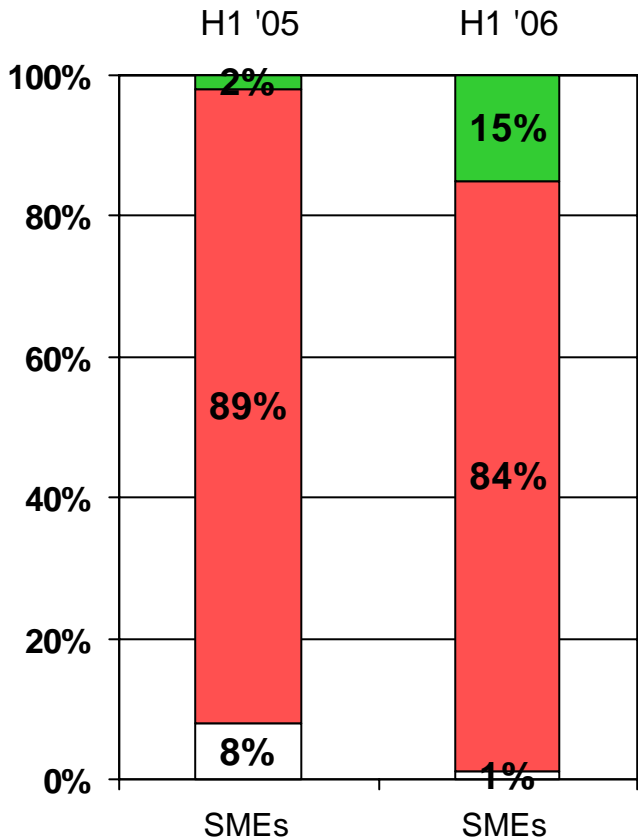
■ Yes ■ No □ Don't know

Note: Question Not Asked in H2 '05

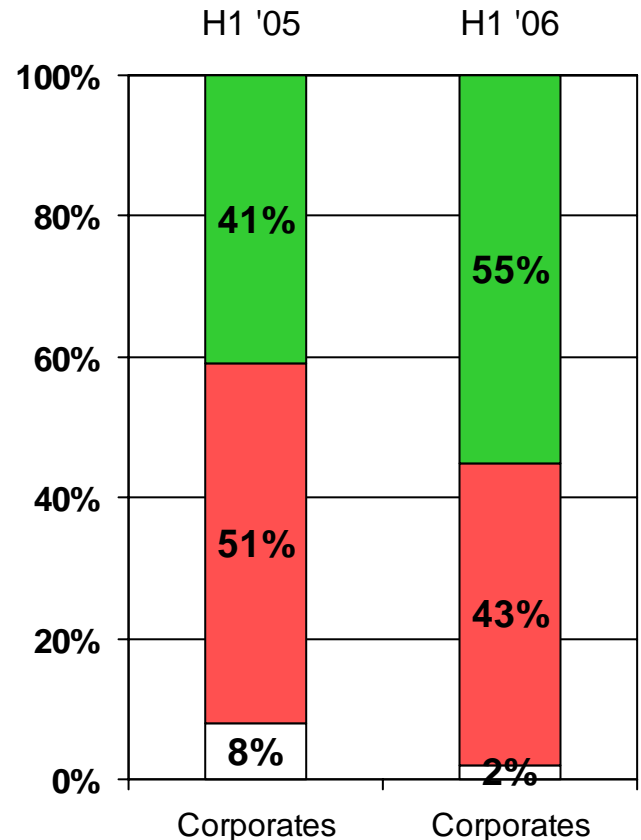


Approaches by VoIP Providers

Q. Have you been approached by a Service Provider offering such a service?



- In line with a general increases in awareness, approaches by VoIP providers has also increased since this time last year.
- Corporates are far more likely to have been approached by VoIP providers. This is also true of companies based in Dublin.



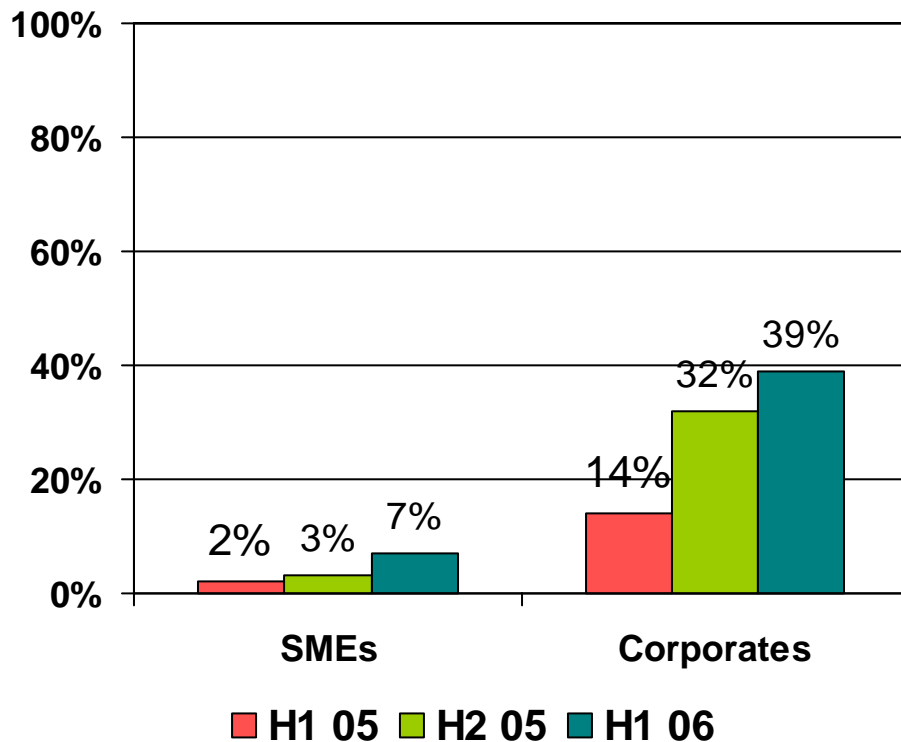
■ Yes ■ No □ Don't know

Note: Question Not Asked in H2 '05



Usage of VoIP

Q. Is your company currently using Voice over IP (or VoIP) services?

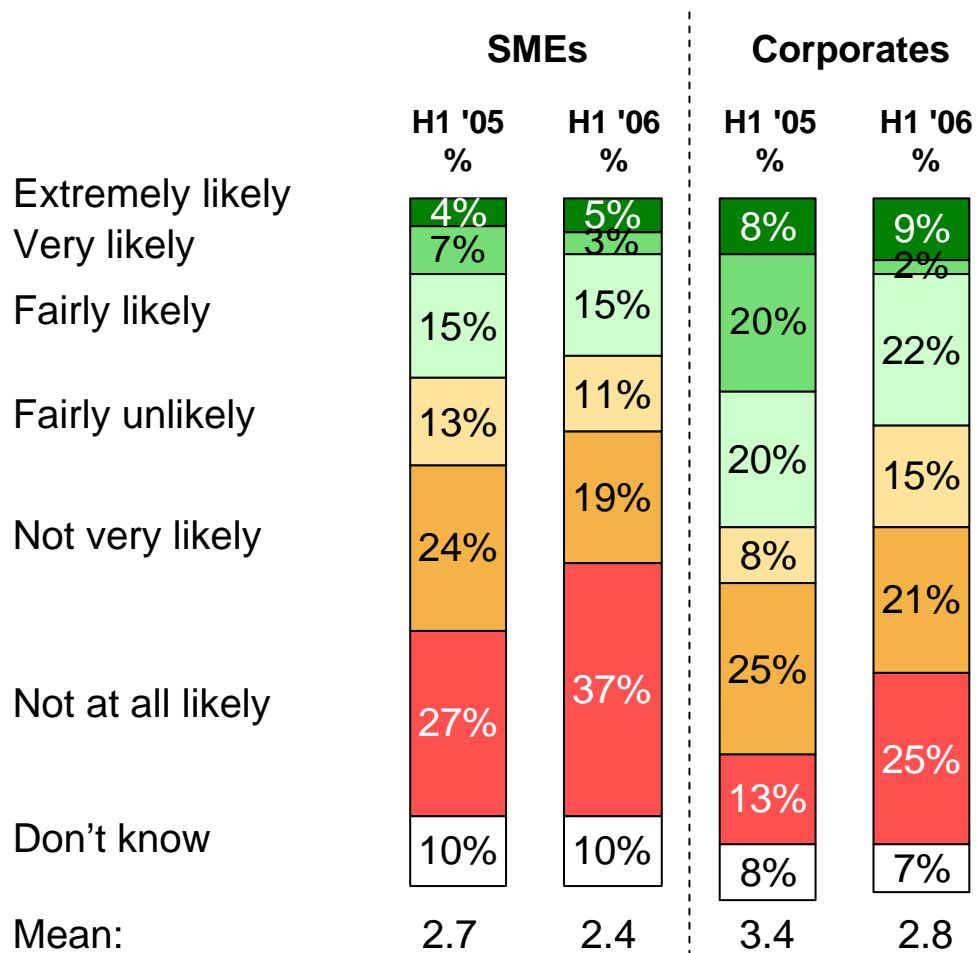


- Overall 10% of companies claim to be using VoIP.
- Usage among Corporates is five times the level of SME usage.
- Usage is higher among financial companies and businesses based in Dublin.
- Of those using VoIP, about a third have started using it in the past 6 months.
- Sixty percent of VoIP users use VoIP over a public unmanaged broadband connection and the balance over a managed private broadband network.
- SMEs were most likely to use Sykpe for the provision of voice services.



Likelihood of Using VoIP

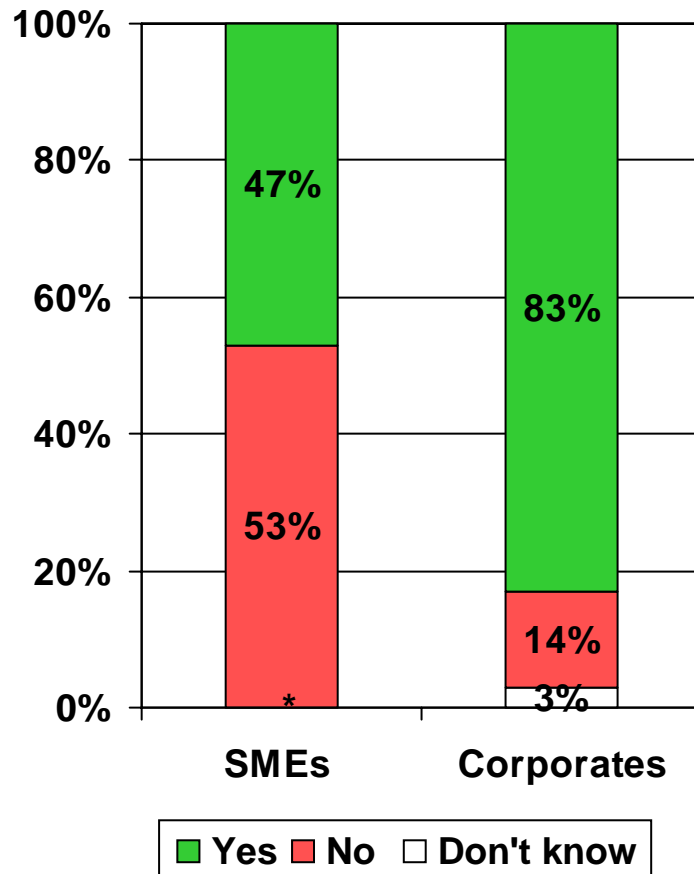
Q. How likely is your company to start using VoIP over the next 12 months?



- Interest in VoIP is reasonable among Corporates and fairly limited among SMEs.
- Interest in VoIP is higher among those in the wholesale sector and those with a high fixed line spend.
- It is also higher among those who have already been approached by a VoIP provider, suggesting that understanding the benefits of VoIP increases interest levels.

Connectivity Linking Sites

Q. If your company operates from more than one site, does it have connectivity linking some or all of these sites?



- 31% of SMEs and 78% of corporates operate from more than one location.
- Of those, over half have connectivity linking some or all of their sites
- This is particularly true of those based in Dublin and those based in urban Business Parks.





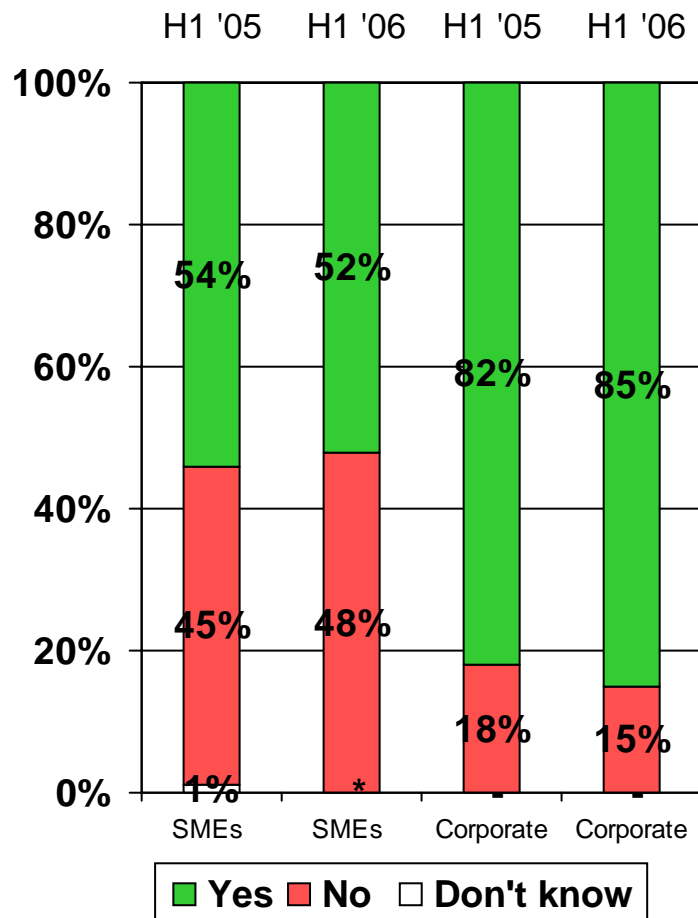
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Awareness of and Attitudes to ComReg

Awareness of ComReg

Q. Have you ever heard of the Commission for Communications Regulation, also known as ComReg?



- Awareness of ComReg has remained mostly unchanged over the past 12 months, with Corporates being much more aware than SMEs.
- Awareness is higher among those in the manufacturing and service industries and among those based in Dublin.

Note: Question Not Asked in H2 '05



Websites Visited

Q. Have you ever visited the following websites?

	SMEs		Corporates	
	H1 '05	H1 '06	H1 '05	H1 '06
www.comreg.ie (ComReg's main website)	6	7	22	28
www.askcomreg.ie (ComReg's consumer website)	2	1	6	6
www.callcosts.ie	n/a	5	n/a	12

- Nearly 3 in 10 Corporates have visited ComReg's main website, with a slight increase in the number of SMEs visiting the website this Wave.
- Business use of www.askcomreg.ie is relatively low as it is directed primarily at consumers rather than businesses.
- Awareness and use of www.callcosts.ie is relatively high given its recent launch. As with askcomreg.ie, this site is designed primarily for personal mobile users rather than for business and corporate users.





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Key Findings

Key Findings - I

- *eircom* maintains its position as the dominant provider within the fixed line sector, with 72% of respondents using only *eircom* for their fixed line services, similar to the last wave of research.
- Nearly half of SMEs and two fifths of Corporates have switched fixed line operator at some time in the past. Half of all switching has been done in the past 12 months, indicating a high degree of competition within this market.
- However, switching back is remains common. This may indicate that initial competitive approaches may offer only a short term benefit to business customers. The most important factors in choosing a supplier appear to be related to reliable levels of service and good customer service rather than price.
- Levels of complaints made against fixed line providers seem to be quite high, particularly among larger businesses. However, satisfaction with complaint resolution is reasonably positive.



Key Findings - II

- Within the mobile phone market, both Vodafone and O₂ maintain their high market share in the market. Neither Meteor nor 3 appear to have had a significant impact on the business sector as yet.
- The key cost driver in choosing a mobile operator is the cost of calls to the same network, along with cost of calls to landlines.
- Switching is not as prevalent within the mobile market as it is in the fixed line market.
- There has been a general increase in the provision of additional mobile services to employees. 3G handsets in particular appear to have risen in popularity, as well as wireless LAN cards.
- A significant minority of those using their company mobiles abroad express dissatisfaction with roaming charges, although many do not have procedures in place to help minimise these charges.



- The growth in broadband uptake continues, with only about a quarter of companies connected to the Internet using dial-up or an ISDN line.
- Time savings and efficient customer communications are considered the key business benefits of having broadband. In addition, over half of all broadband users say they are using specific applications which require a broadband connection.
- It is noteworthy that perceived availability/access to broadband has also increased.
- While interest in getting broadband among non-users is high, there does remain a core of businesses not interested in up-grading, regardless of any access issues.
- There has been a significant rise in the awareness of VoIP, and in line with this, VoIP providers appear to have increased their activity in approaching the Business community.





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**Appendix:
Sample Details**

Sample Profile: Location of Business

Q. What region is your workplace in?

	SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
Dublin City	29	30	24	38	42	40
Rest of Leinster	25	20	24	16	14	14
Cork City	5	9	5	12	2	4
Waterford City	3	1	1	-	-	7
Limerick City	3	4	4	2	2	4
Rest of Munster	15	19	24	24	17	15
Galway City	4	3	2	-	2	5
Rest of Connaught	10	9	10	4	12	9
Rest of Ulster	6	4	5	4	9	2



Sample Profile: Location of Premises

Q. Is your company located in....

	SMEs		Corporates	
	H2 '05 %	H1 '06 %	H2 '05 %	H1 '06 %
In a large town or city	39	32	46	41
A small or mid-sized town	20	25	15	19
A rural area or village	20	23	5	2
A business park in urban area	17	16	27	30
A business park in a rural area	3	2	4	6



Sample Profile: Type of Company

Q. Is your company?

	SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
An Irish owned – private company	89	86	83	40	35	36
An Irish owned – public company	3	3	3	8	3	11
A Subsidiary of overseas company	6	3	4	30	30	24
A Semi-State body	1	2	1	10	10	7
A Government department	1	2	2	10	18	11
Other	*	3	6	-	2	11



Sample Profile: Position in Company

Q. What is your own position in the company?

	SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
IT Manager /IT Director	7	11	6	46	46	44
CEO/Managing Director/ Owner Manager	45	36	38	2	-	6
Telecommunications Director/ Telecommunications Manager	1	2	*	4	11	-
Finance Director/ Finance Manager	8	11	5	8	9	6
Other Director/Manager	23	24	19	26	12	10
Administration	10	9	9	-	4	-
Other	5	7	32	4	19	35
Refused	1	1	*	-	-	-



Main Fixed Line Supplier

Q. Which fixed line phone services provider does your company use for its voice call?

	Total H1 '06 %	SME			Corporates		
		H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
Eircom	78	79	80	77	82	77	88
BT Ireland	6	6	8	6	8	14	4
Access	5	3	2	5	8	2	-
Euphony	2	4	2	2	2	-	5
Smart Telecom	1	2	2	2	-	2	1
Pure Telecom	1	1	2	1	2	-	2
WorldCom (MCI)	1	2	1	*	4	-	4
Perlico	-	*	-	-	2	-	-
NewTel	1	1	*	1	-	-	-
Cinergi/Speedial	1	1	*	1	-	-	-
NTL Business/NTL	1	1	*	*	-	2	6
Other	8	5	5	7	-	2	8
Don't know/refused	2	1	2	2	-	2	-

Base: All Respondents (n=501,51)



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Internet Supplier Used

Q. What internet supplier does your company use for connecting to the Internet

	Total			SMEs			Corporates		
	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %	H1 '05 %	H2 '05 %	H1 '06 %
<i>eircom</i>	66	69	70	66	72	73	61	46	54
BT Ireland (Esat BT)	7	7	6	6	6	6	16	12	1
Irish Broadband	3	4	5	4	4	5	2	4	4
IOL	2	1	-	2	1	-	-	-	-
MCI (Worldcom)	1	*	*	1	*	*	2	2	-
DigiWeb	1	1	1	1	1	1	-	-	-
UTV Internet	1	1	*	1	1	1	-	-	-
Leap Broadband	1	*	*	1	*	*	-	-	-
Indigo	1	1	-	1	1	-	-	-	-
NTL	1	1	2	1	1	1	-	2	7
Net Source	1	*	1	1	*	*	2	-	2
Smart Telecom	1	*	1	1	*	1	-	-	3
Oceanfree.net	0	*	-	1	*	-	-	-	-
Gallileo	0	*	-	1	*	-	-	-	-
IFA Telecom	-	*	-	-	*	-	-	-	-
Perlico	-	*	-	-	*	-	-	-	-
Other	7	9	9	6	7	8	10	26	16
Don't know	6	6	6	6	5	4	4	8	16





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