



Commission for
Communications Regulation

Irish Communications Market

Quarterly Market Commentary

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LEGAL DISCLAIMER

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1 Foreword

This report updates information on the Irish Communications Sector for the period 01 October to 31 December 2004, except where otherwise stated.

Mobile penetration increased by 6% from 88% to 94% with over 3.78 million mobile subscribers. SMS messages also increased and reached over 1 billion during the quarter. This represents an increase of 10% and equates to an average of 89 SMS messages per subscriber per month. Furthermore approximately 236,000 subscribers have ported their mobile number since the introduction of Mobile Number Portability in August 2003. Vodafone and O2's market share has remained relatively stable for the past three years. However, this quarter Meteor's share of mobile subscribers has increased to 9%, a 2% increase since last quarter, while Vodafone's market share has decreased by 2% to 51%. All operators have increased their subscriber base since the last quarter.

Overall revenues for the fixed, mobile and broadcasting sectors have increased by approximately 10.7 % since the same quarter last year, mainly due to an increase in mobile revenues, while OAO (Other Authorised Operators) share of overall fixed line revenue is 21% and has been relatively stable for the last two years. There are now approximately 330,000 CPS lines, up from 300,000 last quarter. DSL subscriptions have also grown by over 37% since last quarter. The recently introduced wholesale line rental product which allows consumers to have a single bill for both their fixed line rental and fixed calls is currently offered by four OAOs. In the period from launch to the end of September 2004, over 74,300 subscribers have taken the product. This level of interest from consumers would indicate that Single Billing can play a valuable role in stimulating further competition in the market place here.

The number of subscribers to digital television has reached 499,000 this period, representing 57% of all Pay TV households and 37% of all households with a television. More than one in four of all digital subscribers now subscribe via cable/MMDS.

There have been a number of key publications and developments which relate to the period 17th of December to 11th of March 2005. These included a number of documents relating to market reviews under the new regulatory framework, such as the notification to the European Commission on the markets for Retail Leased Lines and Wholesale Terminating and Trunk Segments. ComReg concluded that eircom had SMP in the markets for low bandwidth leased lines and in the markets for wholesale terminating and trunk segments. A Decision which designated Vodafone and O2 as having Significant Market Power (SMP) in the Wholesale Mobile Access and Call Origination Market was also published. ComReg made this SMP designation following the decision of the European Commission to endorse ComReg's review of the market for access and call origination on mobile telephone networks in Ireland.

Additionally, a number of Decisions which set out directions to eircom in relation to LLU were issued. A consultation on the Proposed Financial Reporting Obligations for Fixed Dominant Operators having Accounting Separation and/or Cost Accounting Obligations was also published. In addition ComReg issued a consultation paper concerning aspects of the Universal Service Obligation (USO). Another key publication during the period was the report on Preparing the Radio Spectrum Strategy for 2005 – 2007.

I would like to thank all those operators and organisations who have contributed information and comments for this review and I appreciate their efforts in facilitating the publication of this document. I encourage all operators to complete the questionnaire sent to them on a quarterly basis to ensure as complete a picture as possible of the Irish market can be presented.

Isolde Goggin,
Chairperson
Commission for Communications Regulation.

2 Market Overview

This section of the report provides analysis of the main trends and developments in the various sectors of the Irish communications market and is based on the information contained in the Key Data Report. For more detailed information on the sectors please refer to the Key Data Report. The data covers the quarter 01 October to 31 December 2004, except where otherwise stated.

Total revenue for fixed, mobile and broadcasting has increased by 5.85% this quarter. This is mainly attributable to a growth in mobile revenues. Additionally, total revenues increased by 10.7 % since 2003. The telecoms sector is estimated to account for approximately 3.27% of Irish GNP.

Fixed

The OAO (Other Authorised Operator) share of overall fixed line revenue is 21% and has been relatively stable for the last two years.

There are now approximately 330,000 CPS lines, 74,300 of which are also wholesale line rental. This number is up from 300,000 last quarter. There are approximately 419,000 ISDN channels. Basic rate ISDN access accounts for approximately half of these channels. DSL take-up has increased over the last quarter by over 37% (114,000 up from 83,000). FRIACO – wholesale flat rate services - were launched at the end of June 2003 and there are now approximately 96,500 FRIACO subscribers which represents an increase of 3% from 93,600 in the last quarter.

Mobile

Mobile penetration increased by 6% from 88% to 94% with over 3.78 million mobile subscribers, this may be due in part to seasonal factors as the data relates to the Christmas period. Additionally Vodafone launched its 3G service in November 2004. Meteor has increased its market share to 9% of mobile subscribers with Vodafone and O₂ having 51% and 40% respectively. All operators have increased their subscriber base since the last quarter. There were over 1 billion SMS messages sent this quarter, an increase of almost 10% on the previous quarter. This equates to an average of 89 SMS messages per subscriber per month.

Cable/MMDS & Satellite

At 499,000, total digital subscribers in Ireland now represent 57% of all Pay TV households and 37% of all households with a television, up from 31% in 2003. Total cable/MMDS revenues have increased by 4.4 % since last quarter.

Tariffs

Since last quarter Ireland's relative position has improved by one place in the national residential and business PSTN baskets but has remained unchanged in the residential and business international baskets. Ireland remains in third and first place in the national and international leased line baskets respectively. Ireland's position has also remained unchanged in all three of the ISDN baskets. Ireland's position has fallen by one place in the ADSL (Normalised) baskets and has remained unchanged in the ADSL (Minimum) basket. Ireland's position remains unchanged in three of the mobile baskets but has improved by two places to 6th in the low user basket.

3 Regulatory Developments

The following publications and developments relate to the period 17th of December to 11th of March 2005:

3.1 Fixed

3.1.1 Market Analysis: International Leased Lines

ComReg issued a response to consultation¹ after completing a review of the retail international leased lines market under the new EU Regulatory Framework. As part of the review ComReg concluded that no single operator is dominant in this particular market, and believes that this market is effectively competitive. ComReg proposes, as part of a process of rolling back regulation, where effective competition exists, to remove remaining obligations and allow market forces to operate.

3.1.2 Market Analysis: Retail Leased Lines and Wholesale Terminating and Trunk Segments of Leased Lines (National)

The results of ComReg's market analysis on the markets for retail and wholesale leased lines², propose to remove obligations on eircom to pre-publish prices for high bandwidth retail leased lines. In addition to the conclusions on the market for high bandwidth retail leased lines, ComReg's market analysis also reviewed the level of effective competition in low bandwidth retail leased lines and in the provision of wholesale leased lines. ComReg concluded that effective competition has still not been achieved and eircom enjoys a position equivalent to dominance in these particular markets. For this reason ComReg is proposing to designate eircom as having significant market power (SMP) and puts forward proposals for appropriate regulation to be placed on eircom.

3.1.3 Direction to eircom – Requirement to Respond to Industry Request for Developments to LLU Processes and Product Range

This Decision note³ set out directions to eircom requiring it to respond to industry requests for the development of LLU products and supporting processes. Part of this response involved eircom meeting with industry on the 1st of February to, among other issues, discuss operators' LLU requirements.

3.1.4 Market Analysis: International Leased Lines (Response to Consultation Document 04/120 and Decision Notice)

ComReg has concluded⁴ that the relevant market for international retail leased lines is effectively competitive and, accordingly, has decided to withdraw, with effect from two weeks from the date of the Decision, all obligations within the relevant market, applicable to eircom Limited, by virtue of Regulation 13 of the European Communities (Electronic Networks and Services) (Universal Service and Users' Rights) Regulations 2003.

¹ ComReg 04/120 – Market Analysis – International Leased Lines

² ComReg 05/03 – Market Analysis – Retail Leased Lines and Wholesale Terminating and Trunk Segments

³ ComReg 05/04 – Direction to eircom – Requirement to Respond to Industry Request for Developments to LLU Processes and Product Range

⁴ ComReg 05/06 – Market Analysis – International Leased Lines (Response to Consultation Document 04/120 and Decision Notice)

3.1.5 CPS – Code of Practice Breach: Tele2 Sales Activity

This Information Notice⁵ highlights a breach of the CPS code of practice by Tele2. The breach in this case related to three cases of misleading and therefore inaccurate information about another operator's service being provided to consumers by telesales representatives of Tele2.

3.1.6 Market Analysis: Wholesale Broadband Access (Decision Notice – Designation of SMP and Related Remedies)

ComReg issued a paper⁶ which designated eircom with SMP in the wholesale broadband access market and a Decision containing relevant regulatory obligations to be imposed further to the SMP designation.

3.1.7 CPS – Code of Practice Breach: Unauthorised Provisioning of CPS by NewTel

This Information Notice⁷ highlights a breach of the CPS code of practice by NewTel. The breach in this case related to twelve cases of unauthorised provisioning of CPS by NewTel. The unauthorised provisioning was in the form of Third Party Verifications which were inappropriate, e.g. the consumer did not realise that they were signing up to the NewTel service.

3.1.8 Consultation on the Proposed Financial Reporting Obligations for Fixed Dominant Operators having Accounting Separation and/or Cost Accounting Obligations (including Annexes)

In the recent Market Analysis Consultation process, ComReg proposed the obligations of Accounting Separation and/or Cost Accounting Obligation on certain markets. The purpose of this consultation⁸ is to set out in more detail how these obligations can be achieved and initiate a discussion on the general principles governing accounting matters and provide an indication of the type of information that might be required to comply with such obligations.

3.2 Mobile

3.2.1 Decision – Designation of SMP: Market Analysis – Wholesale Access and Call Origination on Public Mobile Telephony Networks

This Decision⁹ designated Vodafone and O2 as having Significant Market Power (SMP) in the Wholesale Mobile Access and Call Origination Market. ComReg made this SMP designation following the decision of the European Commission to endorse ComReg's review of the market for access and call origination on mobile telephone networks in Ireland. In its review, ComReg found that the market was not effectively competitive because of the joint dominance of Vodafone and O2. ComReg believes that this situation will continue in the absence of appropriate regulatory action. ComReg's next step in relation to this matter will be to impose one or more SMP obligations in relation to both companies. ComReg has proposed that the networks of Vodafone and O2 should be open

⁵ ComReg 05/08 – Code of Practice Breach – Tele2 Sales Activity

⁶ ComReg 05/11r – Market Analysis – Wholesale Broadband Access (Decision Notice – Designation of SMP and Related Remedies)

⁷ ComReg 05/15 – CPS – Code of Practice Breach – Unauthorised provisioning of CPS by NewTel

⁸ ComReg 05/18, ComReg 05/18a, ComReg 05/18b and ComReg 05/18c – Consultation on the Proposed Financial Reporting Obligations for Fixed Dominant Operators having Accounting Separation and/or Cost Accounting Obligations (and Annexes)

⁹ ComReg 05/14 – Decision – Designation of SMP: Market Analysis – Wholesale Access and Call Origination on Public Mobile Telephony Networks

to alternative providers such as Mobile Virtual Network Operators (MVNOs). ComReg also proposed that existing agreements regarding national roaming should be maintained.

3.2.2 ComReg presentation to the Joint Oireachtas Communications Committee

After the publication of its decision on the market for Mobile Access and Call Origination ComReg made a presentation¹⁰ on March 2nd to the Joint Oireachtas Communications Committee on issues in the Irish mobile market.

3.3 Consumer Issues

3.3.1 SME Telecommunications Survey 2004 – Survey Results, Report and Analysis

ComReg published its annual telecommunications survey¹¹ amongst small and medium sized companies (SMEs) in the Republic of Ireland. This survey, conducted by TNS-MRBI, examines the sector's usage of – and attitudes to – fixed, mobile and internet services. The associated report and analysis outlines the key findings and trends from the responses of those interviewed, and highlights a number of current issues in light of those responses.

3.3.2 Review of ComReg Quarterly Report

ComReg issued a consultation¹² on the content and format of its Quarterly Report on the Communications Market. The Quarterly Report, is compiled from data provided by authorised operators, and has been published since 1999. ComReg would like to ensure that the quality of the report is maintained and improved upon, and guarantee that those sections of the report that attract most interest are maintained to a high standard. The consultation aims at addressing these objectives.

3.3.3 Report of ComReg/OFCOM Joint Working Group Cross-Border Telecoms Issues (including Annexes)

This is the first report¹³ of the ComReg/OFCOM Joint Working Group (JWG) set up in April 2004 in order to explore solutions to problems that affect telecommunications users in both in the Republic of Ireland and Northern Ireland. These issues include mobile phone roaming charges, data transfer, numbering, illegal radio broadcasting, and the potential for joint provision of all-island spectrum licences.

3.3.4 Universal Service Requirements – Provision of access at a fixed location – connections to public telephone network and provision of functional internet access

ComReg issued a consultation paper¹⁴ concerning aspects of the Universal Service Obligation (USO). The paper relates to the obligation on eircom to provide connection to the public telephone network; and the setting of a minimum data speed for narrowband internet access.

¹⁰ OCP01 – ComReg Presentation to the Joint Oireachtas Communications Committee

¹¹ ComReg 05/05 and ComReg 05/05a – SME Telecommunications Survey 2004 (Survey Results and Report and Analysis)

¹² ComReg 05/09 – Review of the ComReg Quarterly Report

¹³ JWG01 and JWG01a – Report of ComReg/Ofcom Joint Working Group Cross-Border Telecoms Issues (and Annexes)

¹⁴ ComReg 05/17 – Universal Service Requirements – Provision of access at a fixed location – connections to public telephone network and provision of functional internet access

3.4 Broadcasting

3.4.1 Decision D16/04 – Wholesale Broadcasting Transmission Services Market: SMP Obligations

ComReg issued a paper¹⁵ which designated RTÉNL with SMP in the wholesale broadcasting transmission market and detailed the relevant regulatory obligations to be imposed further to the SMP designation.

3.4.2 Renewal of RTÉ Licence, RTÉ Licence Text and RTÉ Licence Technical Schedule

ComReg is required to issue a licence to the RTÉ Authority for the transmission of its programme services under the Broadcasting Authority Act 1960 as amended, and which must also conform to the new EU regulatory framework. In summary, the licence permits the transmission of RTÉ radio and television services; is being renewed for analogue broadcasting only and does not allow for digital broadcasting; and maintains the status quo – ensuring that the public service broadcaster can continue to deliver television and radio to viewers and listeners. The new licence came into effect on the 1st of March 2005. The renewal notice¹⁶, licence text¹⁷ and technical schedule¹⁸ are available on ComReg's website.

3.5 Postal

3.5.1 ComReg Report on Postcodes

Towards the end of January, ComReg published its report¹⁹ on the introduction of postcodes in Ireland. The report recommends that a detailed feasibility study be undertaken in relation to the introduction of postcodes, and finds that there is broad support for the introduction of postcodes.

3.5.2 The Universal Postal Service – Formulating a Working Definition

In this paper²⁰ ComReg consults on what services should be included in the universal postal service. ComReg said the consultation will lead to a decision on which services An Post should be providing to fulfil its obligation to provide a universal service. The Consultation Paper covers letter services, bulk mail services, separate insured and registered mail services, parcel services and ancillary services.

3.5.3 An Post's Quality of Service – Domestic Single Piece Mail: Annual Report – January to December 2004

The results of ComReg's 2004 annual report on the Quality of Service performance of An Post²¹ show that: 72% of single piece priority mail is delivered within one working day

¹⁵ ComReg 04/122 – Decision D16/04 Wholesale Broadcasting Transmission Services Market – SMP Obligations

¹⁶ ComReg 05/13 – Renewal of RTÉ Licence

¹⁷ ComReg 05/13a – RTÉ Licence Text

¹⁸ ComReg 05/13b – RTÉ Licence Technical Schedule

¹⁹ ComReg 05/07 – ComReg Report on Postcodes

²⁰ ComReg 05/16 – The Universal Postal Service – Formulating a Working Definition

²¹ ComReg 05/19 – An Post's Quality of Service – Domestic Single Piece Mail: Annual Report – January to December 2004

throughout the State, while 96% of mail is delivered within 3 working days. Service levels varied with mail posted in Dublin for delivery countrywide receiving poorer levels of service than mail posted outside of Dublin for delivery countrywide – 69% compared with 73%.

3.6 Radio Spectrum/Technology

3.6.1 Preparing the Radio Spectrum Management Strategy for 2005 – 2007 (including Appendices and Annexes)

ComReg published a consultation paper²² on how it intends to manage the radio spectrum from 2005 – 2007. The objective of the consultation is to encourage debate and feedback on ComReg’s proposed strategy. The radio frequency spectrum is used to support a large number of electronic communications services and applications. Access to radio frequencies is an essential requirement for telecommunications, aviation, shipping, defence, public safety, broadcasting, mobile phone services and the many other private businesses that rely on radio communications.

3.6.2 Radio Experimenters Examinations

This document²³ provides information for parties interested in setting, organising and correcting Irish Radio Experimenter Examinations according to CEPT ECC REC T/R 61-02. ComReg will assess all Expressions of Interest received to determine if the submitting parties are competent to conduct the examination to the required standard. ComReg will then enter into a contract with the most suitable party.

3.6.3 Draft Directions to Enable Opening of Access to VoIP Services Based on 076 Number Ranges

ComReg issued draft Directions²⁴ in February 2005 to allow access to the new ‘076’ number range for voice over internet phone services (VoIP). ComReg is intervening to assist industry to put in place a preliminary framework for prices and settlements.

3.7 General

3.7.1 The Treatment of Confidential Information – Draft Guidelines

These draft guidelines²⁵ summarise the legislative provisions of the Regulations which implement the EU Communications Directives concerning confidential information; and describe the process that ComReg will follow when respondents provide confidential information to ComReg without also providing a non-confidential version. The draft Guidelines will contribute to the transparency of ComReg’s consultation processes.

Specifically, ComReg’s draft directions propose two price points to facilitate telephone calls to VoIP numbers.

²² ComReg 05/01a and ComReg 05/01b – Preparing the Radio Spectrum Management Strategy for 2005 – 2007 (including Appendices and Annexes)

²³ ComReg 05/10 – Radio Experimenter Examinations

²⁴ ComReg 05/12 – Draft Directions to Enable Opening of Access of VoIP Services Based on 076 Number Ranges

²⁵ ComReg 05/02 – The Treatment of Confidential Information – Draft Guidelines

3.7.2 Statutory Annual Report and Accounts for 2002 – 2003

ComReg has published its annual report and accounts for 2002 – 2003²⁶. These are available in English and Irish at www.comreg.ie

²⁶ AR02/03 – Statutory Annual Report and Accounts for 2002 - 2003

4 Consumer Focus

One of ComReg's functions is to investigate complaints from consumers regarding the supply of electronic communications services. In exercising this function, the primary point of contact for any complaint or query will always be the consumer's service provider or operator. ComReg has established frameworks on a Code of Conduct for the handling of consumer complaints by operators. Each operator's code sets out the procedure for making a complaint and the level of service that a customer can expect. Operators should provide a copy of their code of conduct to any customer who requests a copy. In addition operators should have a copy available on their website. Where a customer is dissatisfied with the initial response to their complaint they can request that the complaint is escalated to a higher level within the organisation for further examination. ComReg can only investigate a complaint if the consumer has firstly exhausted an operator's complaint handling process as set out in its Code of Conduct for Complaint Handling.

The table below illustrates the volume of queries and complaints received by the consumer team during the last quarter:

| | <i>July - Sept '04</i> | <i>Oct - Dec '04</i> | <i>% Change Oct - Dec '04 v July - Sept '04</i> |
|-------------------|------------------------|----------------------|---|
| Complaints | 465 | 517 | 11% |
| Queries | 2706 | 3545 | 31% |
| Total | 3171 | 4062 | 28% |

The majority of issues regarding the fixed line market were concerned with billing issues. These related to disputed service charges, cancelled services, disconnection in error and premium rate calls. During this reporting period, ComReg also received a significant amount of queries regarding autodialler programs and modem hijacking. Consumers became aware of the problem when they received bills with call charges to destinations which they insisted they had not dialled. ComReg had issued a direction to ISPs and telephone companies requiring publicity and specific measures to be taken. As a result of discussions with the telephone companies it was possible for ComReg to withdraw the direction as the major operators have committed to ComReg that the consumer will not be liable for charges in the event of autodialler fraud. ComReg continues to monitor this.

ComReg received a number of contacts from consumers with concerns regarding the phone based subscription process for CPS, the alleged transfer of call traffic without authorisation and misleading sales practices.

In relation to mobile telephony, the majority of issues which arose related to mobile number portability (MNP), billing issues including roaming charges and network quality. MNP issues in the early part of this quarter concerned delays in transferring numbers. These issues were resolved shortly after receipt.

The number of issues in the broadcasting area has remained low. Since July 2003 ComReg no longer has a statutory basis for regulating the distribution of television programming and therefore can no longer handle complaints relating to this. Where these are received they are passed directly to the operator in question. The majority of calls related to service quality.

4.1 Ideal Homes Exhibition

As part of its ongoing consumer awareness campaign, ComReg participated in the Ideal Homes Exhibition in October 2004. The purpose was to provide information on competition in the telecommunications market to visitors to the Exhibition and to offer advice on ComReg's role and in particular on our consumer role. ComReg staff members greeted over 500 people who visited the stand. This helped to create awareness about ComReg and also helped consumers find relevant information on their queries. Such queries included ComReg's work programme, broadband rollout, operator pricing and comparability, broadcasting queries and controlling mobile phone costs while travelling abroad. ComReg's new consumer website www.askcomreg.ie was on display and consumer guides and handouts were available to members of the public. The event was a great success for ComReg.

4.2 Universal Service Obligations (USO)

On March 4th ComReg issued a public consultation paper doc 05/17 concerning aspects of the Universal Service Obligation (USO). The paper relates to the obligation on eircom to provide connection to the public telephone network and the setting of a minimum data speed for narrowband internet access. The consultation is open until 6th April

5 Postal Regulation

5.1 Quality of Service Domestic single piece mail – Performance of An Post

On 11th March 2004, ComReg published the results of its 2004 yearly report on the Quality of Service performance of An Post.

The annual results for 2004 published by ComReg show that:

- 72% of single piece priority mail – i.e. standard correspondence – is delivered within one working day throughout the State. This result falls well short of the target set by ComReg of 94% and represents only a slight improvement on the corresponding result for 2003 (71%);
- 96% of mail is delivered within 3 working days. This falls outside of the target set by ComReg of 99.5% and shows no improvement on 2003;
- Service levels varied with mail posted in Dublin for delivery countrywide receiving poorer levels of service than mail posted outside of Dublin for delivery countrywide – 69% compared with 73%.

The survey, which was conducted by TNS-MRBI, is based on the statistical methods set out by CEN, the European Standards Institute. These methods are mandated by the European Commission.

The full document ComReg 05/19 is available in the Publications Section of the ComReg website.

5.2 Universal Service Obligation – Bulk Mail Access– Draft Direction to An Post

On 1 September 2004 ComReg announced its intention to direct An Post to provide sufficient access points to meet the needs of users of its bulk mail services (ComReg document 04/92) and asked for observations from interested parties on the operational aspects of the proposed direction. The closing date for the receipt of such observations was extended to 17 January 2005. As the issue is closely related to issues raised in the consultation about what services should be included in the working definition of a universal postal service initiated on 2 March (ComReg document 05/16), it is unlikely that the Direction will be issued until the second quarter of 2005 at the earliest.

5.3 Universal Postal Service

On 2nd March 2005 ComReg issued a consultation paper ComReg 05/16 about what services should be included in the working definition of a universal postal service.

The European Communities (Postal Services) Regulations 2002 contains a list of ‘minimum facilities’ that must form part of the universal postal service. Using this consultation, ComReg will flesh out this very broad framework of the universal service requirement and formulate a customer-focused working definition of the universal service. An Post (as the current designated universal service provider) will be required to provide all services within the working definition in order to fulfil its obligation to provide a universal service.

The Consultation Paper covers letter services, bulk mail services, separate insured and registered mail services, parcel services and ancillary services.

The consultation period will run from 2nd March 2005 until 6th April 2005 during which time ComReg welcomes written comments on any of the issues raised in this paper. Having analysed and considered the comments received, ComReg will publish a Response to Consultation setting out its working definition of the universal postal service.

The full document ComReg 05/16 – ‘The Universal Postal Service, Formulating a working definition’ – is available in the Publications Section of the ComReg website.

5.4 Universal Service Obligation – Continuity of Universal Service Obligation

ComReg has recently reminded An Post that contingency plans must be in place to ensure that quality of service is maintained in periods of disruption and is awaiting receipt of such plans.

5.5 Postcodes

At the end of January ComReg published a report (ComReg 05/07), about the lack of a Postcode system in Ireland. The following advantages of a postcode system were identified in the Report:

- Rural householders would have a unique address without losing historical townland names
- Postcodes would help Irish businesses to become more efficient
- Postcodes would bring Ireland in line with best international practice
- Postcodes would improve the efficiency of the postal sector

The report showed that there is broad support for the introduction of postcodes and recommended that a detailed feasibility study be undertaken in relation to their introduction.

The Minister subsequently set up a Working Group to investigate the introduction of postcodes and the findings are due in Q2 2005.

5.6 Pricing

An Post submitted their initial price increase proposal in 2004. They are currently reviewing their submission in light of their actual financial performance in 2004 and the revised financial projections in respect of 2005 and 2006.

The basis on which ComReg will make its decision are set out in section 3.3 and Decision No. 1 of document odtr 02/32. Fundamental to this is that all stakeholders must have the opportunity to make observations under Regulation 16(1) of the Postal Regulations about the adequacy of An Post’s justification for the proposals. It is ComReg’s practice, in the interests of transparency and in order to enable interested parties express their views, to hold a public consultation within a reasonable time period after receiving a fit-for-purpose pricing proposal, together with the appropriate supporting data.

Appendix I: Documents Issued December 04 – March 05

Fixed

| <i>Document No.</i> | <i>Title</i> |
|---------------------|---|
| 04/120 | Market Analysis: International Leased Lines |
| 05/03 | Market Analysis: Retail Leased Lines and Wholesale Terminating and Trunk Segments of Leased Lines (National) |
| 05/04 | Direction to eircom- Requirement to respond to industry request for developments to LLU processes and product range |
| 05/06 | Market Analysis: International Leased Lines (Response to Consultation Document 04/120 and Decision Notice) |
| 05/08 | CPS – Code of Practice Breach Tele2 sales activity |
| 05/11r | Market Analysis: Wholesale Broadband Access (Decision Notice – Designation of SMP and Related Remedies) |
| 05/15 | CPS – Code of Practice Breach – Unauthorised provisioning of CPS by NewTel |
| 05/18 | Consultation on the Proposed Financial Reporting Obligations for Fixed Dominant Operators having Accounting Separation and/or Cost Accounting Obligations |
| 05/18a | Annex A to Consultation 05/18 – Indicative List of Products/Services for the Relevant Markets |
| 05/18b | Annex B to Consultation 05/18 – Financial Statements |
| 05/18c | Annex C to Consultation 05/18 – List of Proposed Obligations Applied to Each Market |

Mobile

| <i>Document No.</i> | <i>Title</i> |
|---------------------|---|
| 05/14 | Decision – Designation of SMP. Market Analysis: Wholesale Access and Call Origination on Public Mobile Telephony Networks |
| OCP01 | ComReg presentation to the Joint Oireachtas Communications Committee - (Summarised Version) |

Consumer Issues

| <i>Document No.</i> | <i>Title</i> |
|---------------------|--|
| 05/05 | SME Telecommunications Survey 2004 – Survey Results |
| 05/05a | SME Telecommunications Survey 2004 – Report and Analysis |
| 05/09 | Review of the ComReg Quarterly Report |
| JWG01 | Report of ComReg/Ofcom Joint Working Group cross-border telecoms issues |
| JWG01a | Report of ComReg/Ofcom Joint Working Group cross-border telecoms issues – Annexes |
| 05/17 | Universal Service Requirements – Provision of access at a fixed location – connections to public telephone network and provision of functional internet access |

Broadcasting

| <i>Document No.</i> | <i>Title</i> |
|----------------------------|---|
| 04/122 | Decision D16/04 – Wholesale Broadcasting Transmission Services Market – SMP Obligations |
| 05/13 | Renewal of RTÉ Licence |
| 05/13a | RTÉ Licence Text |
| 05/13b | RTÉ Licence Technical Schedule |

Postal

| <i>Document No.</i> | <i>Title</i> |
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| 05/07 | ComReg Report on Postcodes |
| 05/16 | The Universal Postal Service – Formulating a working definition |
| 05/19 | An Post's Quality of Service – Domestic Single Piece Mail: Annual Report – January to December 2004 |

Radio Spectrum/Technology

| <i>Document No.</i> | <i>Title</i> |
|----------------------------|---|
| 05/01a | Preparing the Radio Spectrum Management Strategy for 2005 – 2007 |
| 05/01b | Preparing the Radio Spectrum Management Strategy for 2005 – 2007 (Appendices and Annexes) |
| 05/10 | Radio Experimenter Examinations |
| 05/12 | Draft Directions to Enable Opening of Access to VoIP Services based on 076 Number Ranges |

General

| <i>Document No.</i> | <i>Title</i> |
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| 05/02 | The treatment of confidential information – Draft Guidelines |
| AR02/03a | Tuarascáil agus Cuntais Bhliantúla ón gCoimisiún um Rialáil Cumarsáide 2002-2003 |
| AR02/03b | Statutory Annual Report and Accounts for 2002 to 2003 |

