Commission for
Communications Regulation

Irish Communications Market

Quarterly Key Data

December 2002

Document No:	**02/106b**
Date:	**3rd December 2002**

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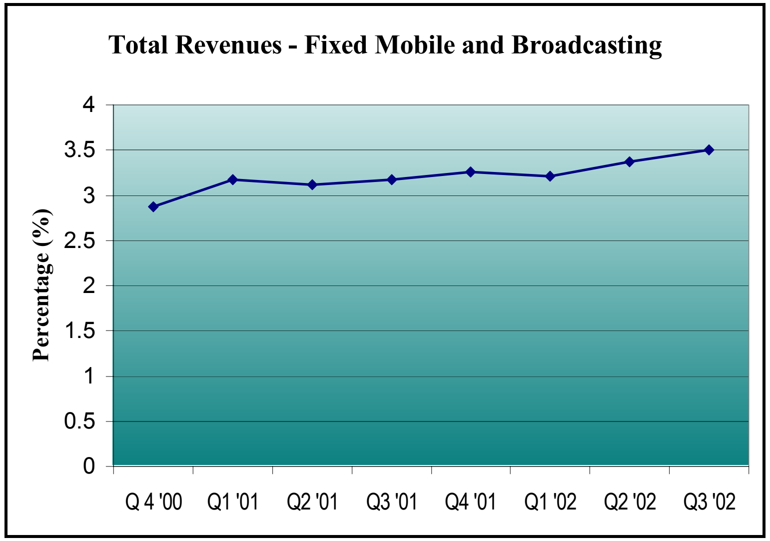
1 Overall Market Data

The data in this review is based on returns from licensees for the period 1st July 2002 to 30th September 2002. The report is based on submissions from 42 operators (detailed in the Appendix) which represent approximately 99% of total market activity.

1.1.1 Overall Telecommunications Revenues

Figure 1.1.1 Total Revenues – Fixed, Mobile & Broadcasting



- Total revenues for fixed, mobile & broadcasting markets now stands at an estimated €3.5billion per annum on an annualised basis.
    - Increase of approximately 4% since last quarter.
    - Increase of approximately 9% since September 2001.

1.1.2 Telecoms Sector as a % of GDP

- Telecoms sector is estimated to account for approximately 3% of Irish GDP (2001)[1].
    - Increase of 0.1% since last quarter.
    - Decrease of 0.1% since last year

1.1.3 Number of licenses

- To date 46 General and 40 Basic licences[2] are in issue in the Irish market[3].
- There are 24 operators providing services under General licences (December 2001; 23) and 18 under Basic licences (December 2001; 20)[4].

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[1] Figure was calculated using GDP at market price (2001) – ESRI Quarterly Economic Commentary, Summer 2002.

[2] Broadband Partners (Ireland) Ltd. were awarded a Basic licence on 18/10/2002

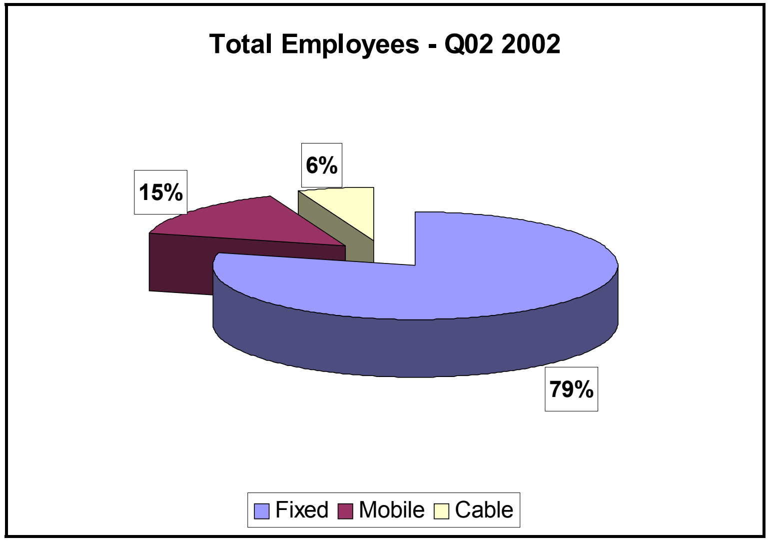
[3] Formus and Cignal Global's licences have been revoked. These figures are based on a number of operators rather than on the number of licences. *eircom* have both a general and a basic licence (Indigo) and have been included in the general category only.

[4] AUCS Communications ceased operations, licence transferred to Infonet Broadband Services. Telenet, previously known as Valuetel, surrendered licence.

1.1.4 Employees

- The number employed in the telecommunications sector is approximately 15,300.
    - Decrease of 4% since last quarter
    - Decrease of 10% since last year
- The fixed, mobile & broadcasting markets account for approximately 76%, 18% and 6% of the total figure respectively, consistent with last year.
    - Last quarter, fixed, mobile & broadcasting markets accounted for approximately 79%, 15% and 6% of the total figure respectively.

Figure 1.1.2 Total Employees



2 Data By Sector

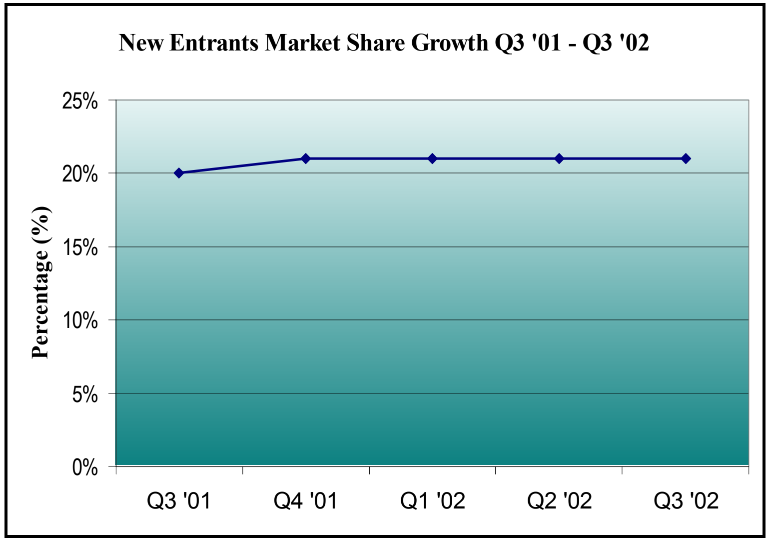
2.1 Fixed Line

2.1.1 Fixed Line Revenue

- Total fixed line revenue approximately €521 million
    - Remains the same since last quarter
    - Annualised fixed line revenue figure accounts for 60% of total telecoms revenue

2.1.2 OLO Market Share

Figure 2.1.1 OLO Market Share

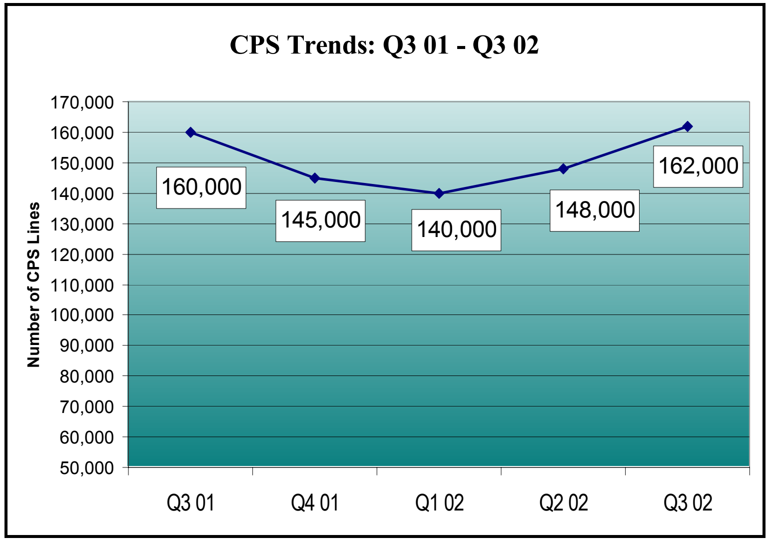


Source: ODTR Quarterly Review Questionnaire

- OLO market share is approximately 21%
    - Remaining the same since last quarter
    - Remaining the same since last year

2.1.3 Carrier Pre Selection

Figure 2.1.2 Carrier Pre Selection



- Approximately 162,000 CPS lines[5]
    - Increase of approximately 10% since last quarter.
    - Represents approximately 10% of total PSTN lines.
- Of the total number of CPS lines, 97%, 2% and 1% are apportioned to all calls, national & international calls, and international calls only respectively.

[5] Both business & residential

2.1.4 Telecom Access Paths

- 4.94 million telecom access paths

2.1.5 PSTN Lines

- Total of 1.6 million lines
    - Remained constant since last quarter
    - Accounts for 32% of total access paths

2.1.6 ISDN Access Channels

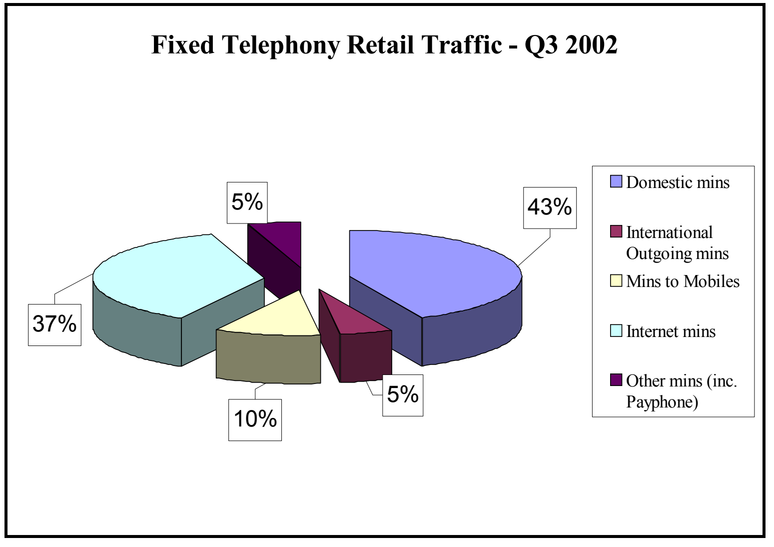
- Approximately 345,000 ISDN access channels
    - Increase of 28% since last year
    - Increase of 4% since last quarter
    - Accounts for 7% of total access paths
- The proportion of primary, fractional & basic rate ISDN is 48%, 6% and 46% respectively of the total number of ISDN access channels.

2.1.7 Mobile Subscribers

- 3 million mobile subscribers
- Account for approximately 61% of total access paths

2.1.8 Retail Traffic

Figure 2.1.2 Retail Traffic



- Retail traffic has decreased overall by approximately 2% since last quarter. Though this period is usually the least buoyant of the year.
    - Total minutes remained static in the same quarter last year.
    - Other minutes[6] have increased since last quarter.
- Domestic minutes retain the highest proportion of total retail traffic, followed by internet minutes.

[6] Other minutes include minutes from payphones, premium rate services, voicemail, freephone, locall and callsave.

2.1.9 DSL

- Approximately 1,900[7] DSL lines of which 10% are non-incumbent lines
    - Increased from 1,200 lines last quarter

2.1.10 Cable Modems

- Approximately 2,040 cable modems supplied by Ntl, Chorus and Casey CableVision (Dungarvon).

2.1.11 Fixed Wireless Access

- Approximately 5,300 residential subscribers up from 4,500 last quarter
- Approximately 180 business subscribers down from 750 last quarter[8]

2.1.12 Leased Lines

- There are approximately 22,000 *retail* leased line circuits.
    - Approximately 95% of the circuits are under 2 Mbits.
- There are approximately 8,000 wholesale leased line circuits[9].

[7] This figure includes the incumbent and OLO lines and is based on the number of orders.

[8] There has been a re categorisation of FWA figures by an operator since last quarter.

[9] The figure for wholesale leased lines last quarter was 7,800 and not 9,500 as reported; this is due to a submission error.

The following table sets out the rolling three month average delivery time for circuits delivered by *eircom* to OLOs. A table setting out individual monthly performance is set out in Annex 1.

Table 2.1.1 Rolling Three Month Average Delivery Time for Leased Line Circuits Ordered by OLOs (Working Days)

	Aug 2002	Sept 2002	Oct 2002
All Leased Lines	*23*	*21*	*22*
Of Which:			
Sub 2Mbit Lines	*22*	*21*	*22*
2Mbit Lines	*33*	*28*	*31*

- The rolling three month average delivery time for leased line circuits ordered by OLOs for July 2002 was between 22 and 25 days.
- Since July this figure has remained the same at 22 days for Sub 2Mbit Lines and increased to 31 days for 2 Mbit Lines[10] with a fall in the average delivery time for all Leased Lines to 22 days[11].
- In October 2001 *eircom's* average delivery time for leased line circuits to OLOs was between 36 and 43 days, falling from and between 70 and 90 days in 2000. As shown in Annex 1, this figure has fallen further to between 20 and 25 days for October 2002, an improvement of some 55% to 58% since last year.
- An analysis of *eircom's* current order book also shows that of those orders awaiting delivery, 94% are less than 29 days old of which over 50% are less than 9 days old. This is a further indication of the improvement on the situation in 2001 showing that not only are delivery timeframes improving but that the issue of the backlog of orders has been addressed.

[10] The unusually large figure for Sub 2Mbit Lines has been caused by one extremely late non-standard order in August. The equivalent figure for the first 95% of orders delivered in this period is substantially lower. This was a one off event and the figures for October are within the SLA timeframes. Please see Annex 1.

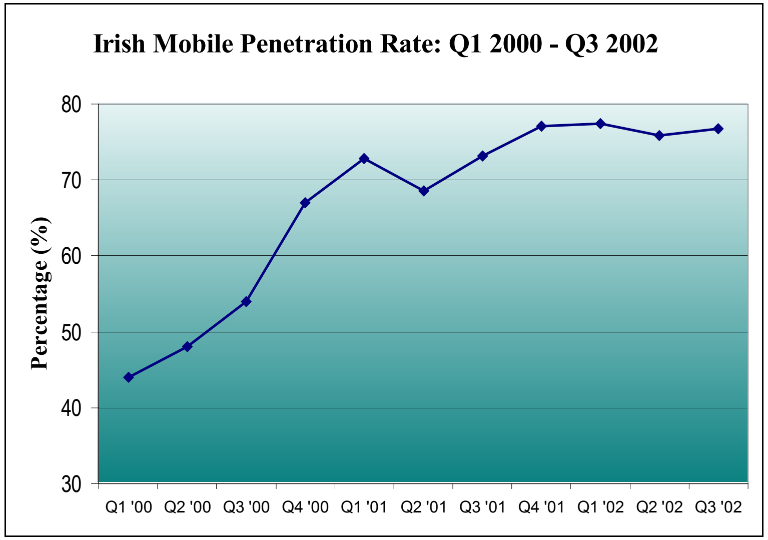
[11] 1) Delivery lead-time is shown for 100% of orders delivered in the period 2) Sub 2mb deliveries include digital circuits with transmission speeds of less than 2mb. 3) The statistics provided relate to orders from other licensed operators only. 4) Other interconnect circuits are not included in the statistics.

- In addition to speed of delivery, certainty around delivery dates has also been a major concern to OLOs. As a consequence, performance targets have been set regarding Due Delivery Date Performance i.e. the delivery date provided to OLOs at order validation or order forecast. A target of 80% Due Date Performance was set and achieved by *eircom* in 2001. This was increased by the ODTR to 95% in 2002. In recent months the Due Date Performance figure has been estimated by *eircom* at between 90 and 95%.

2.2 Mobile

2.2.1 Irish Mobile Penetration Rate

Figure 2.2.1 Irish Mobile Penetration Rate

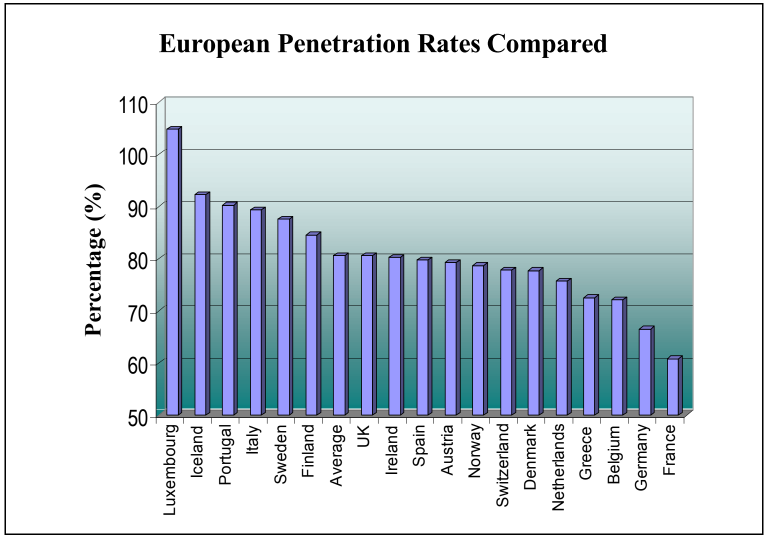


Source: Baskerville and ODTR Estimates

- Irish mobile penetration rate now stands at 77%.
  - ➢ Increase of 1% since the last quarter
  - ➢ Increase of 4% in the last 12 months

2.2.2 European Penetration Rate

Figure 2.2.2 European Penetration Rate



Source: Baskerville

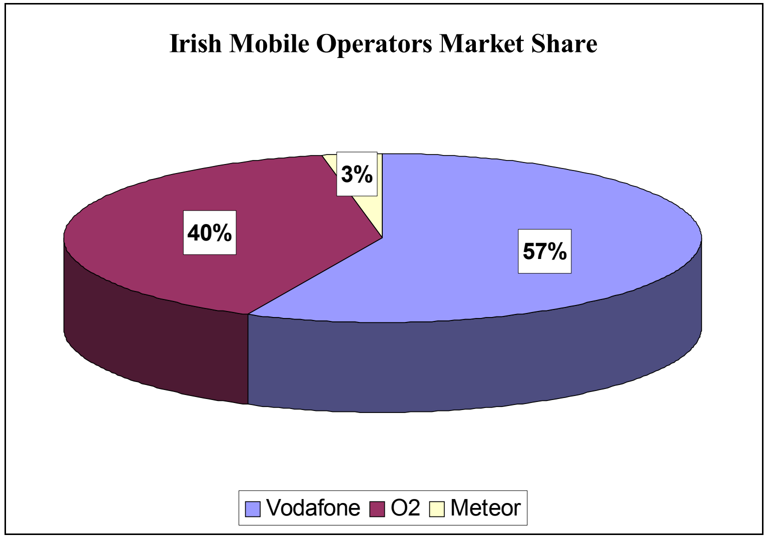
- Ireland has the 8th highest rate in Europe, two places behind the European average and one place behind the UK
- One position lower than the last quarter as the UK was one place behind Ireland in the last quarter

2.2.3 Subscribers

- Approximately 3 million mobile subscribers, at the end of September 2002.
    - Increasing from approximately 2.7 million at the end of September 2001

2.2.4 Market Shares

Figure 2.2.3 Mobile Operators Market Share

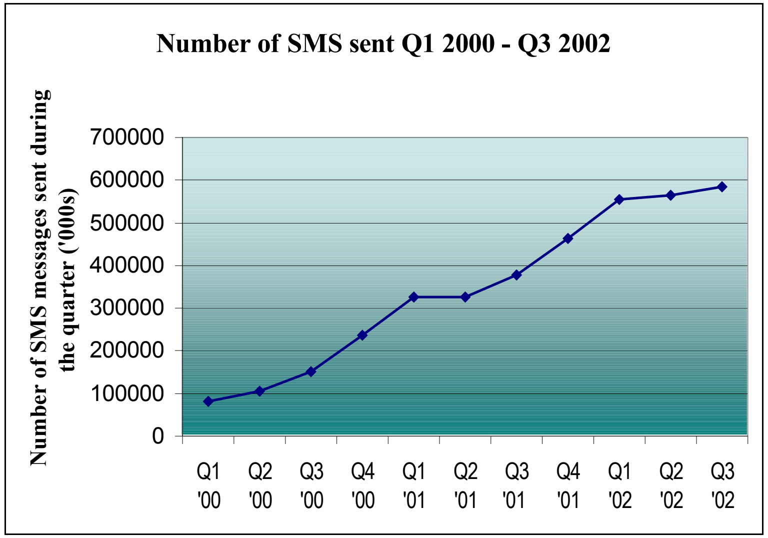


Source: ODTR Quarterly Review Questionnaire

- Vodafone - 57%, remaining the same since our last review
- 0_2 – 40%, an increase of 1% since our last review
- Meteor - 3%, a decrease of 1% since our last review

2.2.5 SMS

Figure 2.2.4 Number of SMS Messages sent Q1 2000 – Q3 2002

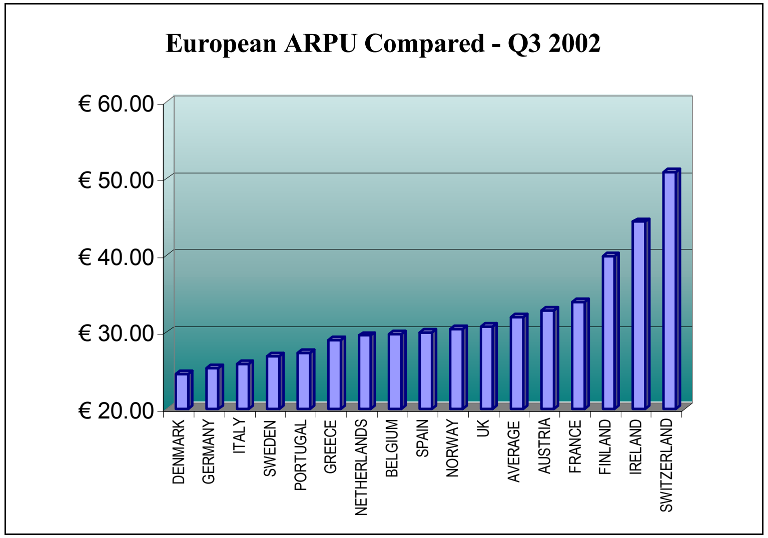


Source: ODTR Quarterly Review Questionnaire

- Approximately 585 million messages sent during the quarter.
    - 65 SMS messages sent on average per month, increase of 4% on the previous quarter.
    - 55% increase in the number of messages sent in 12 months.

2.2.6 ARPU

Figure 2.2.5 European ARPU Compared



Source: The Yankee Group

- Irish Mobile Operator's ARPU is estimated at €44 per month[12] up from €39 last quarter while the EU average is €32.

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[12] ARPUs for Q3 2002 are all quarterly averages except for Ireland, Germany, UK (12 month average), and Greece (9 month average). Average revenue generated by each user per month on an annualized basis. Derived by dividing annual service revenues by the mid-term installed user base (the sum of the opening and closing customer bases for the period divided by two). Once the Yankee group calculates individual ARPU figures, they are applied to each operator's mid-term base to obtain service revenues by operator, which are then combined to obtain a country total. This total revenue figure is then divided by total mid-term users which give country- level ARPU.

2.3 Internet

During the quarter Nielsen NetRatings discontinued its residential Internet panel in Ireland[13]. As the ODTR considers that residential Internet data is a key indicator of the Information Society, it commissioned MRBI to carry out relevant research using the methodology adopted by the European Commission in its benchmarking reports[14]. MRBI's research comprised of 1,003 telephone interviews amongst a representative sample of Irish adults aged 15+ years and was conducted from 12th-21st November 2002[15]. The results of the survey are referred to throughout this section and ComReg intends to continue to publish internet data on an ongoing basis. It is noted that the MRBI/EU Commission methodology shows a significantly rising trend for 2001 which appears to be supported by the views of major retailers. There is less consensus on the absolute level of penetration but this will be confirmed by census data due shortly.

[13] Previously the ODTR used Nielsen NetRatings as its source for residential Internet data.

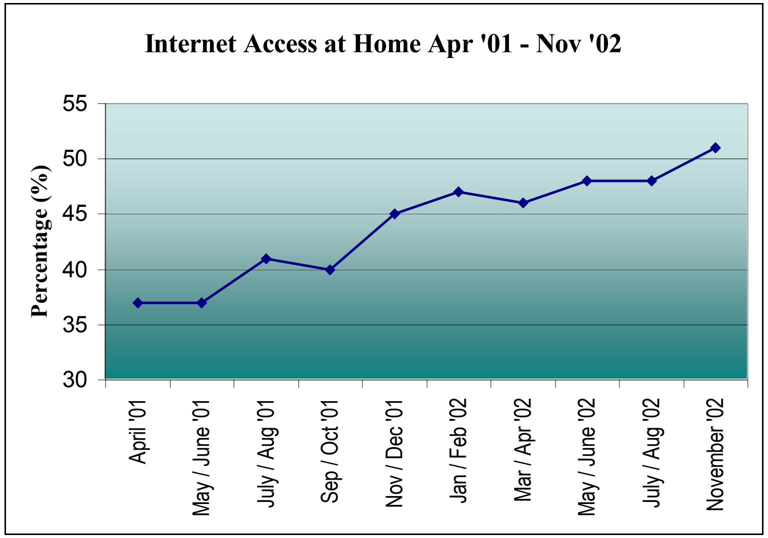
[14] EOS Gallup Europe carried out a survey in relation to Internet usage on request of the European Commission.

[15] Due to the different methodologies some of the results vary from the previous data that we published from Nielsen NetRaings, the main difference is that MRBI examines access and usage amongst adults fifteen plus while Nielsens examined access and usage amongst the whole population.

2.3.1 Ireland's Internet Penetration Rate

The graph below varies from the previous Internet penetration data that we published but shows a growth in the Irish Internet penetration rate over the last year.

Figure 2.3.1 Ireland's Internet Penetration Rate

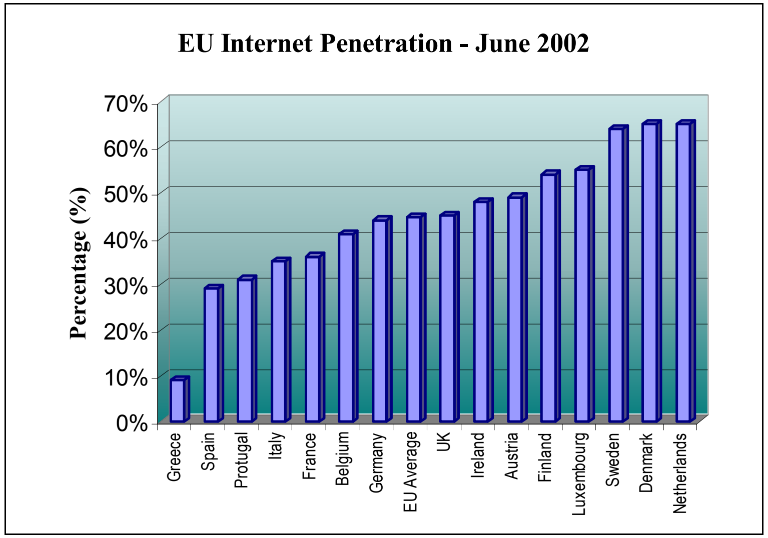


- Residential Internet penetration is estimated at 51%
- Increase of 3% since June 2002

2.3.2 EU Internet Penetration

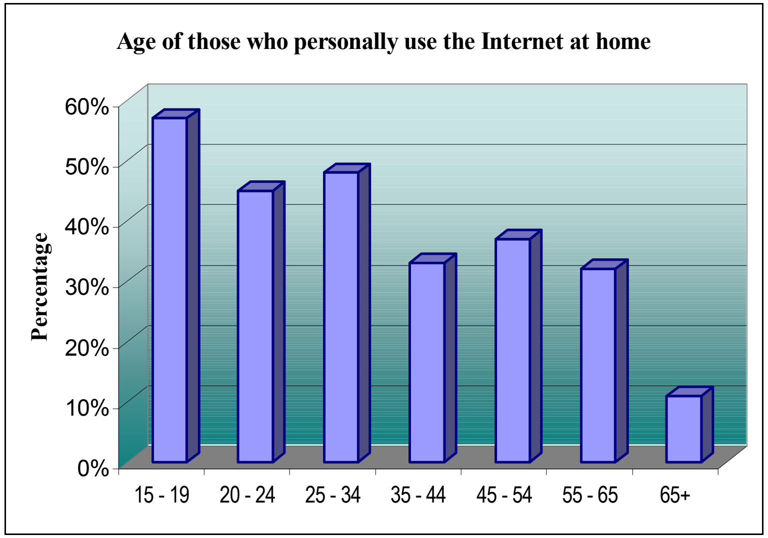
According to the results of the European Commission's Flash Eurobarometer report Ireland was 7th in terms of Internet penetration rate in the EU at June 2002.

Figure 2.3.2 EU Internet Penetration



2.3.3 Average Internet Usage

Figure 2.3.3 Age of those who personally use the Internet at home



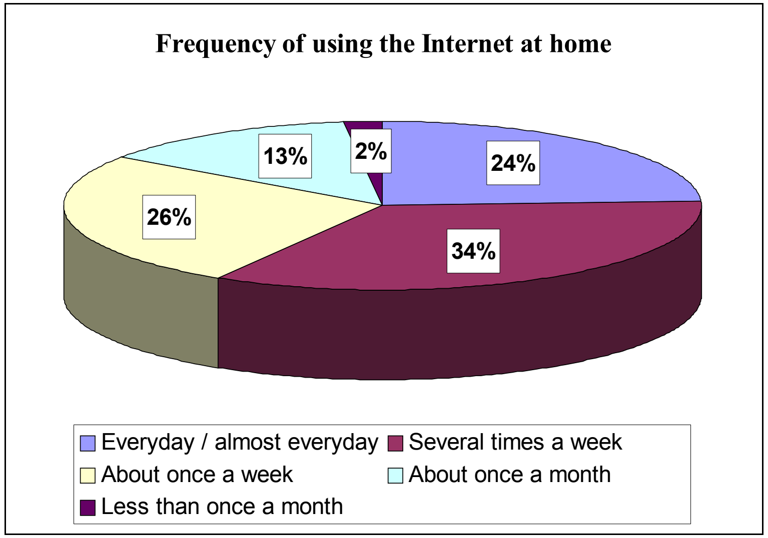
- 37% of all adults (15yrs+) personally use the Internet at home
- Usage is highest amongst 15 – 19 year olds (57%), 20 -24 year olds (45%) and 25 – 34 year olds (48%)

2.3.4 Methods of access to the Internet at home

- PSTN is the predominant form of home Internet access (91%) followed by ISDN (6%)

2.3.5 Frequency of using the Internet at home

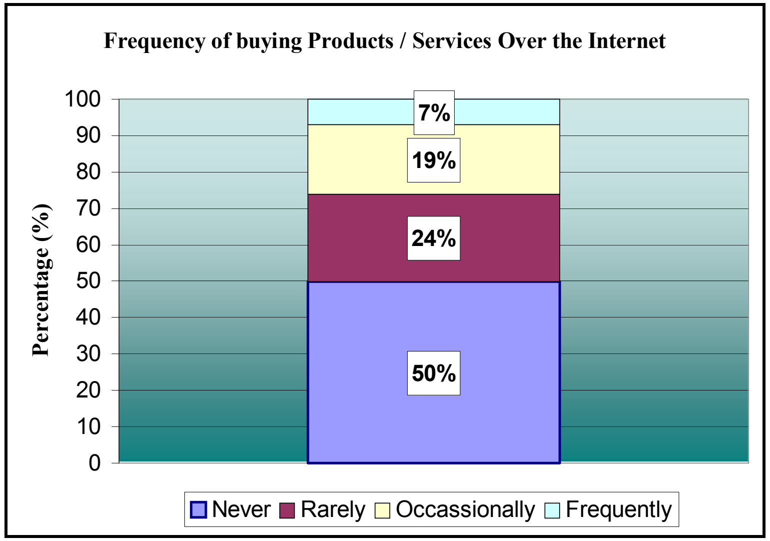
Figure 2.3.4 Frequency of using the Internet at home



- Of those who personally use the internet at home, almost one quarter use it every day or almost every day, while a further third use it several times a week.

2.3.6 On-line Purchases

Figure 2.3.5 Frequency of buying products / services over the Internet



- 7% frequently purchase products of services on the Internet, while half of those surveyed never made a purchase on the Internet

2.3.7 Reasons for using the Internet at home

- The most common use of the Internet at home is to send / receive e-mails (92%) and for travel information and bookings (76%)

2.3.8 Internet Minutes

- Internet minutes account for 37% of all fixed retail traffic
  - Last year Internet minutes accounted for 32% of all traffic.

2.4 Cable/MMDS & Satellite

2.4.1 Cable/MMDS Subscribers

- Approximately 585,000 cable/MMDS subscribers to basic television services in Ireland[16]
    - Decrease of approximately 2% since last quarter

2.4.2 Digital Subscribers

- Approximately 9% of cable/MMDS subscribers have upgraded to digital
    - Increase of 2 percentage points since last quarter
- 255,000 subscribers to BSkyB[17]
    - Increase of 4% since last quarter
- Approximately 308,000 cable/MMDS and satellite digital subscribers
    - Represents approximately 24% of all households with a television[18]

[16] Figure of 619,000 reported last quarter was inaccurate due to an element of double counting in operator reporting systems. The true figure for Q2 2002 was 597,000

[17] BSkyB Quarterly – 30th September 2002

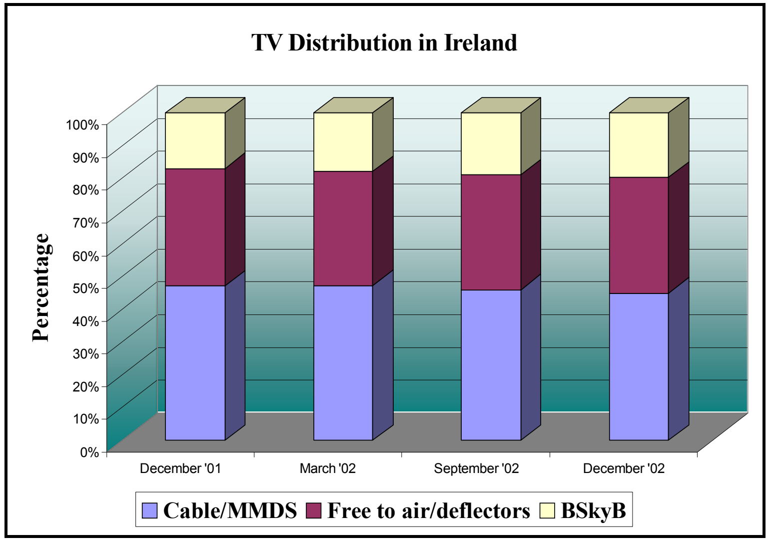
[18] Figure is based on CSO estimate of 1.3 million households with a television

2.4.3 Households Passed

- Over 1 million households passed
    - Approximately 68% are passed for digital services[19]

2.4.4 TV Distribution in Ireland

Figure 2.4.1 TV Distribution in Ireland



2.4.5 Cable/MMDS Revenues

- Total cable/MMDS revenues have increased by 5% since last quarter.

[19] This figure has been recalculated to provide a more accurate reflection of the current percentage of households passed for digital

3 Tariff Data

This section compares movements in incumbents' tariffs for a range of telecommunication services since the ODTR's last review in September 2002. It should be noted that competing operators sometimes offer cheaper tariffs and this would also be true in the other countries surveyed. The tariff comparisons, generated from the pricing of a number of baskets of telecom services, rank Ireland's position against a group of key countries in relation to telecom tariffs[20]. The tariff comparison also reflects only one tariff option per incumbent operator and by definition is not indicative of tariff levels available in other tariff options, which may be offered by operators.

The baskets, which are constructed by Teligen using an OECD approved methodology, provide a "snapshot" of Ireland's position vis-à-vis other countries at a particular point in time. The baskets of services examined in this review include:

- National PSTN
- International PSTN
- National Leased Lines
- International Leased Lines
- Pre-paid and post paid mobile baskets

[20] For the purpose of our analysis only the EU 15, Iceland, Norway and Switzerland are examined. For the mobile baskets only the EU 15 are available this quarter.

Mobile Baskets

The mobile tariff baskets are changed this quarter due to revisions of the methodology that were agreed in the OECD/Teligen mobile basket workshop in October 2001. There are three new baskets: low user, medium user and high user. Unlike the old mobile baskets, the usage profile of each basket now includes a number of SMS messages per month and is based on the operator with the lowest available tariff in each country[21].

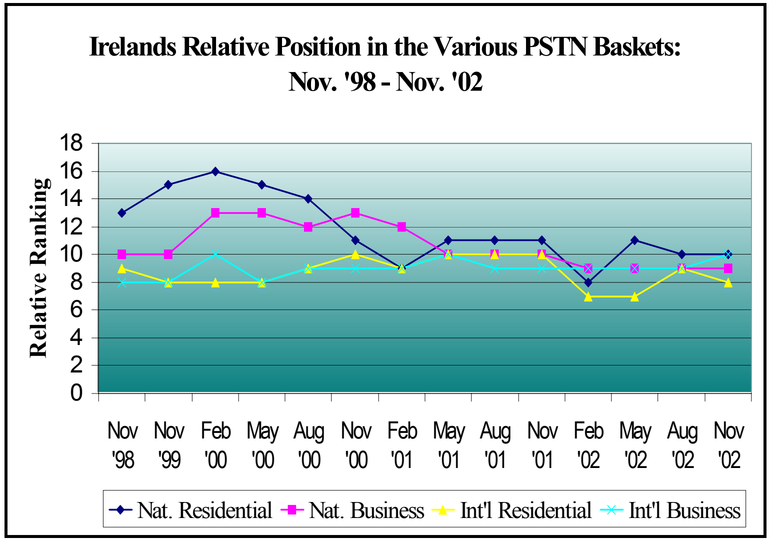
[21] Previously this was based on tariffs available from the incumbent mobile operator.

3.1 Overview

3.1.1 PSTN

- Ireland's position in the national business and residential PSTN baskets remained the same, while there was an improvement in the international residential basket but a fall of one place in the international business basket

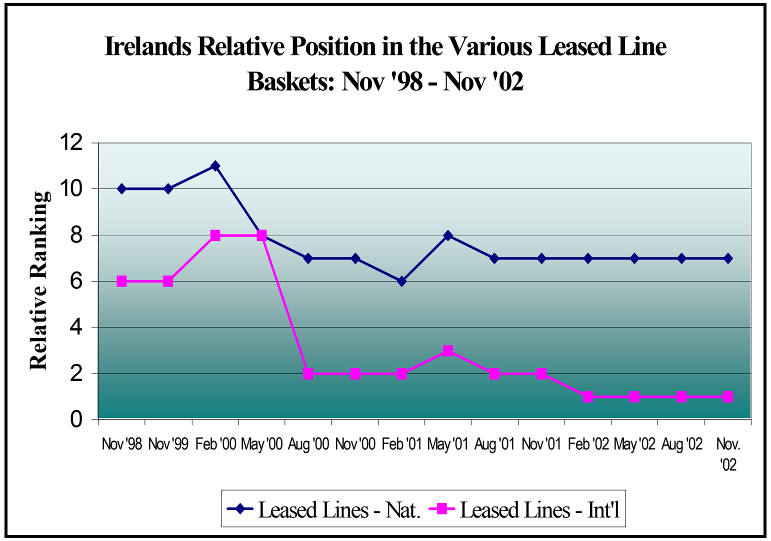
Figure 3.1.1: Ireland's Relative Position for Various PSTN baskets: Nov '98 – Nov '02



3.1.2 Leased Line

- Ireland remained in 7th and 1st place respectively in the national and international leased line baskets

Figure 3.1.2 Irelands Relative Position in the Leased Line Baskets: Nov '98 – Nov '02

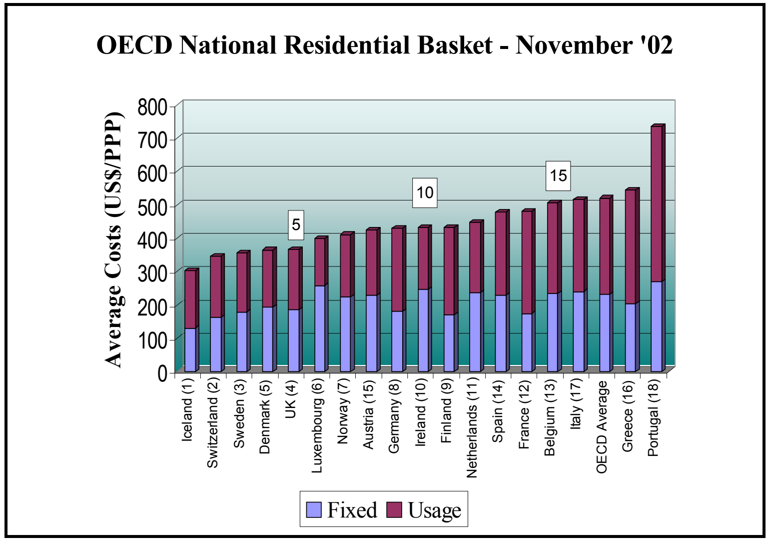


3.2 PSTN Baskets

3.2.1 National Residential Basket

- Ireland remains in 10th place, and is seven positions ahead of the OECD average

Figure 3.1.3: OECD National Residential Basket – November 2002

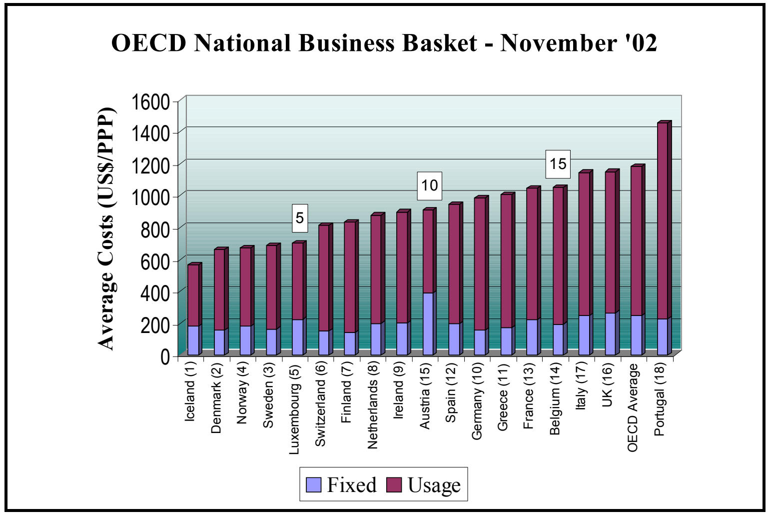


NB: The numbers in brackets represent the countries respective rankings as at Sept 2002.

3.2.2 National Business Basket

- Ireland remains in 9th place, and is nine positions ahead of the OECD average

Figure 3.1.4: OECD National Business Basket – November 2002

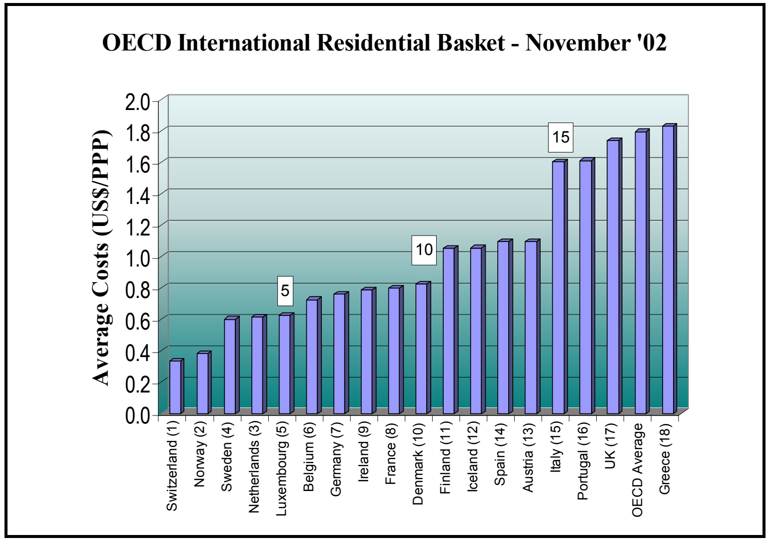


NB: The numbers in brackets represent the countries respective rankings as at Sept 2002

3.2.3 International Residential Basket

- Ranked 8th, Ireland's position in the basket has improved by one ranking from 9th since our last review

Figure 3.1.5 OECD International Residential Basket – November 2002

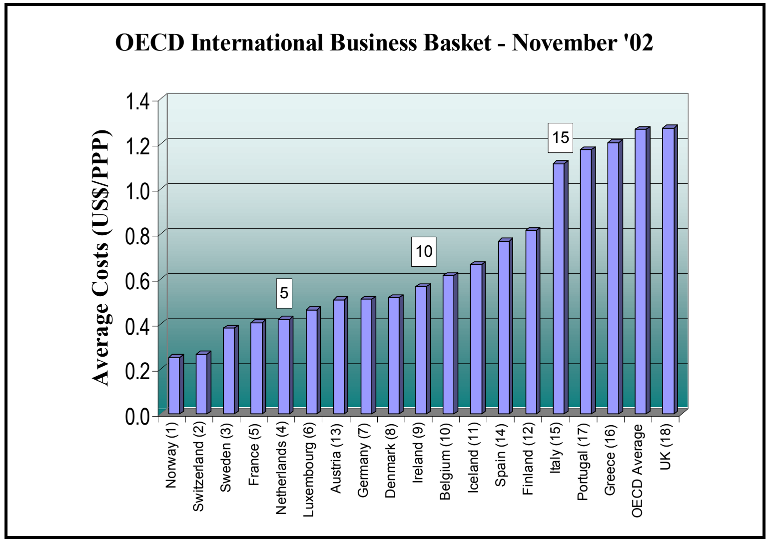


NB: The numbers in brackets represent the countries respective rankings as at Sept 2002

3.2.4 International Business Basket

- Ireland's position in the basket has fallen by one place to 10th since our last review[22], eight places ahead of the OECD average and nine places ahead of the UK

Figure 3.1.6: OECD International Business Basket – November 2002



NB: The numbers in brackets represent the countries respective rankings as at Sept 2002

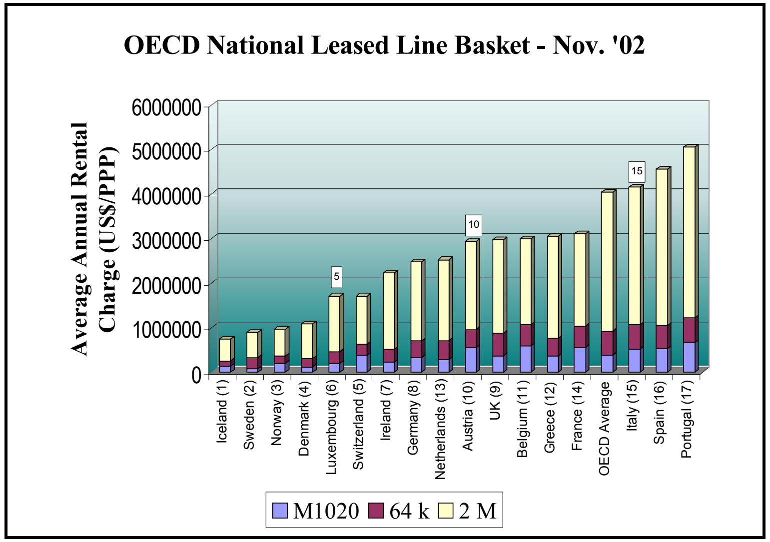
[22] The package types used for Austria have changed since last quarter. This has moved Austria up a number of places in ranking for all of the PSTN baskets (except international residential) and as a result has pushed Ireland down one place to 10th for this basket.

3.3 Leased Line Baskets

3.3.1 National Leased Lines

- Ireland remains in 7th position, lying two places ahead of the UK and eight places ahead of the OECD average[23].

Figure 3.1.7 OECD National Leased Line Basket – November 2002



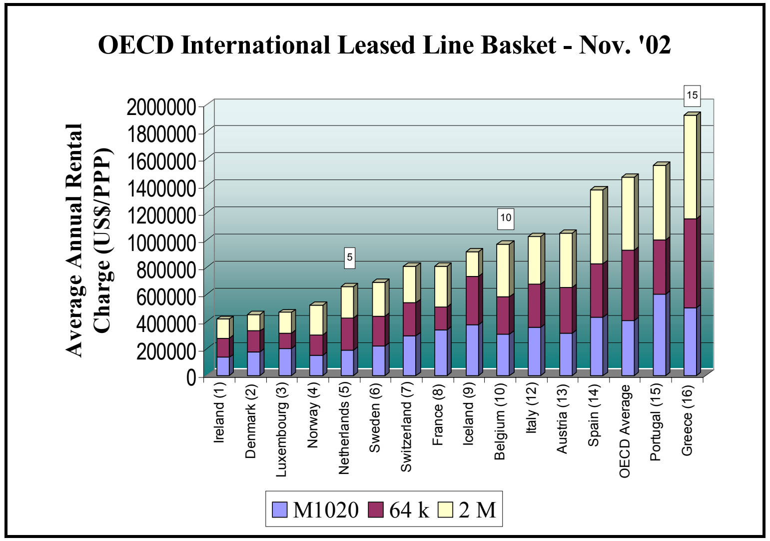
NB: The numbers in brackets represent the countries respective rankings as at Sept 2002

[23] The "National Leased Line Basket" is based on 100 circuits distributed over 6 distances from 2 to 500 km. Results exclude Vat.

3.3.2 International Leased Lines

- Ireland remains in 1st position[24].

Figure 3.1.8 OECD International Leased Line Basket – November 2002



NB: The numbers in brackets represent the countries respective rankings as at Sept 2002

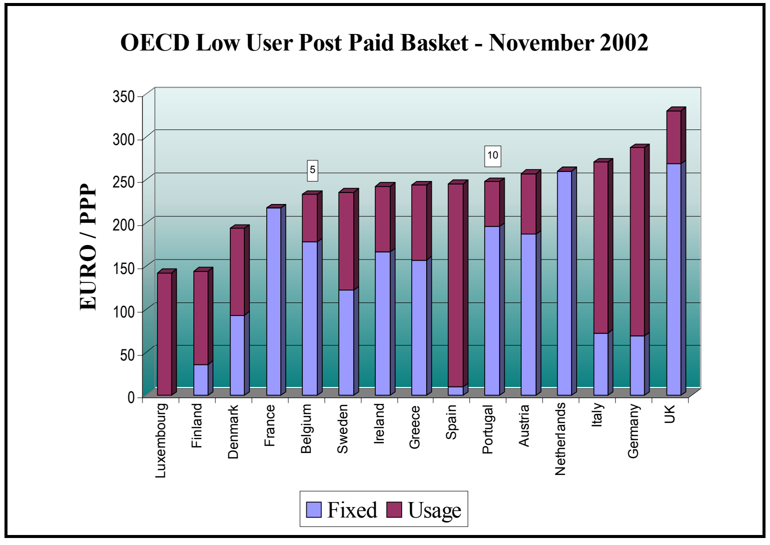
[24] The prices for these circuits are devised from the weighted average of half-circuits to all other OECD countries, using the traffic volume weighting method proposed by Teligen. The UK prices for international digital leased lines have been removed – they are not available at present as they are only priced on a case-by-case basis.

3.4 Mobile Baskets

3.4.1 Low User Post Paid Mobile Basket

- Ireland lies in 7th position, eight places ahead of the UK[25].

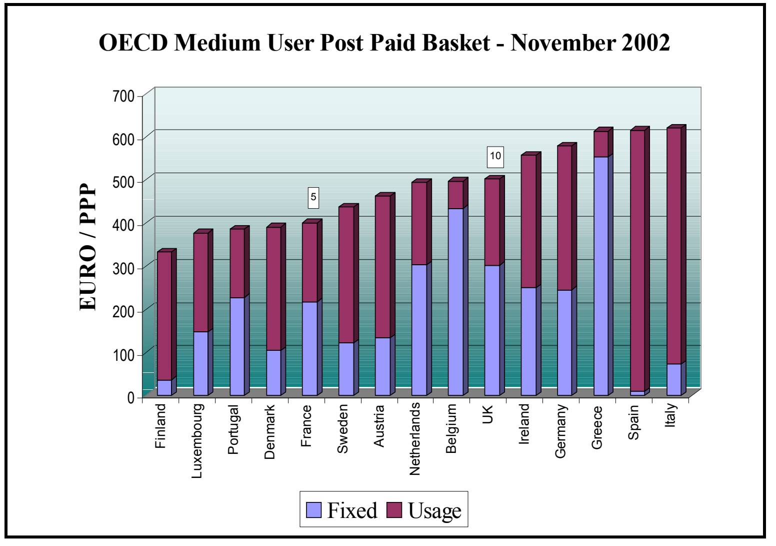
Figure 3.1.9 OECD Low User Post Paid Mobile Basket – November 2002



3.4.2 Medium User Post Paid Mobile Basket

- Ireland lies in 11th position.

Figure 3.1.10 OECD Medium User Post Paid Mobile Basket – November 2002

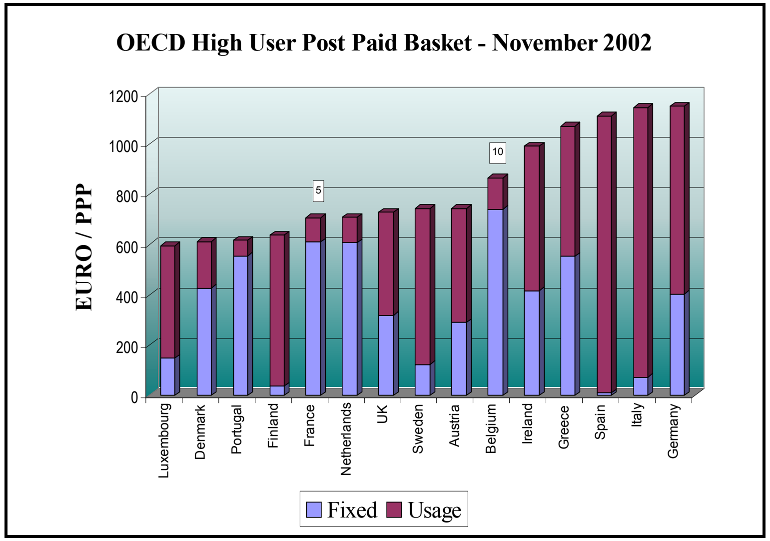


[25] As mobile baskets were not included in the September 2002 Quarterly Report there are no comparisons available for movement in rankings. There is also no OECD average available for mobile baskets this quarter.

3.4.3 High User Post Paid Mobile Basket

- Ireland lies in 11th position in the high user post paid mobile basket.

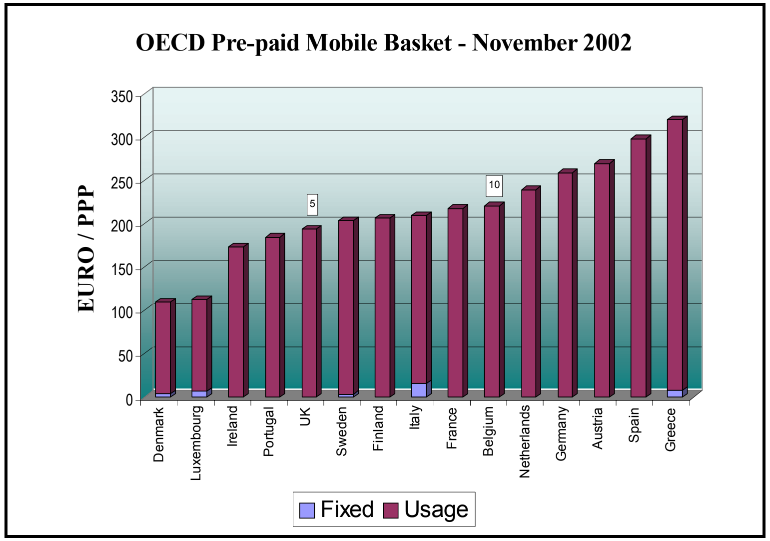
Figure 3.1.11 OECD Medium User Post Paid Mobile Basket – November 2002



3.4.4 Pre Paid Mobile Basket

- Ireland lies in 3rd position behind Denmark and Luxembourg for the pre-paid mobile basket.

Figure 3.1.12 OECD Pre Paid Mobile Basket – November 2002



Annex 1: Delivery Statistics for the Leased Line Market

Section 2: Wholesale Market	Aug-02 100% of orders			Sep-02 100% of orders			Oct O2 100% of orders		
	Standard	Non Standard	Total	Standard	Non Standard	Total	Standard	Non Standard	Total
Delivery Lead Time for digital leased lines ordered by OLOs	14	37	25	19	25	21	16	26	20
- Sub 2mb delivery lead times for OLO orders	14	36	24	18	25	21	16	25	20
- 2mb delivery lead times for OLO orders	25	55	45	22	0	22	19	39	25

Notes

1. An order is classified as Non Standard where there are impediments to *eircom* delivering the order such as Network Build, Infrastructure Build or Core Transmission Network. A delivery date will be provided for such orders at the order forecast stage.

Appendix - Licensees

GENERAL LICENSEES

FIXED OPERATORS[26]

Licensee	*Operational*	*Responded to QR*
360 Atlantic	No	No
Aurora Telecom Ltd.	YES	YES
Alphyra (previously known as ITG Carrier Services)	YES	YES
BT (Concert) Global Networks Ltd.	NO	NO
Budget Telecommunications Ltd.	NO	YES
Cable & Wireless Services (Ireland) Ltd.	YES	YES
Carrier 1 AG *(licence surrendered 20/06/02)*	NO	NO
Cignal Global Telecommunications Ireland Ltd. (licence surrendered 28/06/2002)	NO	NO
Colt Telecom	YES	YES
Conduit Enterprises Ltd.	YES	YES
Dome Telecom Ltd.	NO	NO
eircom	YES	YES
EsatBT	YES	YES
Esat Net	YES	YES
Formus Communications Ltd. (licence withdrawn)	NO	NO
Global Crossing Ireland Ltd.	YES	YES
GTS Business Services (Ireland) Ltd.	YES	YES
IDT Europe BV Ltd Liability Cooler	NO	YES
Infonet Broadband Services Corporation (licence transferred from AUCS Communications Services Ireland Ltd.)	NO	NO
Interoute Ireland Ltd.	NO	NO
IXC Communications Services Europe Ltd.	NO	NO
LCN-Ireland, L.L.C.	NO	NO
LDMI Telecommunications of Ireland	NO	YES
Mastercall International Ltd.	NO	NO
WorldCom	YES	YES
Meridian Communications Ltd.	NO	NO
Ocean Communications Ltd.	YES	YES
PrimeTec UK Ltd.	NO	NO
Primus Telecommunications Ltd.	NO	NO
RSL Communications (Ireland) Ltd.	NO	NO
Sigma	NO	NO

[26] Fixed line operators who hold a general telecommunications licence

SM Communications	YES	YES
Smart Telecom	YES	YES
Startec Global Communications UK Ltd.	NO	NO
Nevada tele.com	YES	YES
Swiftcall Centre	YES	YES
TCSI Ltd.	NO	NO
Tele2 Telecommunications Services Ltd.	NO	YES
Teleglobe Ireland Ltd.	NO	NO
Transaction Network Services Ltd.	YES	YES
VarTec Telecom (UK) Ltd.	NO	YES
Viatel (I) Ltd.	NO	NO
Yac Ltd.	NO	NO

MOBILE OPERATORS

Licensee	*Operational*	*Responded to QR*
Meteor Mobile Communications	YES	YES
Hutchison Whampoa	NO	NO
O2 Communications Ireland Ltd.	YES	YES
Vodafone Ireland Ltd.	YES	YES

CABLE OPERATORS[27]

Licensee	*Operational*	*Responded to QR*
Chorus	YES	YES
NTL Communications (Ireland) Ltd.	YES	YES

[27] Cable operators who hold a general telecommunications licence

BASIC LICENCES

FIXED OPERATORS[28]

Licensee	*Operational*	*Responded to QR*
Alord Holdings Ltd.	YES	YES
AT & T Global Network Services Ireland Ltd.	YES	YES
Axis Communications	NO	NO
Broadband Partners (Ireland Ltd.)	NO	NO
Broadband Communications Ltd.	NO	YES
Broighter Networks Ltd.	NO	YES
Cargo Community Systems Ltd.	YES	YES
Cinergi Telecom Ltd. **(licence transferred from Hibercall Ltd. 14/11/02)**	YES	YES
Crossan Cable	NO	NO
EGN B.V.	YES	YES
ESB Telecoms Ltd.	NO	YES
European Access Providers Ltd.	NO	NO
Flag Telecom	NO	NO
Genesis Internet Service Provider Ltd.	NO	NO
Genuity International Inc.	YES	YES
Global Crossing Ireland Ltd.	YES	YES
Equant Systems Ltd. **(licence transferred from Global One Communications Ltd. 29/10/02)**	NO	NO
Galileo Nederland BV **(previously known as Timas Ltd.)**	YES	YES
GTS Network (Ireland) Ltd.	NO	NO
IDirect	NO	NO
Indigo	YES	YES
Irish Broadband Internet Services	NO	NO
IXNET UK Ltd.	NO	NO
Kokomo Telecom Ltd.	NO	NO
KPNQwest Carrier Services B.V.	NO	NO
Lake Communications Systems	NO	NO
MediaNet Ireland Ltd.	NO	NO
Metromedia Fibre Network Ireland Ltd.	NO	NO
Next Telecom	NO	NO
Radianz Connect Services	NO	NO
Rillbank Ltd.	YES	NO
Savvis Europe B.V.	YES	YES
SkyNet	NO	NO
Sonic Telecom	NO	YES

[28] Fixed operators who hold a basic telecommunications licence

SITA	NO	NO
Sprintlink	NO	NO
Tarwin Trading Ltd.	NO	NO
Tele Media International Ltd.	NO	NO
Torc Telecom	NO	NO
Universal Access Ireland Ltd.	NO	YES
Telenet Communications Ltd. **(previously known as Valuetel Ltd. licence surrendered 25/10/02)**	NO	NO
Waterland Technologies	NO	NO
Web-Sat Ltd.	NO	YES

CABLE OPERATORS[29]

Licensee	*Operational*	*Responded to QR*
Casey Cable Vision Ltd.	YES	NO

[29] Cable operators who hold a basic telecommunications licence