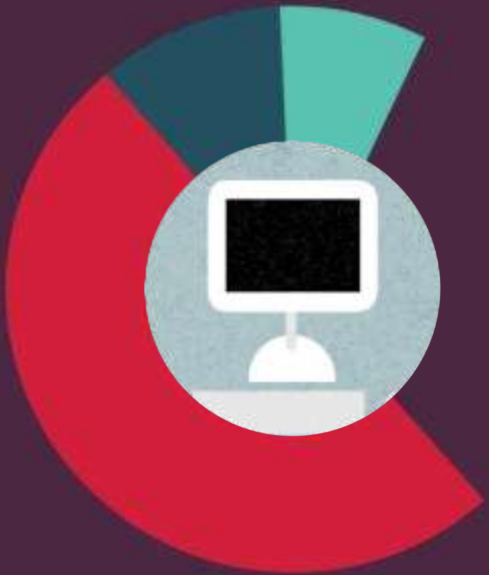


ComReg: Market Analysis – Business Market

Reference: ComReg 16/69b

Appendix 2 of ComReg Document 16/69

Commission for Communications Regulation

REDC

Background and Objectives

/ The Commission for Communications Regulation (ComReg) wish to conduct a Market Analysis survey of the business broadband and leased lines in Ireland

/ The purpose of this research is to assess the following:

- Access to broadband and leased lines
- Understand modes of broadband and leased line access
- Establish incidence of broadband and leased lines bundling and switching among Irish businesses

/ Specifically the research examines access to broadband and leased lines, and seeks to determine the impact different access modes have on Irish business .

Methodology

- 1,100 interviews were conducted by telephone among a nationally representative sample of businesses operating in Ireland
- Interviews were quota controlled by industry sector/company size and region in order to accurately represent the correct profile of Irish business.
- Boost interviews were conducted in larger company sizes and weighted back to known proportions

Company Size	Number of Interviews Conducted	Weighted Representative Sample
Micro (1-10 Employees)	705	913
Small (11-50 Employees)	195	154
Medium (50-250 Employees)	100	22
Large (250+ Employees)	100	11

- All interviews were conducted via CATI telephone interviewing
- Fieldwork was conducted between 10th November – 5th December 2014.
- Interviews were conducted with the person responsible for telecommunication decision making within each company. In larger companies this was likely to be a specialised person such as an IT manager and for smaller companies this person was likely to be the owner/manager.

Note on Sample Size

- ComReg have requested a complete analysis of broadband and leased lines among businesses in Ireland. Some access modes are not commonly used and therefore have very small bases sizes. In the interest of completeness these access modes are presented herein. However due to small sample sizes some of the more granular data reported is not statistically significant. Therefore care should be taken when interpreting this information.

Access Type Primary Broadband Mode	Unweighted Base Size
Fixed Landline	566
Fibre Network	125
Cable Network	59
3G/4G Mobile Broadband	57
Satellite Broadband	36
Fixed Wireless	25
Other Broadband	7

Access Type Primary Leased Line Mode	Unweighted Base Size
Other incl.Wavelength Connectivity	58
Digital Leased Line	51
Ethernet Leased Line	46
Analogue Leased Line	15
Don't Know	7

- On filtered questions the base size described above will fall further and analysis within each access type will not always be possible.
- Base sizes within leased line platforms are shown unweighted throughout the presentation.

REDC

Presentation Structure

Sample Profile (Total Sample)

Connection details (Total Sample)

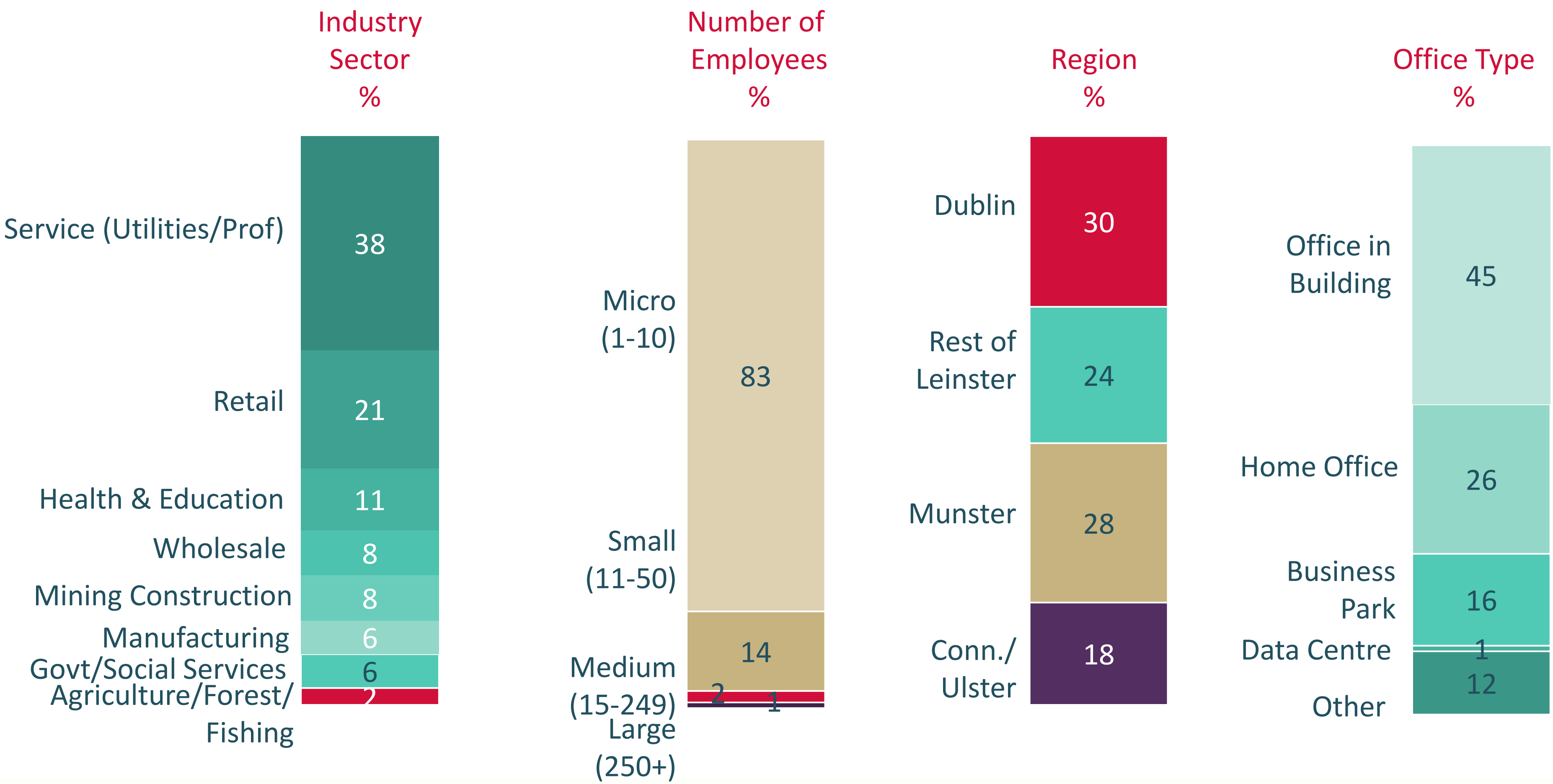
Broadband Users	Leased Line Users
Suppliers and Usage	Suppliers and Usage
Service Level Agreement	Service Level Agreement
Speed of Connection	Speed of Connection
Contracts	Contracts
Bundling	Bundling
Switching	Switching
SSNIP	SSNIP

Key Findings

Sample Profile

Sample Profile

(Base: All Business Decision Makers – 1,100)



Sample was weighted to represent the total businesses in Ireland by industry sector, size and region.

Connection Details

Data Connectivity: What the Respondents were told

(Base: All Business Decision Makers - 1,100)

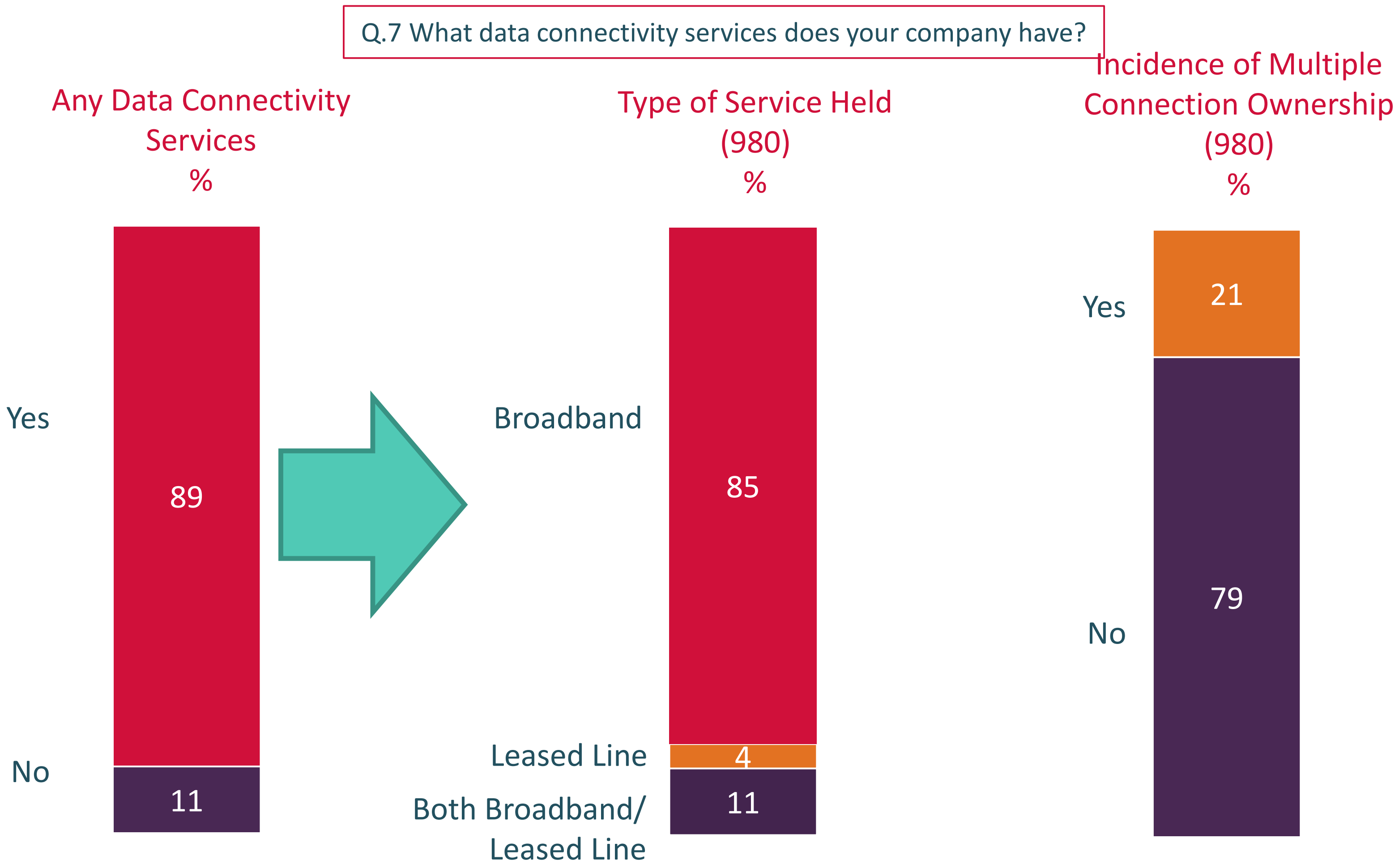
There are different ways that data connectivity services can be provided to a business, namely through broadband and leased line access. I will briefly explain the difference between these before asking what services you have in your business.

A broadband service is typically a mass market product or “off the shelf” product sold to households and businesses. The download and upload bandwidth or speeds are usually different and may not be guaranteed (i.e. you may get faster/slower speeds at certain times). There may also be no or limited service contracts or Service Level Agreements (SLAs) between you and your service provider (e.g. no guaranteed fault repair time within an agreed set of hours).

On the other hand, a leased line provides the same or near similar bandwidth/speed (whereby download and upload bandwidth/speeds are the same), the bandwidth or speed you get is guaranteed and there is typically an SLA between you and your service provider for things such as service availability and fault repair times (e.g. within a certain number of hours).

Connection Details – Top Level Overview

(Base: All Business Decision Makers - 1,100)



89% of Irish business have either a broadband or leased line connection. Of those holding a connection 21% have access to two or more means of connection.

Access Type by Company Size (Multiple Responses)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

Q.8 Can I ask you, in your business which of the following means of accessing services are used?

	Total (n=980)	No. of Employees			
		1-10 (794) %	11-50 (154) %	51-249 (100*) %	Corporate 250+ (100*) %
Fixed broadband via a traditional fixed telephone line (landline)	64%	67	54	47	51
Fixed broadband provided by a Fibre network	15%	12	26	27	41
3G\4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets)	12%	11	12	17	41
Fixed broadband via a cable TV network	7%	7	9	12	40
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	7%	6	12	9	12
Broadband provided by Satellite	4%	3	6	4	5
Fixed wireless connection, provided via a modem that receives radio signals through the air	3%	4	3	1	10
Any Leased Line	15%	9	28	59	75

* = base expressed in unweighted terms throughout the presentation

64% of Irish business connects to broadband via a landline. Use of this broadband access means is highest for the Micro business sector (1-10 Employees) at 67%.

Access Type Most Often Used (Single Code)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

Q.10 Which service do you consider to be your primary/main access mode?

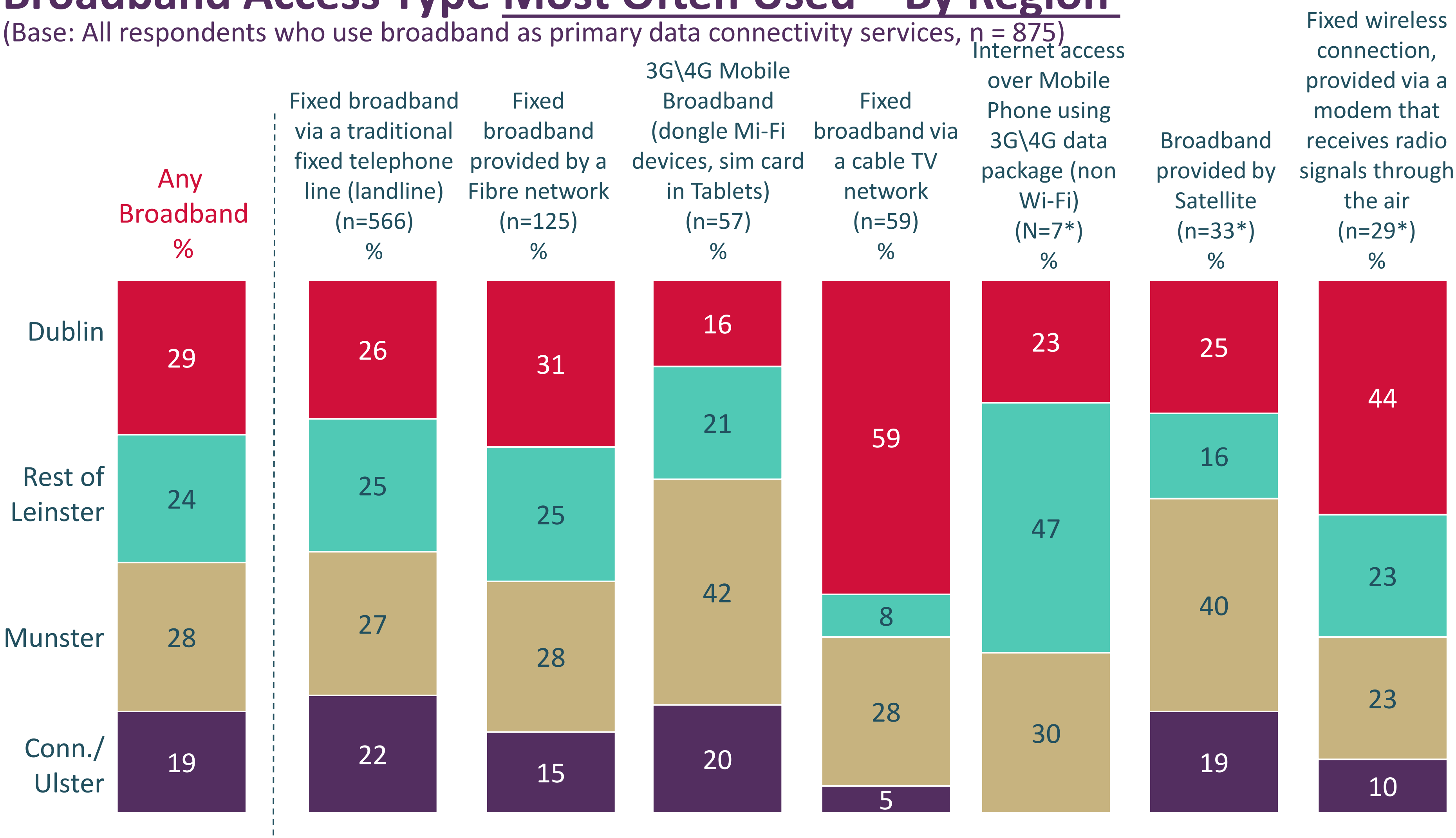
	Total (n=980)	No. of Employees: 1-10 (794) %	11-50 (154) %	51-249 (100*) %	Corporate 250+ (100*) %
Fixed broadband via a traditional fixed telephone line (landline)	58%	63	40	25	11
Fixed broadband provided by a Fibre network	13%	11	20	15	18
Fixed broadband via a cable TV network	6%	5	9	5	4
3G/4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets)	6%	7	2	-	-
Broadband provided by Satellite	3%	4	3	-	1
Fixed wireless connection, provided via a modem	3%	3	3	2	1
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	1%	1	-	-	-
Any Leased Line	9%	5	21	51	64

* = base expressed in unweighted terms throughout the presentation

58% of Irish business rely on broadband access via a traditional phone line with fibre the next most common broadband access mode at 13%.

Broadband Access Type Most Often Used – By Region

(Base: All respondents who use broadband as primary data connectivity services, n = 875)



Broadband via a cable TV network is most prevalent in Dublin. Broadband via a traditional fixed telephone line is more evenly split across the geographic regions.

Specific Type of Leased Line Access by Company Size (Single Response)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

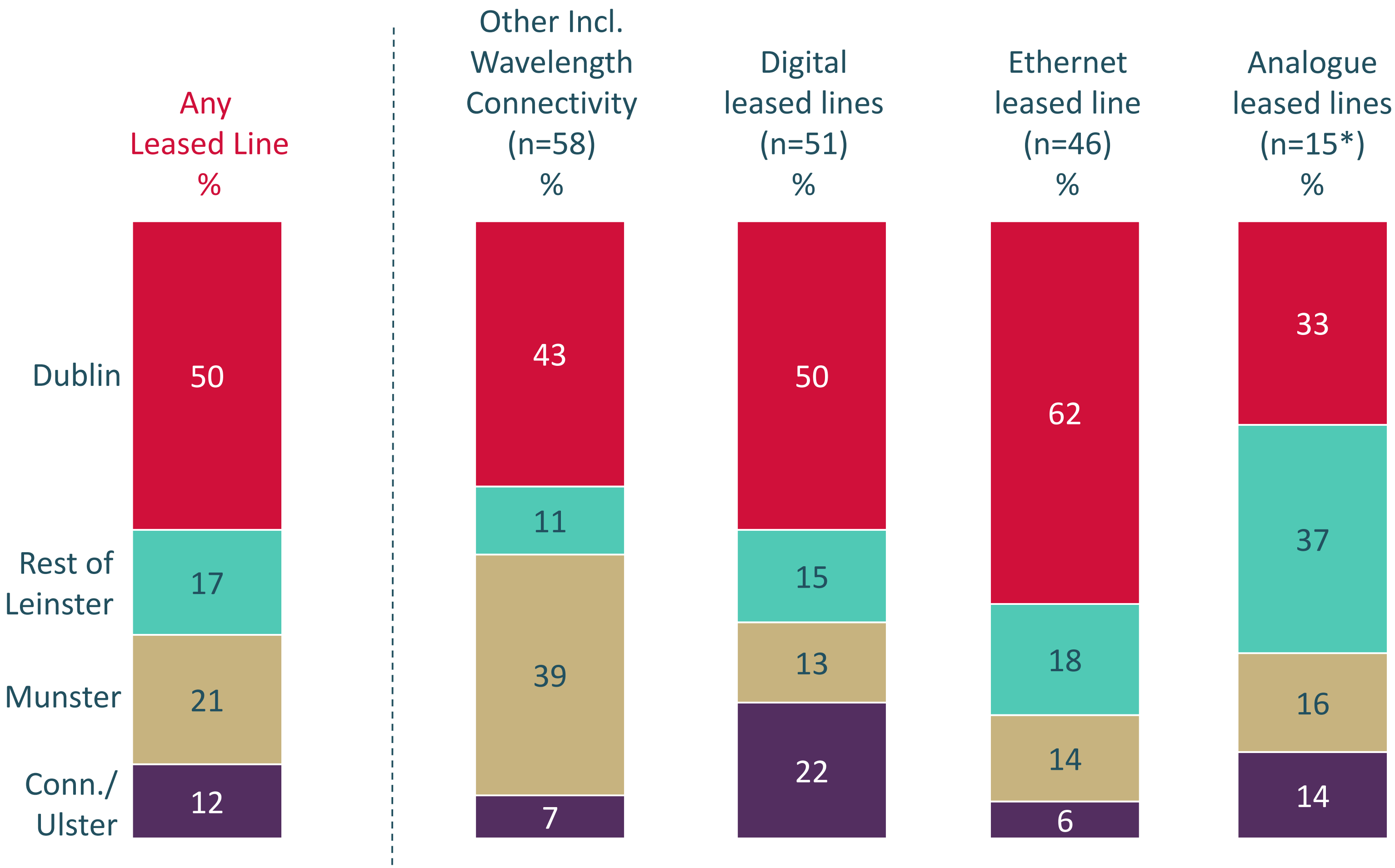
Q.10 Which service do you consider to be your primary/main access mode?

	Total (980)	Company Size 1-10 % (794)	11-50 % (154)	51-249 % (100)	Corporate 250+ % (100)
Any Leased Line	9%	5	21	51	64
Other inc. Wavelength Connectivity	3%	0	11	23	14
Digital	3%	1	5	15	21
Ethernet	2%	1	3	9	27
Analogue	1%	1	1	1	2

For primary means of access, other including wavelength and digital leased lines are equally used at 3%.

Leased Line Access Type Most Often Used – By Region

(Base: All respondents who use Leased Lines as primary data connectivity services, n = 176)

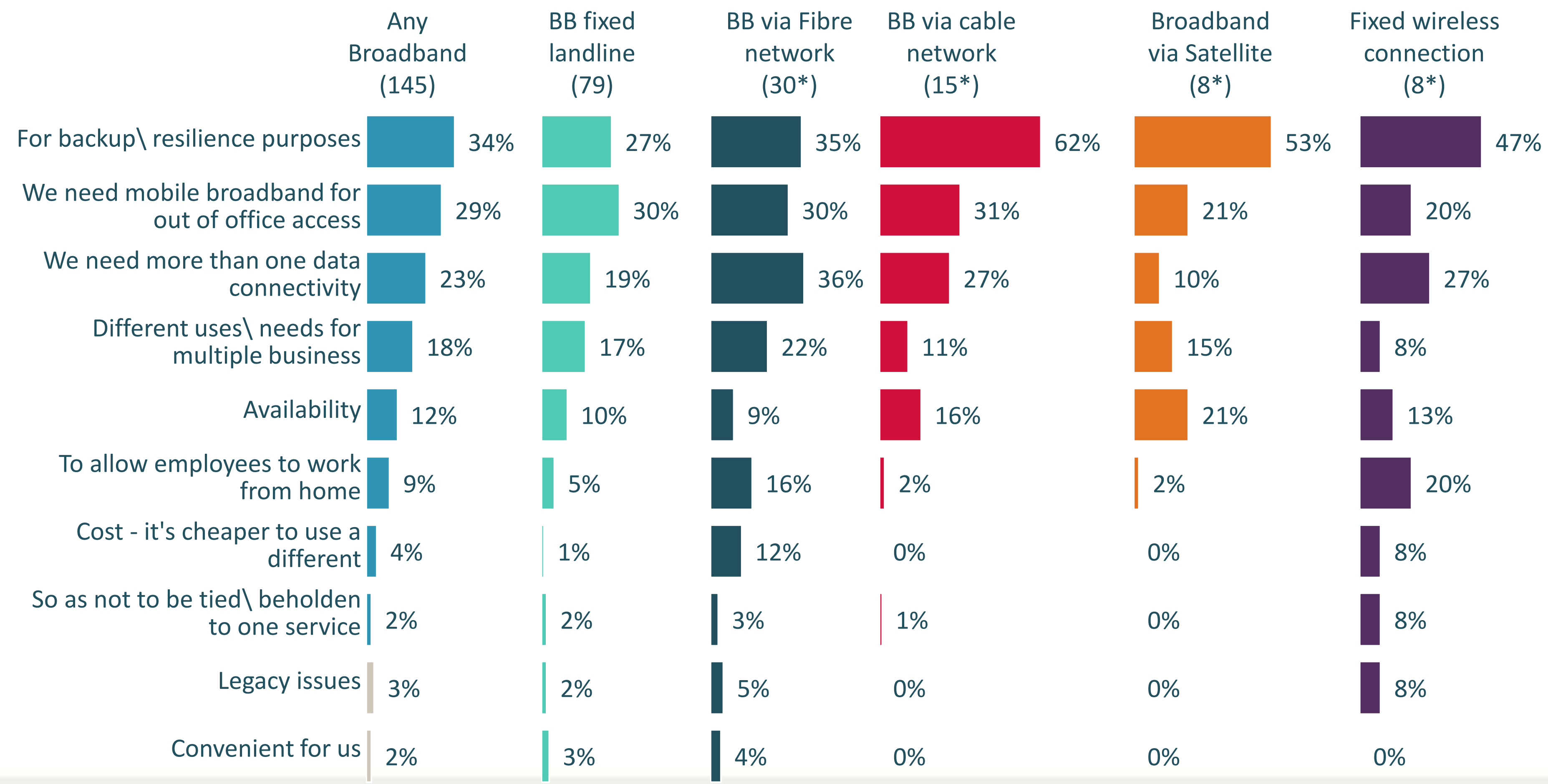


Leased lines are most prevalent in Dublin, particularly Ethernet leased lines.

Why Use More Than One Means of Data Connectivity

(Base: All broadband primary users using more than one means of data connectivity= 145)

Q.15/73/108 Why does your business use more than one means data connectivity services in your business?



- *Small Base*

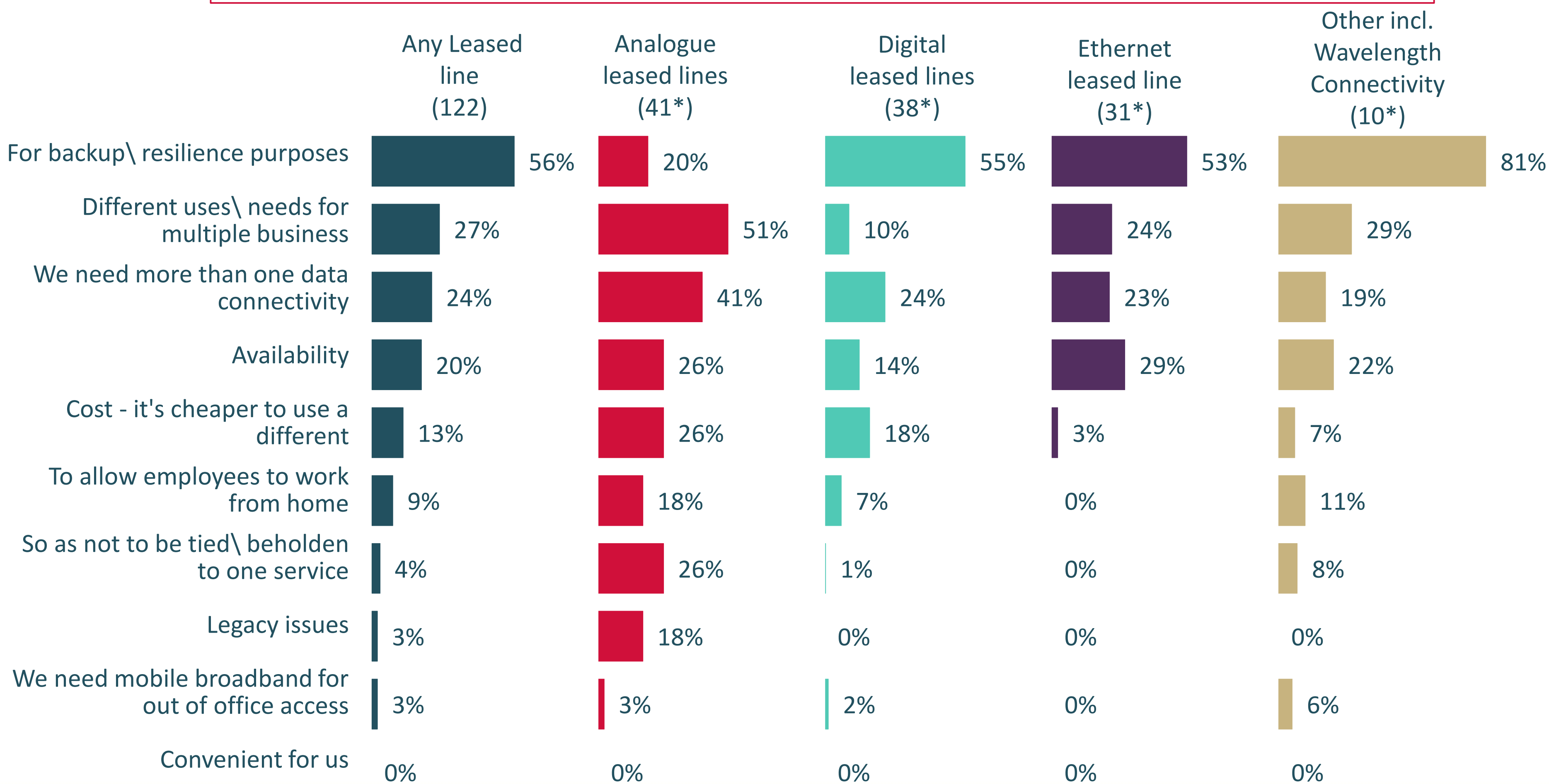
Mobile BB N=5

Main reason primary users use more than one means of data connectivity is for back up purposes or using connection in the out of office environment.

Reasons for Using More than One Means of Data Connectivity

(Base: All Primary service leased line using more than one means of data connectivity, n = 122)

Q.15/73/108 Why does your business use more than one means data connectivity services in your business?



- *Small Base*

All base sizes unweighted

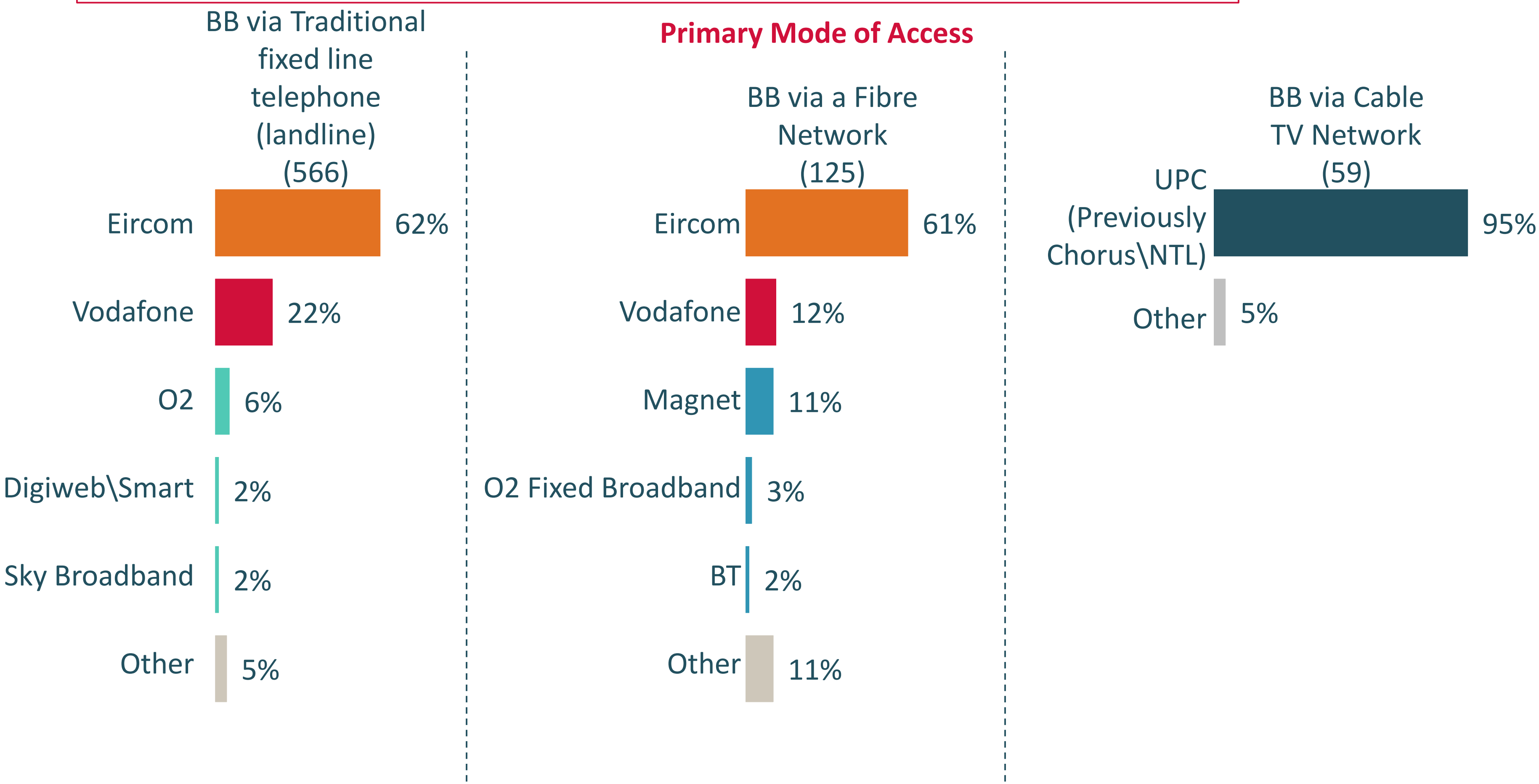
Main reason leased line primary users use more than one means of data connectivity is for back up/resilience purposes.

Broadband Users – Supplier and Usage

Current Broadband Provider Share

(Base: All Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?

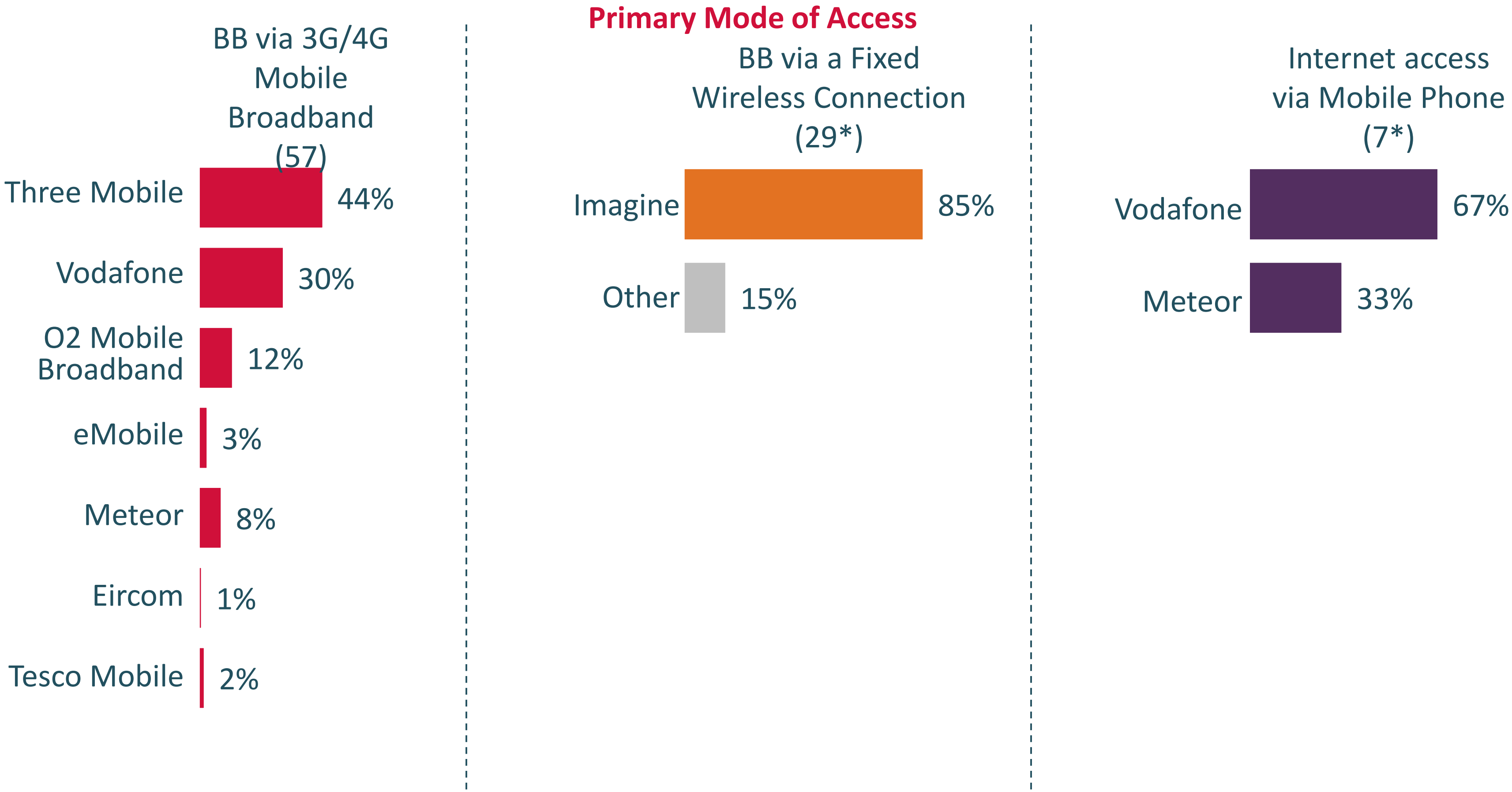


Eircom have 62% share of broadband users using a traditional fixed line telephone and 61% share of broadband of fibre broadband users. UPC have 95% share of cable broadband users.

Current Broadband Provider Share

(Base: All Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?



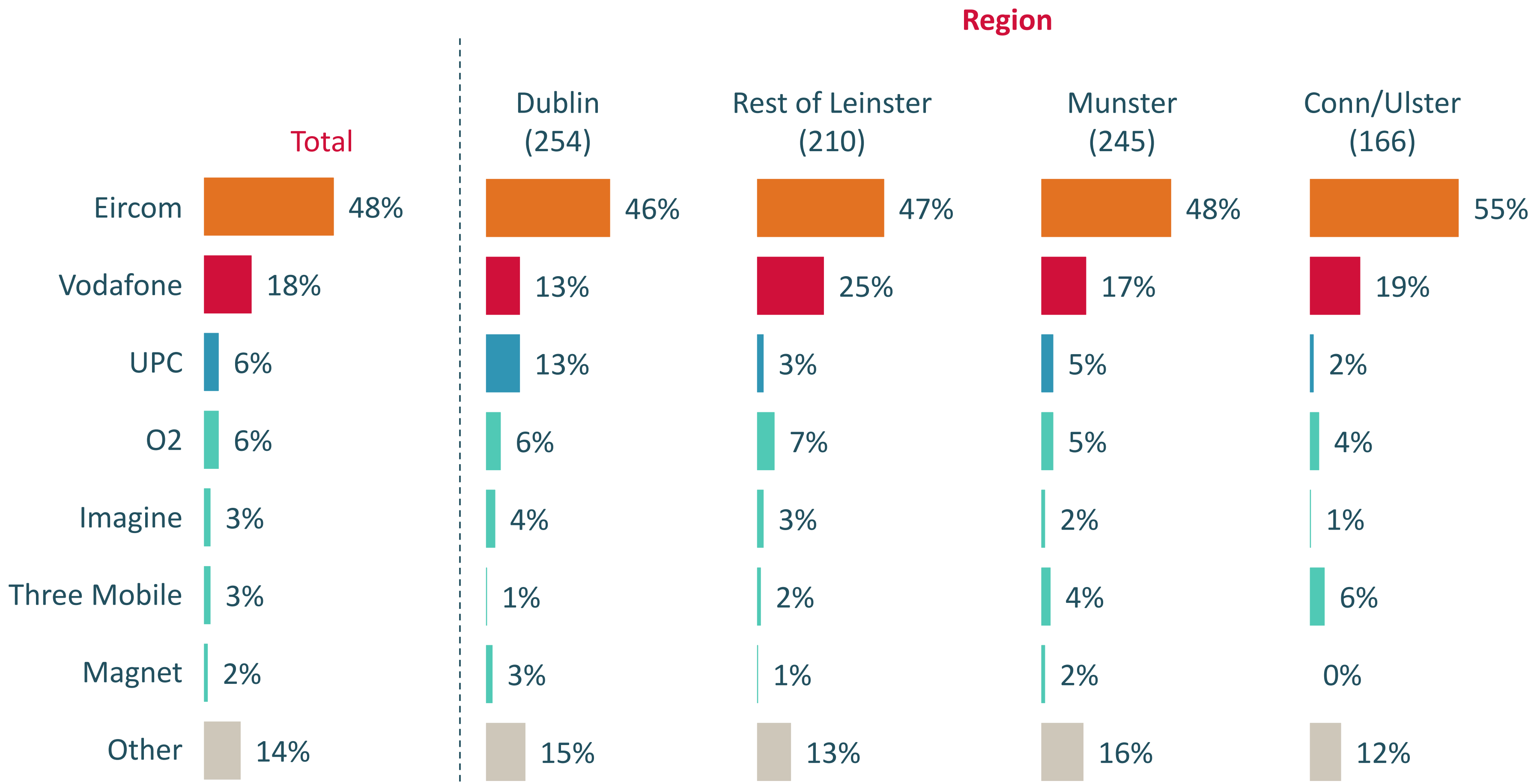
* Small base

Three mobile have 44% share of mobile business broadband users. Most fixed wireless access broadband users have Imagine as their provider.

Current Broadband Provider Share

(Base: All Primary Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?

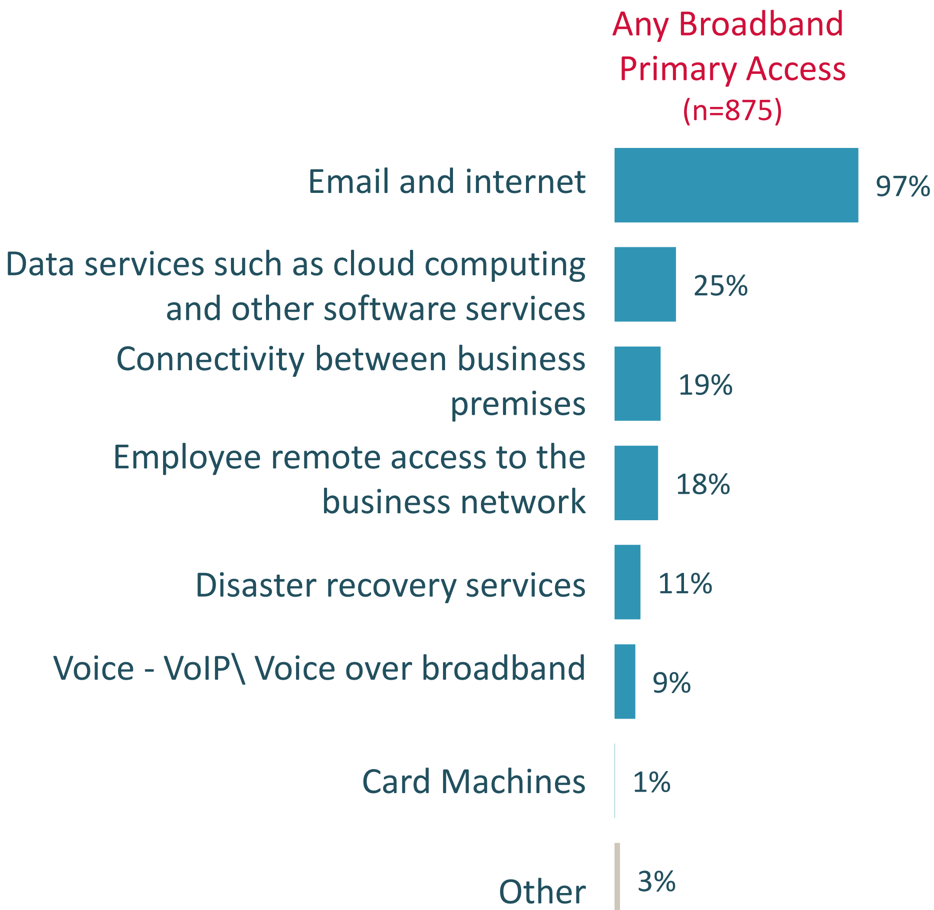


Overall Eircom is used by 48% of primary broadband business users, followed by Vodafone at 18%. Eircom is used by most primary broadband business users in Connaught/Ulster region while Vodafone is used by most in Leinster (outside of Dublin)

Use of Primary Service – Broadband Primary Access Users

(Base: All respondents who use broadband as primary data connectivity services, n= 875)

Q.17/75/110 What does your business use your (SCRIPT IN PRIMARY SERVICE Q10) for?



	Primary Mode of Access						
	Fixed BB (Landline) (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (33*)	Mobile Phone (7*)
Email and internet	98%	96%	93%	100%	100%	100%	85%
Data services such as cloud computing and other software services	21%	40%	39%	10%	39%	34%	-
Connectivity between business premises	16%	28%	29%	5%	21%	33%	23%
Employee remote access to the business network	16%	31%	22%	6%	24%	27%	-
Disaster recovery services	9%	16%	19%	4%	16%	22%	-
Voice - VoIP\ Voice over broadband	7%	19%	10%	4%	1%	26%	23%
Card Machines	1%	-	3%	-	-	4%	15%
Other	3%	5%	9%	2%	-	-	-

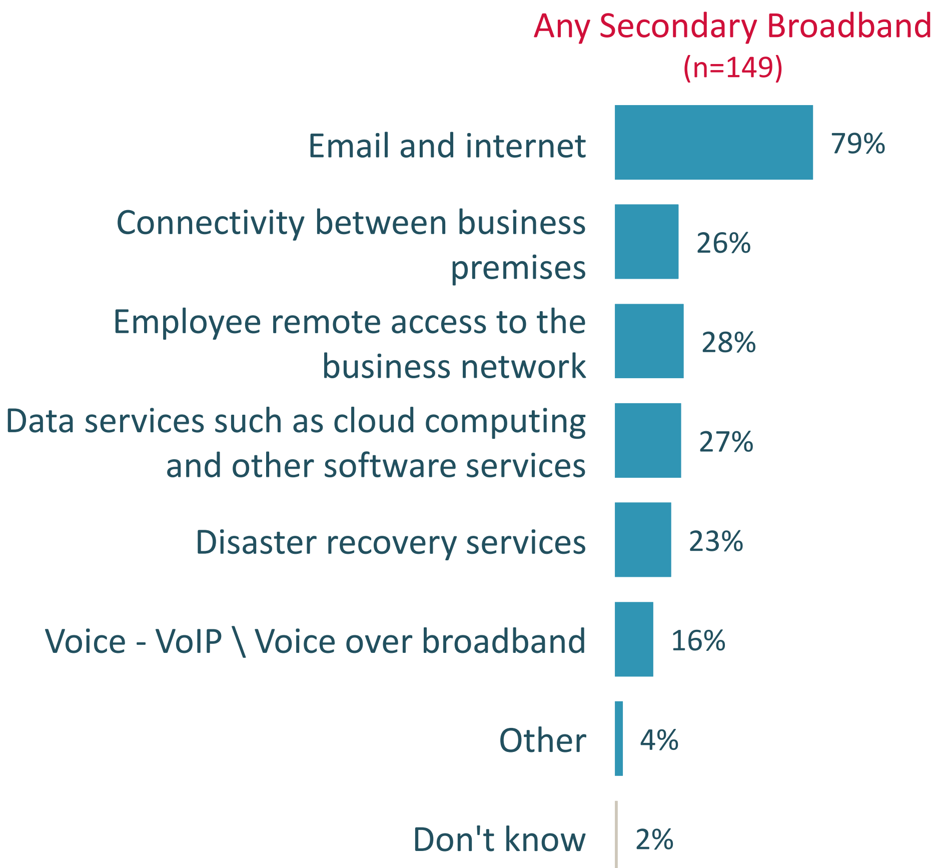
* Small Base

97% of companies using broadband as a primary means of data connectivity stated that they use broadband for email and internet. The next highest category of usage (25%) was for data services.

Use of Secondary Service – Broadband Secondary Access Users

(Base: All respondents who use broadband as secondary data connectivity services, n= 149)

Q.18/76/111 What does your business use your <secondaryservice> for?



	Secondary Mode of Access					
	Fixed BB (Landline) (n=46*)	BB Fibre Network (n=12*)	BB Cable Network (n=5*)	Mobile BB (n=36*)	Fixed Wireless (n=7*)	BB Mobile Ph (n=39*)
Email and internet	68%	95%	84%	82%	62%	87%
Connectivity between business premises	29%	41%	14%	30%	-	22%
Employee remote access to the business network	29%	24%	14%	40%	-	18%
Data services such as cloud computing and other software services	22%	37%	28%	37%	4%	21%
Disaster recovery services	33%	32%	14%	23%	58%	4%
Voice - VoIP \ Voice over broadband	25%	38%	12%	15%	4%	2%
Other	9%	6%	-	1%	13%	
Don't know	-	-	16%	3%	-	4%

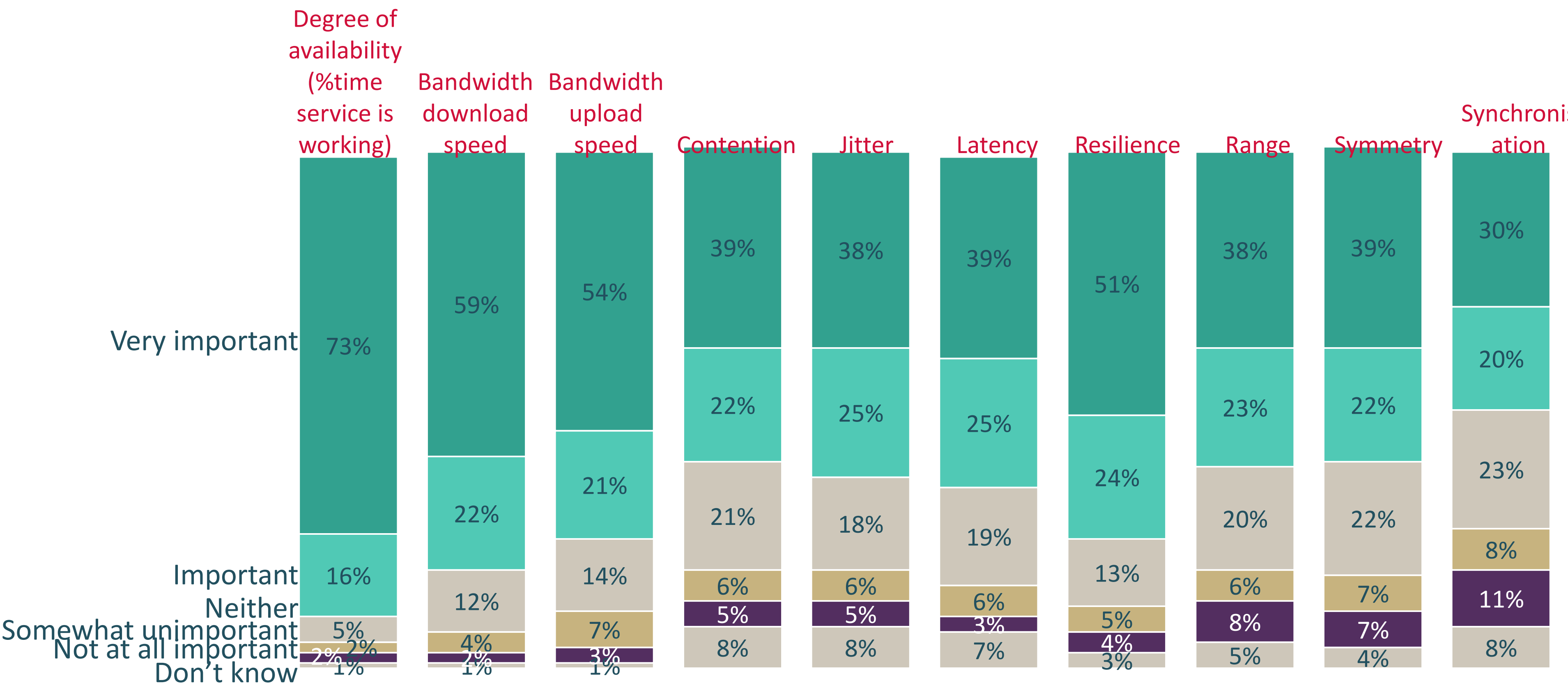
* Small Base

Email and internet access is also the main use of secondary broadband connections.

Importance of Aspects When Selecting Primary Broadband Supplier?

(Base: All respondents who use a primary services, n= 875)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?



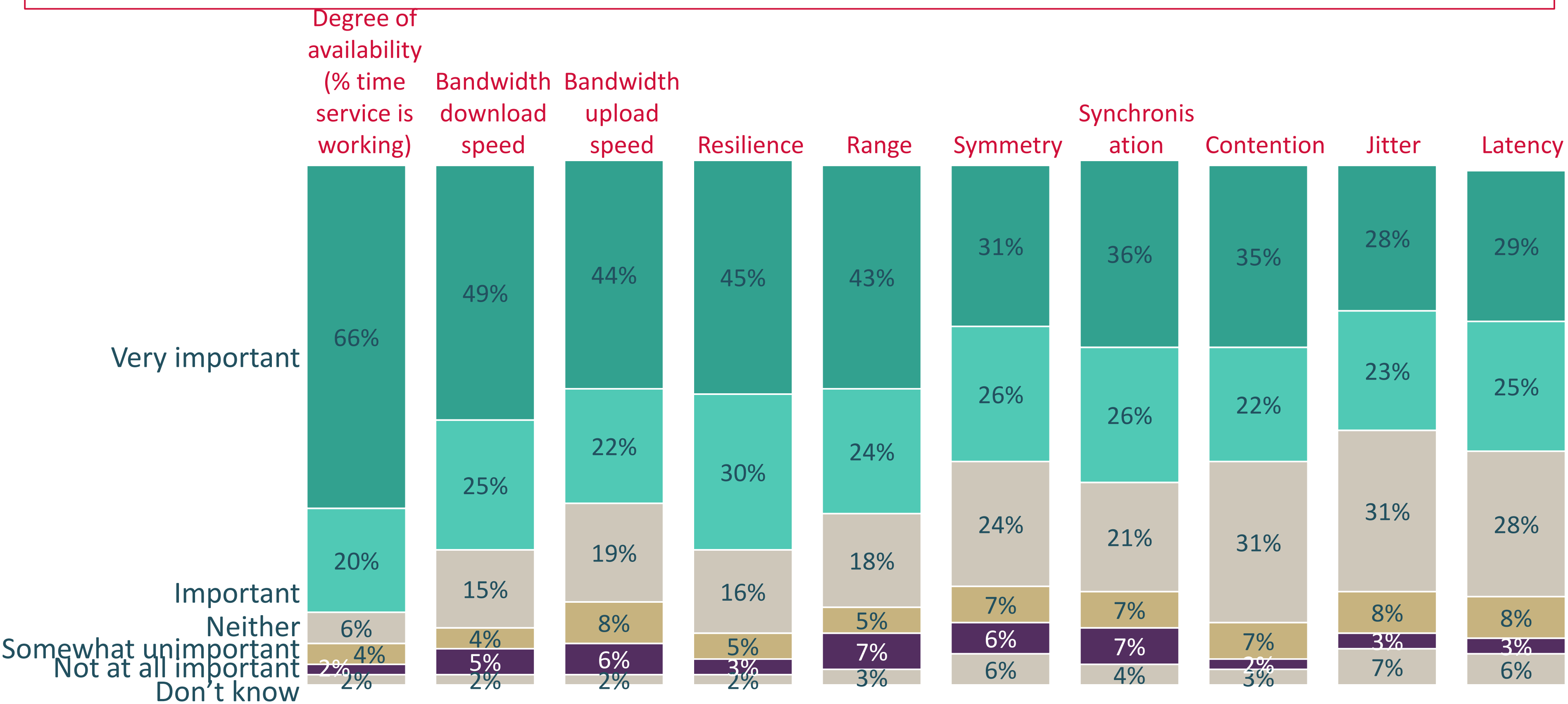
Total: Important	Degree of availability (%time service is working)	Bandwidth download speed	Bandwidth upload speed	Contention	Jitter	Latency	Resilience	Range	Symmetry	Synchronisation
	89%	81%	75%	61%	63%	64%	75%	61%	61%	50%

73% of those with broadband state that availability (% of time service is working) is very important when selecting a primary broadband supplier.

Importance of Aspects when Selecting Secondary Broadband Supplier?

(Base: All respondents who use a secondary service, n= 149)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	86%	74%	66%	75%	67%	57%	62%	57%	51%	54%

Availability (% of time service is working), and download/upload speed are-the main considerations when selecting a secondary broadband supplier – similar to primary broadband supplier.

Importance of Aspects when Selecting Secondary Broadband Supplier?

(Base: All respondents who use a secondary service, n= 149)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?

	Total (n=149)	Primary Mode of Access					
		Fixed BB (Landline) (n=46*)	BB Fibre Network (n=12*)	BB Cable Network (n=5*)	Mobile BB (n=36*)	Fixed Wireless (n=7*)	Mobile Phone (n=39*)
Degree of availability (%time service is working)	86%	77%	79%	100%	92%	60%	96%
Bandwidth - download speed	74%	64%	77%	100%	89%	22%	85%
Bandwidth - upload speed	66%	55%	74%	71%	82%	19%	74%
Resilience	75%	67%	91%	54%	72%	51%	86%
Range	67%	55%	64%	44%	71%	31%	86%
Symmetry	57%	49%	54%	57%	42%	31%	82%
Synchronisation	62%	58%	49%	44%	56%	13%	77%
Connection	57%	58%	64%	44%	44%	3%	65%
Jittery	51%	49%	62%	42%	43%	3%	60%
Latency	54%	54%	69%	41%	42%	19%	65%

* Small Base BB Satellite n =2

Availability (% of time service is working), download/upload speed are the main considerations when selecting a secondary broadband supplier – similar to primary broadband supplier.

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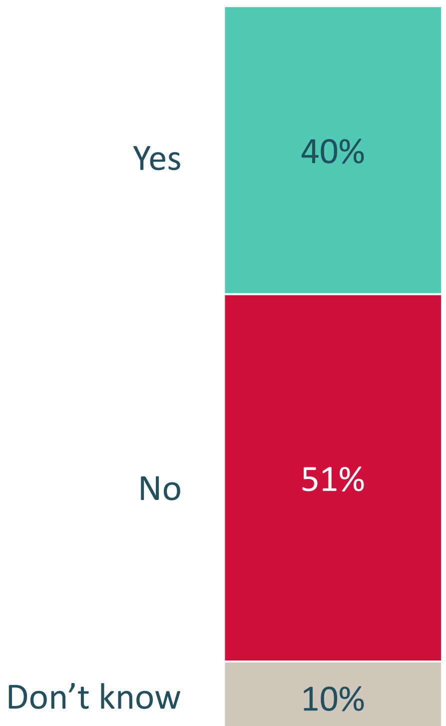
Service Level Agreements (Broadband)

Service Level Agreement's (SLA's)

(Base: All primary broadband users, n = 875)

Q.21/97/114 Do you have service contracts or Service Level Agreements (SLAs) with your service provider? These might include fault repair times, out of hours service, compensation if service levels are not met etc.

Total Broadband
(n=875)



Primary Mode of Access – Yes Service Level Agreement							
	BB Traditional Phone (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Yes	36	54	45	33	45	49	26
No	52	38	55	60	50	35	74
Don't Know	12	8	0	7	5	16	0

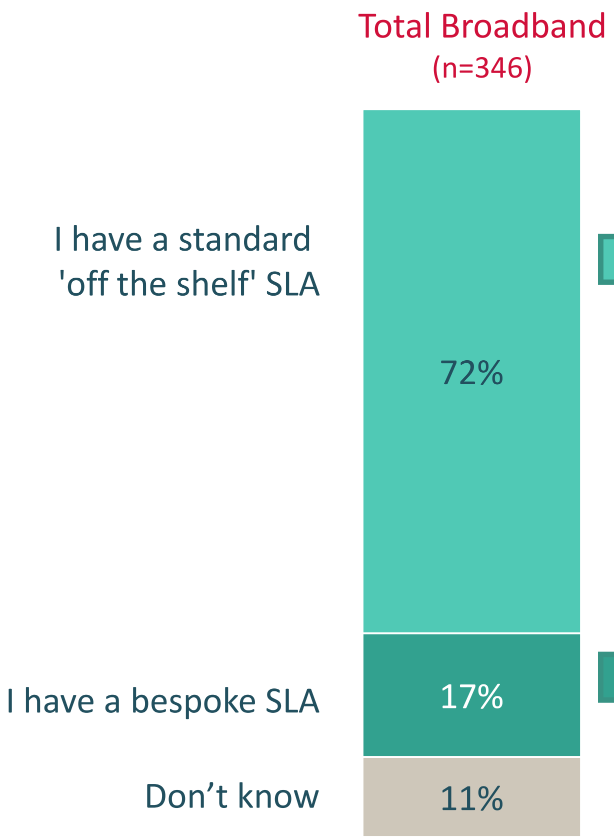
*Base small

40% of business's with broadband have SLA's, with fibre broadband users the most likely to have one.

Type of SLA's

(Base: All broadband primary users who have an SLA in place, n = 346)

Q.22 Do you have a standard 'off the shelf' or bespoke SLA with your broadband service provider(s)? A bespoke SLA might have more parameters or better service level commitments included in it compared to a standard SLA.



Primary Mode of Access – Standard SLA

BB Traditional Phone (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26*)	Mobile BB (n=19*)	Fixed Wireless (n=13*)	BB Satellite (n=16*)	Mobile Phone (n=2*)
72%	70%	72%	76%	76%	63%	n/a

Primary Mode of Access – Bespoke SLA*

BB Traditional Phone (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26)	Mobile BB (n=19)	Fixed Wireless (n=13)	BB Satellite (n=16)	Mobile Phone (n=2)
17%	20%	12%	24%	1%	21%	n/a

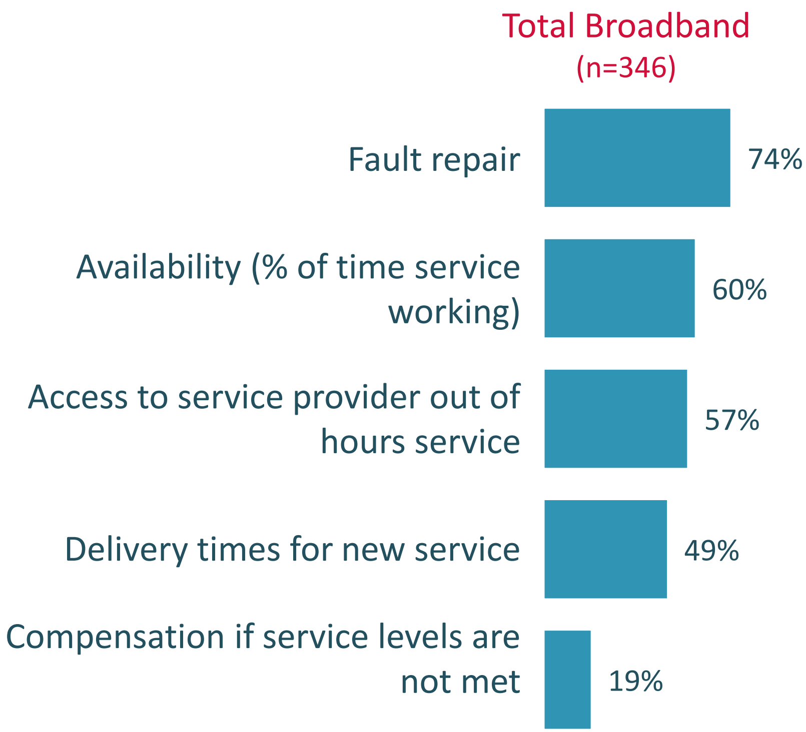
*Small base

72% of primary broadband users who have an SLA have a standard 'off the shelf' SLA.

What Parameters Are Included in the SLA's You Have?

(Base: All Broadband Users Who Use Broadband as a Primary Service And Have an SLA In Place , n= 346)

Q.23/Q.81/Q.116 Do you know which if any of the following parameters are included in your SLA?



Primary Mode of Access							
	Fixed BB (Landline) (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26*)	Mobile BB (n=19*)	Fixed Wireless (n=13*)	BB Satellite (n=16*)	Mobile Phone* (n=2)
Fault repair	76%	75%	66%	44%	77%	81%	n/a
Availability (% of time service working)	57%	65%	61%	58%	67%	64%	n/a
Access to service provider out of hours service	53%	69%	54%	66%	41%	59%	n/a
Delivery times for new service	47%	58%	52%	26%	48%	61%	n/a
Compensation if service levels are not met	19%	27%	10%	7%	20%	17%	n/a

*Base small

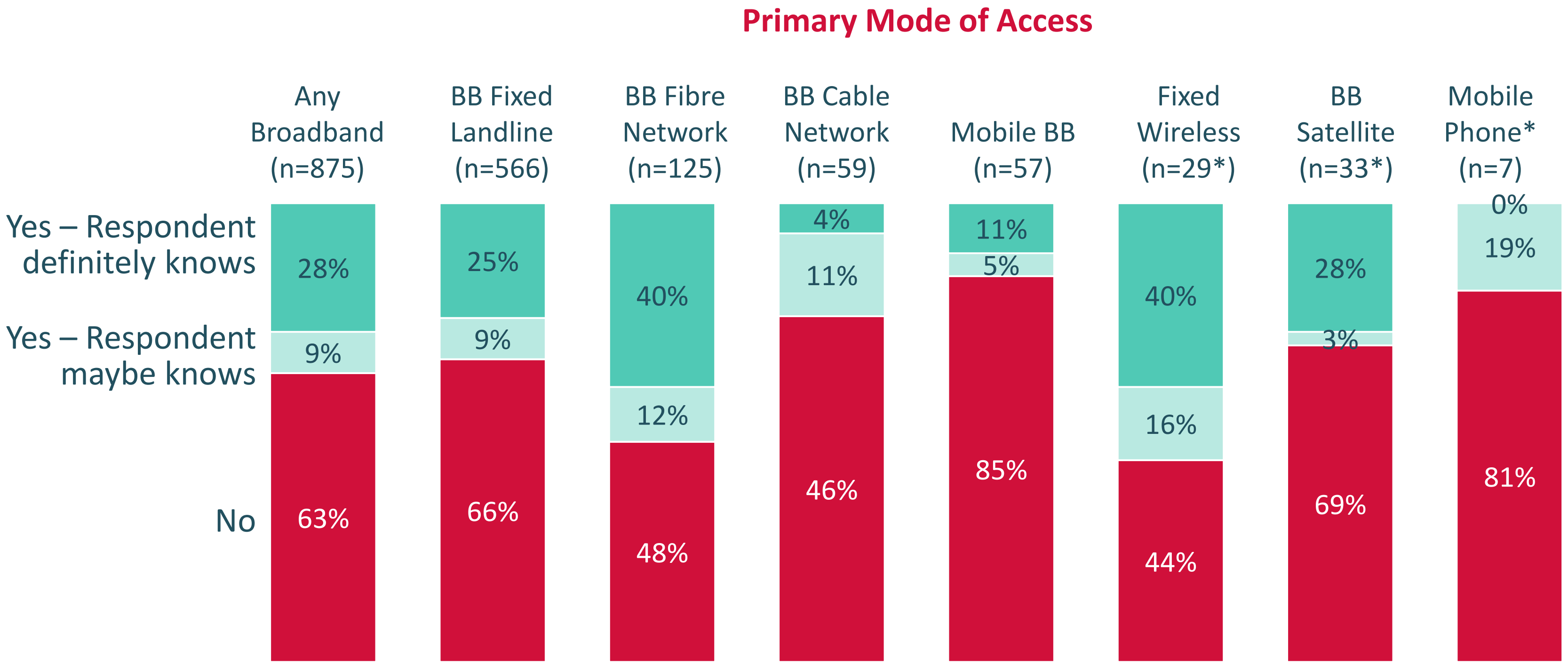
The highest level seen for parameter inclusion is for fault repair (74%) with the lowest level being compensation at just 19% of broadband SLA's.

Speed of Connections (Broadband)

Knowledge of Claimed Maximum Download Speed

(Base: All respondents who use broadband as primary data connectivity services, n= 875)

Q.23b. Do you know the claimed maximum download speed for your main broadband (Insert service Q10) service?



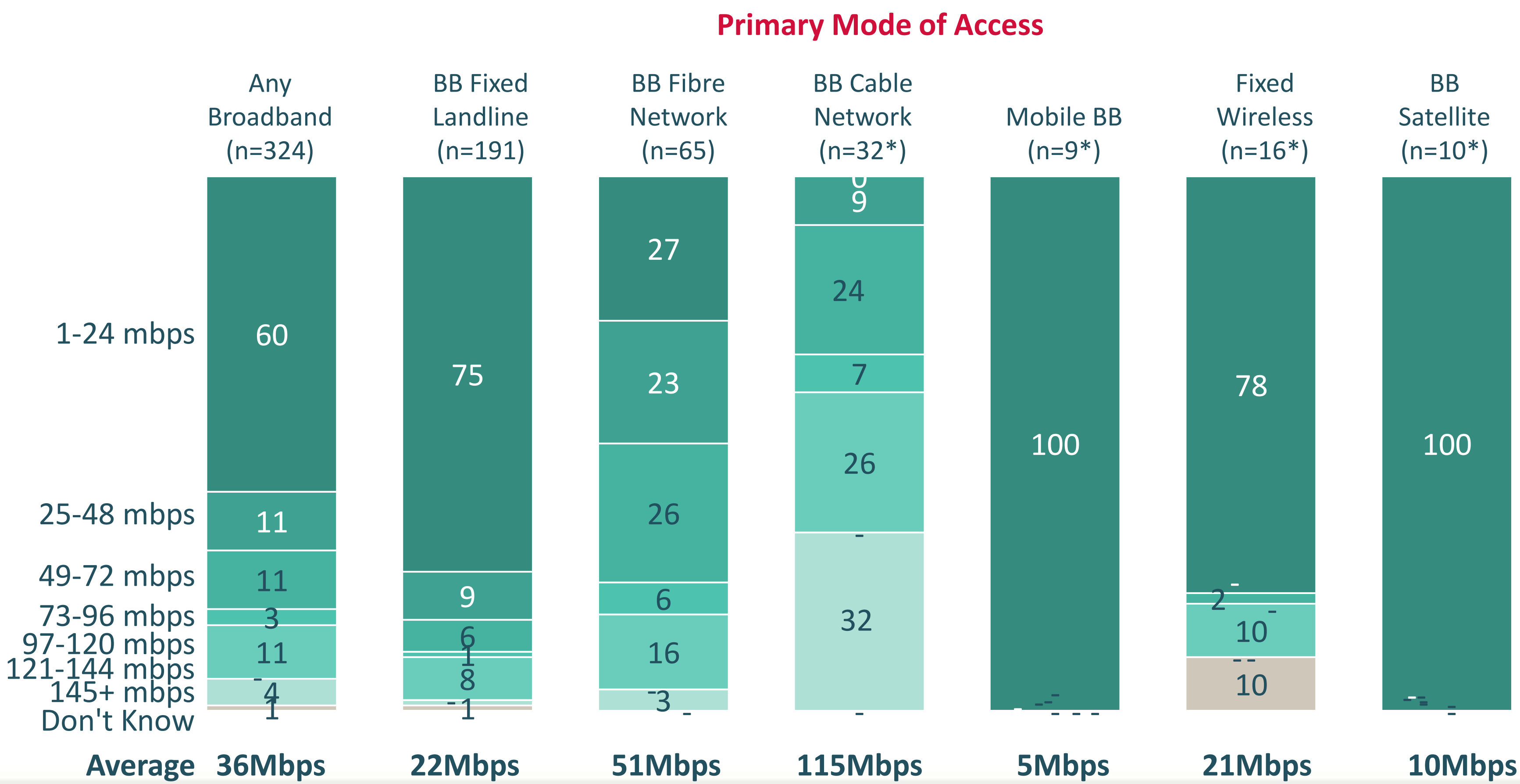
*Base small

Broadband users with a fibre connection are most likely to know their maximum download speed.

What is Maximum Claimed Download Speed?

(Base: Total Broadband Users Who Know Download Speed, n=324)

Q.24/Q.82 What is the maximum claimed download speed for your <primaryservice> in Megabits per second?



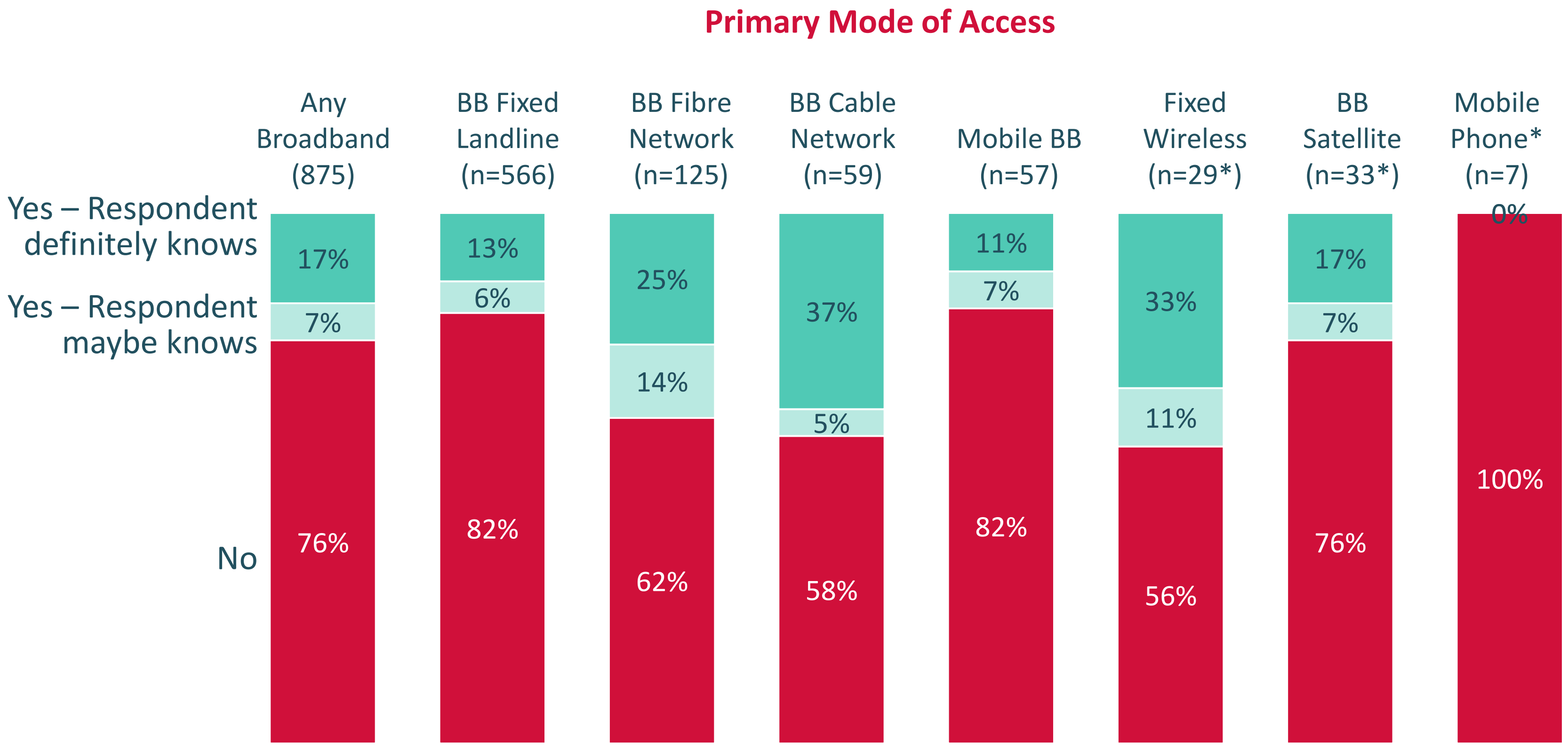
*Base small

Cable users have the highest claimed download speed among broadband users.

Knowledge of Claimed Maximum Upload Speed

(Base: All Broadband users, n = 875)

Q.25/Q.83	Do you know the claimed maximum upload speed for your (insert service type Q10)?



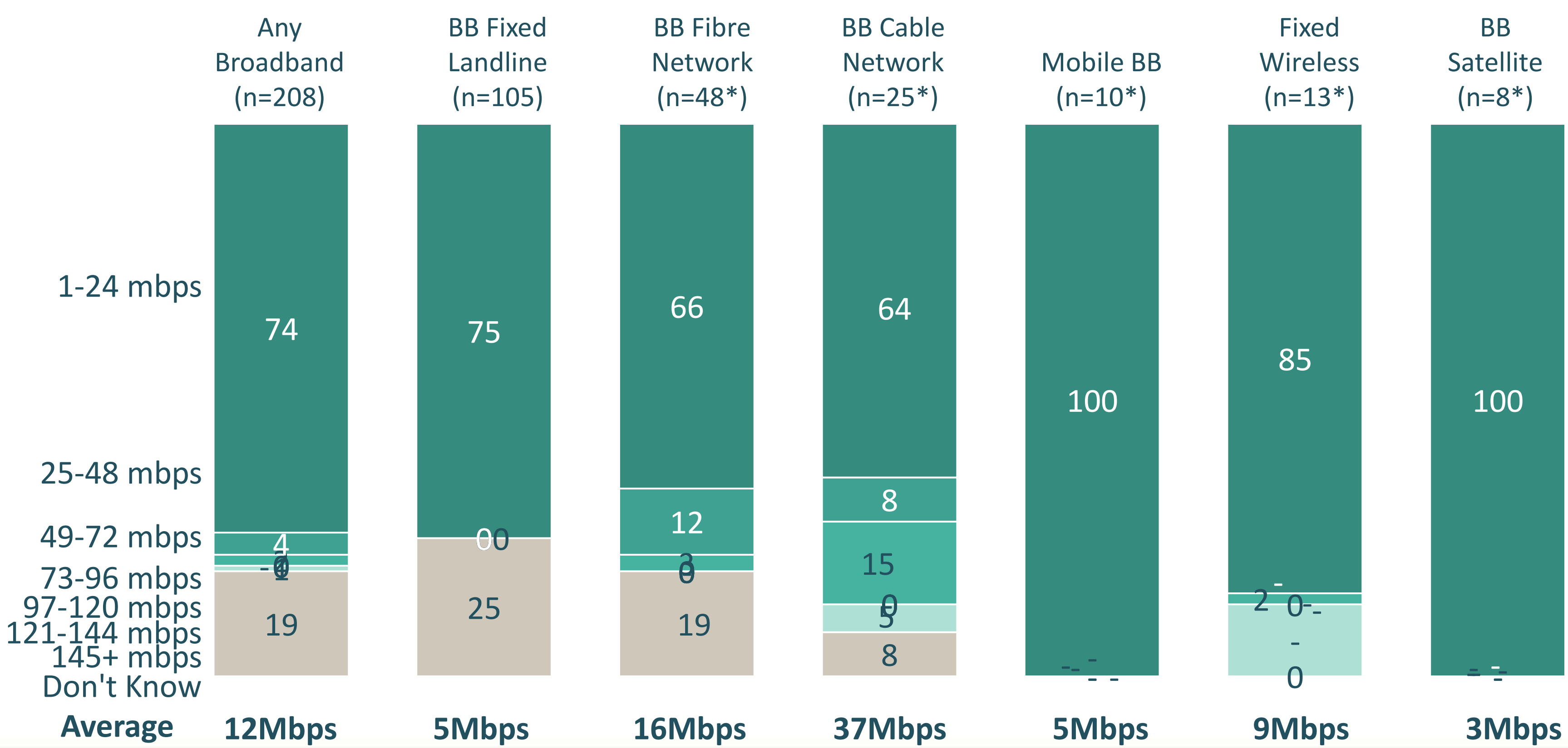
*Base small

Cable broadband users (42%) are most likely to know their claimed maximum upload speed of broadband.

What is Maximum Claimed Upload Speed?

(Base: Total Broadband Users Who Know Upload Speed, n=208)

Q.26/Q.84 What is the maximum claimed upload speed for your <primaryservice> in Megabits per second?



*Base small

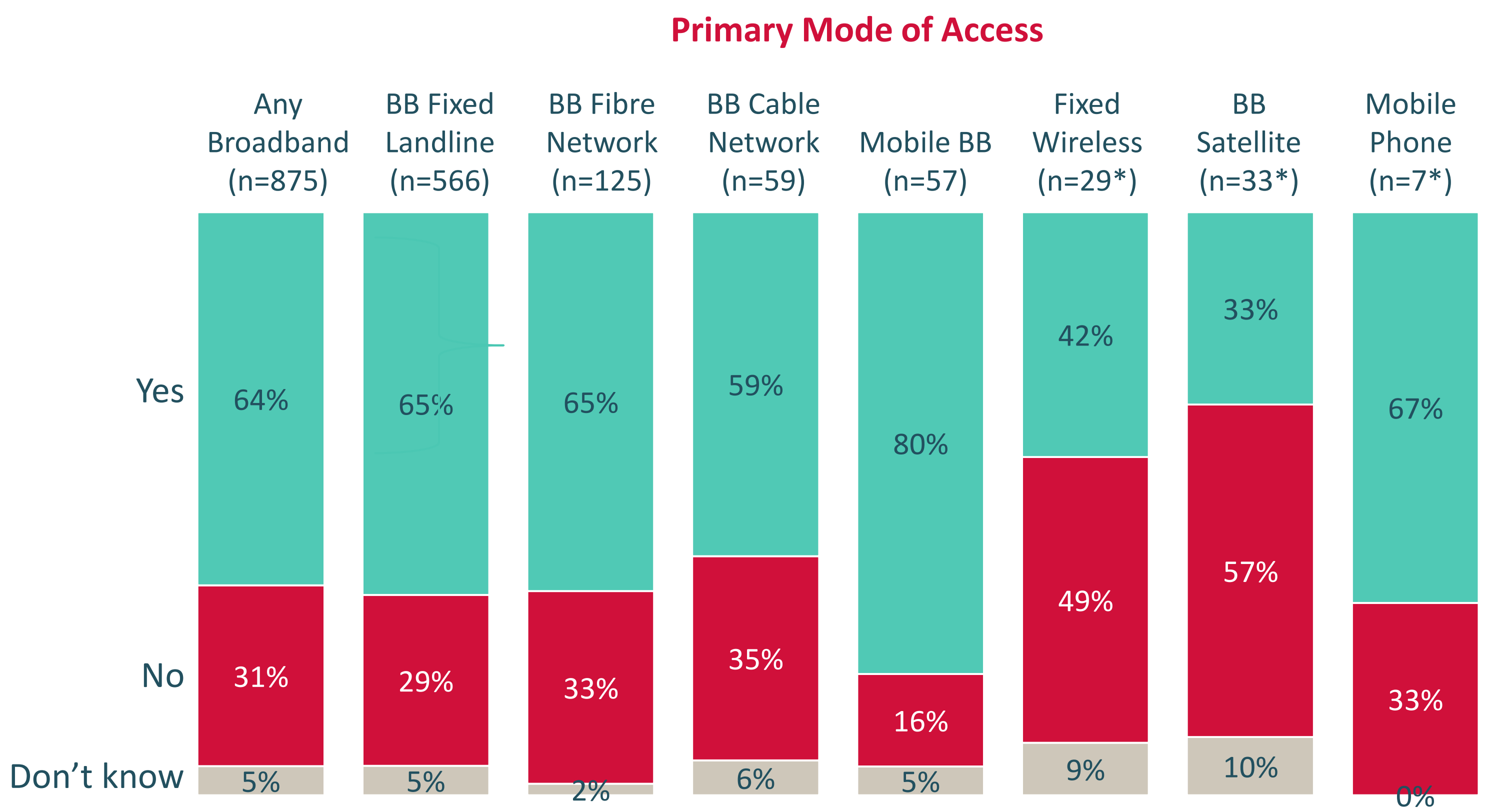
The fastest claimed average broadband upload speed of 37Mbps is made by cable users, however the base size within this group is very small.

Contracts, Loyalty And Ability To Negotiate (Broadband)

Is Primary Service in Contract?

(Base: Total Broadband Users, n = 875)

Q.47/Q.105 Thinking about your primary broadband service, are you currently tied into a contract with your service provider?



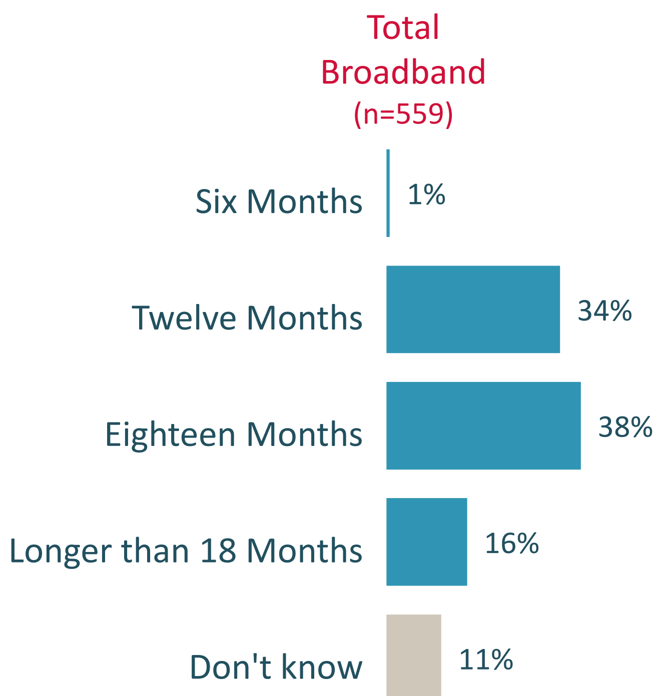
*Caution Small Base

Across various broadband customer types, mobile broadband users (80%) are most likely to be in a contract.

Minimum Contract Period - Those in Contract

(Base: Total Broadband Users Who Are Tied Into A Contract, n=559)

Q.48/Q.106 What is the minimum contract period of this service from sign up time to when you can leave your service provider?



	Primary Mode of Access						
	BB Fixed Landline (n=371)	BB Fibre Network (n=81)	BB Cable Network (n=35)	Mobile BB (n=45)	Fixed Wireless (n=12*)	BB Satellite (n=11*)	Mobile Phone (n=5*)
Six Months	1%	2%	0%	0%	0%	0%	0%
Twelve Months	37%	23%	34%	33%	62%	12%	16%
Eighteen Months	36%	41%	29%	42%	38%	59%	50%
Longer than 18 Months	16%	19%	9%	18%	0%	22%	34%
Don't know	10%	16%	28%	6%	0%	8%	0%

*Caution Small Base

A roughly even split is seen in the proportion of 12 month and 18 month contracts for those traditional fixed telephone broadband users, with a much more definitive split in contract length for Fibre Broadband customers with 41% having 18 month contracts.

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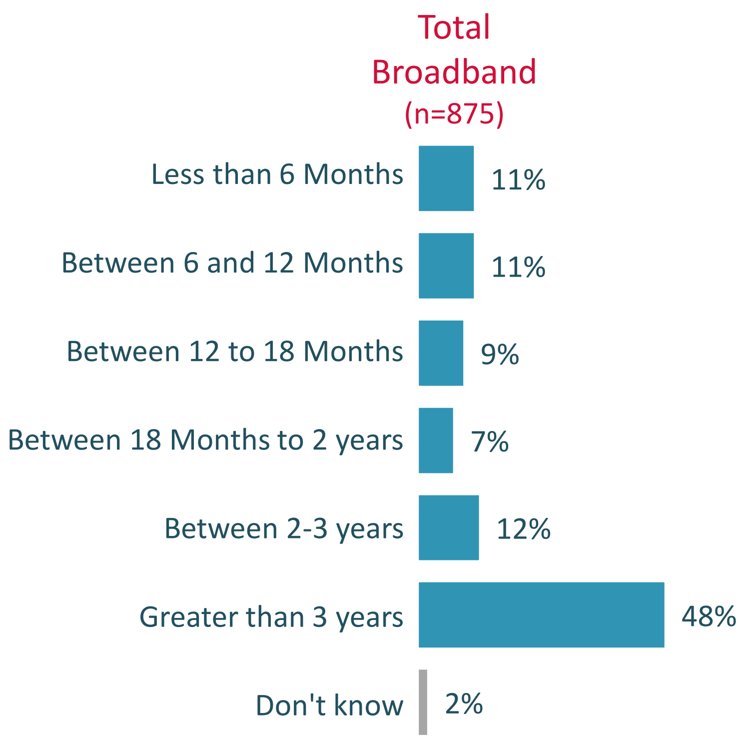
Length of Time with Current Provider

(Base: Total Broadband Users, n=875)

Q.48b/Q.106b How long has your business been with your current main broadband service provider for?



	Primary Mode of Access						
	BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Less than 6 Months	10%	13%	7%	15%	7%	9%	0%
Between 6 and 12 Months	11%	10%	14%	14%	10%	10%	11%
Between 12 to 18 Months	10%	6%	10%	6%	5%	8%	19%
Between 18 Months to 2 years	6%	5%	9%	11%	9%	7%	15%
Between 2-3 years	11%	9%	31%	10%	9%	24%	0%
Greater than 3 years	50%	54%	25%	44%	60%	42%	56%
Don't know	2%	2%	3%	0%	0%	0%	0%

*Caution Small Base

Most broadband users have been with their current provider for more than three years.

Broadband Users - Ability to negotiate terms and conditions

(Base: Total Broadband Users, n = 875)

Q.49/Q.107 Were you in a position to negotiate improved prices and or other terms and conditions with your broadband service provider?

	Total Broadband (n=875)	Primary Mode of Access						
		BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Yes	56%	58%	63%	50%	38%	66%	25%	34%
Yes - Strong Ability to negotiate	26%	27%	35%	19%	23%	29%	11%	11%
Yes - Moderate ability to negotiate	29%	31%	28%	31%	16%	37%	14%	23%
No - No ability to negotiate	36%	33%	32%	33%	60%	28%	63%	48%
Don't know	8%	9%	5%	17%	2%	7%	12%	18%

56% of business broadband users claimed to have had some ability to negotiate terms and conditions with their broadband service provider.

Bundles (Broadband)

Incidence of Bundling Broadband

(Base: Total Broadband Users, n = 875)

Q.27/Q.85 Which of the following best describes how your business is billed for your broadband and fixed line phone and mobile phone which you may also have?

		Primary Mode of Access						
	Any Broadband (n=875)	BB Fixed (Landline) (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
I receive a single bill for my broadband service that includes at least one of the other services I have	64%	73%	55%	62%	29%	59%	10%	52%
I receive a separate bill for my broadband service but I use the same provider for at least one of the other services	10%	10%	9%	3%	20%	23%	8%	0%
I receive a separate bill for my broadband service as I receive all other services from different providers	20%	13%	26%	28%	34%	15%	79%	30%
I only have broadband. I do not have other communications services from any other provider (e.g. fixed phone, mobile phone)	4%	2%	8%	4%	17%	3%	0%	0%
Don't know	2%	2%	2%	3%	0%	0%	3%	18%

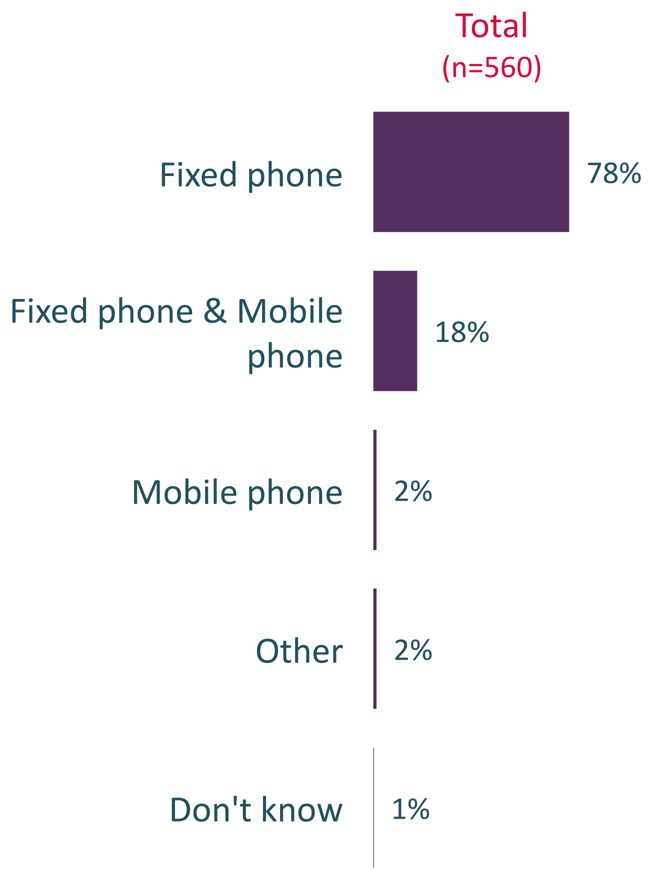
*Base small

64% of business broadband users claim to bundle their broadband service.

Services included Within Broadband Bundles – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle, n = 560)

Q.28 Including your broadband services which of the following services are also included on your single bill?



Primary Mode of Access

	BB Fixed Landline (n=414)	BB Fibre Network (n=69)	BB Cable Network (n=36*)	Mobile BB (n=16*)	Fixed Wireless (n=17*)
Fixed phone	81%	80%	76%	21%	75%
Fixed phone & Mobile phone	18%	18%	8%	38%	15%
Mobile phone	1%	0	0	41%	0
Other	1%	2%	13%	0	0
Don't know	0	0	3%	0	10%

*Base small

BB Satellite (n=3) and Mobile Phone Access (n=4) base too small to show

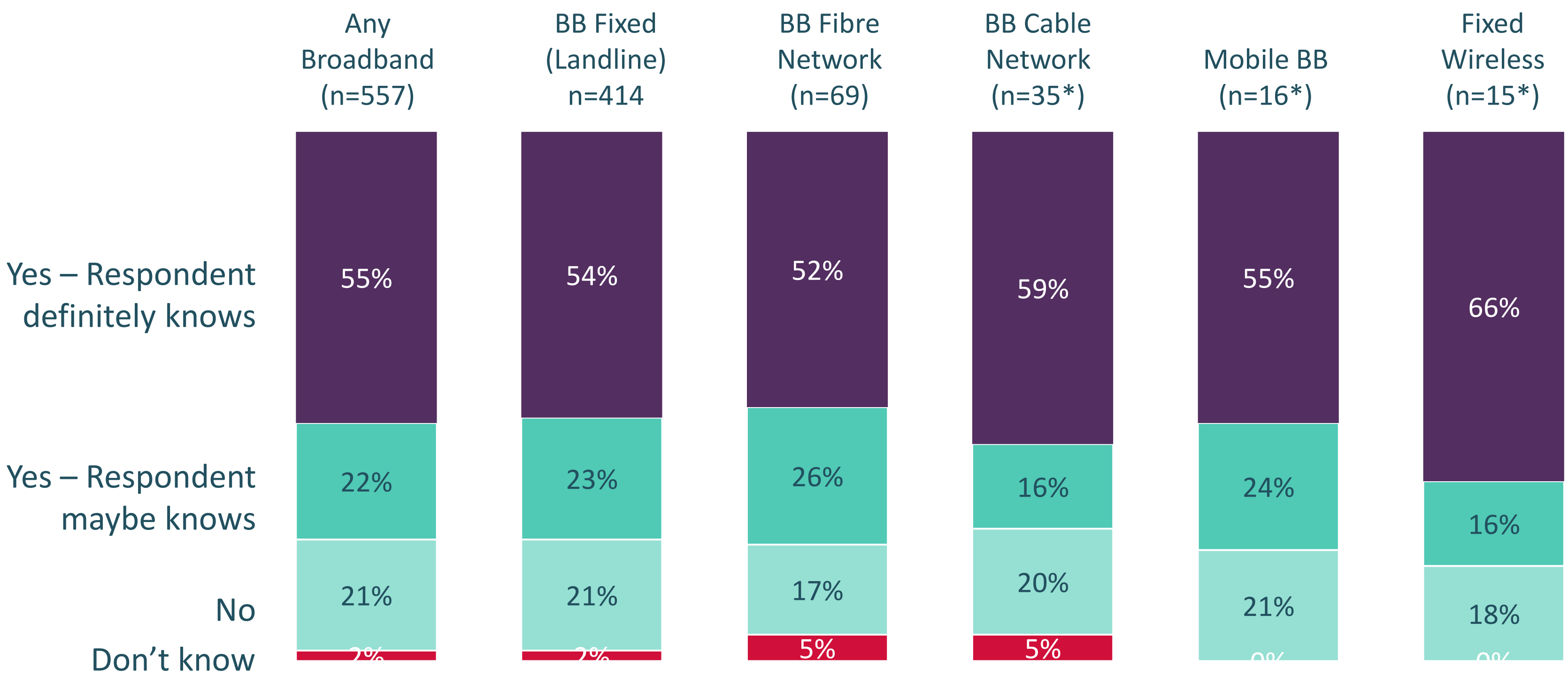
At 78%, the majority of broadband bundles have a fixed phone only included as part of the package with 18% having fixed phone and mobile phones.

Awareness of Cost of Services – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle Which They Know What Is Included, n = 557)

Q.29 Do you know how much your business pays for your combined service on a monthly basis?

Primary Mode of Access



Total: Yes	77%	77%	78%	75%	79%	82%

BB Satellite (n=3) and Mobile Phone Access (n=4) base too small to show

*Base small

77% of those with fixed broadband via landline and 78% of those with broadband via fibre claim to know the cost of their services.

REDC

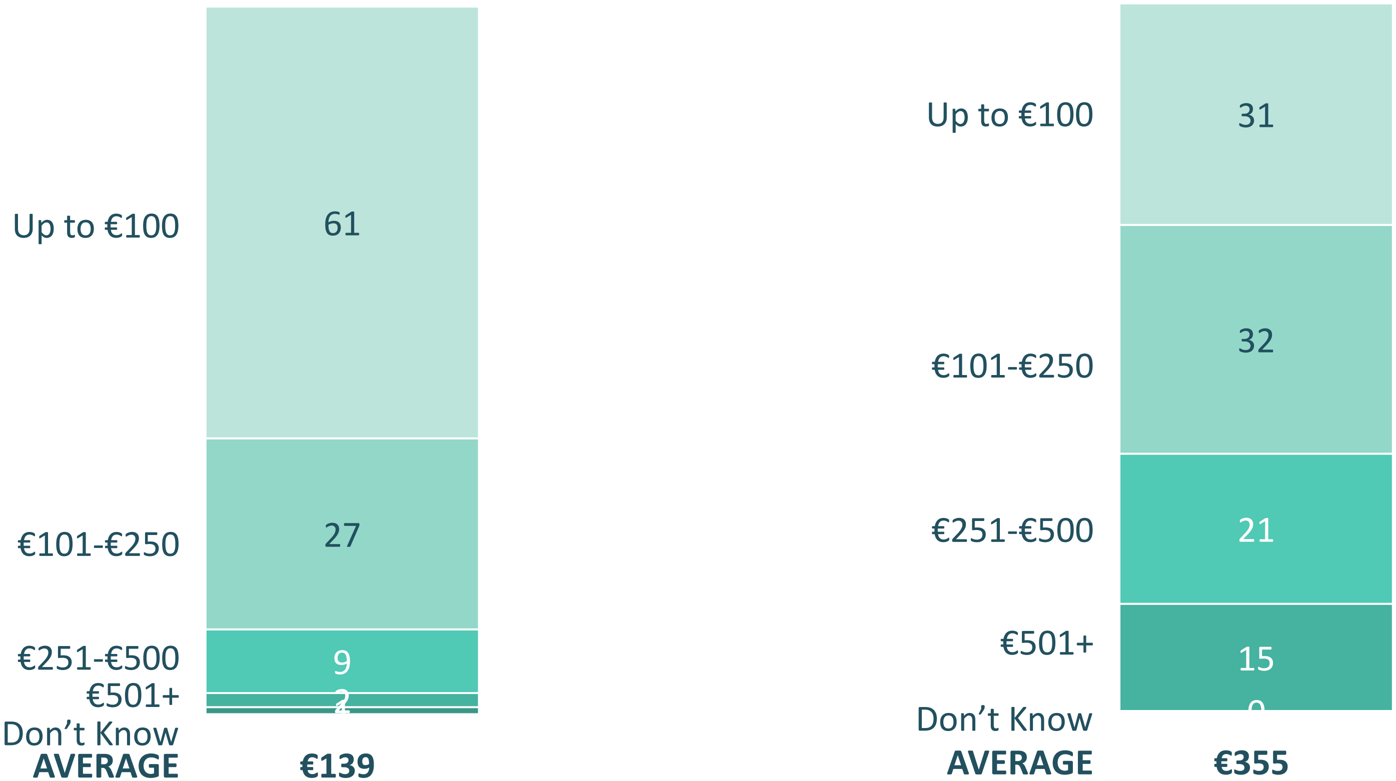
Typical Spend Per Month - Bundle Users

(Base: All Broadband/Fixed Phone Bundle – n=338. BB/Fixed & Mobile Phone – n=77)

Q.30 How much does your business typically pay for this combined package .... of services per month (excluding any promotional\ introductory offers)?

Cost – Broadband and Fixed Phone (n=338) %

Cost – Broadband and Fixed Phone & Mobile Phone (n=77) %



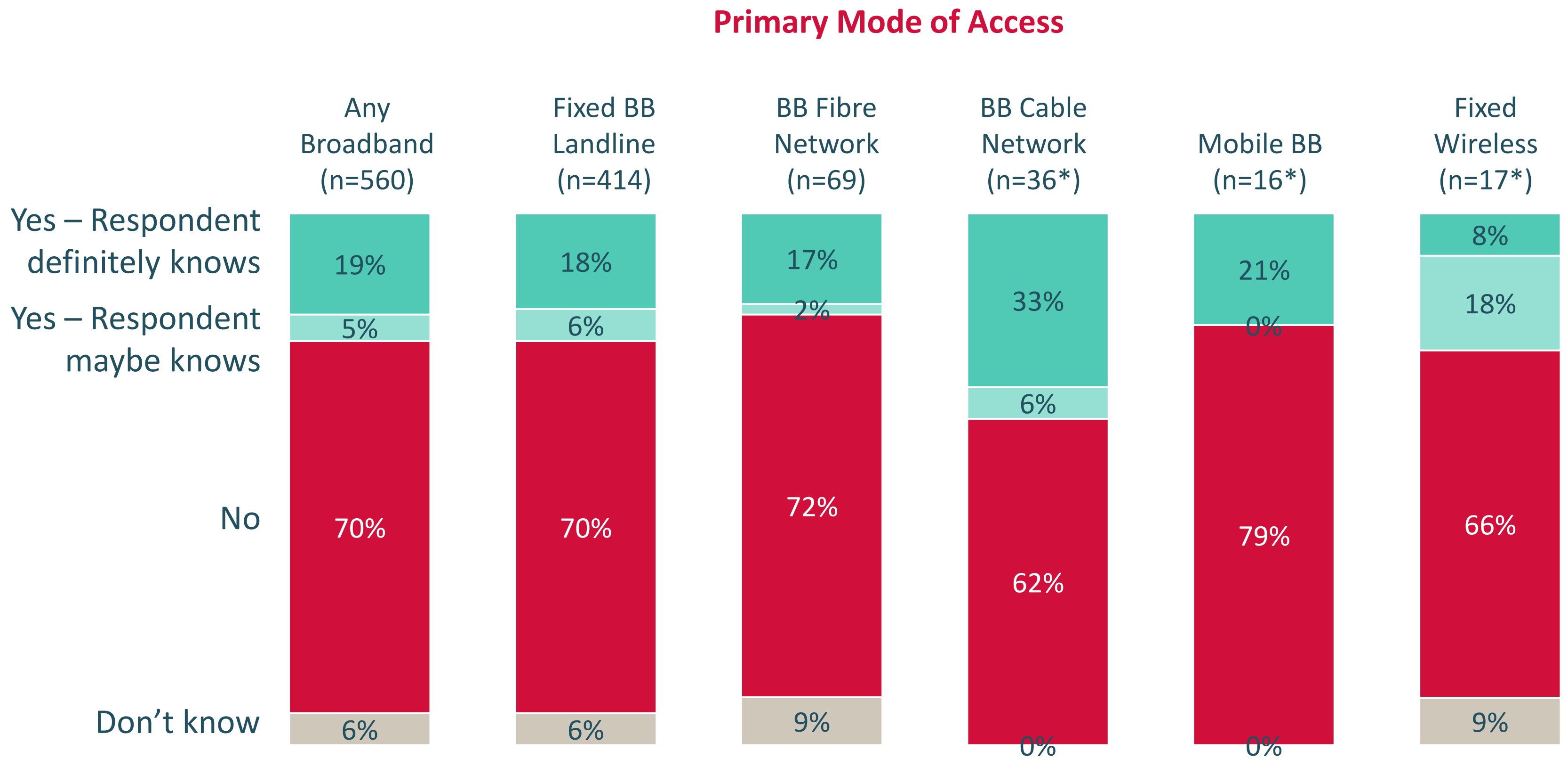
Other Bundle types base too small to show

For the most common bundle “broadband and fixed phone”, the average cost is €139, with 61% of bundles costing less than €100.

Knowledge of Additional Costs to Bundle Broadband Services – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle, n = 560)

Q.31/89 Does the monthly amount you pay for your services include any additional charges (e.g. usage charges, out of package calls charges etc?)



Total: Yes	24%	24%	19%	38%	21%	26%

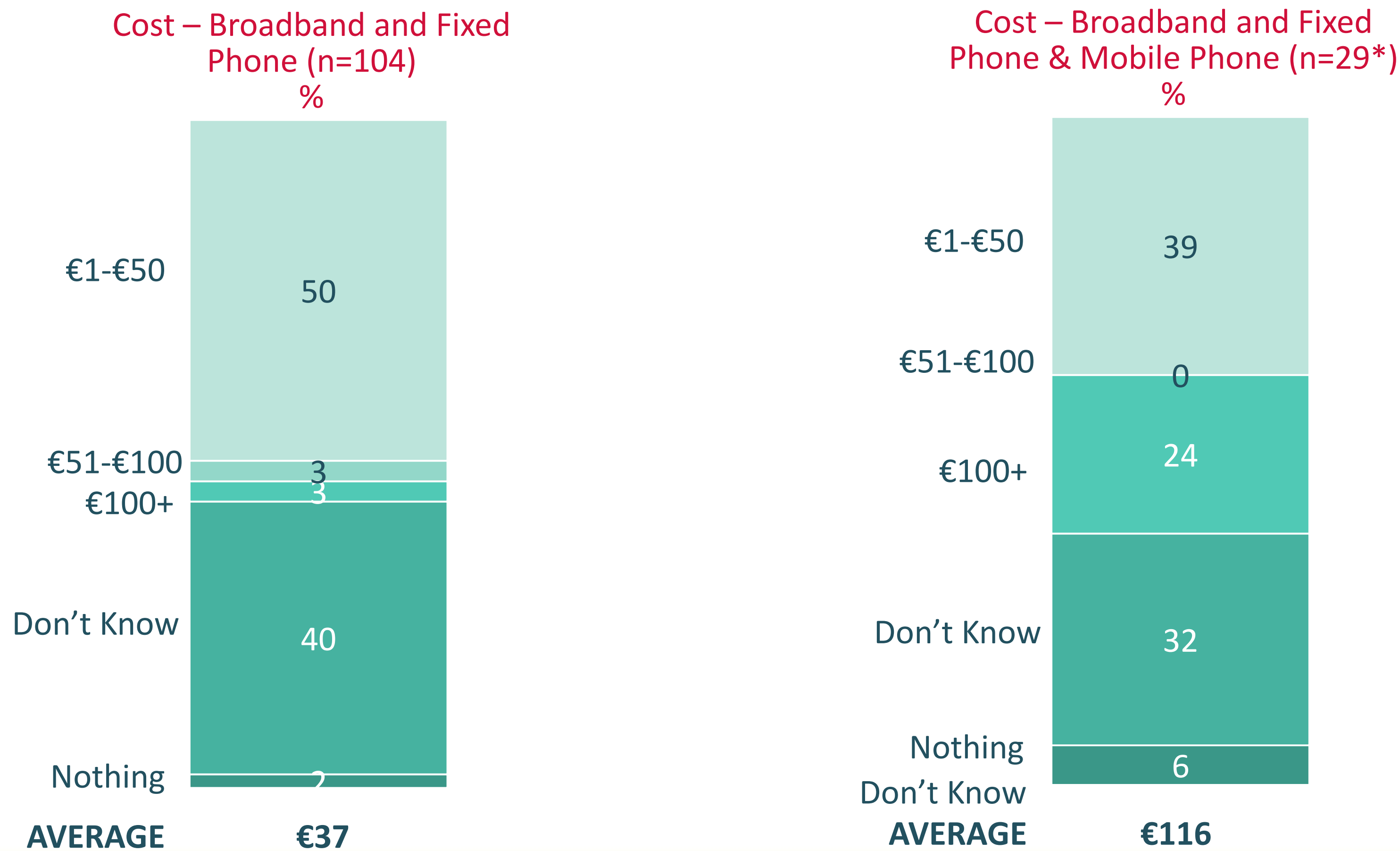
Base: BB Satellite (3) and Mobile Phone Access (4) base too small to show
*Caution Small Base

24% of broadband users stated that their bundle includes additional charges.

Typical Spend Per Month (Additional Charges)-Bundle Users

(Base: All Broadband/Fixed Phone Bundle who know additional charge– n=104. BB/Fixed & Mobile Phone – n=29)

Q.30 How much does your business typically pay for this combined package .... of services per month (excluding any promotional\ introductory offers)?



* Small base

The average additional cost for bundle users per month within a broadband and fixed phone bundle is €37.

Most Important Service within Bundle - Broadband Users

Base: All respondents who use data connectivity services in a bundle and know what is included, n = 557)

Q.33 Which service in the bundle/package you subscribe to is most important to your business? Please answer on a scale where 5 is very important and 1 is not at all important

	Any Broadband (n=557)	Primary Mode of Access				
		BB Fixed Landline (n=414)	BB Fibre Network (n=69)	BB Cable Network (n=35*)	Mobile BB (n=16*)	Fixed Wireless (n=15*)
Broadband	46%	43	54	64	56	45
Fixed phone	24%	29	19	3	10	0
Fixed phone & mobile phone	8%	8	7	3	26	10
Mobile phone	2%	2	0	0	0	0
Other	0%	0	0	5	0	0
Don't know	21%	20	21	25	9	46

*Caution Small Base

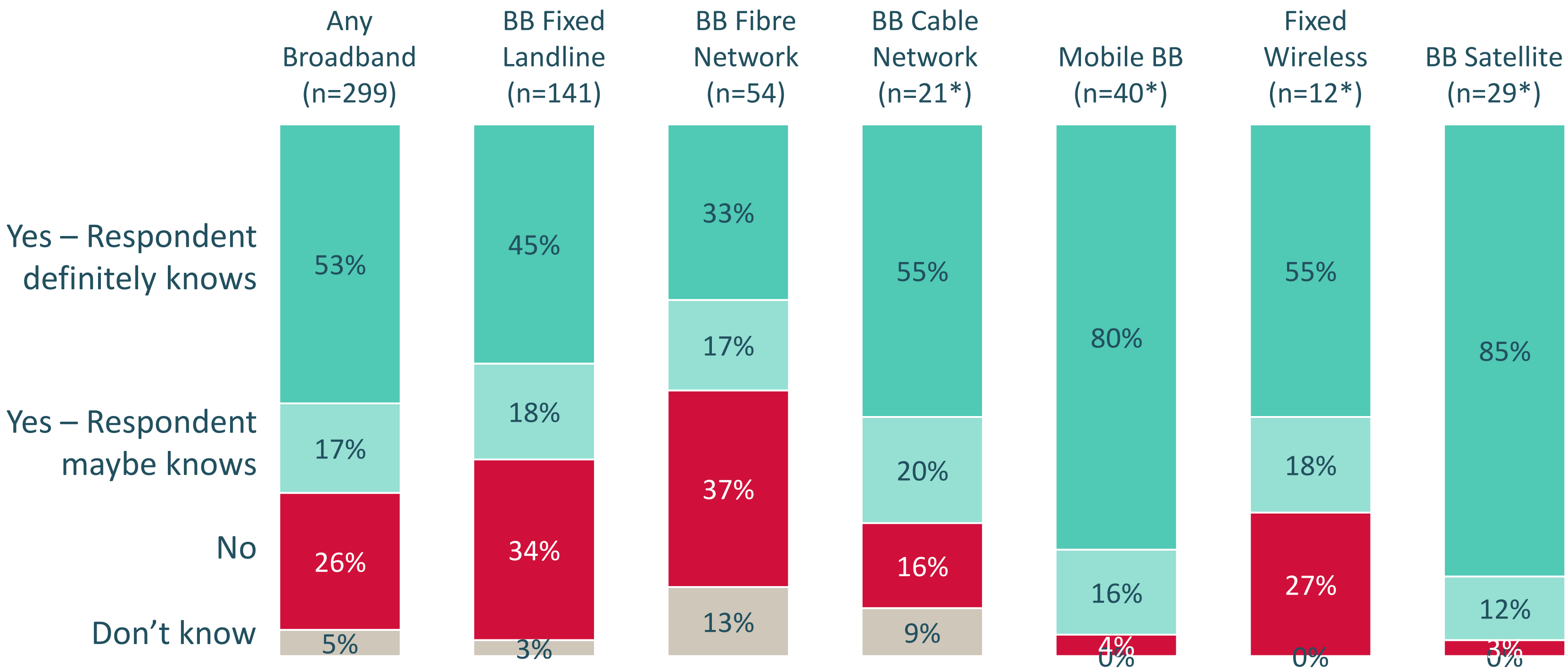
Base: BB Satellite (3) and Mobile Phone Access (4) base too small to show

Broadband at 46% is considered the most important service within the bundle, followed by fixed phone at 24%.

Awareness of Cost of Services – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle n = 299)

Q.34 Do you know how much your business pays for your broadband service on a monthly basis?



Total: Yes	70%	64%	50%	75%	96%	73%	97%

*Caution Small Base
*Access over Mobile Phone too small to show (2)

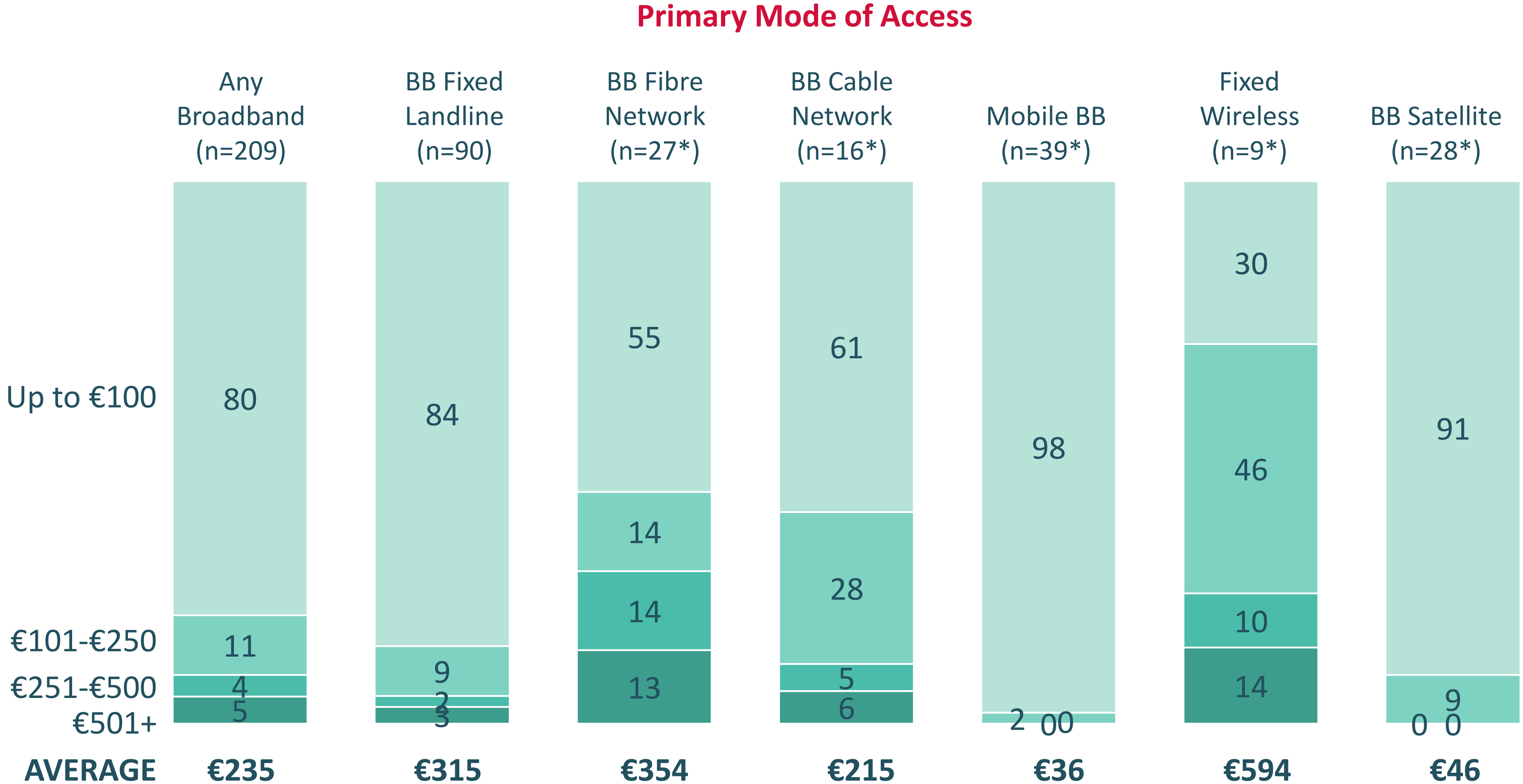
At 70%, non bundle broadband customers have a lower on average awareness of the cost of services than bundle customers (77%).

REDC

Typical Broadband Spend Per Month – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle And Know Cost, n=209)

Q.35/Q.93 Excluding any short term introductory offers, typically how much do you pay for this service each month?



*Caution Small Base

Access over mobile phone base too small to show (1)

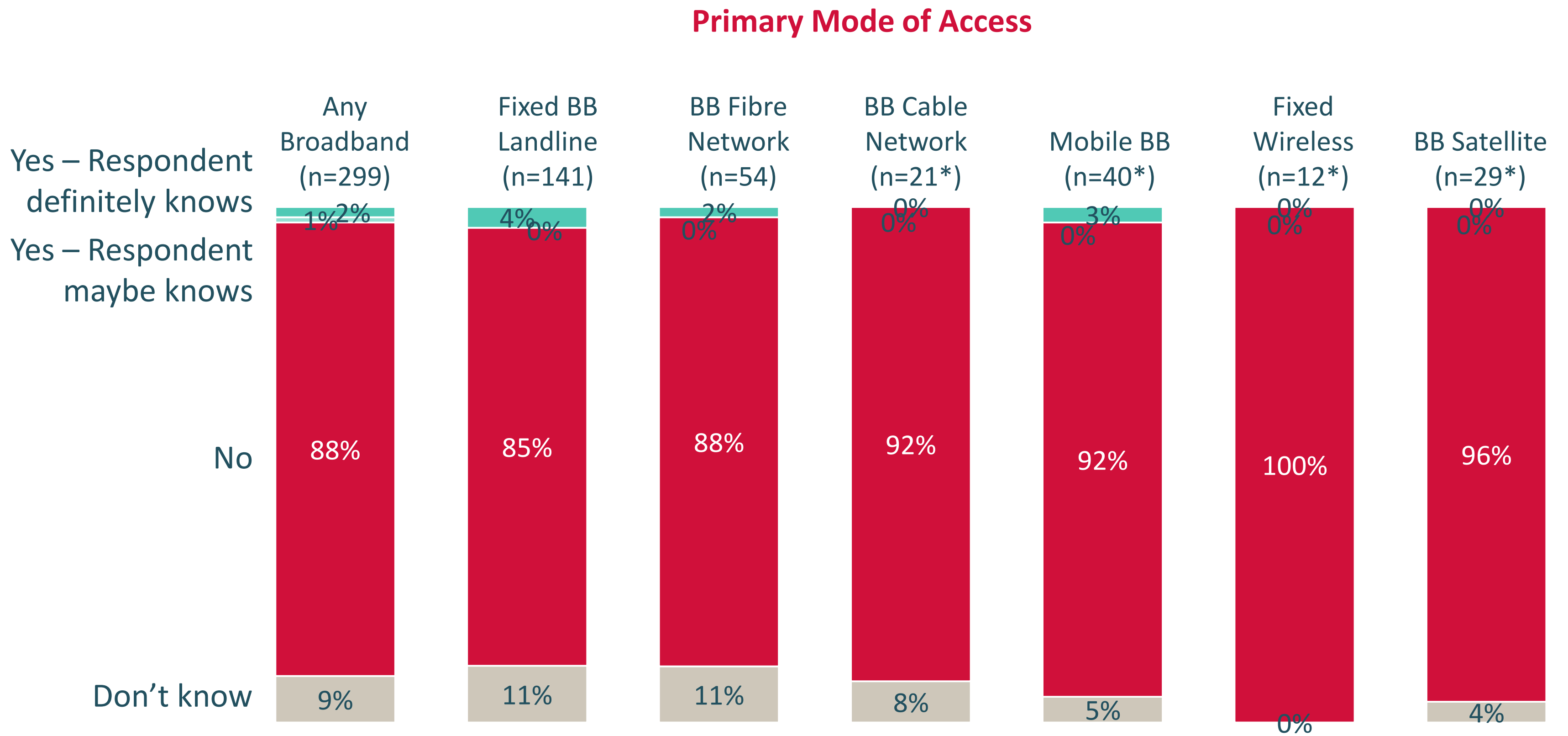
The average cost of non bundled Broadband is €235, although 80% of customers claim to pay less than €100.

(Q.35/93)

Knowledge of Additional Cost to Broadband Charges – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle, n = 299)

Q.36/Q.94 Does the amount you pay for your broadband service include any additional charges (e.g. excess download charges etc?)



Total: Yes	3%	5%	2%	0%	3%	0%	0%

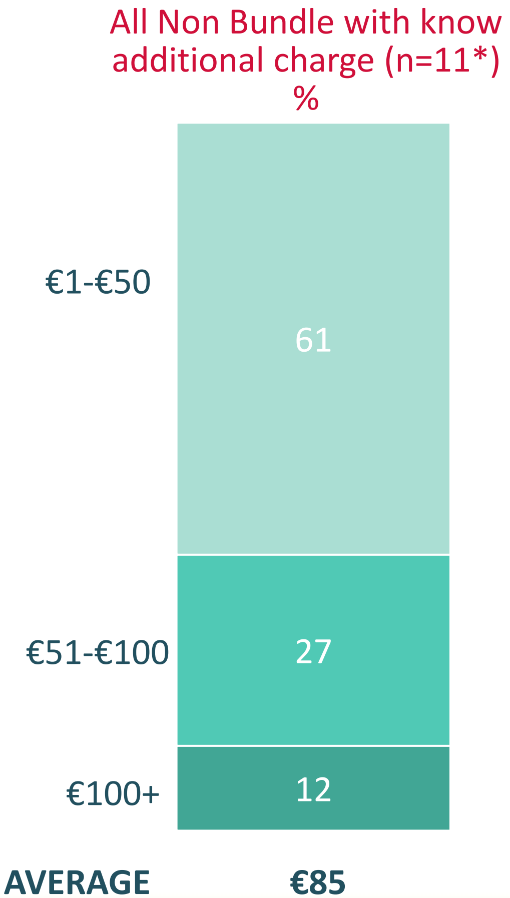
*Caution Small Base
*Access over Mobile Phone too small to show (2)

Awareness of additional monthly cost to broadband charges among non bundle users is very low at 3%.

Typical Spend Per Month (Additional Charges)- Non Bundle Users

(Base: All non bundle who know additional charge– n=11*)

Q.37 If your business incurs any additional usage charges above the typical amount per month for your broadband service, can you estimate the cost of these additional charges?



* Small base on this slide

The average additional cost per month for non bundle broadband users is €85. The base of companies is very small at this question.

Reason for not Bundling - Broadband Users

(Base: Total broadband users who use service not in a bundle n=274)

Q.38 Why did your business choose to purchase your broadband service independent of your other communication services (telephone, mobile phones etc.?)

	Total Broadband (274)	Primary Mode of Access					
		BB Fixed Landline (n=130)	BB Fibre Network (n=44*)	BB Cable Network (n=18*)	Mobile BB (n=31*)	Fixed Wireless (n=11*)	BB Satellite (n=29*)
Preferred to have separate service providers for services	19%	21%	23%	35%	7%	15%	4%
Broadband service provider does not offer other services to bundle my\our broadband with	16%	11%	15%	21%	24%	11%	32%
Value for money\ Good deal	15%	17%	14%	14%	8%	19%	8%
Better service\ coverage	12%	8%	5%	20%	24%	0	29%
Only required broadband service	11%	12%	5%	9%	12%	21%	12%
Did not know I\we could bundle broadband with other services	7%	8%	3%	5%	10%	0	4%
Unwilling to switch service providers to bundle services together	4%	5%	2%	6%	7%	2%	0
No choice in the decision	2%	0	7%	7%	4%	0	0
Always been this way\ Historic	2%	3%	4%	0	0	0	0
More reliable service\ Old provider is unreliable	2%	3%	2%	0	0	0	0
Other	16%	12%	31%	17%	4%	48%	14%
Don't know	8%	12%	4%	0%	3%	13%	0

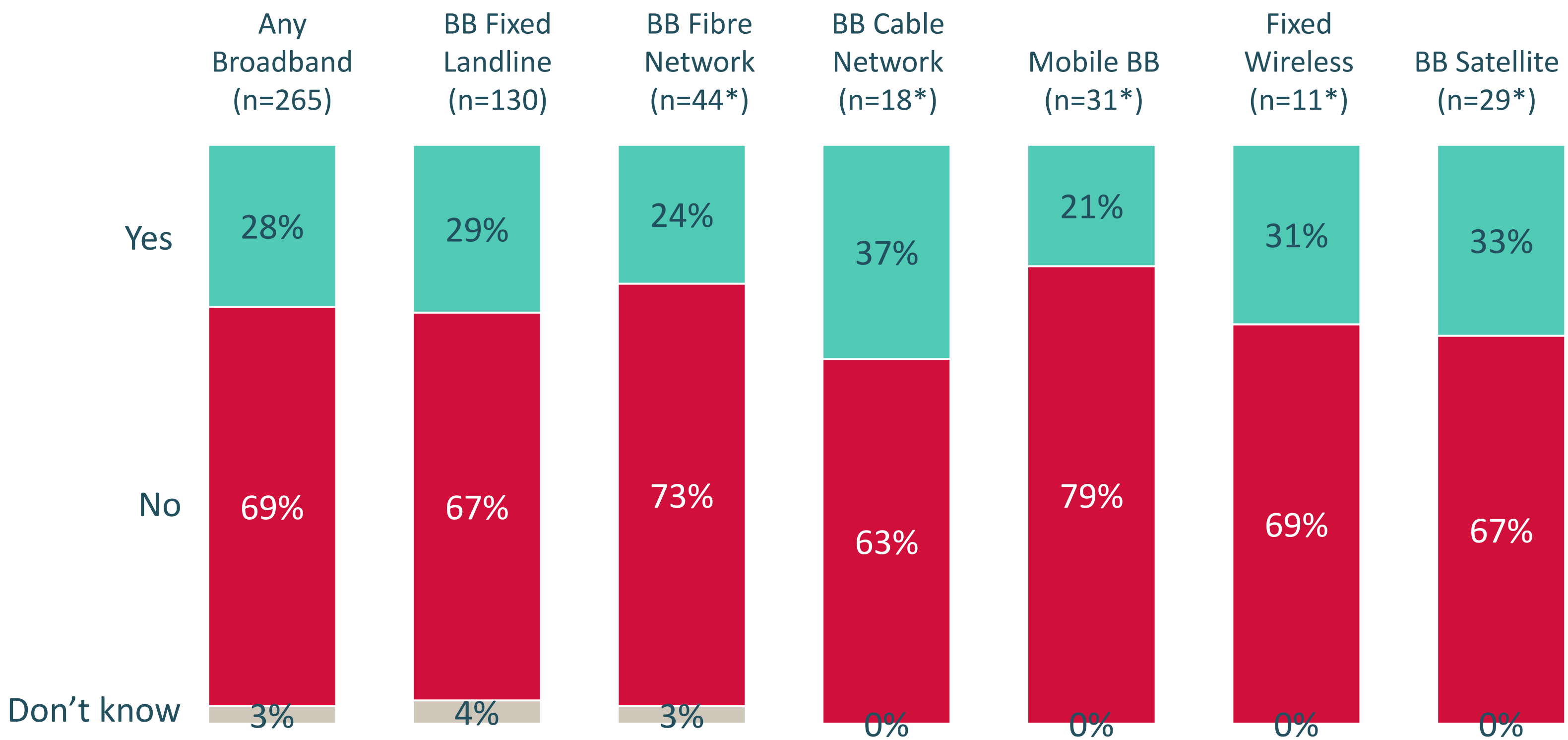
*Caution Small Base
*Mobile Phone too small to show (2)

A preference to use different providers for various telecommunications services is the number one reason to not bundle (19%), followed closely by lack of bundle availability from current broadband service providers (16%).

Non Bundle Users - Previously Bundled Services

(Base: Total Broadband Users Who Use Service Not In A Bundle, n=274)

Q.39/Q.97 Did your business previously purchase broadband with other services in a bundle?



*Caution Small Base
*Mobile Phone too small to show (2)

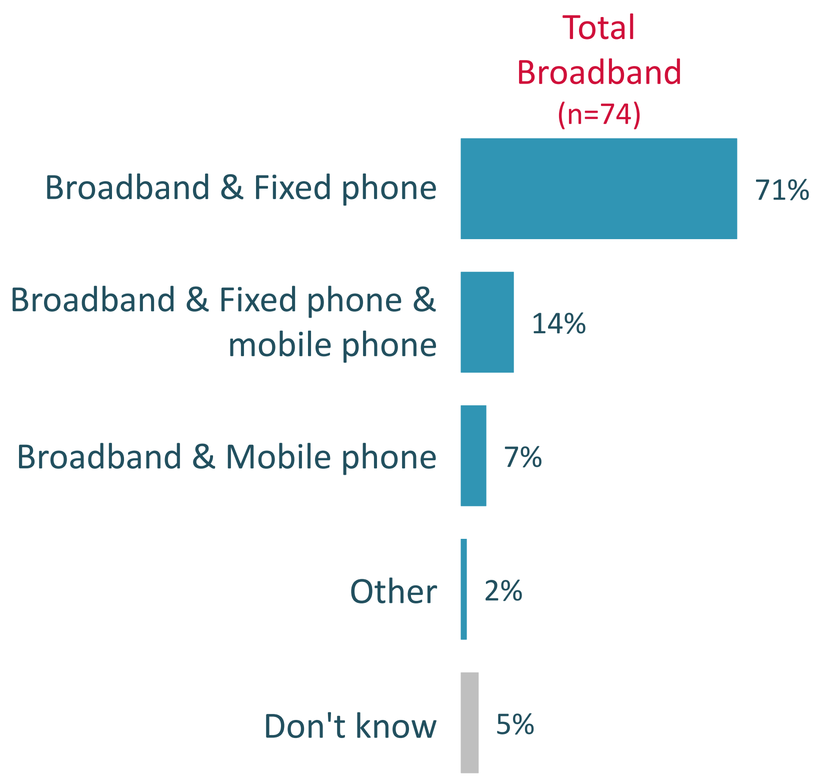
28% of non bundle holders previously bundled services, with users least likely to have done so.

(Q.39/97)

Previously Bundled Services, What was included

(Base: Total Broadband Users Who Use A Service Not In A Bundle And Previously Purchased Service Bundle – n=74)

Q.39b/Q.97b What services were included in your bundle?



	Primary Mode of Access				
	BB Fixed Landline (n=37*)	Bb Fibre Network (n=10*)	BB Cable Network (n=7*)	Mobile BB (n=6)	BB Satellite (n=9)
Broadband & Fixed phone	81%	77%	100%	26%	28%
Broadband & Fixed phone & mobile phone	11%	11%	0%	23%	40%
Broadband & Mobile phone	3%	12%	0%	22%	17%
Other	0%	0%	0%	0%	15%
Don't know	5%	0%	0%	29%	0%

*Caution small base

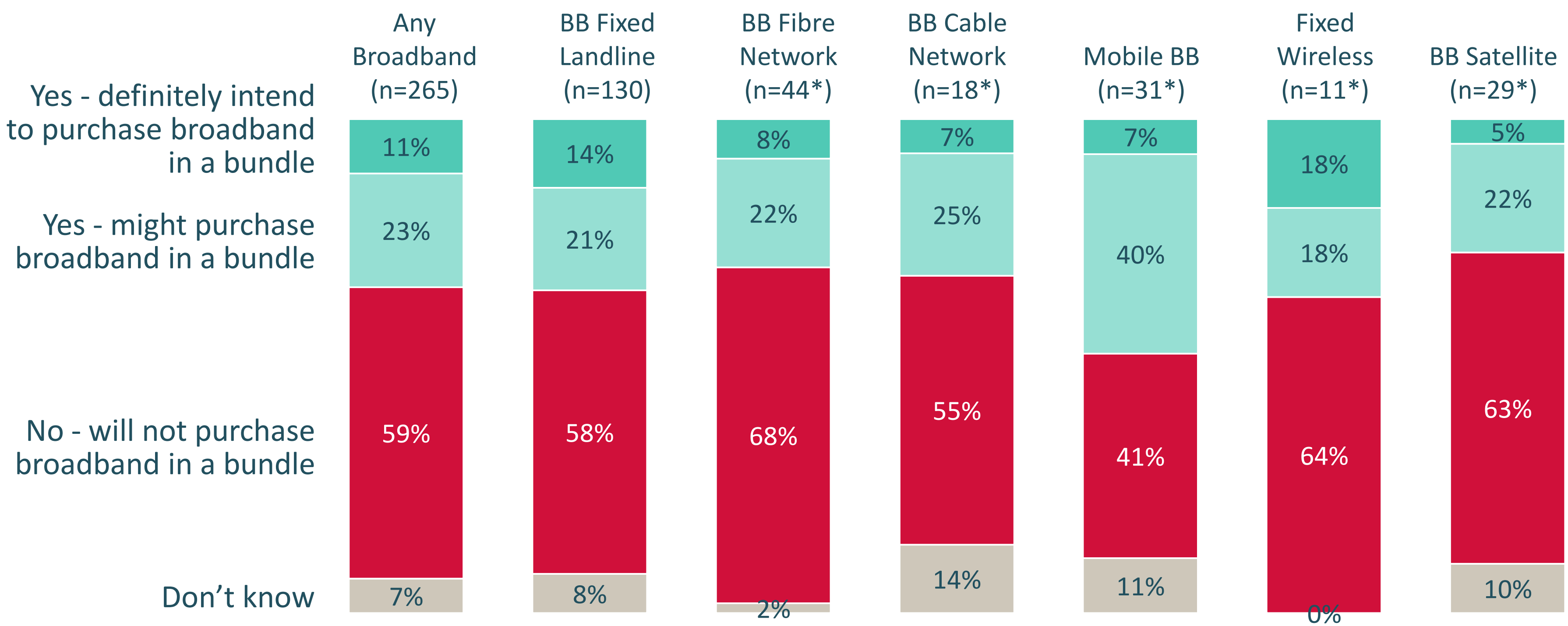
*Fixed Wireless Base too small to show

The most common previously held bundle is broadband and fixed phone (71%), followed by broadband, fixed phone and mobile phone (14%).

Non Bundle Users - Intention to Bundle

(Base: Total Broadband Users Who Use A Service Not In A Bundle, n = 265)

Q.40/Q.98 Does your business intend to purchase your broadband service as part of a broader package with other services over the next 12 months – i.e. receive a single bill for 2 or more services from one service provider?



Total: Yes	34%	34%	30%	32%	48%	36%	27%

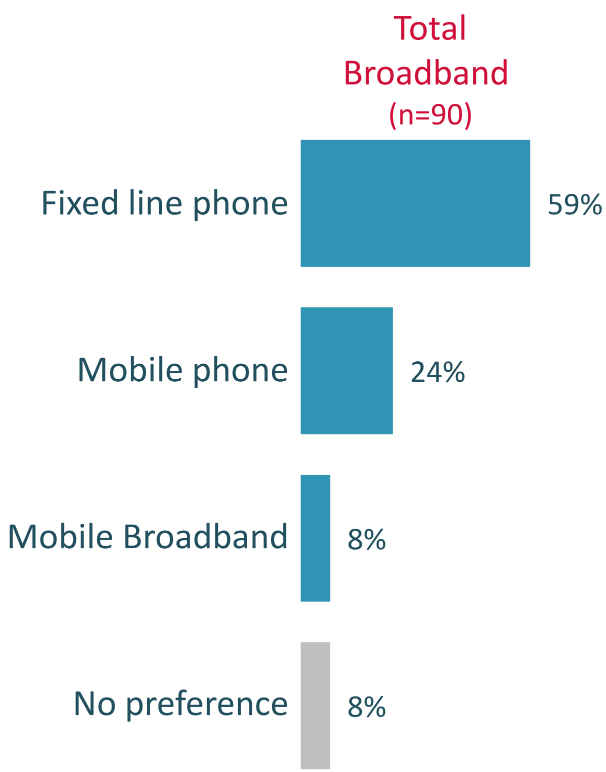
*Caution Small Base
*Mobile Phone too small to show (n=2)

34% of broadband users say they intend to bundle in future, but it is worth noting that just 11% say they definitely intend to purchase.

Non Bundle Holders - What They Intend To Purchase

(Base: All Broadband users who are not in a bundle and intend to purchase a bundle, n =90)

Q.41 Which of the following services would you be most willing to bundle with your broadband?



	Primary Mode of Access				
	BB Fixed Landline (n=44*)	BB Fibre Network (n=13)	BB Cable Network (n=6)	Mobile BB (n=15)	BB Satellite (n=8)
Fixed line phone	73%	43%	46%	31%	62%
Mobile phone	16%	28%	31%	48%	20%
Mobile Broadband	6%	17%	23%	8%	0%
No preference	5%	13%	0%	13%	17%

*Caution Small Base
*Access over Mobile Phone(n=0)/Fixed wireless connection(n=4) too small to show

Of those non bundle broadband holders who intend to purchase a bundle in future, 59% say they would be most willing to bundle a fixed line phone with their broadband service.

REDC

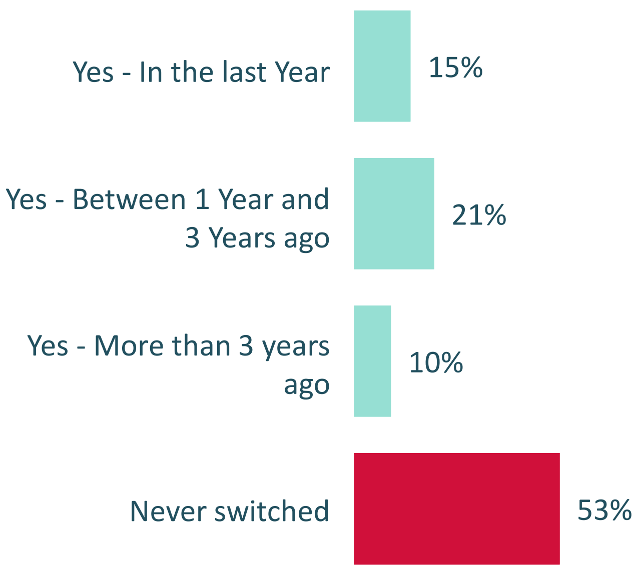
Switching (Broadband)

Incidence of Switching

(Base: Total Broadband Users, N= 875)

Q.42/Q.100 Have you ever switched your broadband service provider or from a leased line service provider?

Total Broadband (n=875)



Primary Mode of Access						
BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone* (n=7*)
17%	15%	18%	24%	1%	15%	0%
22%	16%	24%	21%	24%	15%	11%
9%	14%	19%	5%	25%	13%	0%
53%	55%	40%	50%	50%	58%	89%

*Caution Small Base

47% of broadband users have ever switched provider at some point in time, with most (21%) having switched between 1 year and 3 years ago.

Switchers - Previous Means of Access

(Base: Total Broadband Users Who Have Switched Provider, n=413)

Q.43/Q.101 Thinking about your previous broadband or leased line service provider which means of accessing the internet did you previously use?

	Total Broadband Switchers (n=413)	Current Primary Mode of Access: BB Fixed Landline (n=264)	BB Fibre Network (n=57)	BB Cable Network (n=35*)	Mobile BB (n=28*)	Fixed Wireless (n=14*)	BB Satellite (n=14*)
Broadband	96%	96%	96%	90%	100%	100%	100%
Fixed broadband (Landline)	81%	87%	74%	67%	58%	100%	64%
3G\4G Mobile Broadband	6%	5%	4%	0%	24%	0%	21%
Broadband provided by Satellite	4%	2%	0%	10%	9%	0%	17%
Fixed broadband (Fibre)	3%	1%	19%	0%	3%	0%	0%
Fixed broadband (Cable)	2%	0%	1%	14%	5%	0%	0%
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	1%	1%	3%	0%	4%	0%	0%
Fixed BB (Wireless Connection)	0%	0%	2%	0%	0%	0%	0%
Any other form of broadband connection	1%	1%	2%	0%	0%	0%	8%
Leased Line Options	8%	6%	18%	12%	0%	0%	5%
Analogue leased lines	5%	4%	11%	8%	0%	0%	5%
Digital leased lines	2%	1%	7%	5%	0%	0%	5%
Other incl. Wavelength Connectivity	1%	2%	2%	3%	0%	0%	0%
Ethernet Leased Line	0%	0%	2%	1%	0%	0%	0%
Don't know	2%	3%	0%	9%	0%	0%	0%

*Caution Small Base

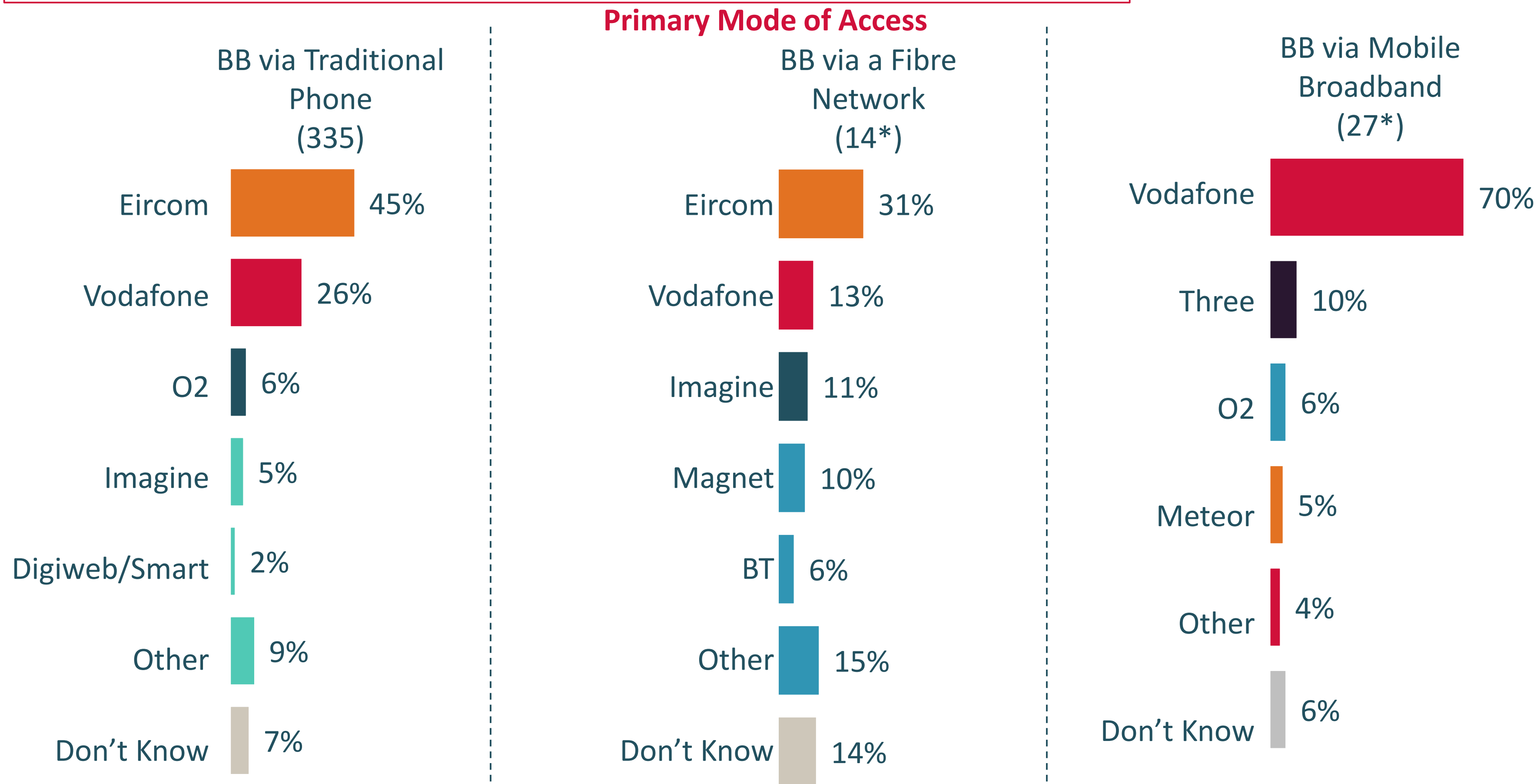
A majority of broadband switchers appear to have switched from broadband, with just 8% having switched from leased line.

(Q.43/101)

Previous Platform Used and Provider Share

(Base: All Broadband Switchers within previous platform)

Q.44 What service provider previously provided your business with your last broadband service?



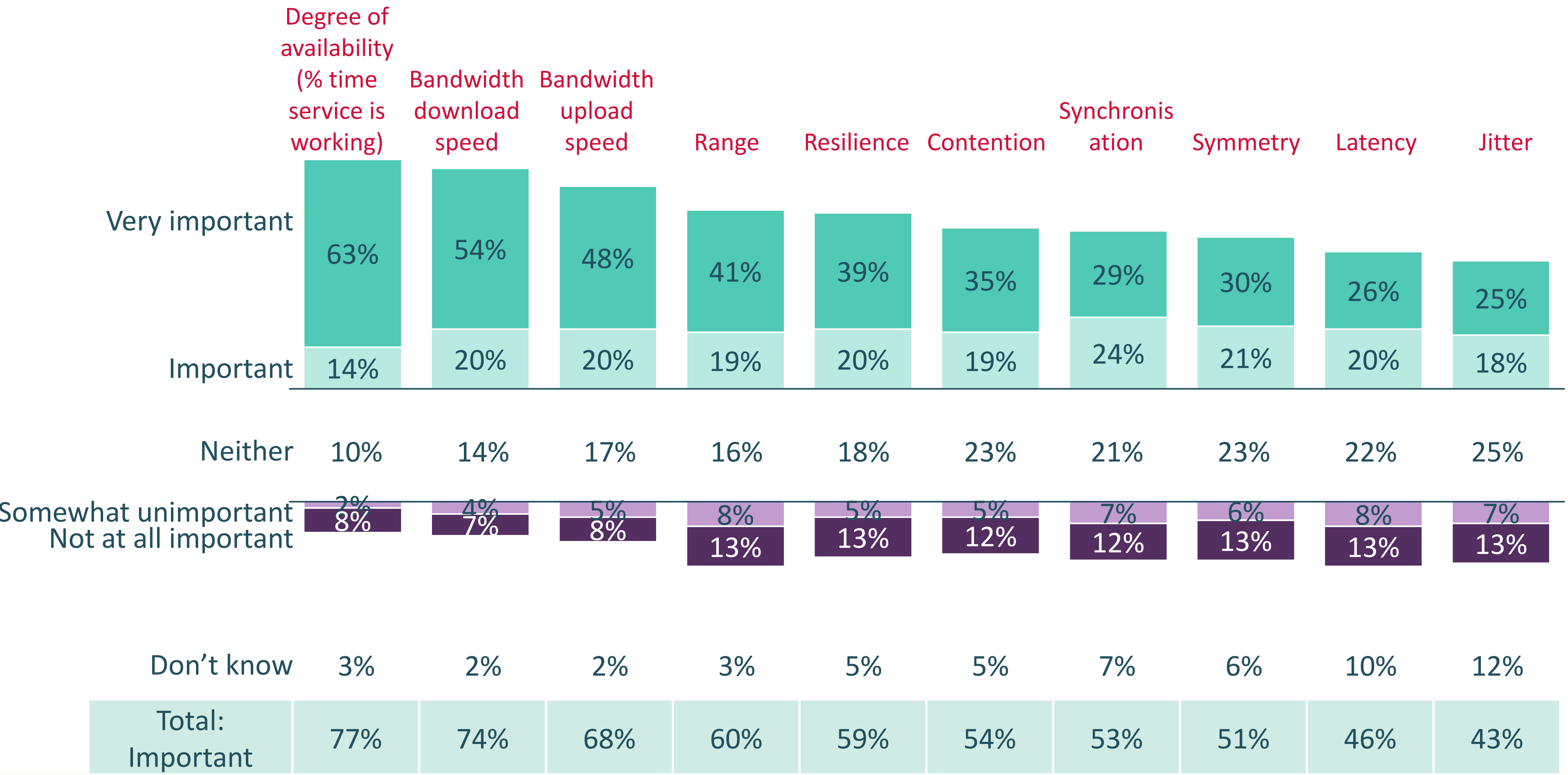
*Other access platforms too small to show

Many fixed landline and fibre network broadband switchers previously used Eircom as their provider, while the majority of mobile broadband customers switched from Vodafone.

Switchers - Importance in Decision to Switch

(Base: Broadband users who have switched provider, n = 413)

Q.45/103 How important where any of these options were in your decision to switch.?



Degree of Availability (% of time services is working) was the most important factor in broadband switching decision making with jitter the least important.

REDC

Switchers - Importance in Decision to Switch

(Base: Total Broadband Users Who Have Switched Provider – n=413)

Q.45/Q.103 How important were these options in your decision to switch?

	Total Broadband (n=413)	Primary Mode of Access					
		BB Fixed Landline (n=264)	BB Fibre Network (n=57)	BB Cable Network (n=35*)	Mobile BB (n=28*)	Fixed Wireless (n=14*)	BB Satellite (n=14*)
Degree of availability (% time service is working)	77%	78%	80%	88%	70%	56%	79%
Bandwidth download speed	74%	71%	78%	91%	69%	56%	85%
Bandwidth upload speed	68%	66%	73%	81%	68%	56%	62%
Range	60%	57%	62%	78%	69%	51%	67%
Resilience	59%	57%	66%	77%	49%	54%	57%
Contention	54%	52%	54%	75%	46%	66%	57%
Synchronisation	53%	50%	55%	72%	52%	49%	57%
Symmetry	51%	47%	55%	74%	58%	51%	50%
Latency	46%	42%	50%	66%	50%	56%	50%
Jitter	43%	39%	42%	60%	47%	64%	51%

*Caution Small Base

*Access through Mobile Phone base too small to show (1)

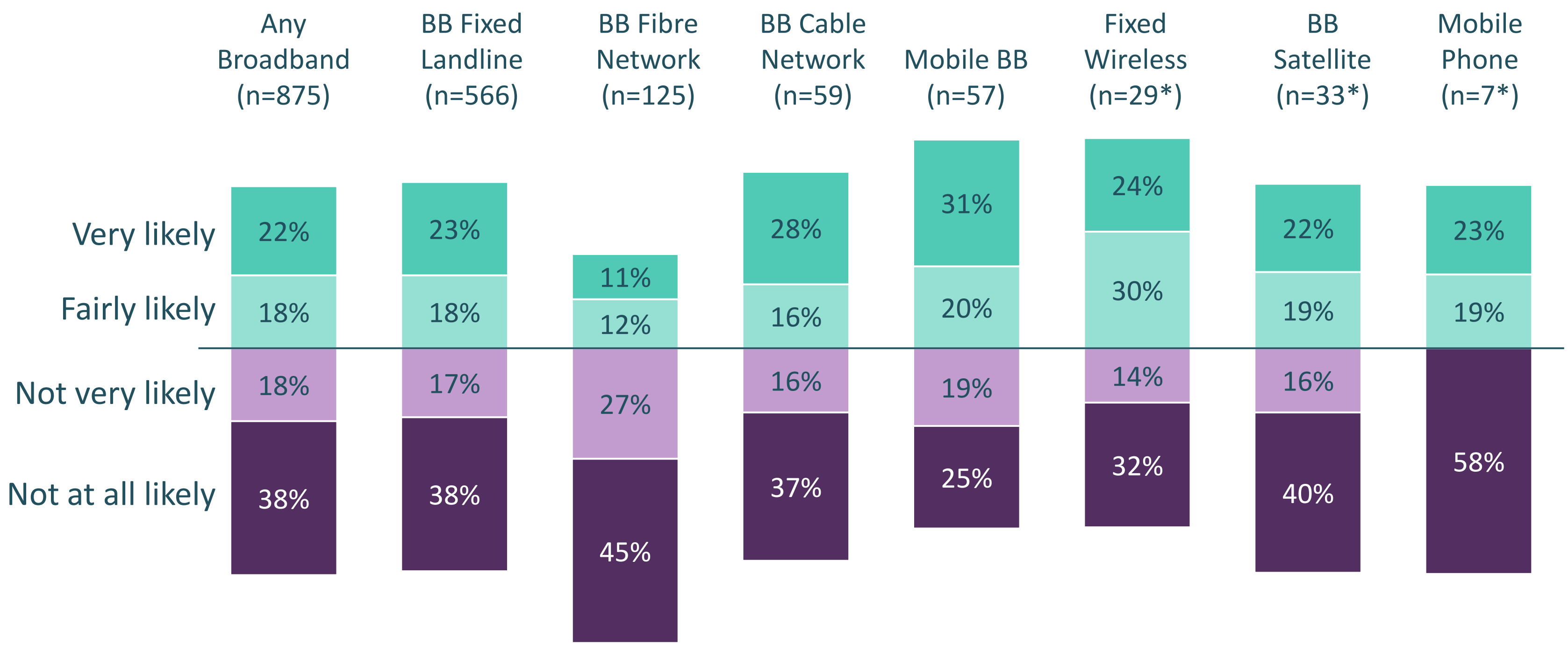
The importance of the degree of availability (% of time service is working) is evident across all modes of access, particularly for fibre and cable users.

Likelihood to Switch - Next 12 - 18 Months

(Base: Total Broadband Users, n=875)

Q.46/Q.104 How likely are you to consider switching broadband service provider within the next 12 - 18 months?

Primary Mode of Access



	Any Broadband	BB Fixed Landline	BB Fibre Network	BB Cable Network	Mobile BB	Fixed Wireless	BB Satellite	Mobile Phone
Don't know	3%	3%	4%	3%	5%	-%	4%	-%
Total: Likely	40%	42%	24%	44%	52%	54%	40%	42%

*Caution Small Base

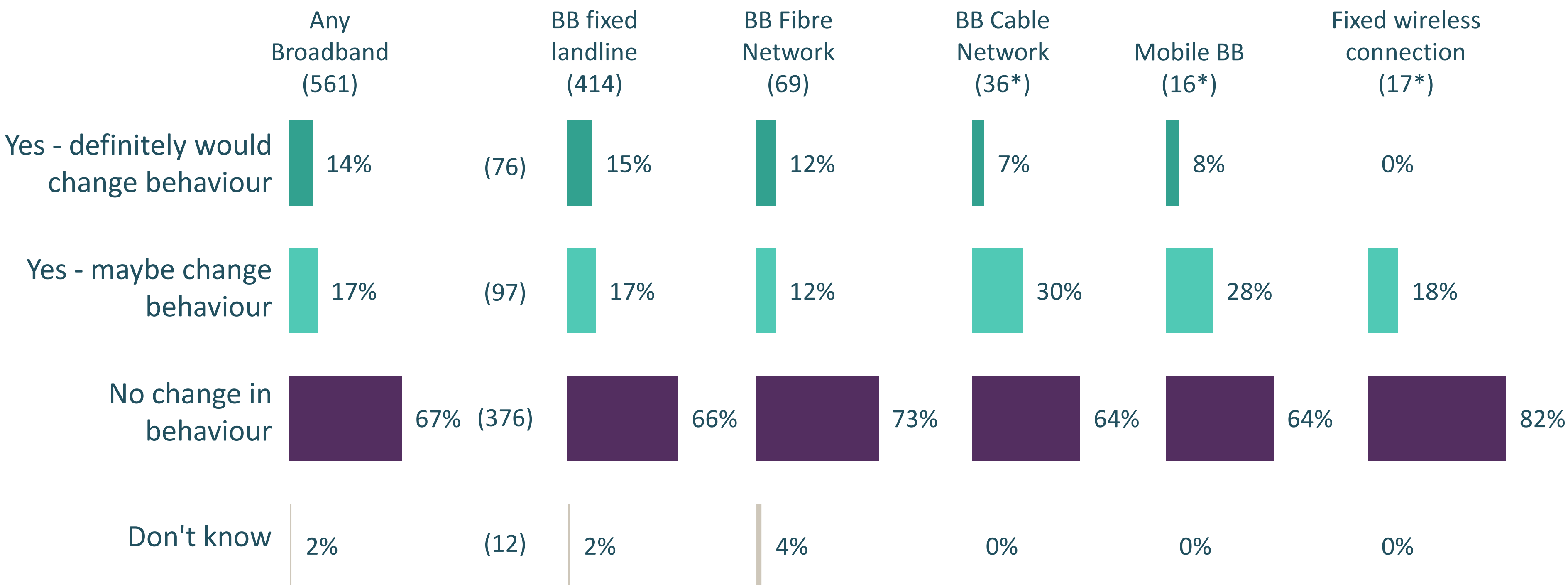
40% of broadband users are likely to switch in the next 12 – 18 months, with fibre network broadband users less likely to do so at 24%.

SSNIP (Broadband Bundle Users)

Response to €2 Price Increases in Broadband Portion of Bundle

(Base: Any Broadband Bundle owners – 561)

Q.S.1/Q.S6 Do you believe that your business would change your actual purchasing behaviour with respect to your broadband service?



( ) Figures in brackets relate to total actual figures

* - Small Base:
Mobile Phone n=4, Satellite n=3

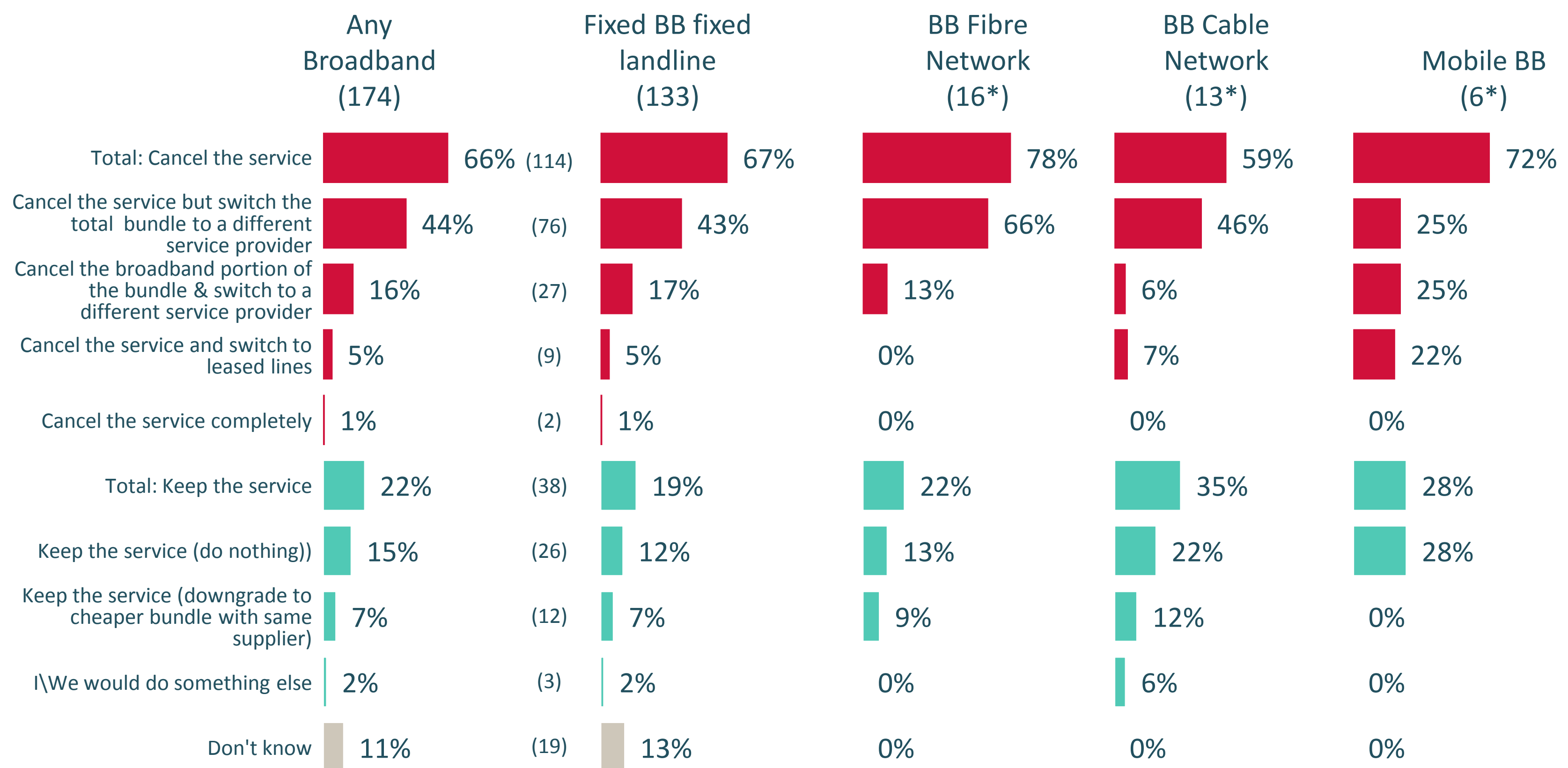
31% of broadband bundle business claim they would change behaviour given a €2 increase in the broadband portion of their bundle cost

REDC

Response to €2 price increases – Broadband Bundle

(Base: All broadband bundle who would change behaviour – n=174)

Q.S2 Which of the following would describe what your business would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



( ) Figures in brackets relate to total actual figures

* - Small Base

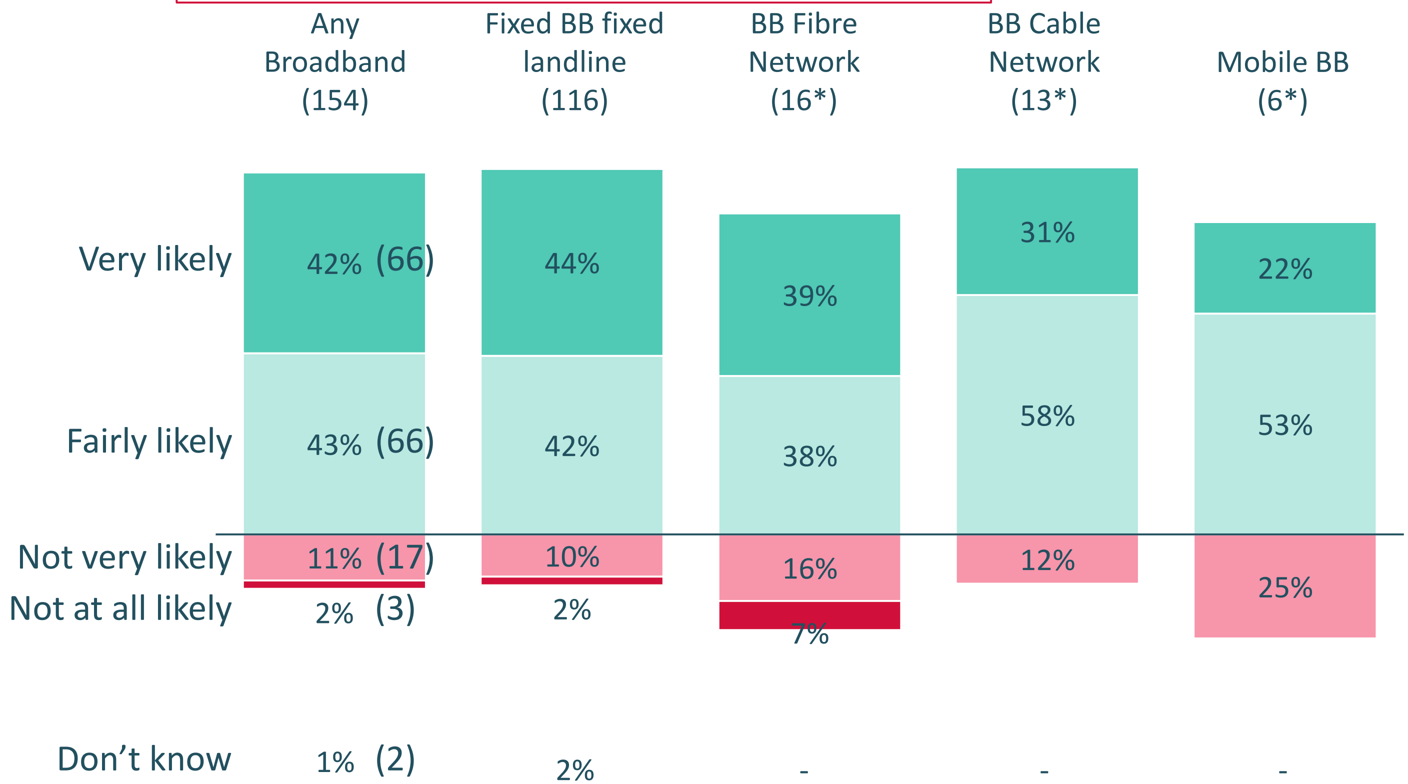
Fixed Wire n=3, Satellite n=0, Mobile Phone n =1

66% of broadband bundle businesses who will change behaviour are likely to cancel the service they have given a €2 price increase

Likelihood To Follow Through With Any Change In Behaviour – Broadband Bundle Owners

(Base: All Broadband Bundle who would change behaviour – n=154)

Q.S3 How likely is your business to carry out any of the stated actions



Total: Likely	85% (131)	87%	77%	88%	75%

( ) Figures in brackets relate to total actual figures

* Small Base

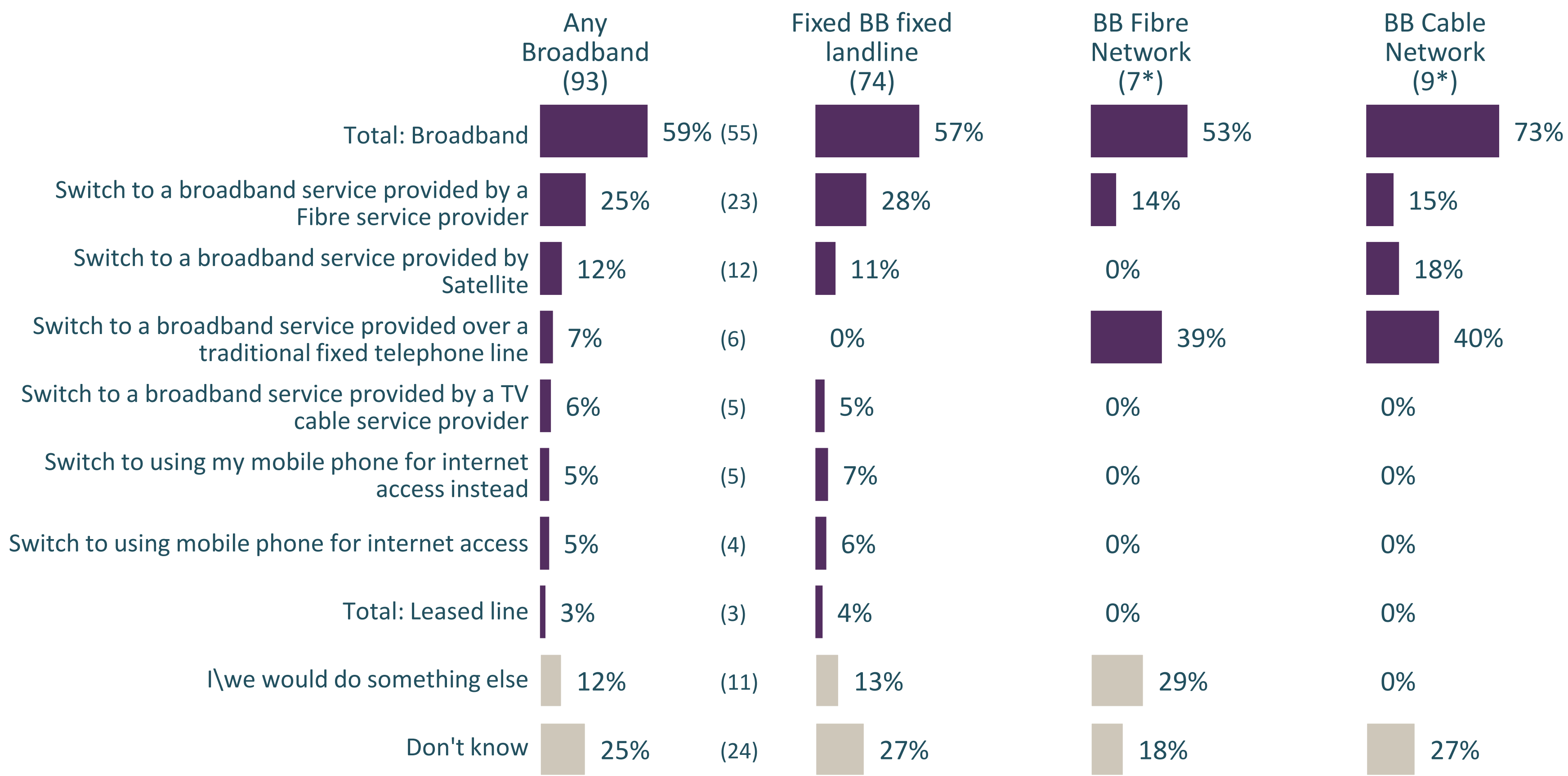
Fixed Wire n=1, Satellite n=0, Mobile Phone n =1

85% of broadband bundle businesses who will keep/switch broadband given €2 increase state they are likely to do this.

Service Likely to Switch To – Broadband Bundle Switchers

(Base: All Broadband Bundle and are likely to switch after price change –n=93)

Q.S4 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

Small Base: Mobile Broadband =1, Fixed Wire n=1, Satellite n=0, Mobile Phone n =0

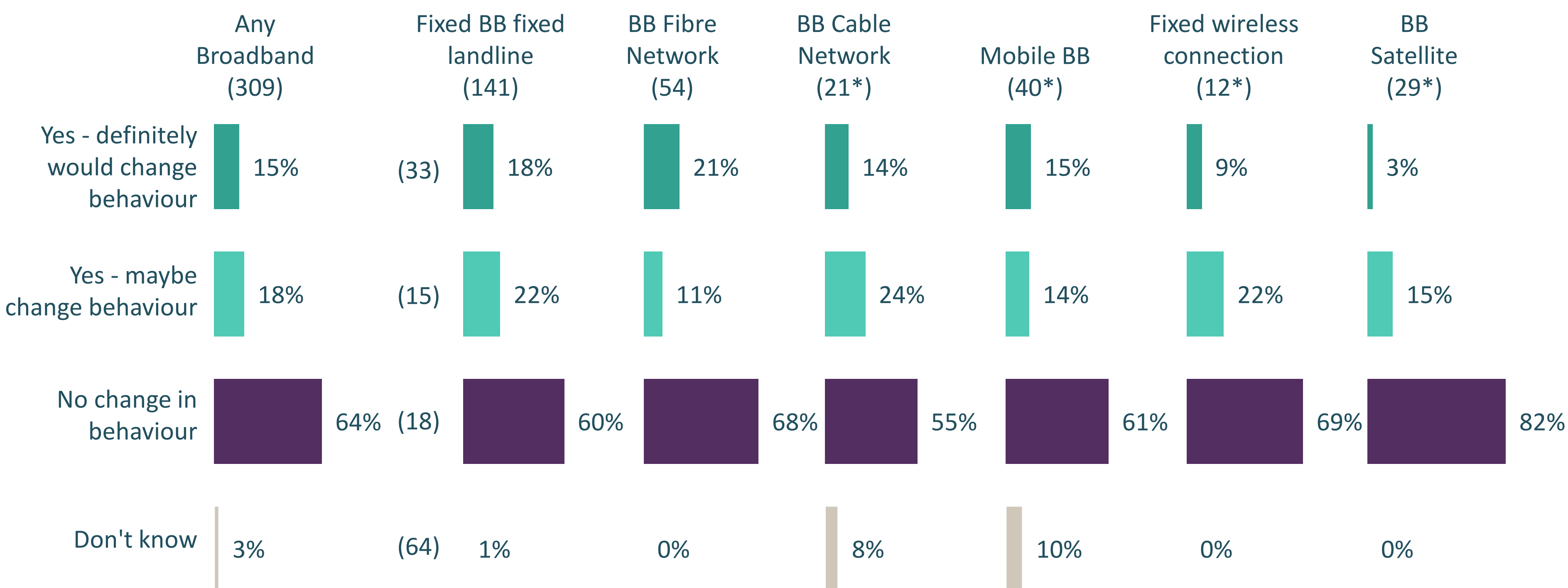
25% of broadband bundle switchers are likely to switch to a Fibre broadband service with 12% likely to switch to a satellite broadband service

SSNIP (Broadband Non Bundle Users)

Response to €2 Price Increases – Broadband Non Bundle Owners

(Base: Total Broadband Users who Use A Service Not In A Bundle - 309)

Q.S6/Q.S26 Do you believe that your business would change your actual purchasing behaviour with respect to your broadband service?



( ) Figures in brackets relate to total actual figures

* -Small Base

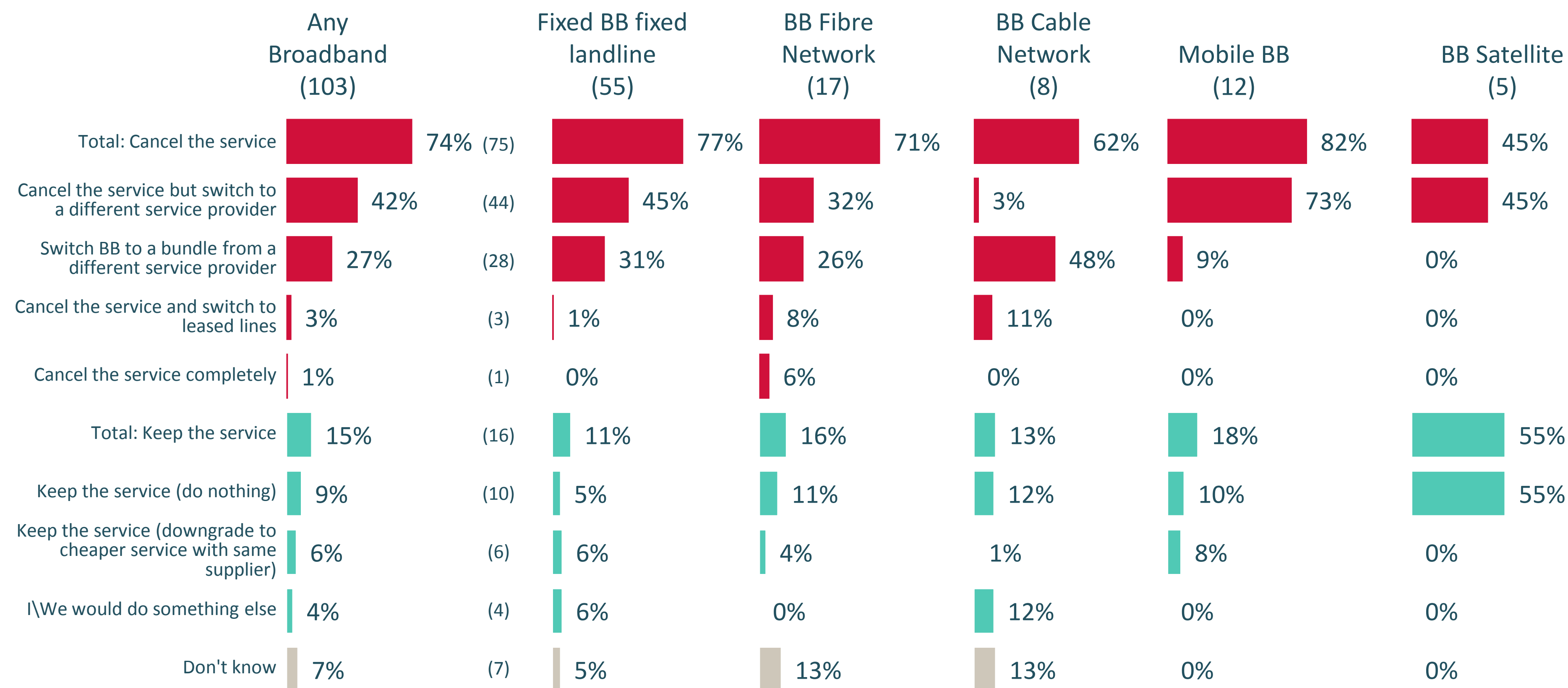
Mobile Phone n=4, Satellite n=3

33% of broadband non bundle business claim they would change behaviour given a €2 increase in the broadband cost

Response to €2 price increases – Broadband Non Bundle

(Base: All non bundle broadband who would change behaviour – n=103)

Q.S7 Which of the following would describe what your business would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



( ) Figures in brackets relate to total actual figures

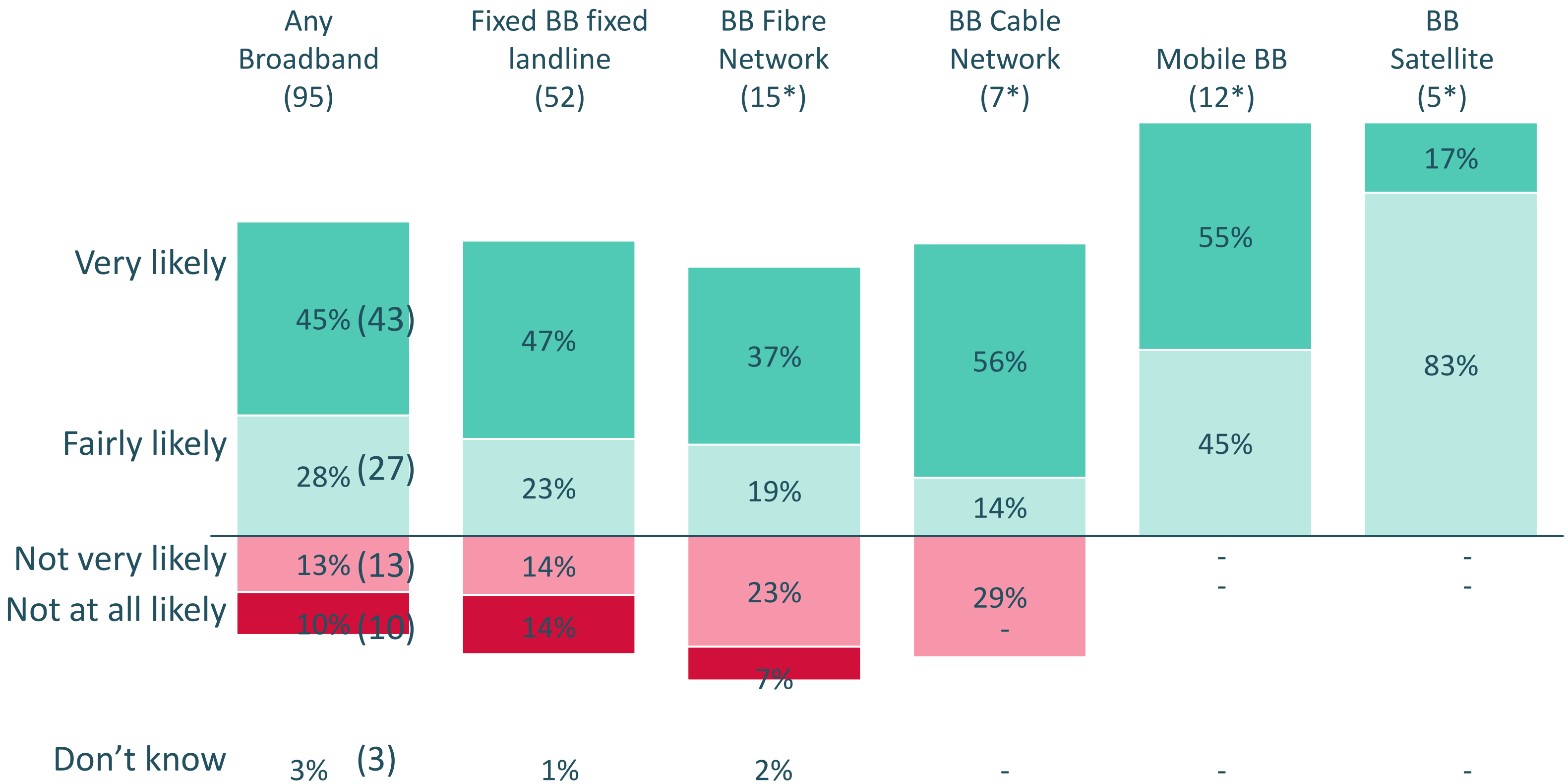
Small Base: Fixed Wire n=3, Satellite n=0, Mobile Phone n =1

74% of broadband non bundle businesses who will change behaviour are likely to cancel the service they have given a €2 price increase

Likelihood To Follow Through With Any Change In Behaviour – Non Bundle Users

(Base: Non Bundle who know how they would change their behaviour- 95)

Q.S8 How likely is your business to carry out any of the stated actions



Total: Likely	73% (70)	70%	57%	71%	100%	100%

( ) Figures in brackets relate to total actual figures

* Small Base:

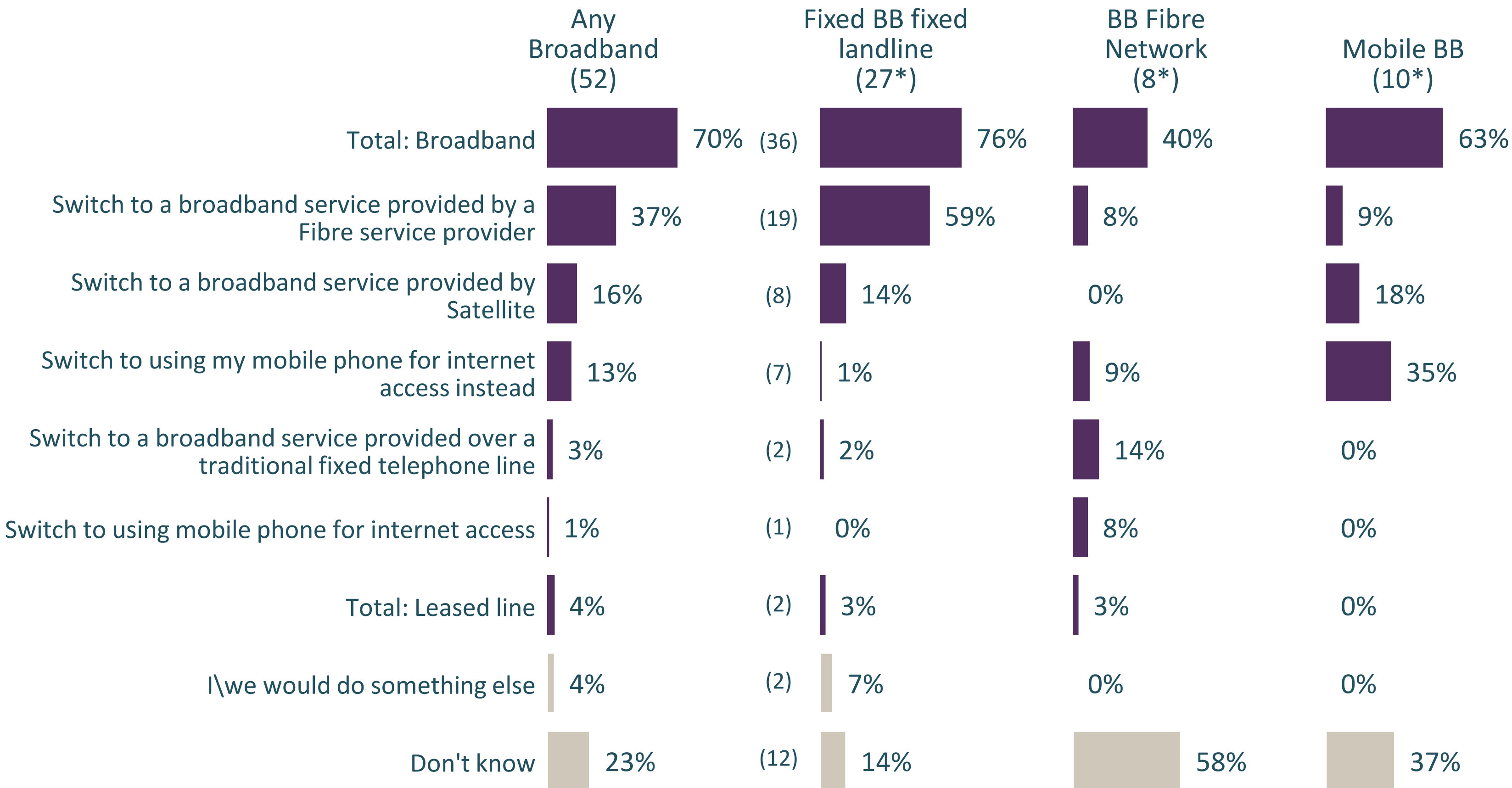
Fixed Wire = 4 Mobile Phone = 0

76% of broadband non bundle businesses who will keep/switch broadband given €2 increase state they are likely to do this.

Service Likely to Switch To – Broadband Non Bundle Switchers

(Base: All Broadband non Bundle who may switch broadband – n=52)

Q.S9/Q.S29 Which type of broadband\ leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

* -small base

Cable n=3, fixed wireless n=3, satellite n=2

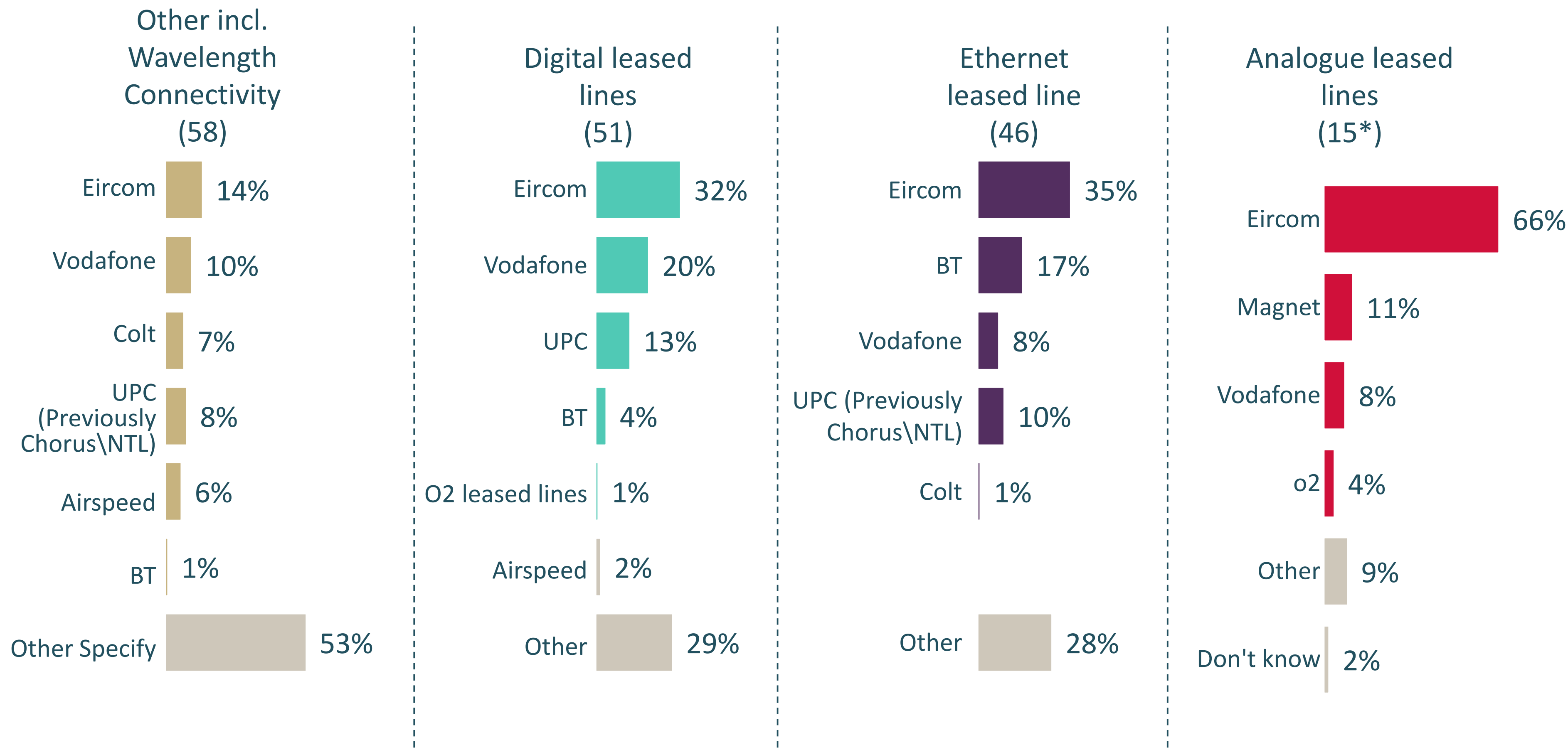
37% of broadband non bundle switchers are likely to switch to a fibre broadband service with 16% likely to switch to a satellite broadband service.

Leased Lines Suppliers and Usage

Current Leased Line Provider Share

(Base: All respondents who use leased line data connectivity services leased line, n= 176)

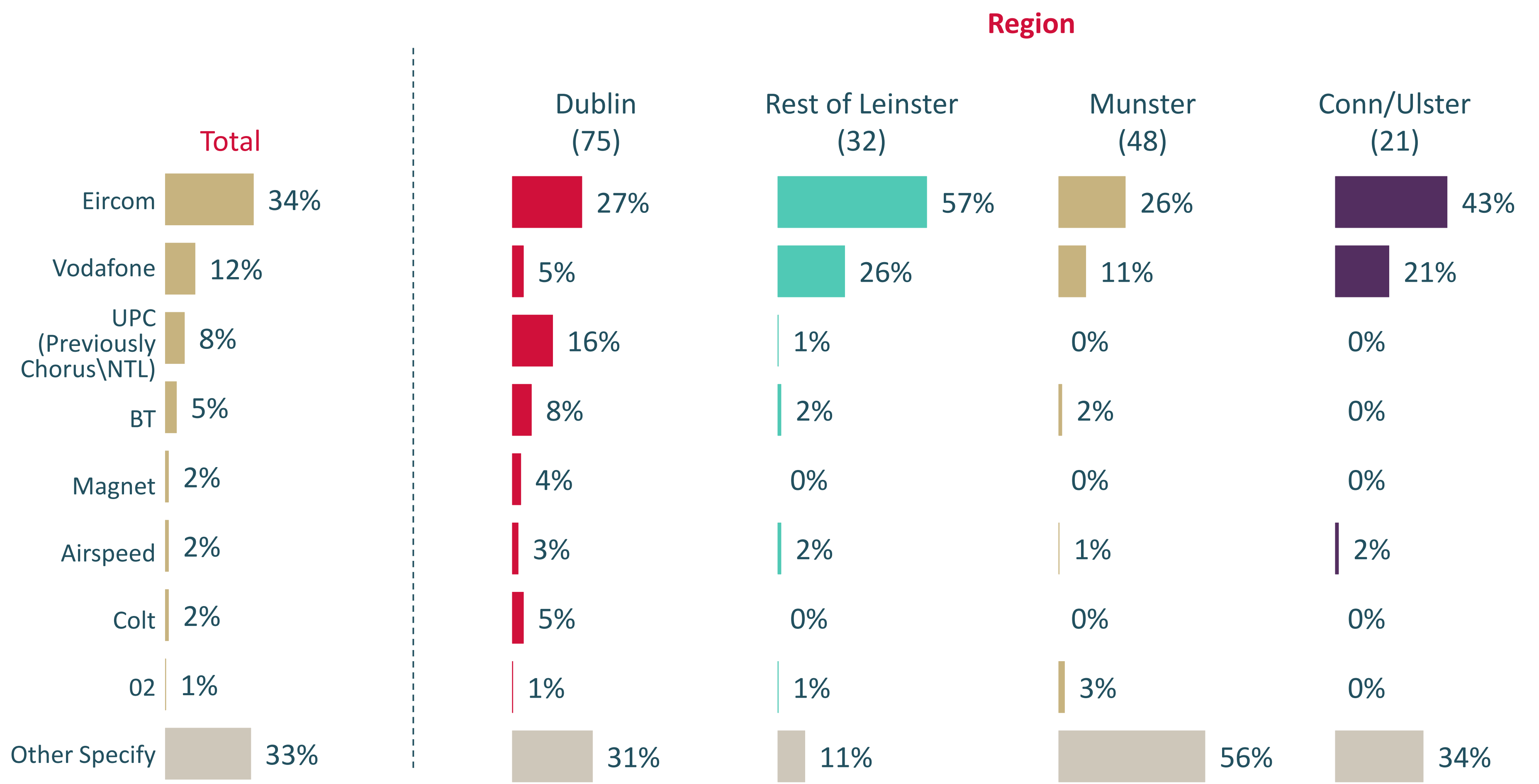
Primary Mode of Access



Eircom is the main supplier of leased lines across all access means.

Current Leased Line Provider Share

(Base: All respondents who use leased line data connectivity services leased line, n= 176)



Eircom is also the main supplier of leased lines across all regions.

Use of Primary Service – Leased Line Primary Access User

(Base: All respondents who use leased line data connectivity services leased line, n= 176)

Q.17/75/110 What does your business use your (SCRIPT IN PRIMARY SERVICE Q10) for?

	Any Leased Line (n=176)	Primary Access Mode			
		Other Incl. Wavelength Connectivity (58)	Digital leased lines (51)	Ethernet leased line (46)	Analogue leased lines (15)
Email and internet	85%	90%	72%	94%	82%
Data services such as cloud computing and other software services	47%	67%	43%	54%	18%
Connectivity between business premises	53%	59%	60%	48%	42%
Employee remote access to the business network	49%	52%	50%	48%	49%
Disaster recovery services	34%	38%	37%	27%	34%
Voice - VoIP\ Voice over broadband	41%	49%	32%	31%	60%
Card Machines	0%	-	-	-	-
Other	4%	2%	7%	-	-

Email and internet used most extensively in leased line business with connectivity between premises registering in second place in terms of usage

Use of Secondary Service – Leased Line Secondary Users

(Base: All respondents who use leased line data connectivity services, n= 93)

Q.18/76/111 What does your business use your <secondaryservice> for?

	Any Leased Line (n=93)	Secondary Mode of Access: Other incl Wavelength Connectivity (10*)	Secondary Mode of Access: Digital leased lines (31*)	Secondary Mode of Access: Ethernet leased line (11*)	Secondary Mode of Access: Analogue leased lines (36*)
Email and internet	65%	90%	78%	91%	54%
Connectivity between business premises	39%	62%	40%	51%	27%
Employee remote access to the business network	26%	9%	22%	13%	29%
Data services such as cloud computing and other software services	24%	59%	12%	32%	28%
Disaster recovery services	24%	15%	13%	15%	36%
Voice - VoIP \ Voice over broadband	19%	16%	14%	13%	26%
Other	20%	32%	15%	9%	27%
Don't know	1%	-	1%	-	-

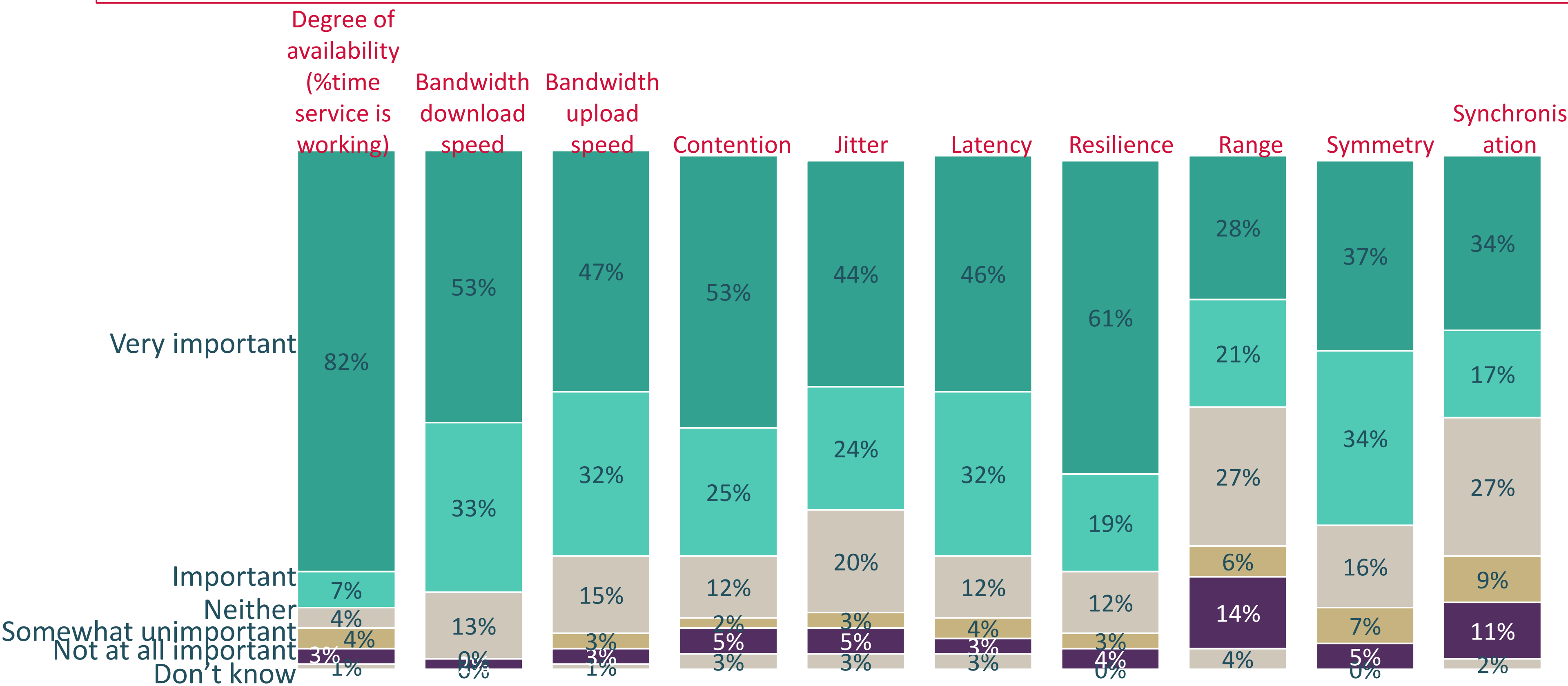
* Small Base

Leased line secondary users main source of use is email and internet (65%) followed by connecting business premises together (39%).

Importance of Aspects When Selecting Primary Leased Line Supplier?

(Base: All respondents who use leased lines as their primary service, n= 176)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	89%	86%	79%	78%	68%	78%	80%	49%	71%	51%

Availability (% of time service is working) of service (89%) and download speed of service (86%) are the two most important considerations when selecting primary leased line supplier.

Importance of Aspects When Selecting Primary Leased Line Supplier?

(Base: All respondents who use leased lines as a primary service, n= 176)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?

	Total (n=176)	Other incl Wavelength Connectivity (58)	Digital leased lines (51)	Ethernet leased line (46*)	Analogue leased lines (15*)
Degree of availability (%time service is working)	89%	90%	86%	96%	79%
Bandwidth - download speed	86%	97%	80%	94%	69%
Bandwidth - upload speed	79%	93%	72%	75%	79%
Connection	78%	91%	74%	88%	62%
Jittery	68%	75%	62%	79%	64%
Latency	78%	80%	70%	96%	90%
Resilience	80%	88%	75%	89%	73%
Symmetry	71%	82%	65%	67%	77%
Range	49%	51%	34%	59%	56%
Synchronisation	51%	55%	57%	50%	44%

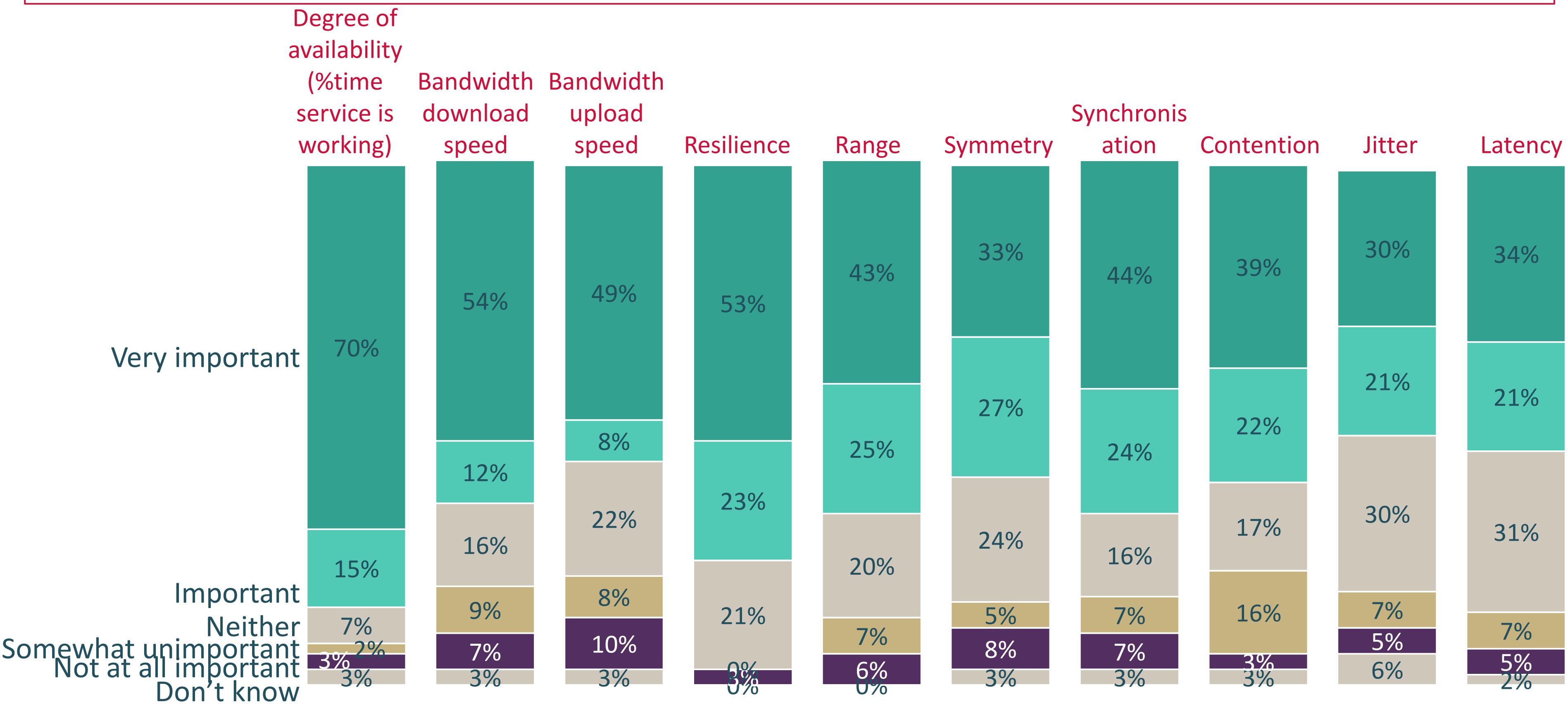
* Small base size

Many aspects of selecting primary leased line supplier register higher for those with other incl. wavelength connectivity leased lines.

Importance of Aspects when Selecting Secondary Leased Line Supplier?

(Base: All respondents who use a secondary LL service, n= 93)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	85%	66%	57%	76%	68%	60%	68%	61%	51%	55%

Availability (% of time service is working) is significantly the most important consideration when selecting a secondary leased line supplier.

Importance of Aspects when Selecting Secondary Leased line Supplier?

(Base: All respondents who use leased lines as a secondary service, n= 93)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?

	Total (n=93)	Primary Mode of Access			
		Other Incl. Wavelength Connectivity (10*)	Digital leased lines (31*)	Ethernet leased line (11*)	Analogue leased lines (36*)
Degree of availability (%time service is working)	85%	61%	86%	93%	85%
Resilience	76%	61%	79%	93%	70%
Bandwidth - download speed	66%	54%	78%	69%	60%
Bandwidth - upload speed	57%	51%	62%	69%	55%
Connection	61%	55%	90%	88%	53%
Range	68%	50%	77%	85%	67%
Symmetry	60%	47%	72%	85%	55%
Synchronisation	68%	49%	85%	85%	59%
Jittery	51%	57%	68%	51%	44%
Latency	55%	57%	68%	51%	50%

* Small base

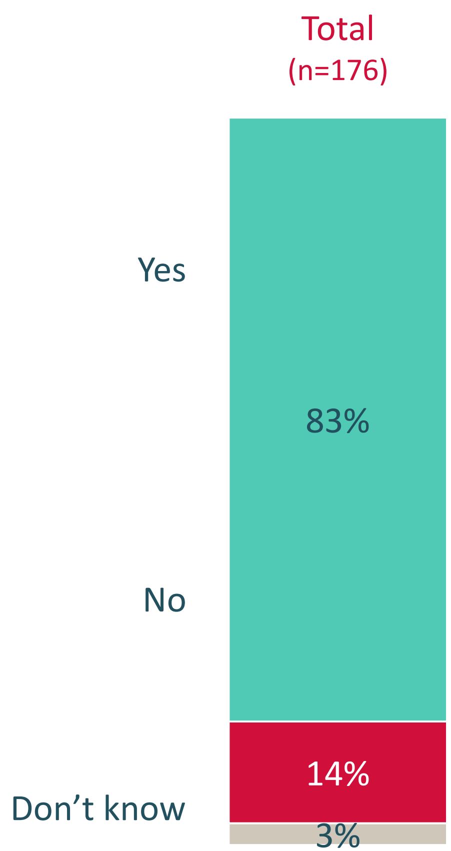
Key issues in selection of secondary leased line supplier Availability (85%) and Resilience (76%)

Service Level Agreements (Leased Line)

Service Level Agreement's (SLA's)

(Base: All leased line users, n = 176)

Q.21/78/114 Do you have service contracts or Service Level Agreements (SLAs) with your service provider? These might include fault repair times, out of hours service, compensation if service levels are not met etc.



Primary Mode of Access				
	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Yes	92%	77%	83%	71%
No	6%	20%	17%	21%
Don't Know	2%	3%	-	8%

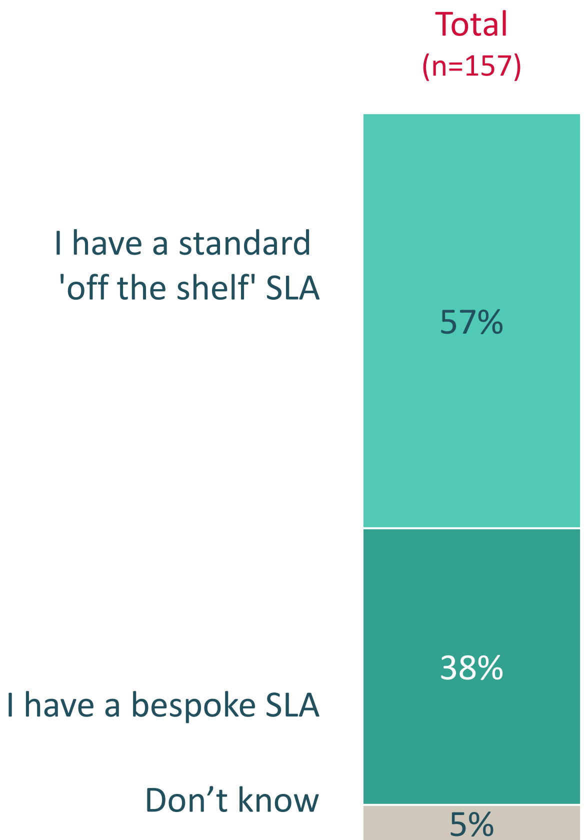
*Base small

Rates of having an SLA are notably high for leased line Users, with other incl. wavelength connectivity Leased line users the most likely to have an SLA.

Type of SLA's

(Base: All leased line primary users who have an SLA in place, n = 157)

Q.22 Do you have a standard 'off the shelf' or bespoke SLA with your broadband service provider(s)? A bespoke SLA might have more parameters or better service level commitments included in it compared to a standard SLA.



Primary Mode of Access – Standard SLA			
Other incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
59%	66%	37%	70%

Primary Mode of Access – Bespoke SLA			
Other Incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
36%	31%	53%	30%

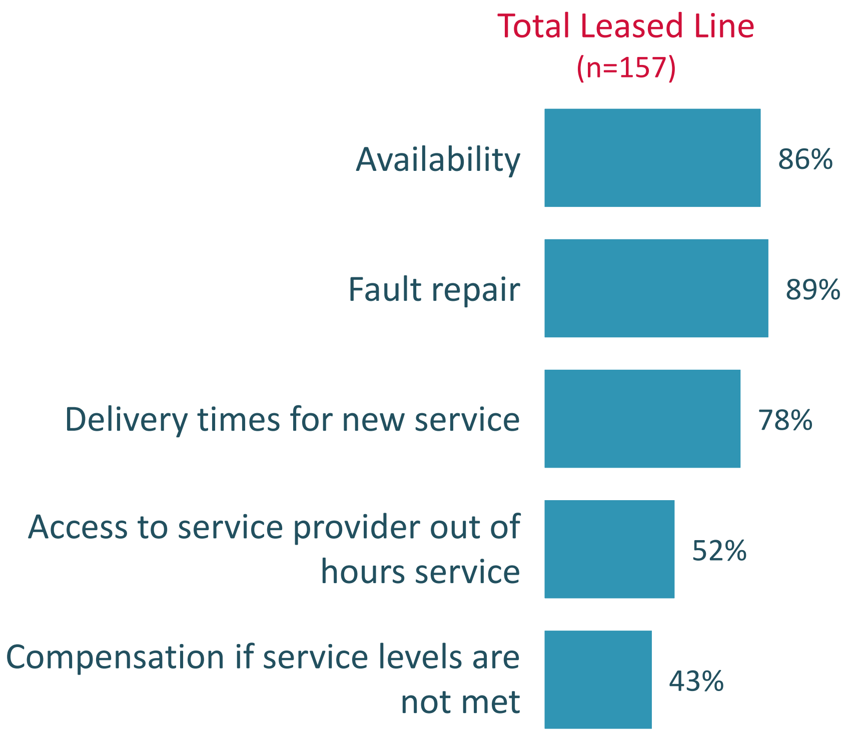
*Small base

Ethernet users with an SLA are notably more likely than other leased line users to have a bespoke agreement (53%)

What Parameters Are Included in the SLA's You Have?

(Base: All Leased Line Users Who Use A Leased Line Primary Service And Have A SLA In Place, n= 157)

Q.23/Q.81/Q.116 Do you know which if any of the following parameters are included in your SLA?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
Availability	90%	90%	86%	91%
Fault repair	90%	92%	93%	81%
Delivery times for new service	90%	77%	79%	52%
Access to service provider out of hours service	45%	40%	52%	32%
Compensation if service levels are not met	47%	51%	66%	63%

*Base small

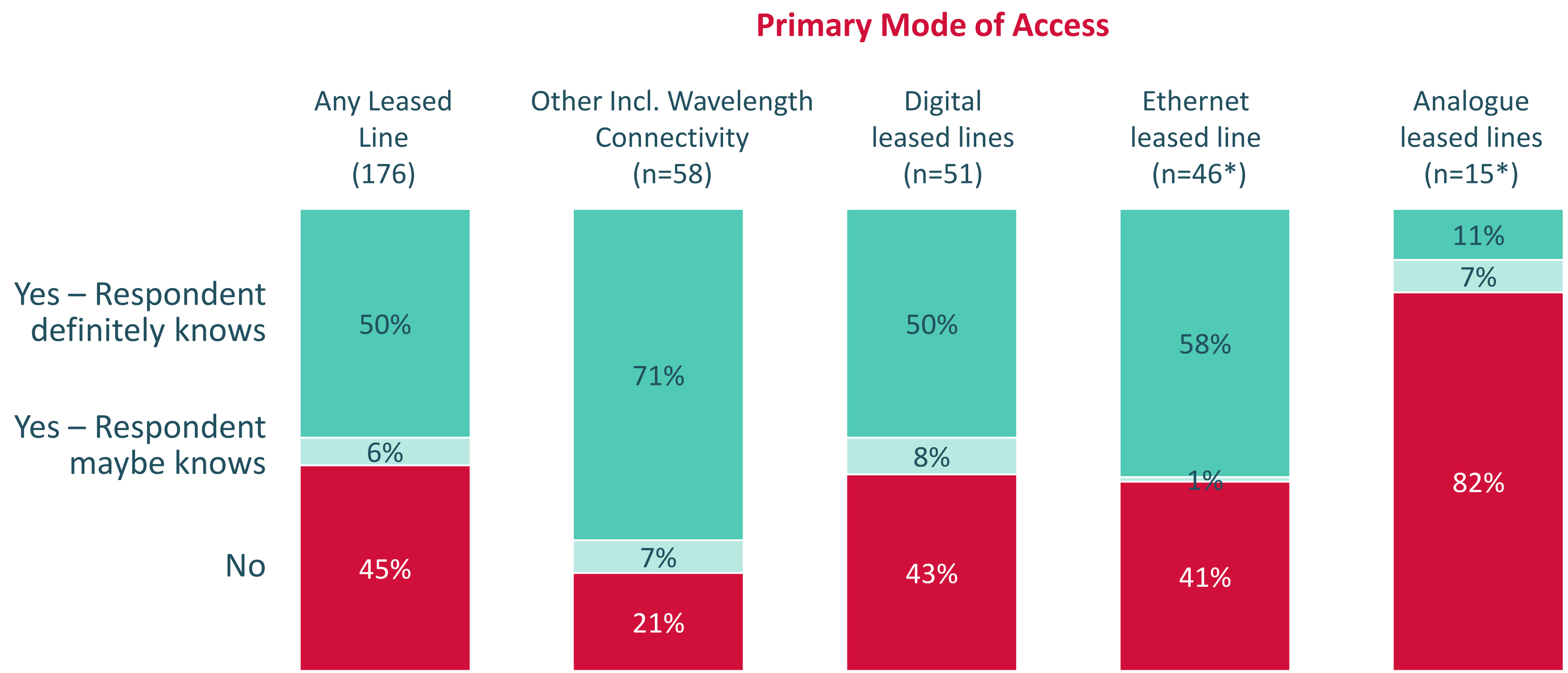
Fault repair and availability (% of time service is working) parameters are included in more than 80% of SLA's across all leased line access modes, making them the most common parameter to be included across access types.

Speed of Connections (Leased Line)

Knowledge of Claimed Maximum Download Speed

(Base: Total leased line users, n = 176)

Q.50/Q.117 Do you know the claimed maximum download speed for your main leased line <primaryservice> service?



*Base small

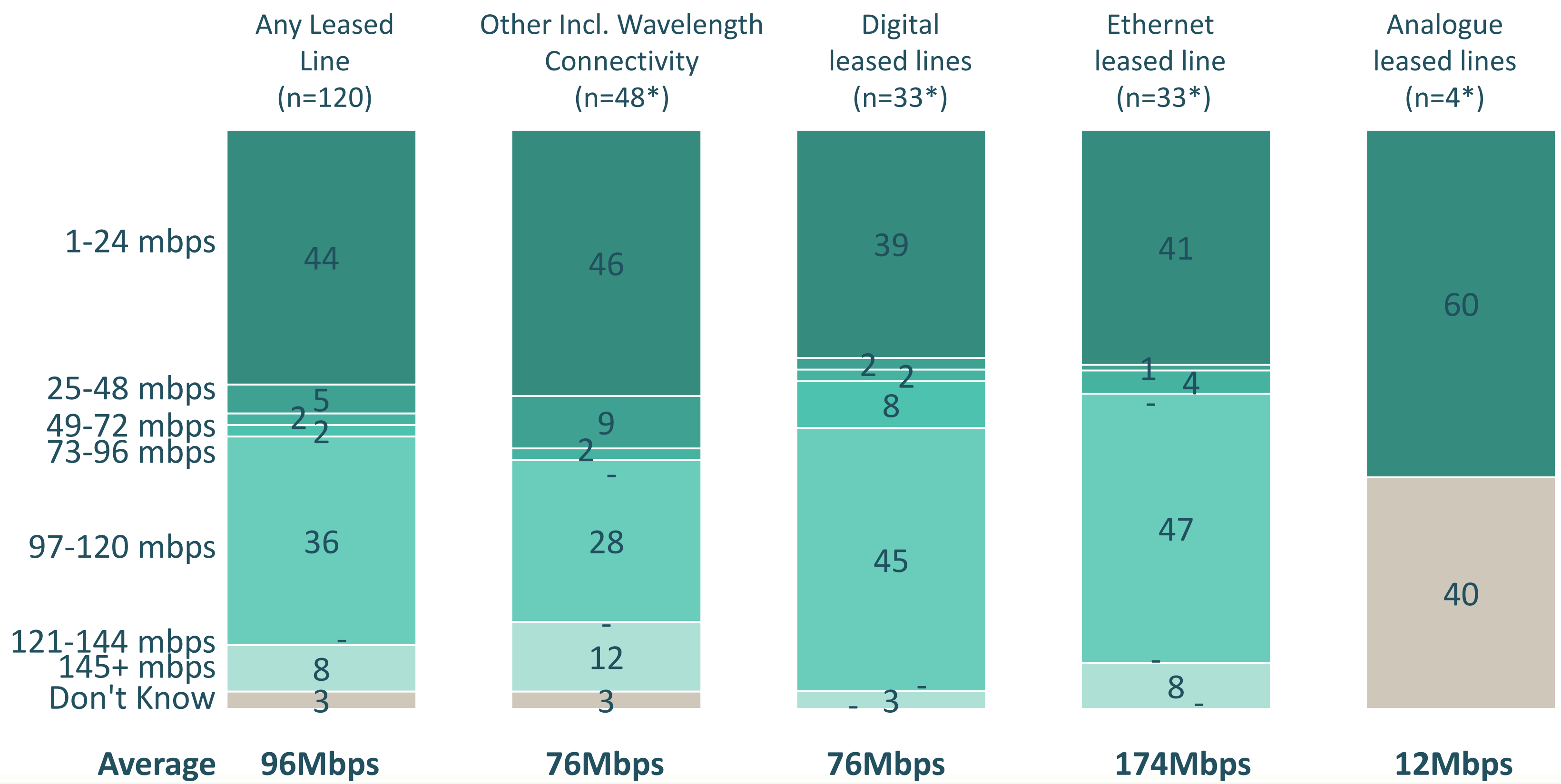
56% of leased line users stated that they know the maximum claimed download speed of their service.

(Q.50/117)

What is Maximum Claimed Download Speed?

(Base: Total Leased Line Users Who Know Download Speed, n=120)

Q.51/Q.118 What is the maximum claimed download speed for your main leased line <primaryservice> service in Megabits per second?



*Base small

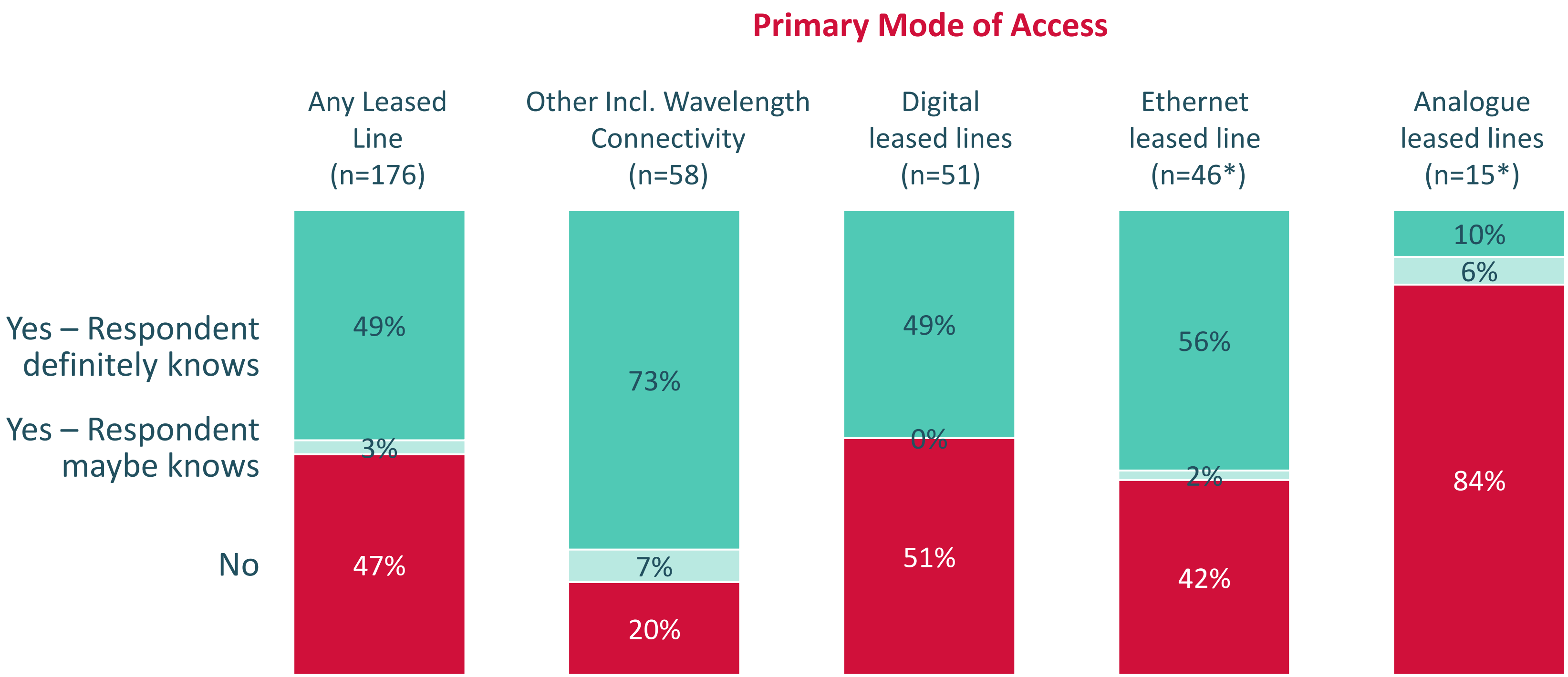
At 174mbps ethernet customers have the highest claimed download speed among leased line users, notably faster than all other forms of leased line.

(Q.51/118)

Knowledge of Claimed Maximum Upload Speed

(Base: Total Leased Line Users, n=176)

Q.52/Q.119 Do you know the claimed maximum upload speed for your main leased line <primaryservice> service?



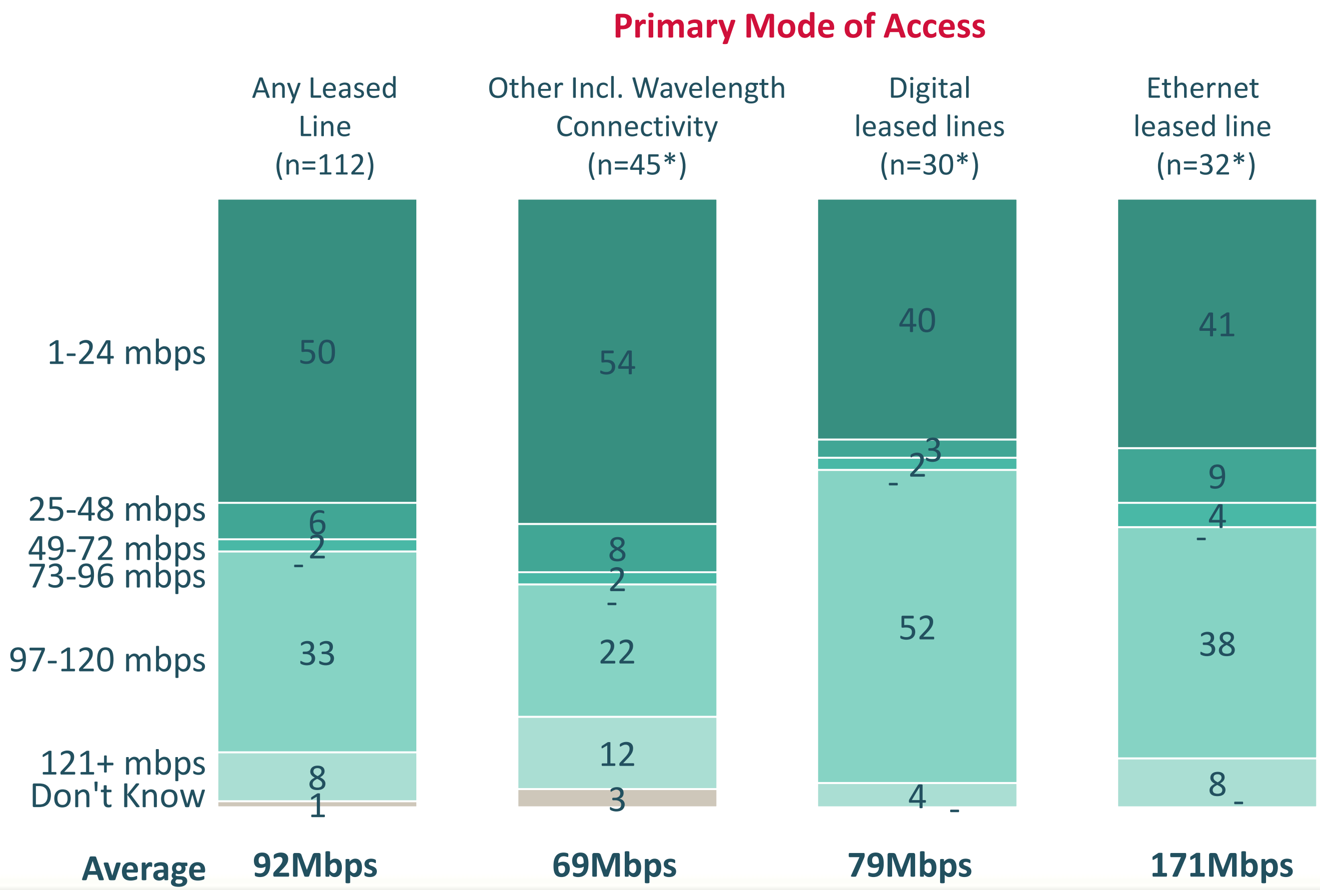
*Base small

52% of leased line users stated that they know their claimed maximum upload speed of their service.

What is Maximum Claimed Upload Speed?

(Base: Total Leased Line Users Who Know Upload Speed, n=112)

Q.53/Q.120 What is the maximum claimed upload speed for your main leased line <primaryservice> service in Megabits per second?



Base too small to show Analogue Leased Lines

*Base small

Ethernet leased line users have the fastest claimed upload speed at 171mbps.

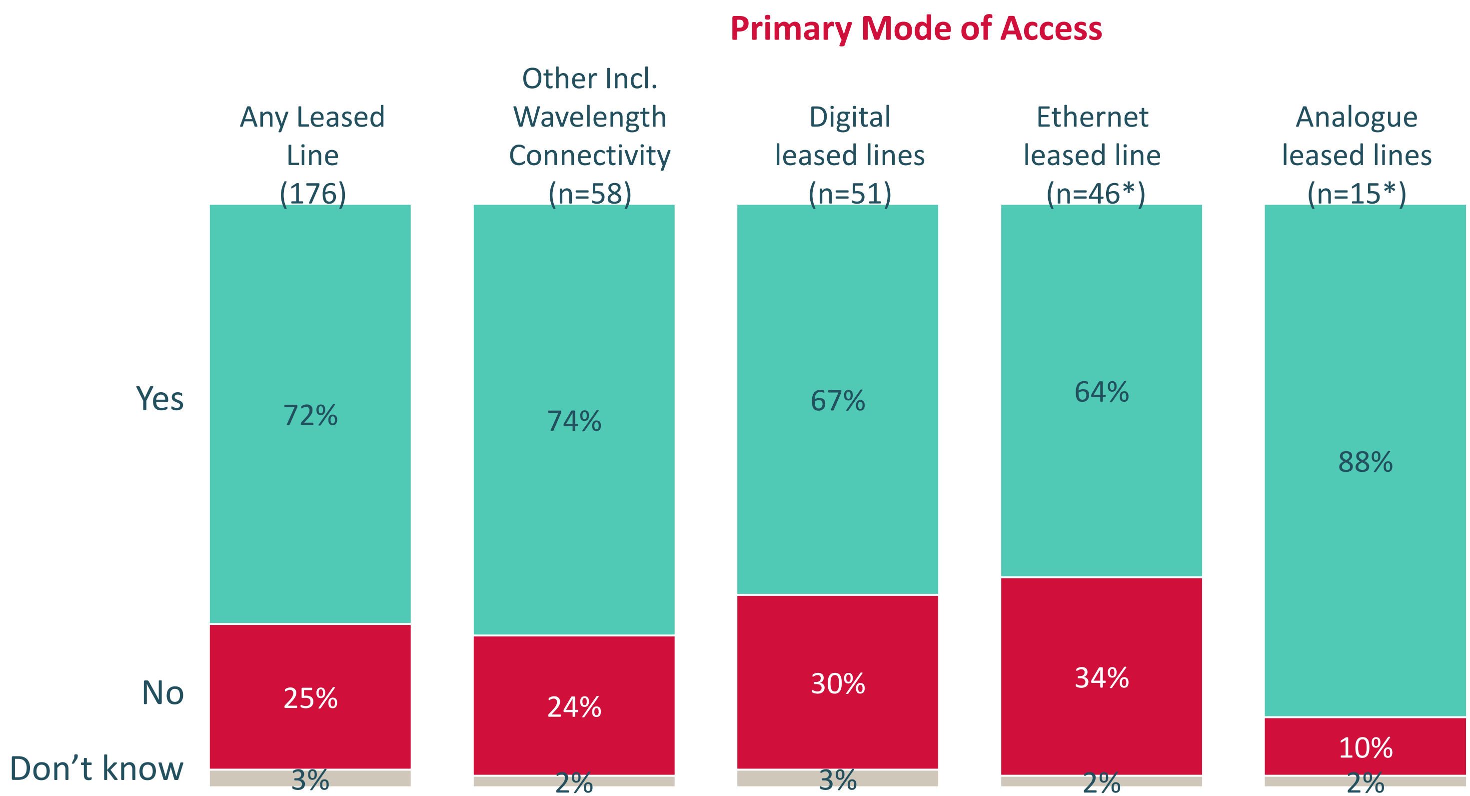
REDC

Contracts, Loyalty And Ability To Negotiate (Leased Line)

Is Primary Service in Contract – Leased Line?

(Base: Total Leased Line Users, n = 176)

Q.70/Q.137 Thinking about your primary\main leased line service (<primaryservice>) are you currently tied into a contract with your service provider?

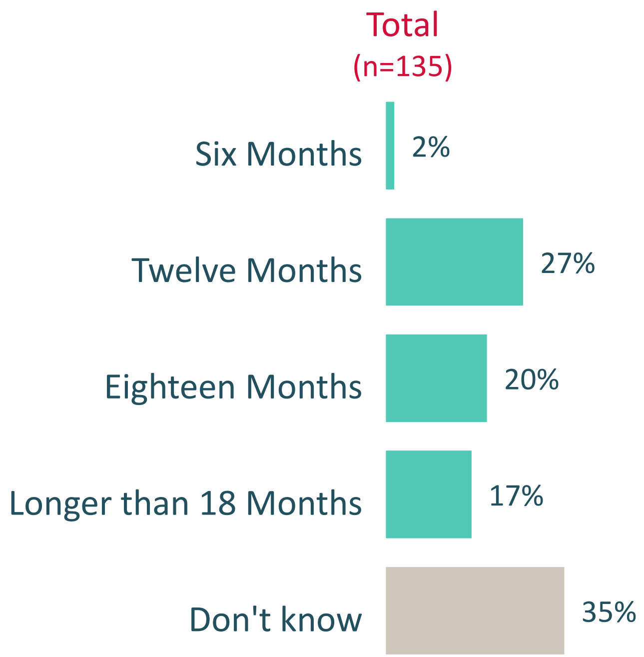


72% of leased line users are currently in contract.

Minimum Contract Period - Those in Contract

(Base: Total Leased Line Users Who Are Currently Tied Into A Contract, n=135)

Q.71/Q.138 What is the minimum contract period of this service - from sign up time to when you can leave your service provider?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (n=45)	Digital leased lines (n=39*)	Ethernet leased line (n=35*)	Analogue leased lines (n=12*)
Six Months	0%	1%	35%	0%
Twelve Months	16%	31%	7%	55%
Eighteen Months	16%	25%	15%	20%
Longer than 18 Months	23%	14%	21%	25%
Don't know	44%	29%	52%	0%

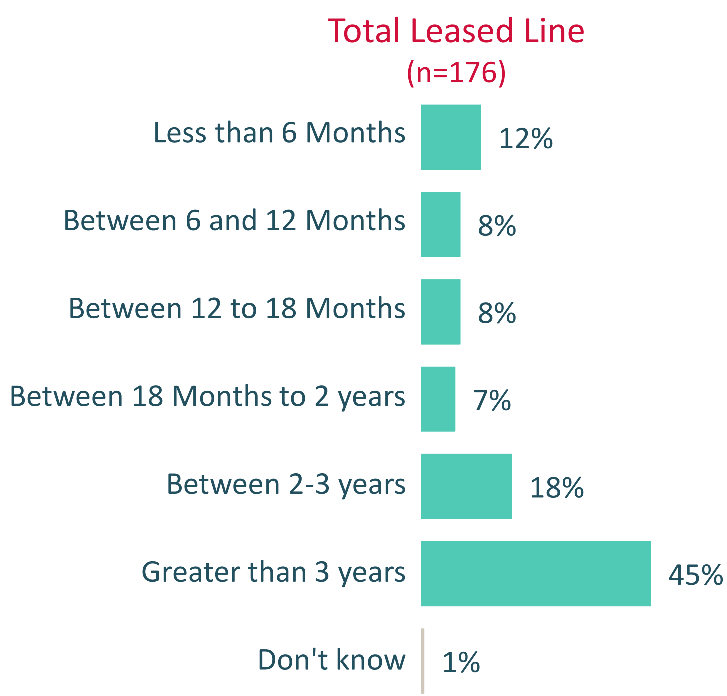
*Caution Small Base

12 months is the most common length of contract on leased line contracts at 27%.

Length of Time with Current Provider

(Base: Total Leased Line Users, n = 176)

Q.72/Q.139 How long has your business been with your current main service provider for …?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Less than 6 Months	5%	19%	1%	28%
Between 6 and 12 Months	8%	3%	0%	28%
Between 12 to 18 Months	7%	13%	11%	0%
Between 18 Months to 2 years	4%	11%	12%	0%
Between 2-3 years	32%	14%	18%	6%
Greater than 3 years	41%	38%	58%	37%
Don't know	1%	2%	0%	2%

*Caution Small Base

45% of leased line customers have been with their current provider for greater than 3 years, with 12% having joined in the past six months.

Leased Line Users - Ability to negotiate terms and conditions

(Base: Total Leased Line Users, n = 176)

Q.72b/Q.140 Were you in a position to negotiate improved prices and or other terms and conditions with your leased line service provider?

	Total Leased Line (n=176)	Primary Mode of Access: Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46)	Analogue leased lines (n=15)
Total: Yes	70%	72%	75%	75%	63%
Yes - Strong Ability to negotiate	42%	36%	48%	63%	25%
Yes - Moderate ability to negotiate	28%	36%	27%	12%	38%
No - No ability to negotiate	24%	19%	19%	23%	35%
Don't know	6%	9%	6%	2%	2%

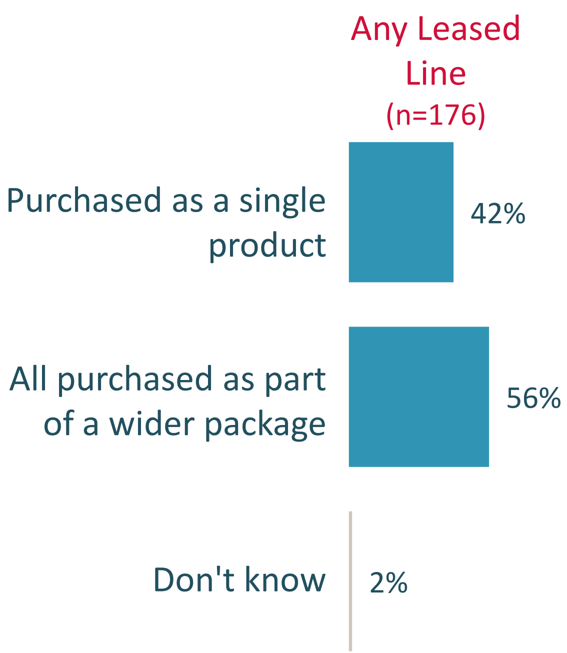
70% of leased line customers claim to have an ability to negotiate terms and conditions, with 42% claiming a strong ability to negotiate.

Bundles (Leased Line)

Incidence of Bundling Leased Line

(Base: Total Leased Line Users, n = 176)

Q.54/Q.121 Do you purchase leased line services as a single product or as part of a wider network solution or telecoms package?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Purchased as a single product	58%	46%	27%	27%
All purchased as part of a wider package	41%	49%	72%	71%
Don't know	2%	5%	1%	2%

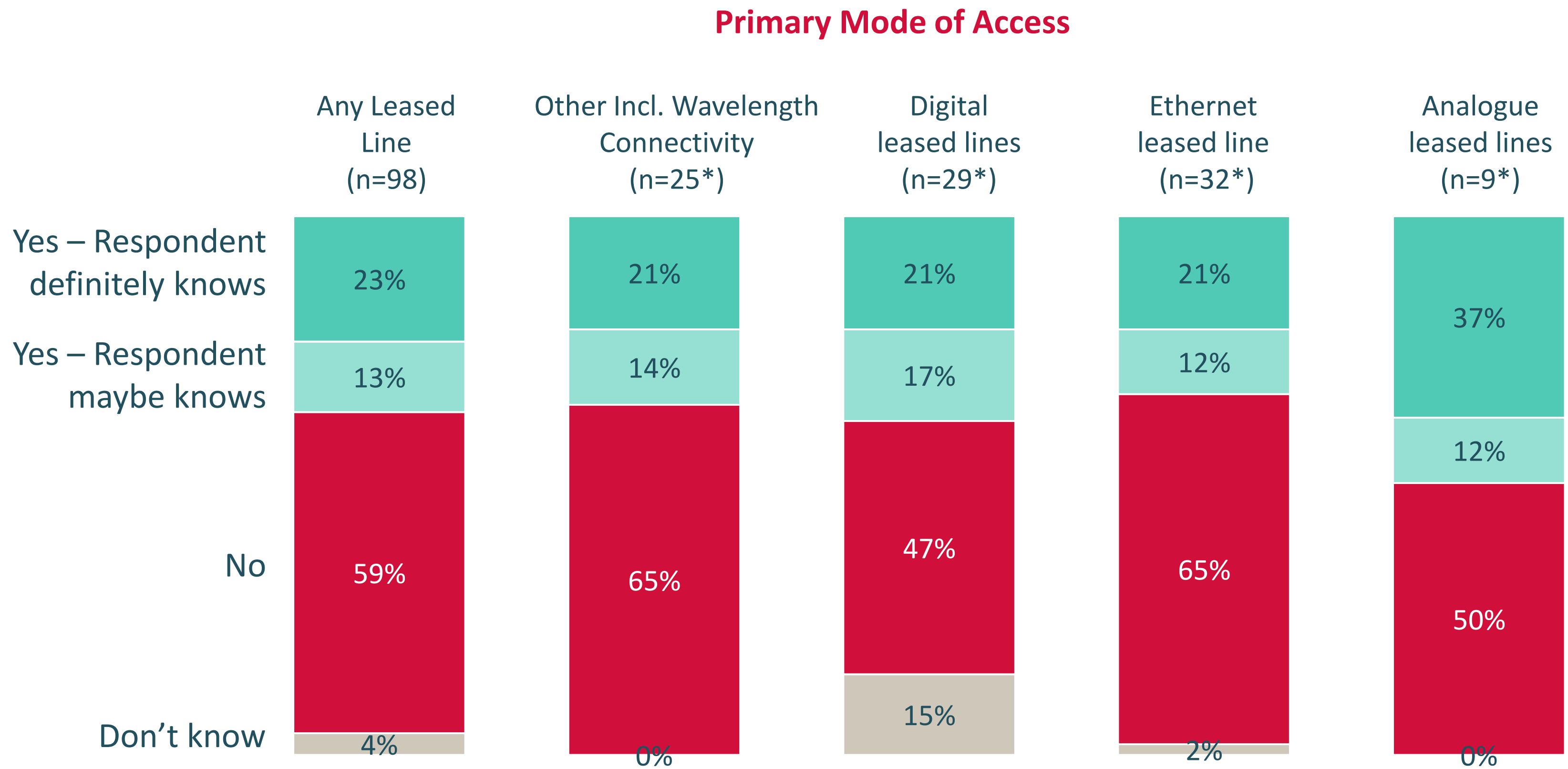
*Base small

56% of leased line connections are bundled with ethernet and analogue leased lines significantly more likely to be part of a bundle.

Awareness of Cost of Services – Bundle Users

(Base: Total Leased Line Users Who Use A Service In A Bundle, n = 98)

Q.55/Q.122 Do you know how much your business pays for your combined service on a monthly basis?



Total: Yes	37%	35%	39%	34%	50%

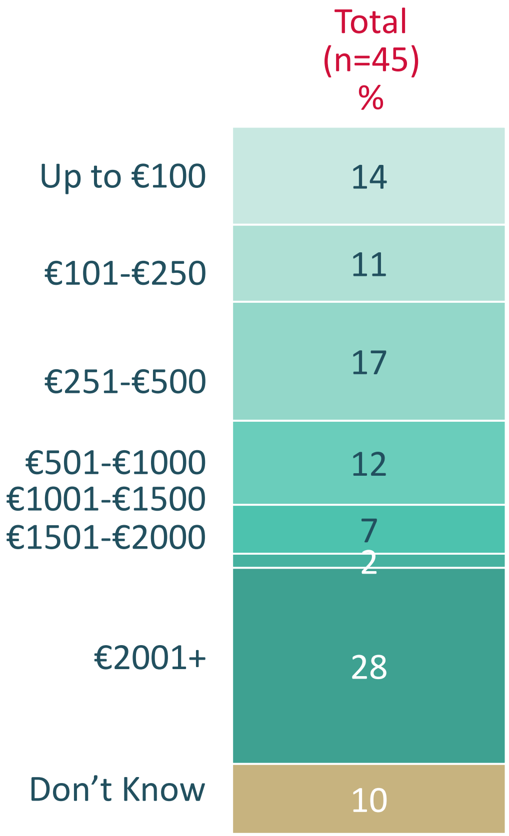
*Caution Small Base

37% are aware of the cost of their bundled leased line services.

Typical Spend Per Month-Leased Line Bundle Users

(Base: Total Leased Line Users Who Use A Service In A Bundle And Knows Costs, n = 45)

Q.56/Q.123 How much does your business typically pay for this combined package of services per month i.e. excluding any promotional introductory offers?



AVERAGE **€3,854**

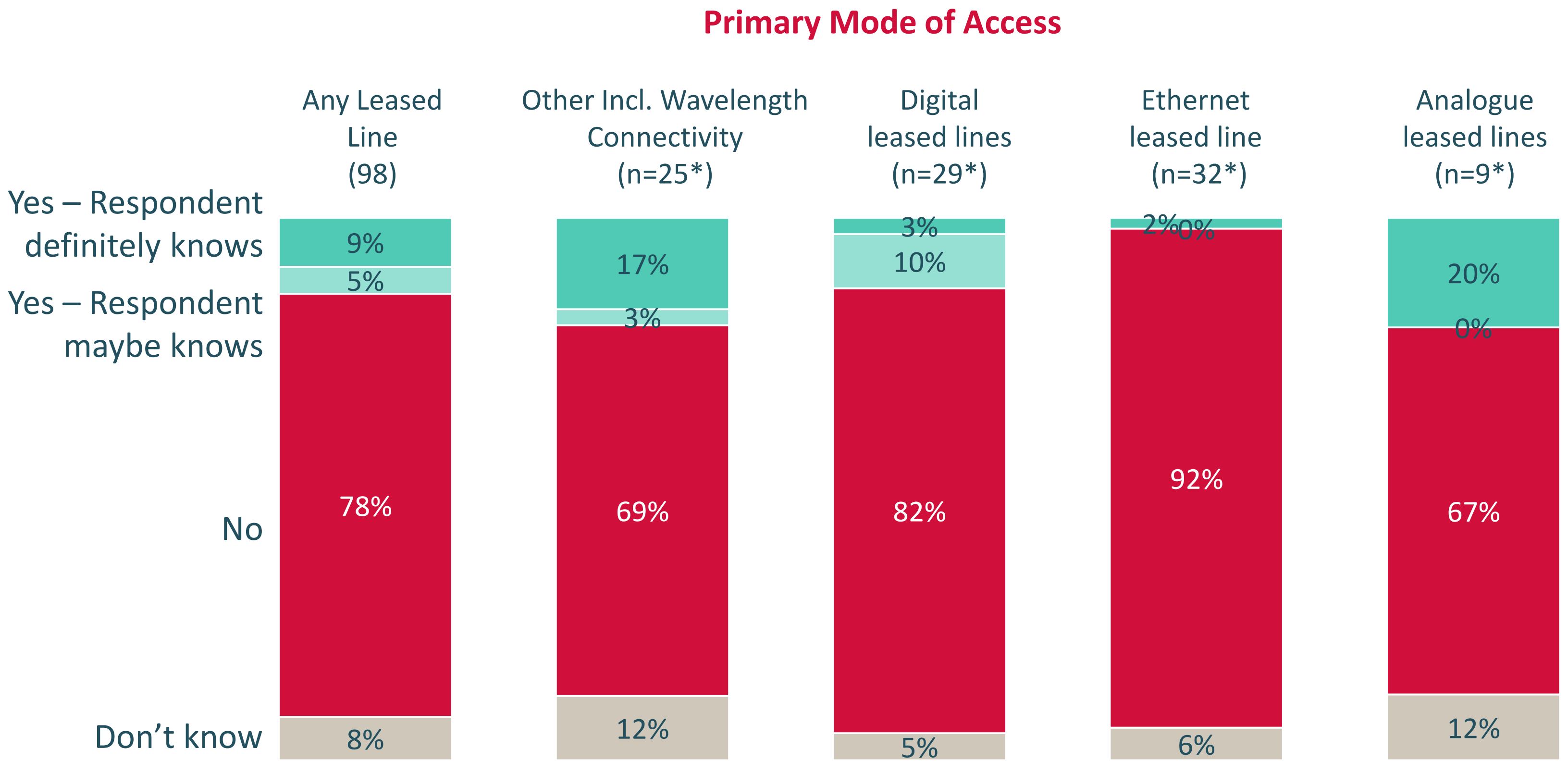
Base within Leased Line type too small to show

At a total level, the average leased line bundle cost is €3,854 with 28% claiming it costs greater than €2,000.

Knowledge of Additional Costs to Bundle Services

(Base: Total Leased Line Users Who Use A Service In A Bundle, n=98)

Q.57/Q.124 Does the monthly amount you pay for your services include any additional charges?



Total: Yes	14%	19%	13%	2%	20%

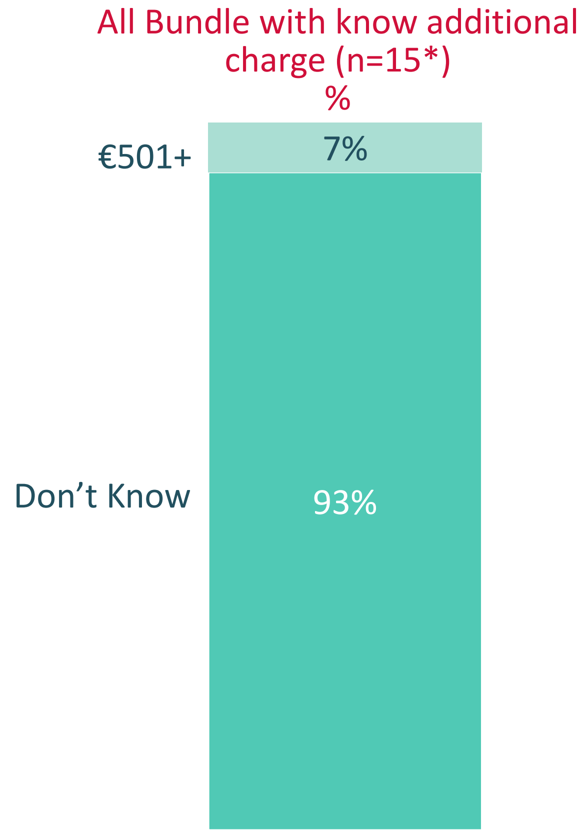
*Caution Small Base

Just 14% of Leased line bundle holders claim that their package includes additional charges.

Typical Spend Per Month (Additional Charges) - Bundle Users

(Base: All leased line bundle who know additional charge– n=15*)

Q.58/125 Can you estimate the cost of these additional charges?



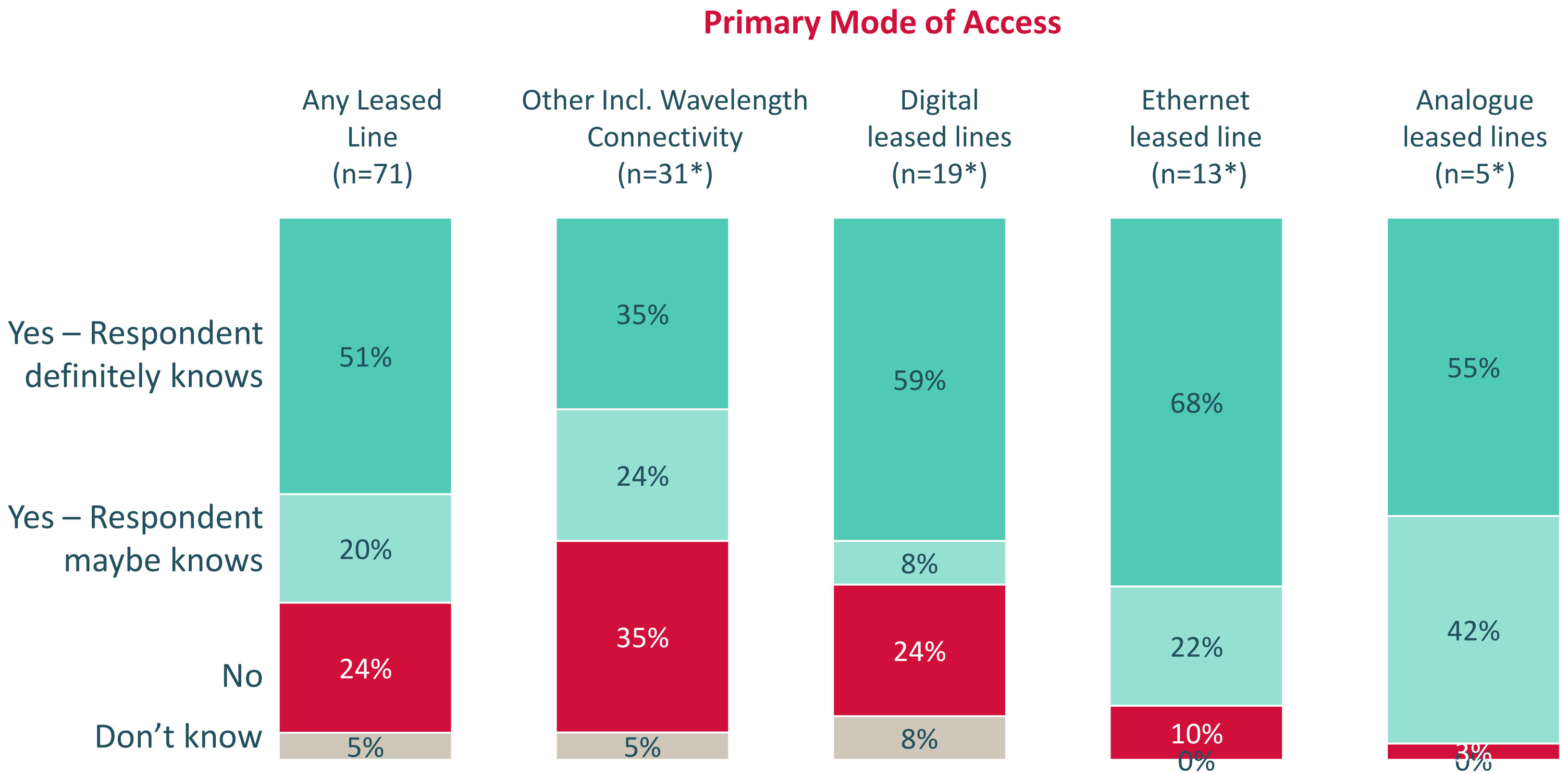
* Small base on this slide

93% of bundle leased line business who know they incur additional charges on their leased line service do not know how much additional these costs each month.

Awareness of Cost of Services – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle n = 71)

Q.59/Q.126 Do you know how much your business pays for your leased line service on a monthly basis?



Total: Yes	71%	59%	67%	90%	97%

*Caution Small Base

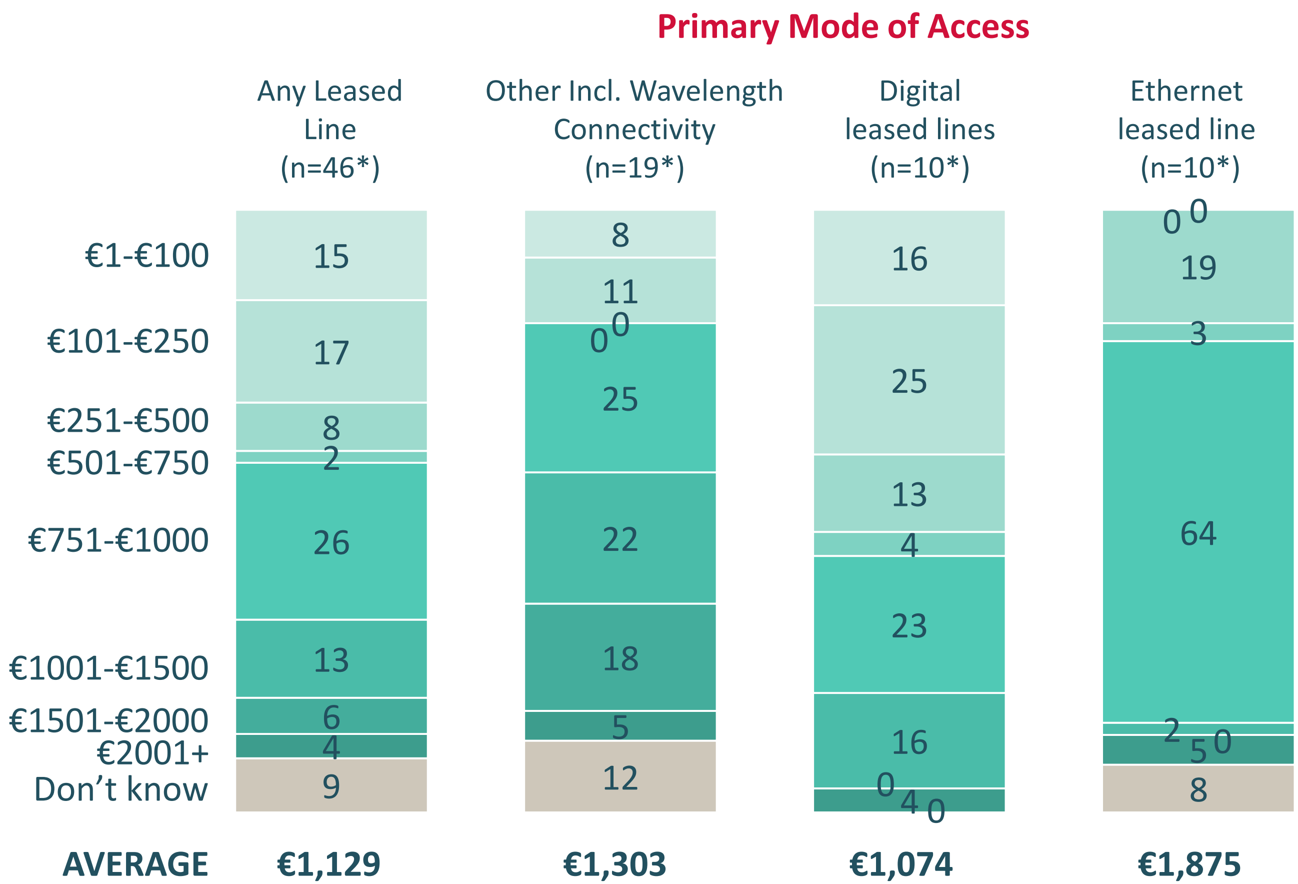
71% of non bundle leased line users are aware of the cost of their service, with a majority (51%) saying they definitely know.

(Q.59/126)

Typical Broadband Spend Per Month – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle And Know Costs - 46)

Q.60/Q.127 Excluding any short term introductory offers, typically how much do you pay for this service each month?



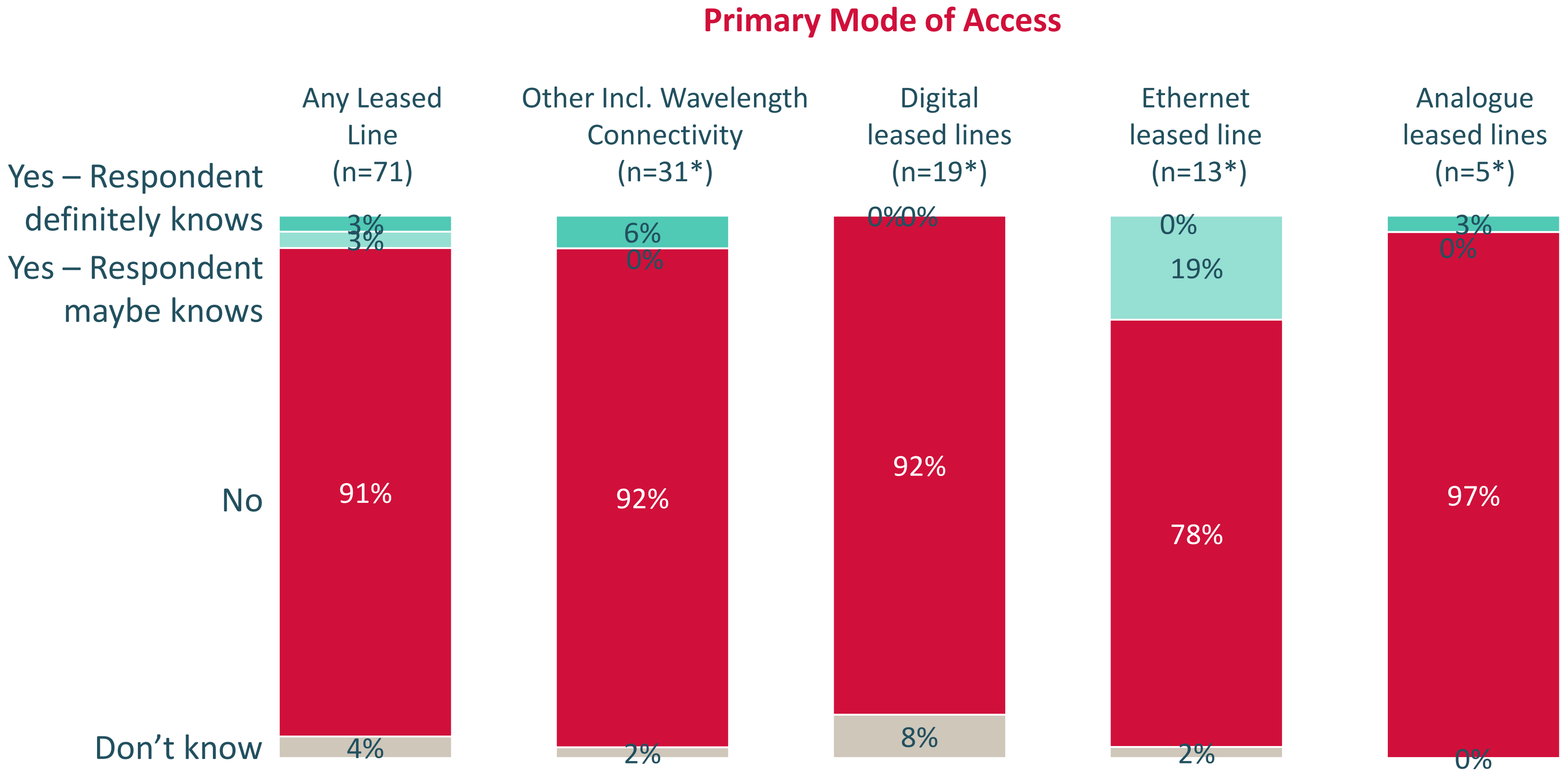
*Caution Small Base
Analogue leased lines base too small to show (4)

The average cost of a non bundle leased line service is €1,129, with 26% claiming their service costs between €751 and €1000.

Knowledge of Additional Cost to Broadband Charges – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle, n = 71)

Q.61/Q.128 Does the amount you pay for your leased line service include any additional charges?



Total: Yes	6%	6%	0%	19%	3%

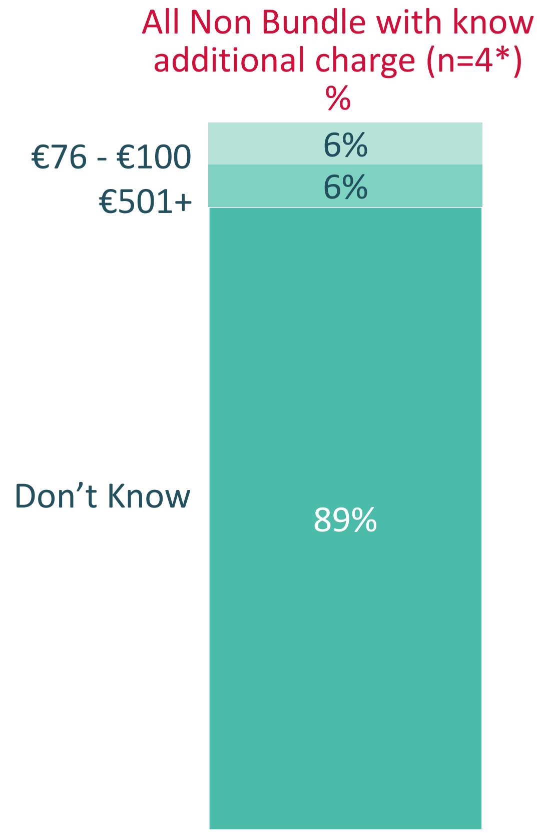
*Caution Small Base
*Too small to show cost breakdown, n = 4)

Just 6% claim their non bundled leased line service includes additional charges.

Typical Spend Per Month (Additional Charges)-Non Bundle Holders

(Base: All leased line bundle who know additional charge– n=4*)

Q.61/129 Can you estimate the cost of these additional charges?



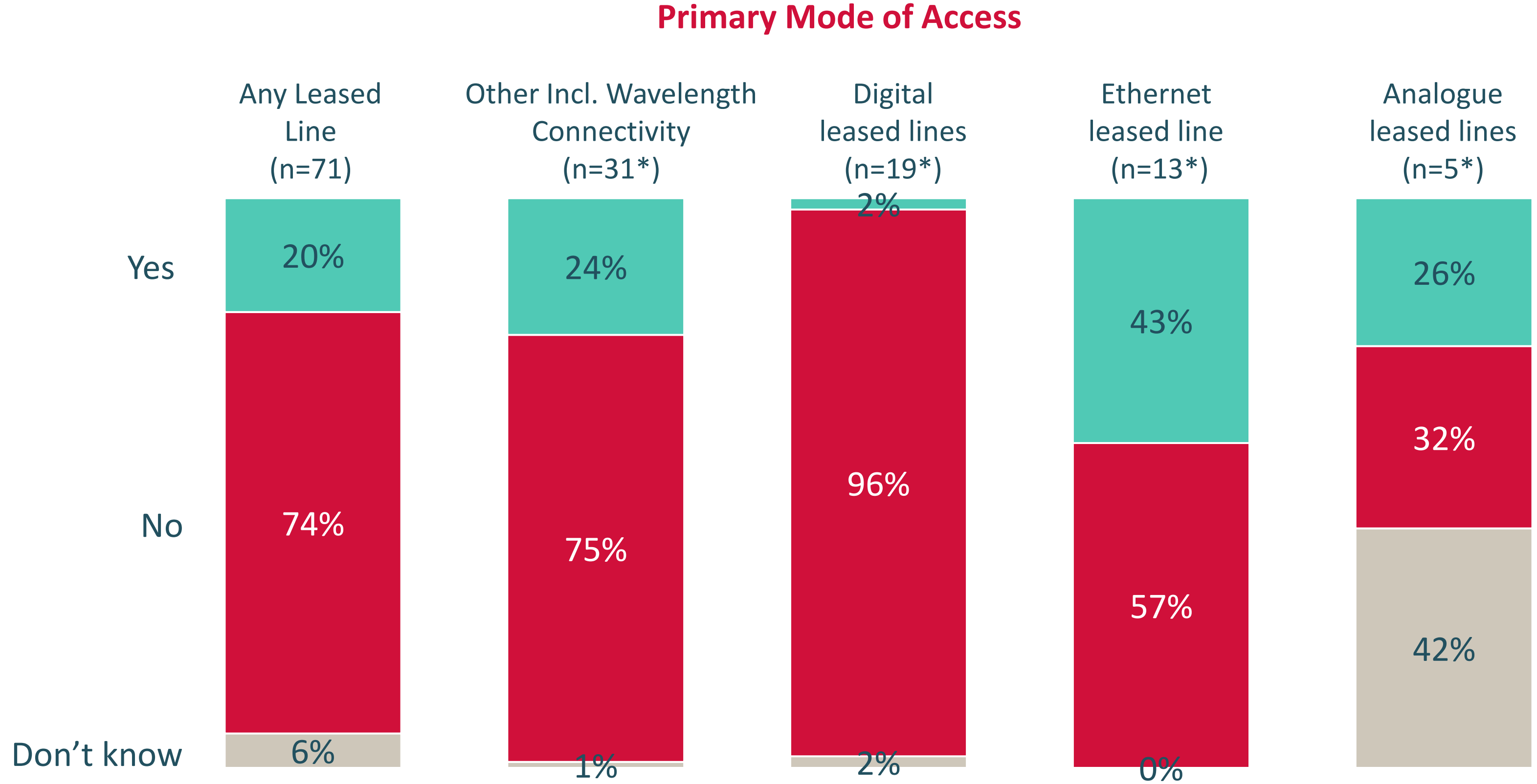
* Small base on this slide

There is a very small base of respondents for analysis in this slide. The majority of non bundle leased line holders who know of additional charges per month do not know specifically how much they are paying.

Non Bundle Users - Previously Bundled Services

(Base: Total Leased Line Users Who Use A Service Not In A Bundle – n=71)

Q.63/Q.130 Did your business previously purchase leased lines with other services in a bundle?



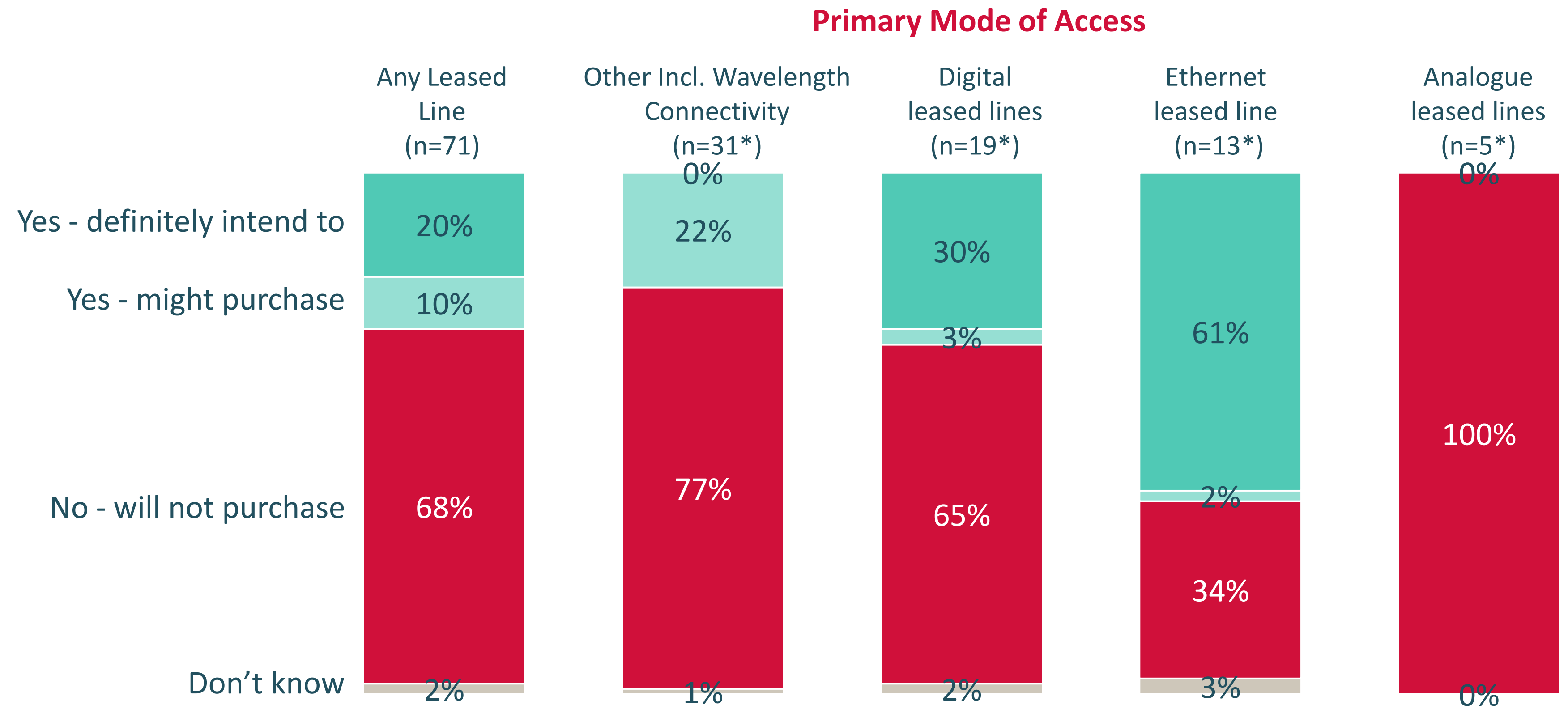
*Caution Small Base
*Caution Access over Mobile Phone too small to show (2)

20% of non bundle leased line users claim to have previously bundled services.

Non Bundle Users - Intention to Bundle

(Base: Total Leased Line Users Who Use A Service Not In A Bundle, n = 71)

Q.64/Q.131 Does your business intend to purchase your leased line service as part of a broader package with other services over the next 12 months?



Total: Yes	30%	22%	33%	63%	0%

*Caution Small Base

30% of non bundle leased line users claim intention to bundle in future with 20% claiming they definitely intend to do so.

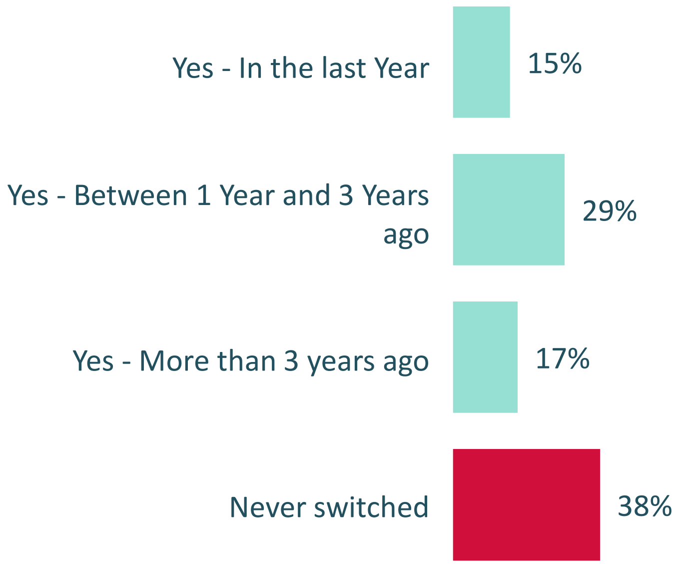
Switching (Leased Line)

Incidence of Switching

(Base: Total Leased Line Users, n=176)

Q.65/Q.132 Have you ever switched your leased line service provider or switched from a broadband service provider within the following time periods?

Any Leased (n=176)



Primary Mode of Access			
Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
12%	21%	10%	28%
36%	29%	21%	31%
27%	5%	14%	10%
24%	45%	55%	31%

*Caution Small Base

62% of Leased line users say they have ever switched, with most (29%) having done so between 1 year and 3 years ago.

Switchers - Previous Means of Access

(Base: Total leased line users who have ever switched, n=102)

Q.66/Q.133 Thinking about your previous leased line and or broadband service provider which of the following access modes did you previously use?

	Total Leased Line Switchers (n=102)	Primary Mode of Access			
		Other Incl. Wavelength (n=38*)	Digital leased lines (n=32*)	Ethernet leased line (n=21*)	Analogue leased lines (n=8*)
Total: Leased Line Options	74%	65%	67%	91%	85%
Digital leased lines	27%	28%	47%	21%	0%
Analogue leased lines	25%	12%	9%	15%	85%
Ethernet Leased Line	21%	17%	3%	70%	0%
Other incl. Wavelength Connectivity	11%	11%	15%	23%	0%
Don't know	9%	11%	11%	0%	15%
Total: Broadband	53%	57%	57%	25%	73%
Fixed broadband (Landline)	42%	33%	50%	23%	73%
Fixed broadband (Fibre)	7%	12%	3%	13%	0%
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	5%	6%	0%	18%	0%
3G\4G Mobile Broadband	4%	4%	2%	10%	0%
Broadband provided by Satellite	3%	3%	1%	10%	0%
Fixed broadband (Cable)	3%	3%	0%	10%	0%
Fixed BB (Wireless Connection)	2%	0%	2%	10%	0%
Any other form of broadband connection	3%	8%	1%	0%	0%

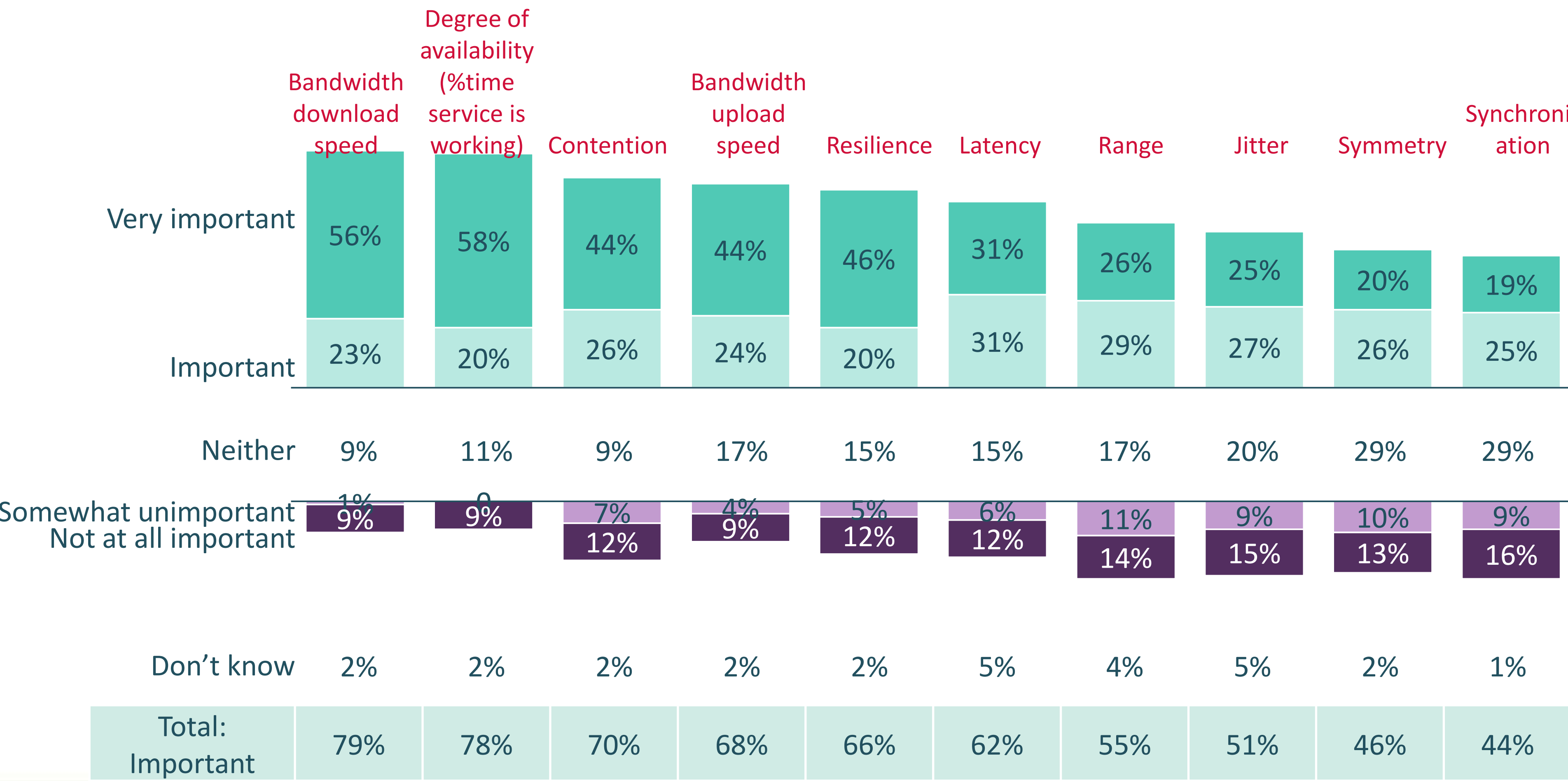
*Caution Small Base

74% of leased line users have switched from leased lines, with 53% having switched from broadband.

Switchers (Leased Line) - Importance in Decision to Switch

(Base: Leased Line users who have switched provider, n = 102)

Q.68 Thinking about your primary/main leased line service are you currently tied into a contract with your service provider?



Download Speed is the most important factor for Leased line users who have switched provider, with Synchronisation least important for these businesses.

Previously Bundled Services, What was included

(Base: Total leased line users who have ever switched – 102)

Q.68/Q.135 How important are these options in your decision to switch?

	Any Leased Line (n=102)	Primary Mode of Access: Other Incl. Wavelength Connectivity (n=38*)	Digital leased lines (n=32*)	Ethernet leased line (n=21*)	Analogue leased lines (n=8*)
Bandwidth download speed	79%	94%	74%	77%	68%
Degree of availability (%time service is working)	78%	78%	95%	79%	65%
Contention	70%	86%	68%	77%	53%
Bandwidth upload speed	68%	90%	68%	45%	53%
Resilience	66%	76%	70%	79%	37%
Latency	62%	72%	67%	64%	43%
Range	55%	45%	66%	53%	65%
Jitter	51%	51%	66%	42%	53%
Symmetry	46%	68%	42%	42%	23%
Synchronisation	44%	59%	47%	33%	23%

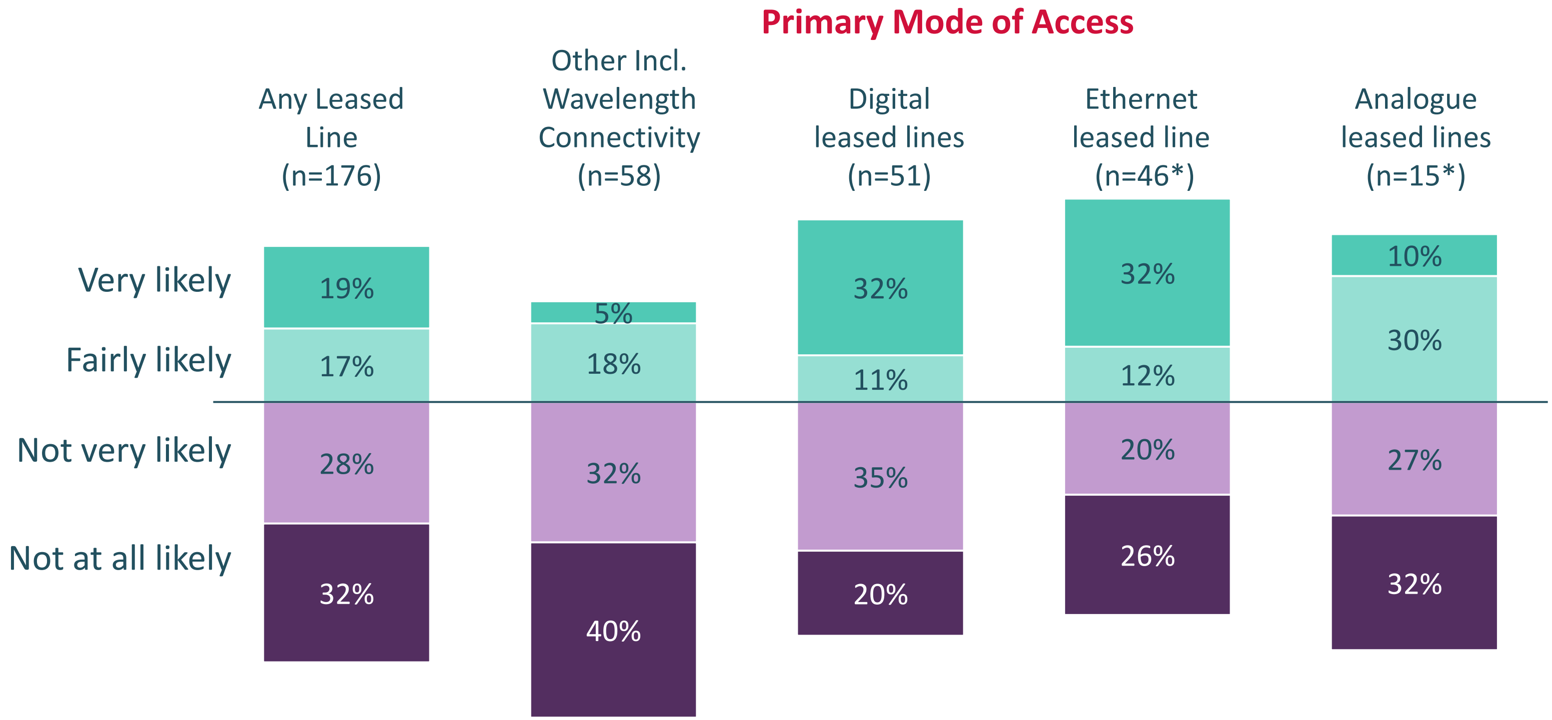
*Caution Small Base

The importance of download speed is seen across all access types, although the degree of availability (%time service is working) takes on increasing importance for digital leased line users.

Likelihood to Switch - Next 12 - 18 Months

(Base: Total Leased Line Users, n=176)

Q.69/Q.136 How likely are you to consider switching leased line service provider within the next 12 - 18 months?



	Any Leased Line (n=176)	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Don't know	4%	5%	2%	10%	2%
Total: Yes	36%	23%	44%	44%	40%

*Caution Small Base

36% of leased line users say they are likely to switch within the next 12 – 18 months.

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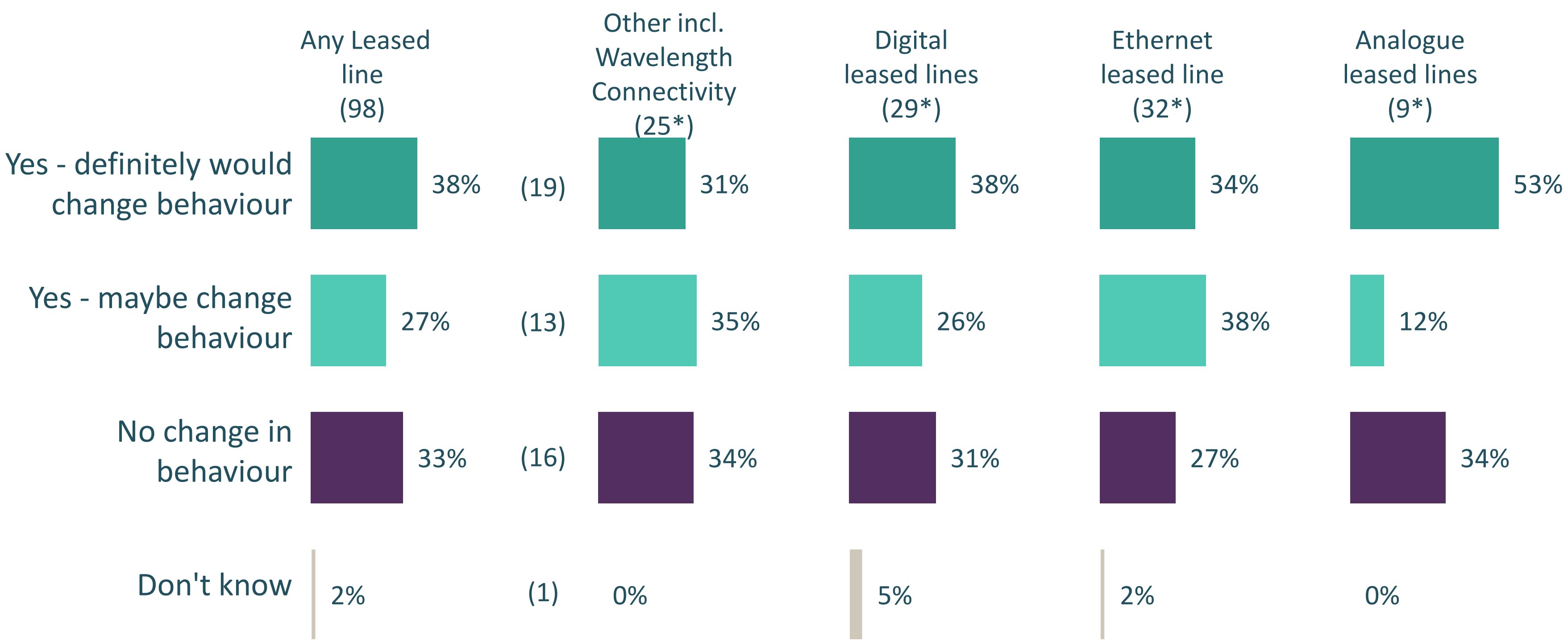
SSNIP Bundle (Leased Line)

Response to 10% Increases in Leased Line – Leased Line Bundle Users

(Base: Total Leased Line Users in bundle – n=98)

Q.S11/Q.S31 Do you believe that your business would change your actual purchasing behaviour with respect to your leased line service?



( ) Figures in brackets relate to total actual figures

* -small base

65% of leased line bundle businesses are likely to switch given a 10% increased in cost of leased line.

Response to 10% Increase Leased Line Cost – LL Bundle Owners

(Base: Total leased line bundle owners who would change behaviour – n=61)

Q.S12/Q.S32 What your business would be most likely to do in response to this hypothetical price increase of your leased line service?

	Any Leased line (61)		Other incl. Wavelength Connectivity (17*)	Digital leased lines (18*)	Ethernet leased line (19*)	Analogue leased lines (6*)
Total: Cancel the service	80%	(25)	56%	83%	96%	88%
Cancel LL portion of bundle to a different supplier	39%	(12)	28%	30%	51%	49%
Cancel the service and switch total bundle different supplier	28%	(9)	25%	24%	28%	39%
Cancel the service and switch to BB	11%	(4)	0%	27%	16%	0%
Cancel the service completely	1%	(5)	3%	2%	1%	0%
Total: Keep the service	15%	(-)	41%	15%	0%	0%
Keep the service (and downgrade to a cheaper service with same supplier)	9%	(3)	25%	15%	0%	0%
Keep the service (do nothing)	6%	(2)	16%	0%	0%	0%
I\We would do something else	4%	(1)	3%	1%	2%	12%
Don't know	1%	(-)	0%	2%	2%	0%

( ) Figures in brackets relate to total actual figures

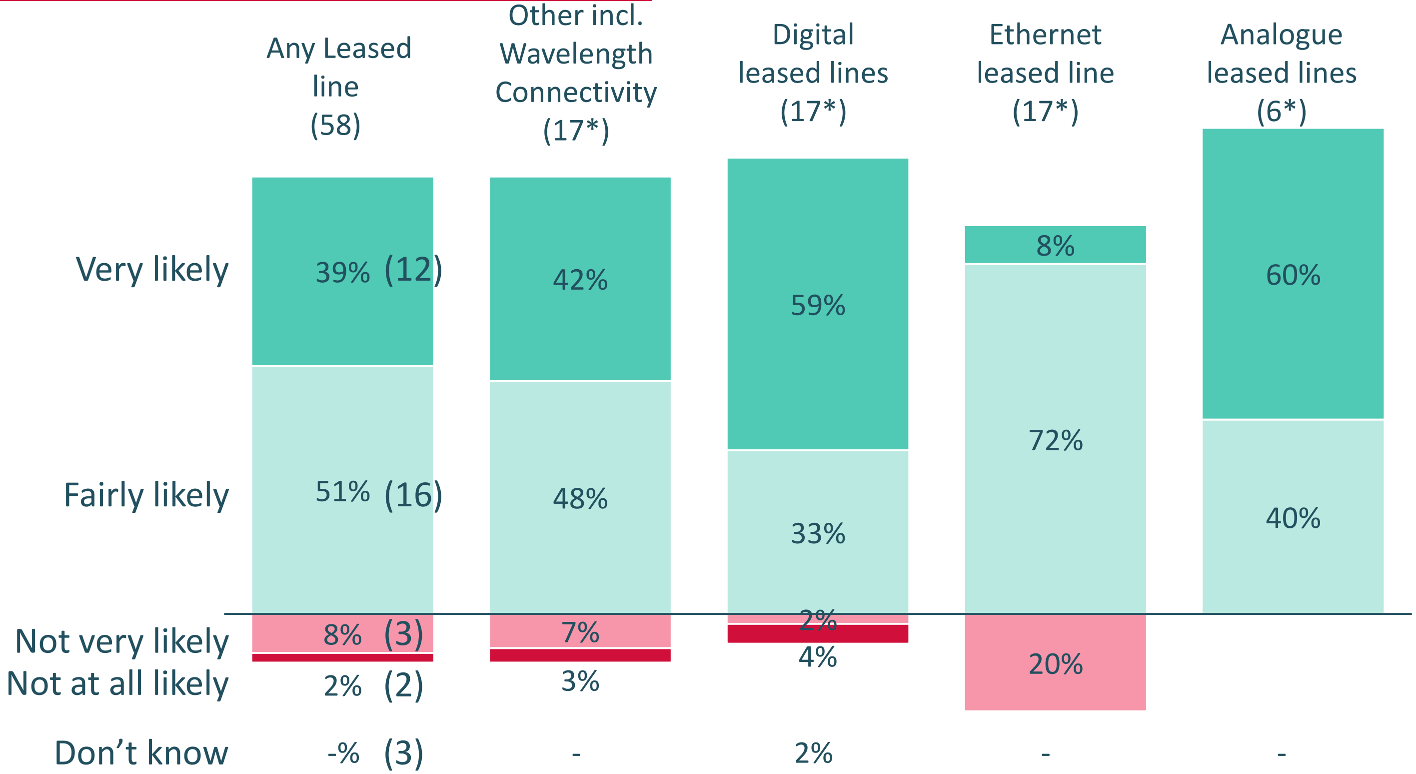
* -Small Base Size

80% of leased line bundle businesses who will change behaviour given 10% increase are likely to cancel service

Likelihood To Follow Through With Any Change In Behaviour – Leased Line Bundle Owners

(Base: Total Leased Line bundle owners who will change behaviour – n=58)

Q.S13/Q.S33 How likely is your business to carry out any of the stated actions?



Total Likely	90% (28)	90%	92%	80%	100%

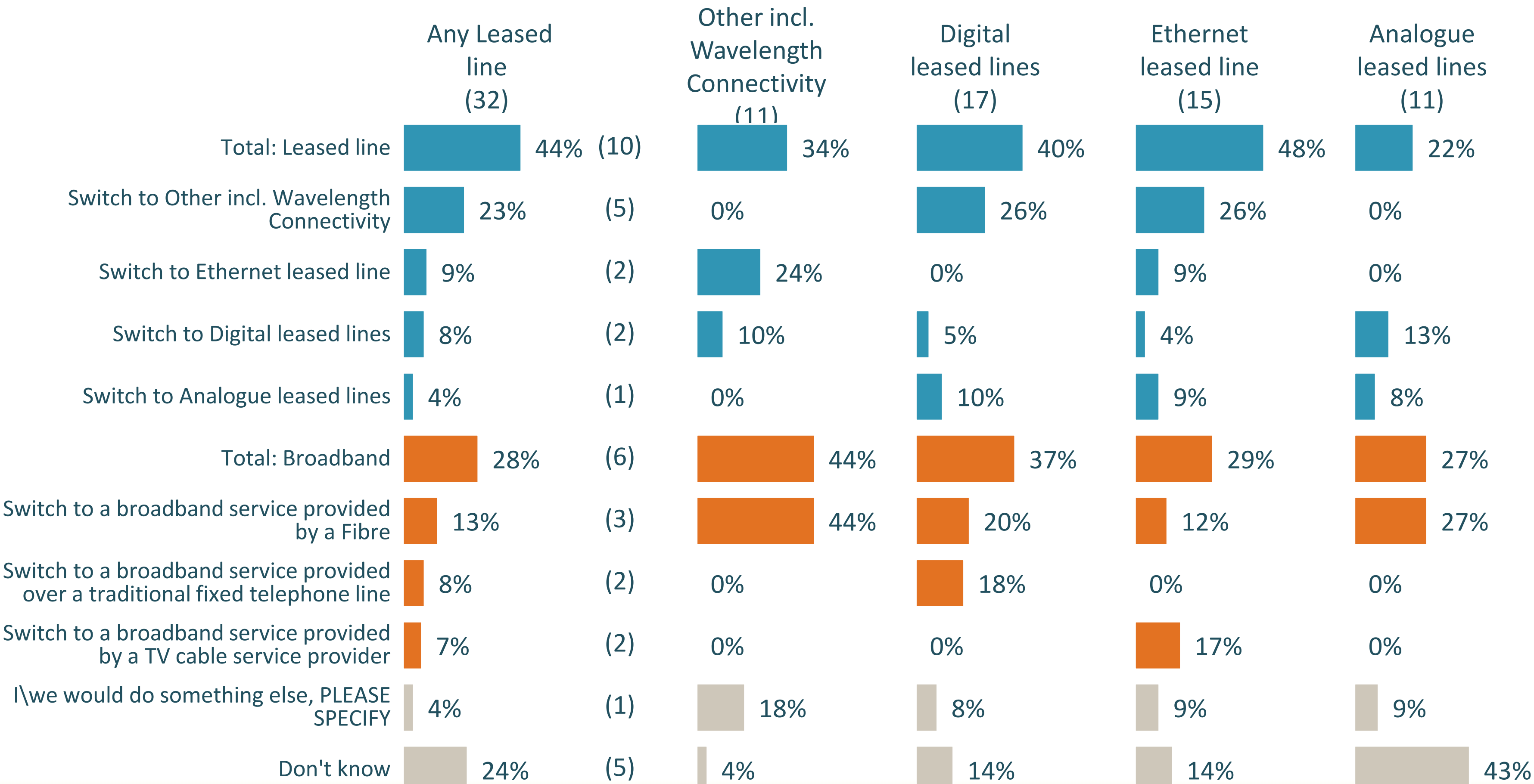
( ) Figures in brackets relate to total actual figures
*Small Base Size

90% of leased line bundle businesses who claim they would switch their service given a 10% increase in price are likely to do so.

Service Likely to Switch To – Leased Line Bundle Switchers

(Base: All Leased Line Bundle and are likely to switch after price change -32)

Q.S14 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

NOTE: SMALL BASE ENTIRE CHART

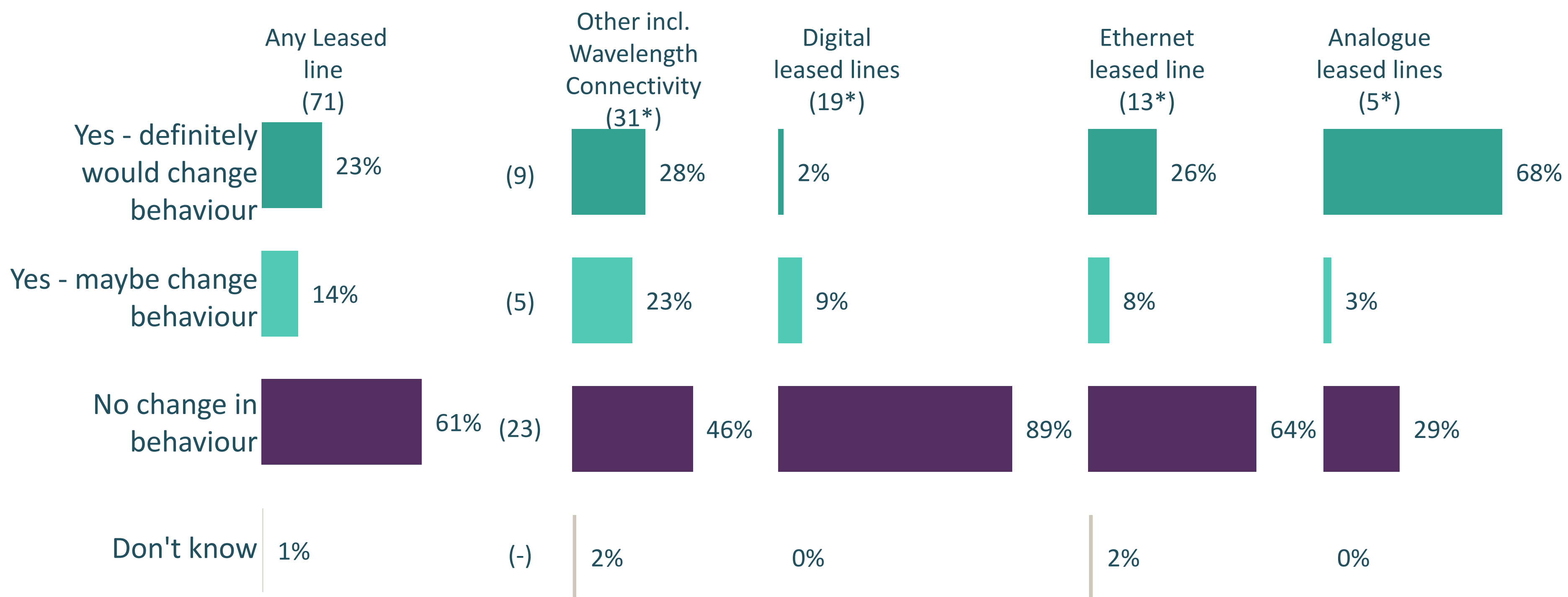
44% of leased line bundle switchers are likely to switch to another leased line service with 28% likely to switch to broadband and 24% were unsure.

SSNIP Non - Bundle (Leased Line)

Response to 10% Increases in Leased Line – Non Bundle Owners Users

(Base: Total Leased Line Non Bundle – n=71)

Q.S16 Do you believe that your business would change your actual purchasing behaviour with respect to your leased line service?



( ) Figures in brackets relate to total actual figures

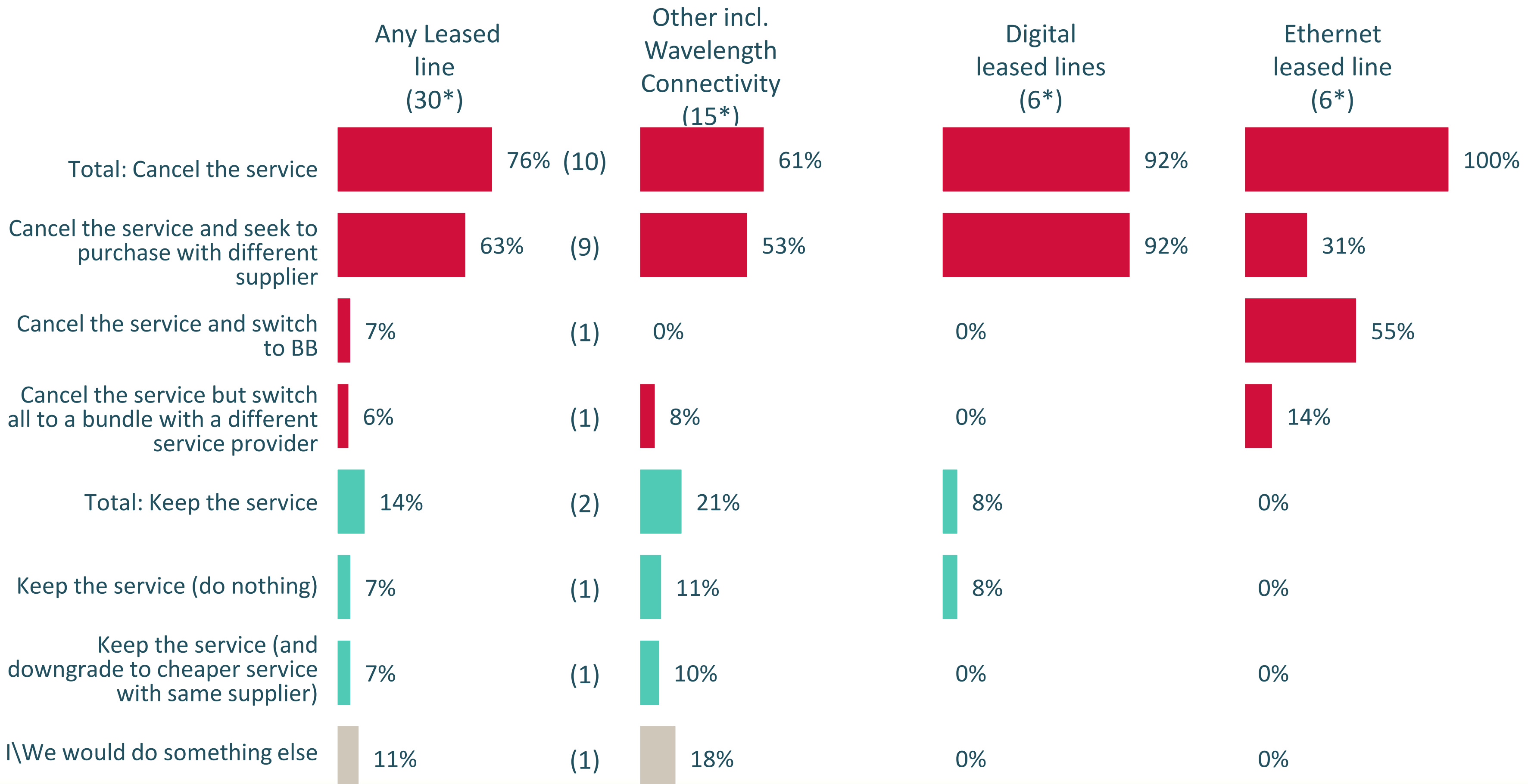
* -Small Base Size

37% of leased line non bundle users would likely change behaviour if there was a 10% increase in the cost of their leased line service.

Response to 10% Increase Leased Line Cost – Non Bundle Users

(Base: Total leased line users who use a service as part of package and may change behaviour -30)

Q.S17 What your business would be most likely to do in response to this hypothetical price increase of your leased line service?



( ) Figures in brackets relate to total actual figures

*Small Base Size

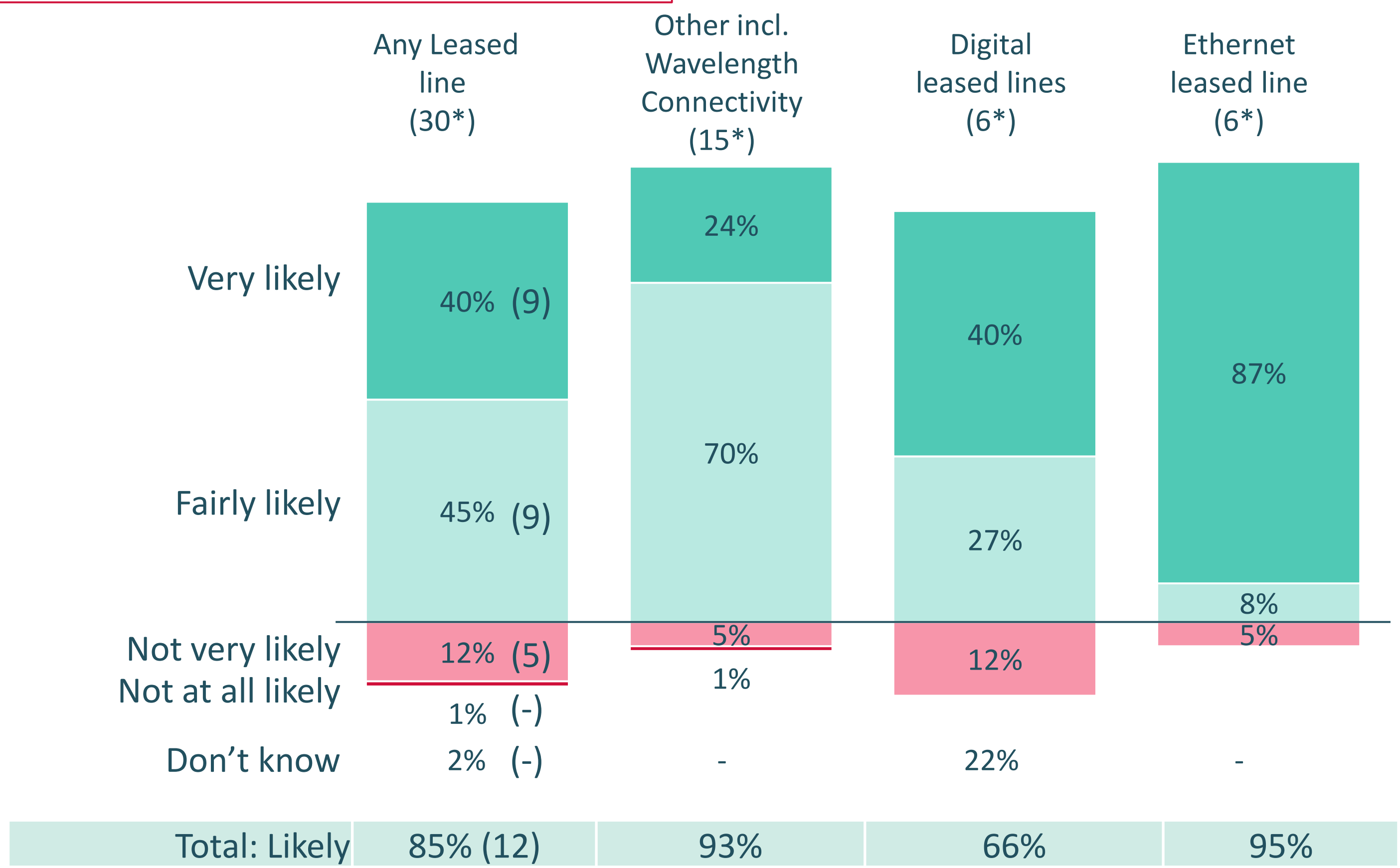
Analogue Leased Line n =3

76% of leased line non bundle businesses who will change behaviour given 10% increase are likely to cancel service.

Likelihood To Follow Through With Any Change In Behaviour – Leased Line Non Bundle Owners

(Base: Total Leased Line non bundle owners who will switch service – n=30*)

Q.S18/Q.S33 How likely is your business to carry out any of the stated actions?



( ) Figures in brackets relate to total actual figures

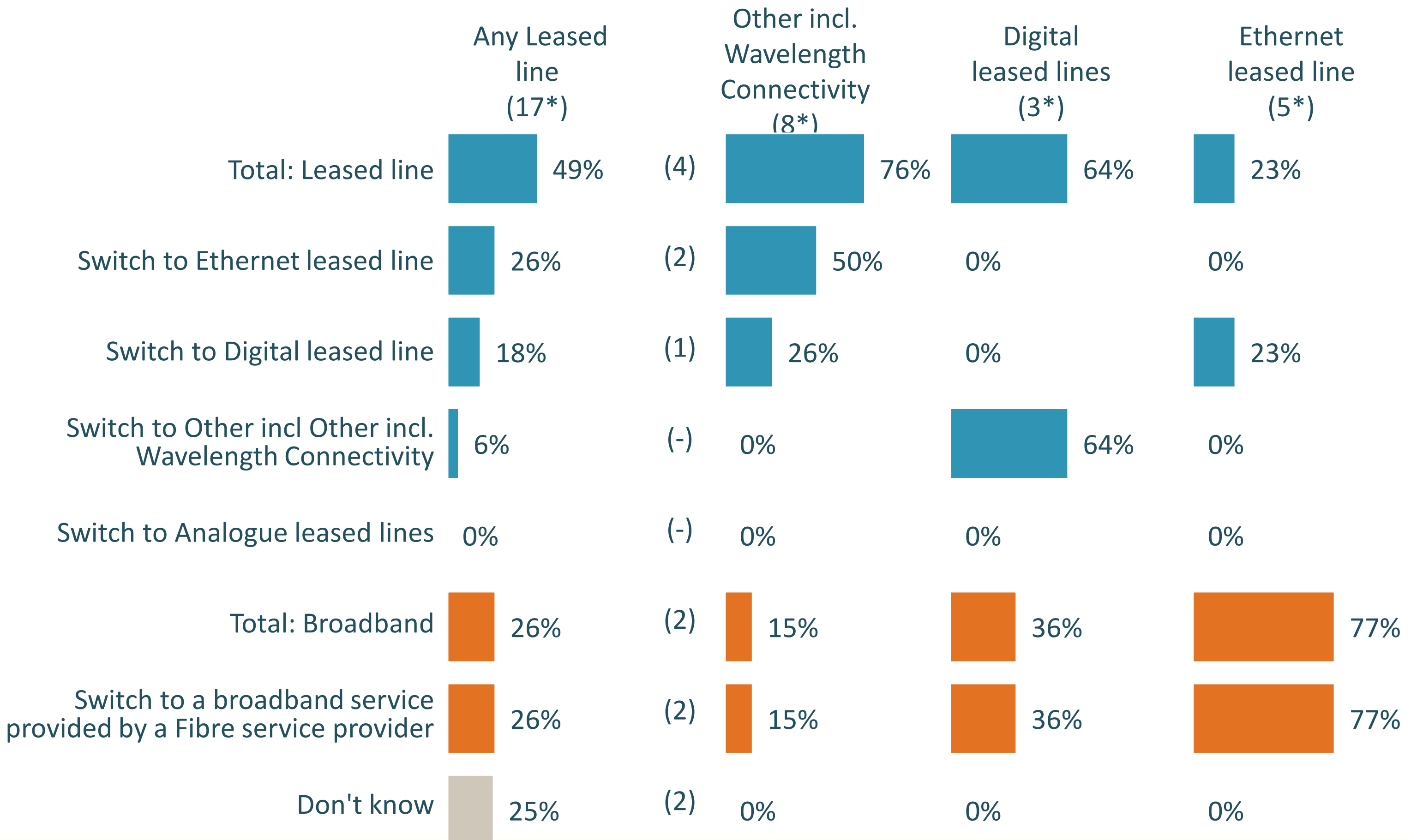
NOTE: SMALL BASE ENTIRE CHART

85% of leased line non bundle businesses who claim they will switch their service given a 10% increase in price are likely to do so.

Service Likely to Switch To – Leased Line Non Bundle Switchers

(Base: All Leased Line Bundle and are likely to switch after price change – n=17)

Q.S19 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

NOTE: SMALL BASE ENTIRE CHART

49% of leased line non bundle switchers are likely to switch to another leased line service with 26% likely to switch to broadband and 25% were unsure.

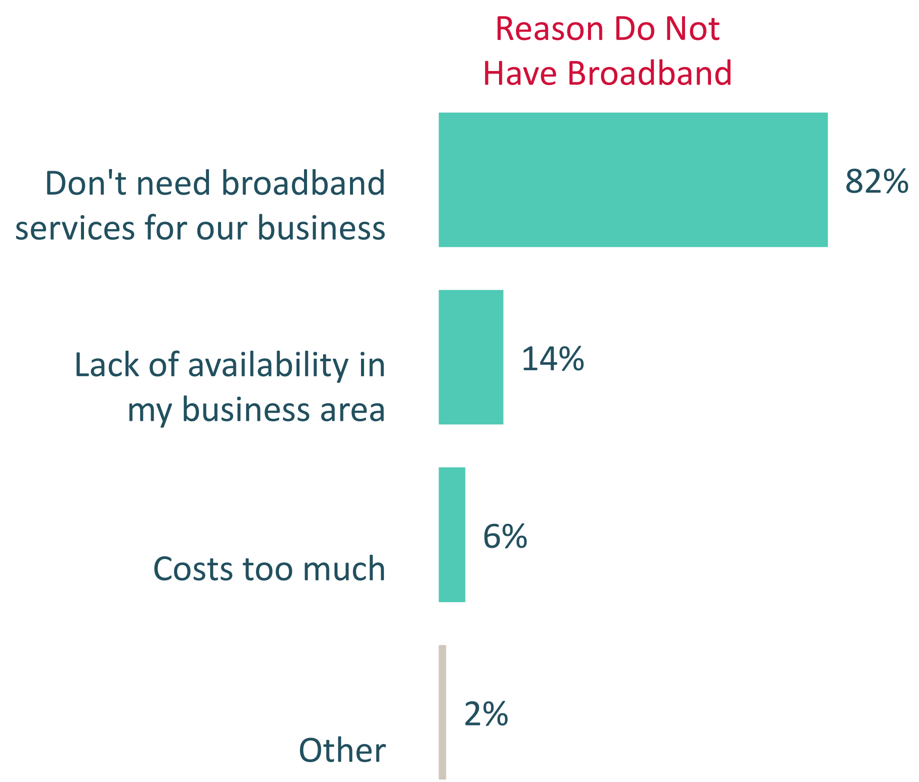
(Q.s2/s22/s12/s32)

Those Who Do Not Use Broadband Or Leased Line

Reason Do Not Have Broadband

(Base: All not using broadband services - 120)

Q.141 Why do you not have broadband access for your business?

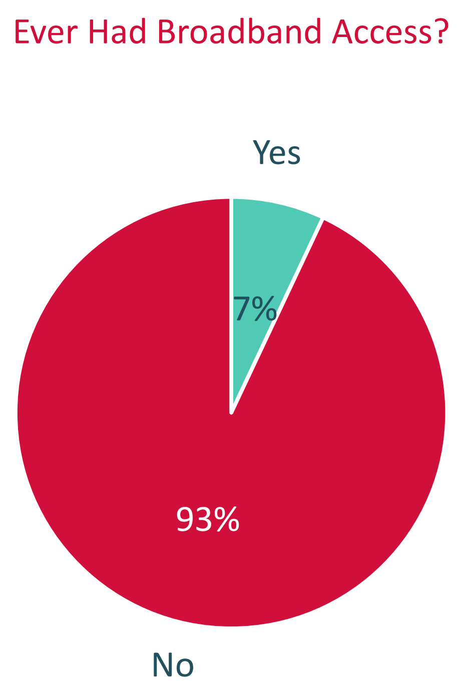


82% of those without broadband do not have it as they do not require it for their business. This opinion was expressed only in the Micro business sector.

Did You Ever Have Broadband Access in Your Business?

(Base: All non broadband owners - 120)

Q.142 Did you ever have broadband access in your business?

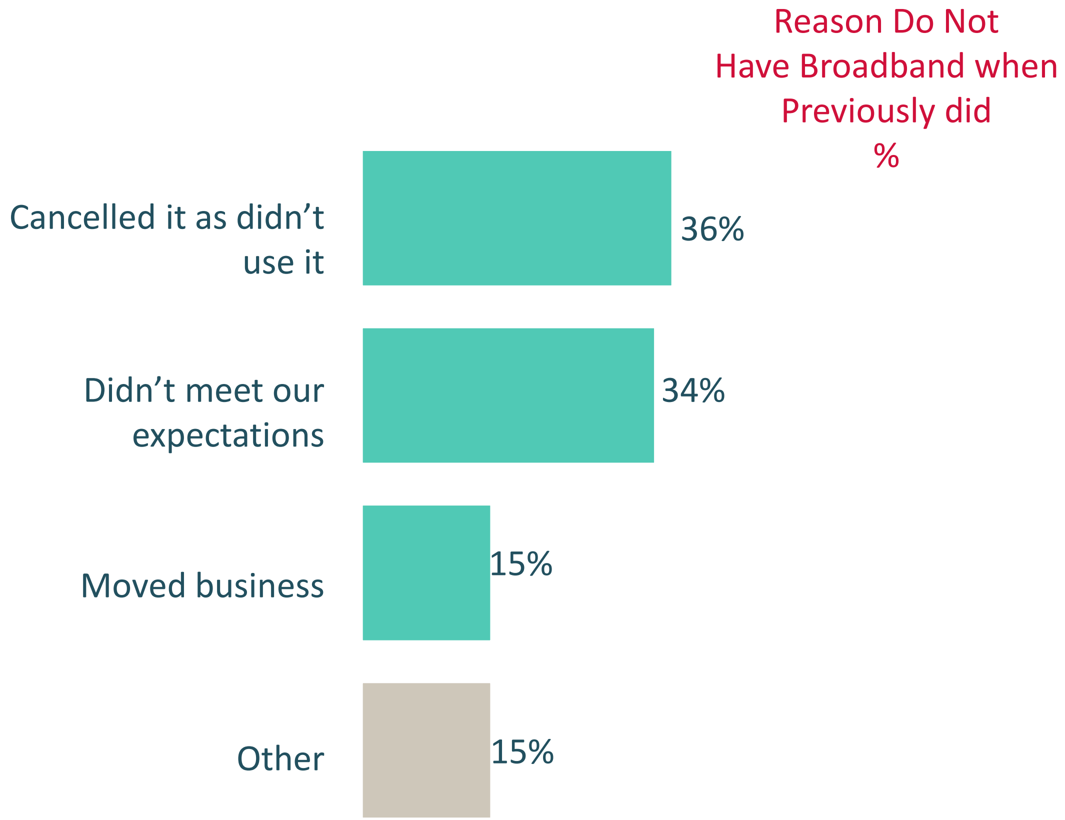


7% of businesses currently without broadband access ever had broadband for their business in the past.

Reason Do Not Have Broadband When Previously Did

(Base: All not using broadband services – 8*)

Q.143 Why do you not have broadband access for your business when previously you did?



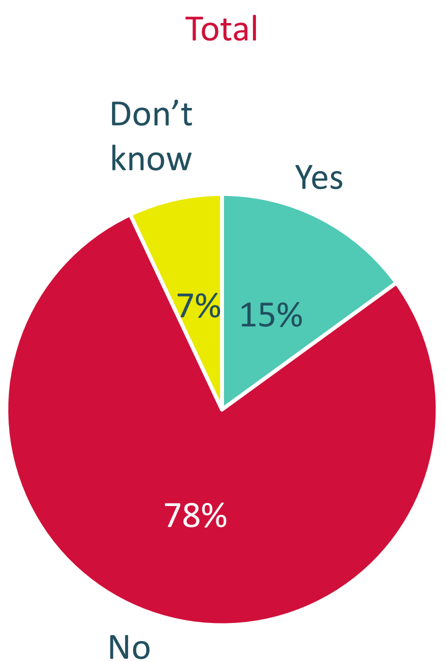
NOTE: SMALL BASE ENTIRE CHART

The base size in this slide is very small. Business who do cancel broadband did so as they didn't use it or it didn't meet their expectations.

Plan on Getting Broadband In The Next 12 Months?

(Base: All not using broadband services - 120)

Q.144 Do you plan on getting broadband access for your business in the next 12 months?

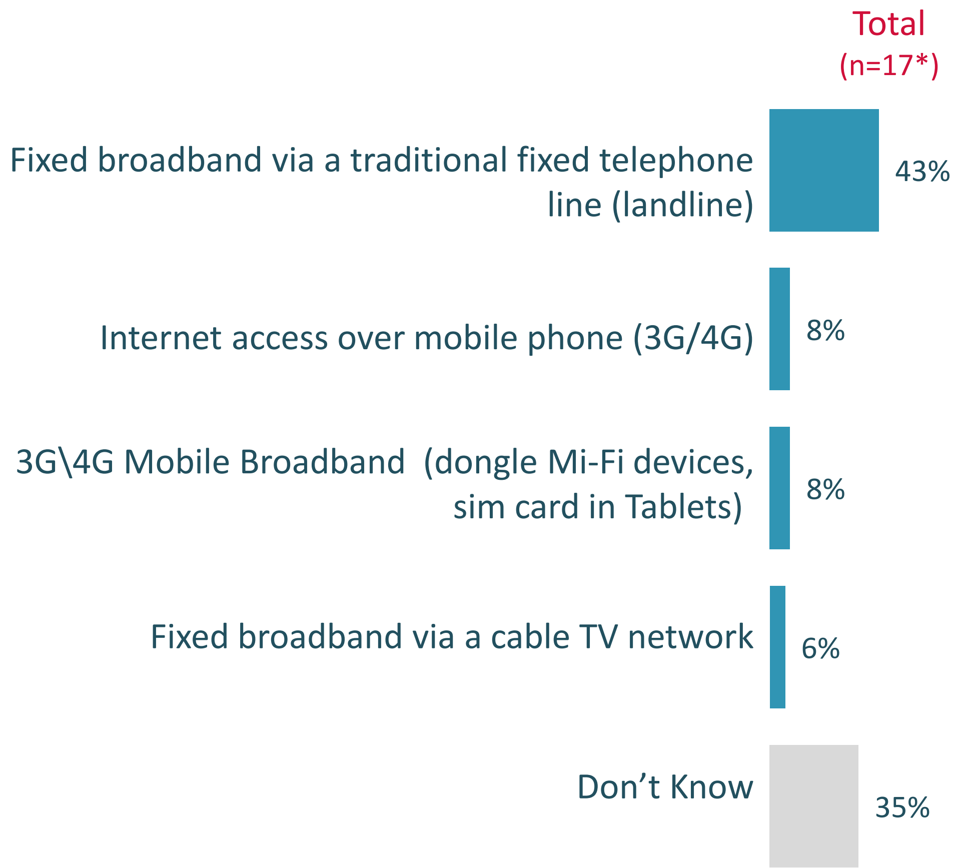


15% of businesses currently without broadband access plan on getting broadband for their business in the next 12 months.

What Form of Access Are You Most Likely to Get?

(Base: All not using broadband but considering it, N= 17*)

Q.145 Can you tell me which broadband mode of access you would consider?



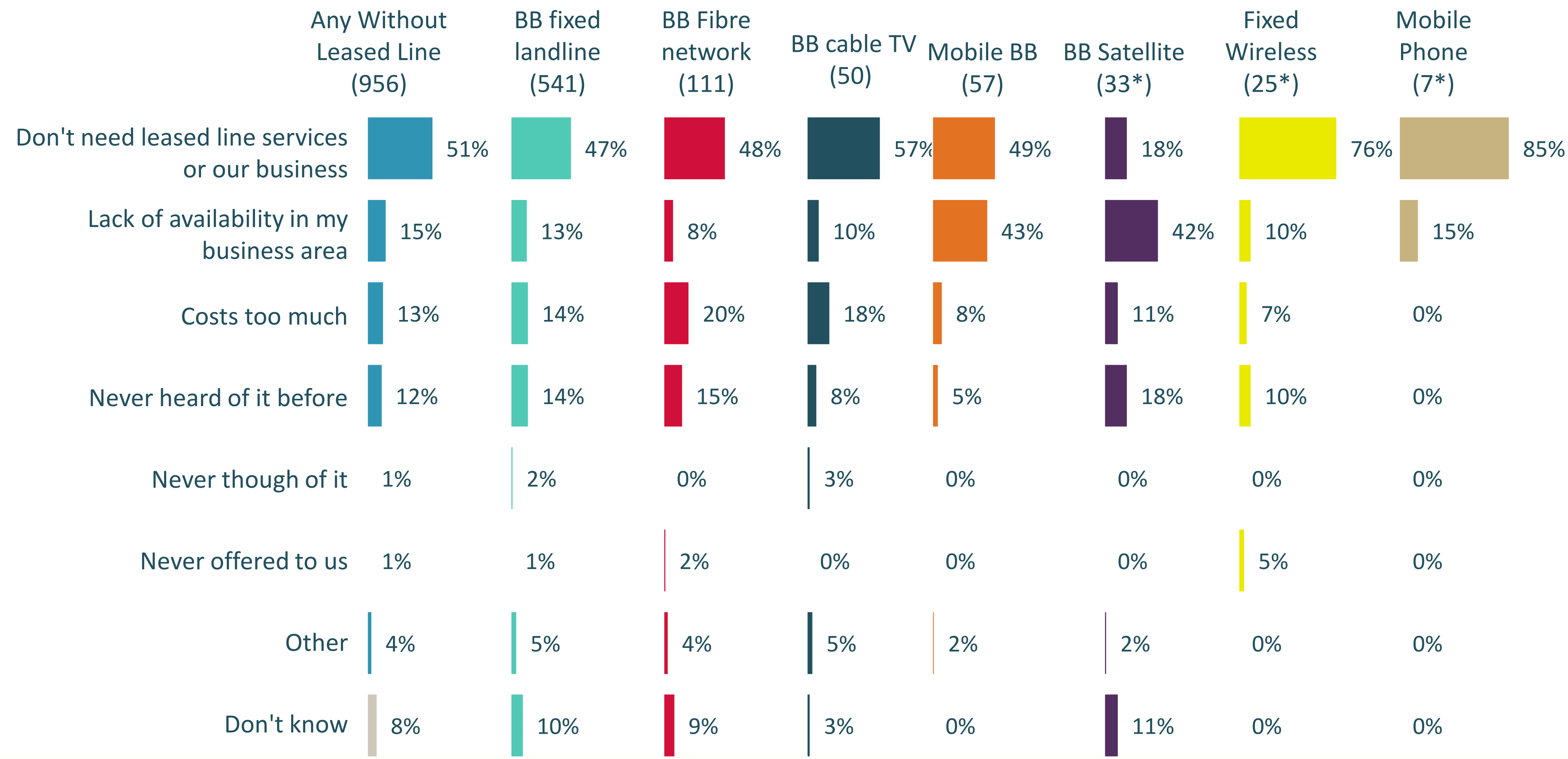
* = SMALL BASE

Many businesses considering getting broadband are likely to seek broadband via traditional fixed line telephone (43%). 35% however, were unsure of what type of broadband they would consider getting.

Reason Do Not Have Leased Line

(Base: All not using Leased Line services - 956)

Q.149 Why do you not have leased line access for your business?



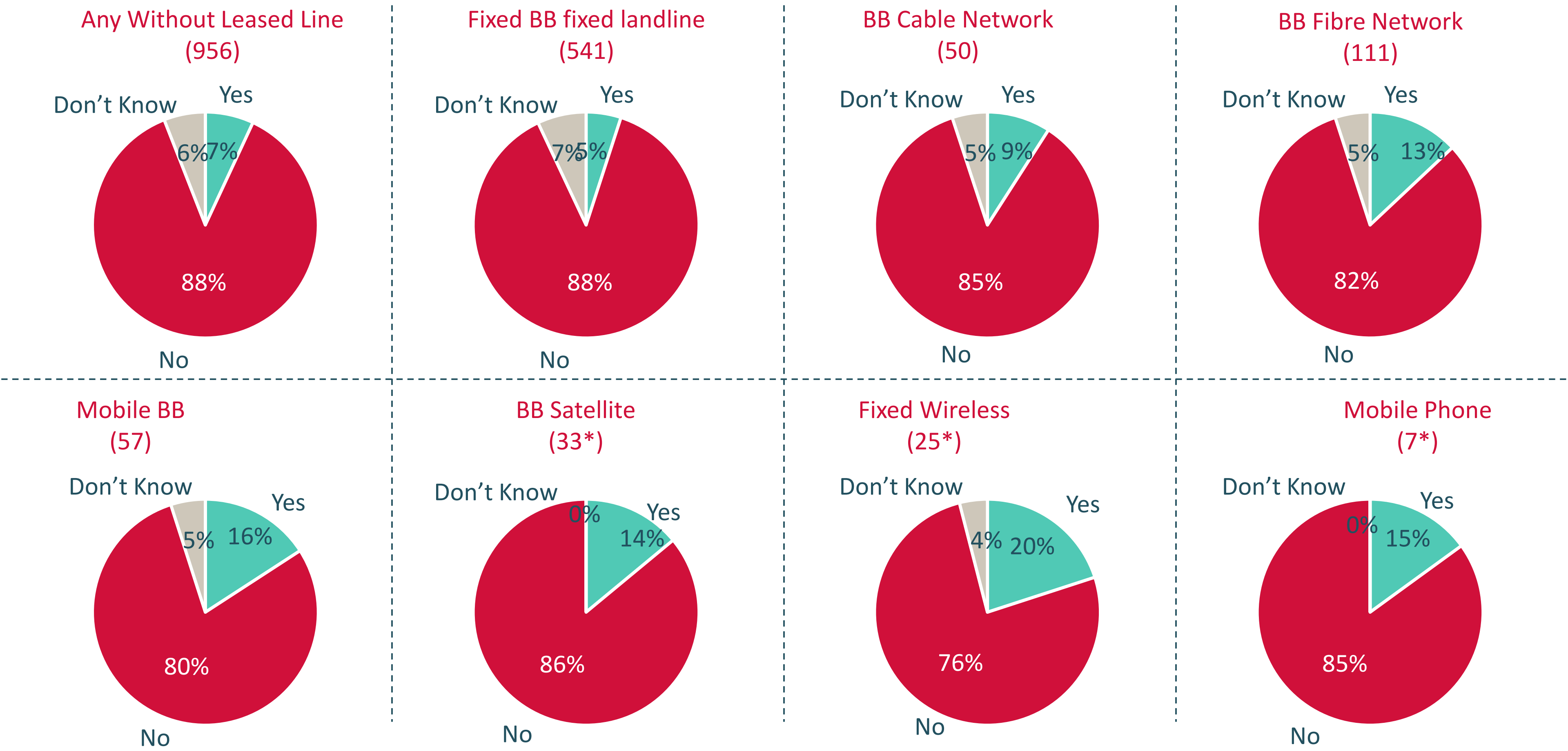
(Base: Small Base)

51% of businesses without a leased line do not have one as it is not required for the business. Availability (15%), cost (13%) and lack of awareness (12%) are also reasons for not having a leased line service.

Did You Ever Have Leased Line (Current Non Leased Line Owners)

(Base: All non leased line holders - 956)

Q.150 – Did you ever have a leased line?



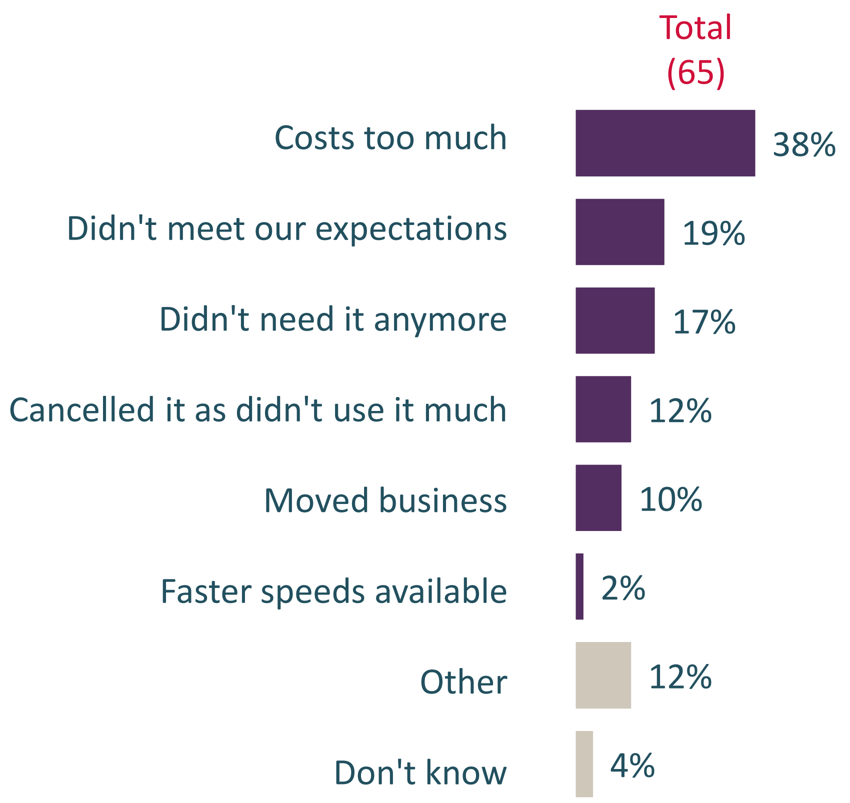
* - Small Base

94% of business currently without a leased line have never previously had a leased line or don't know if the business had one.

Reason Do Not Have Leased Line when previously did have it – Multiple Responses

(Base: All not using Leased Line services who previously did - 65)

Q.151 Why do you not have leased line access for your business when previously you did have it?

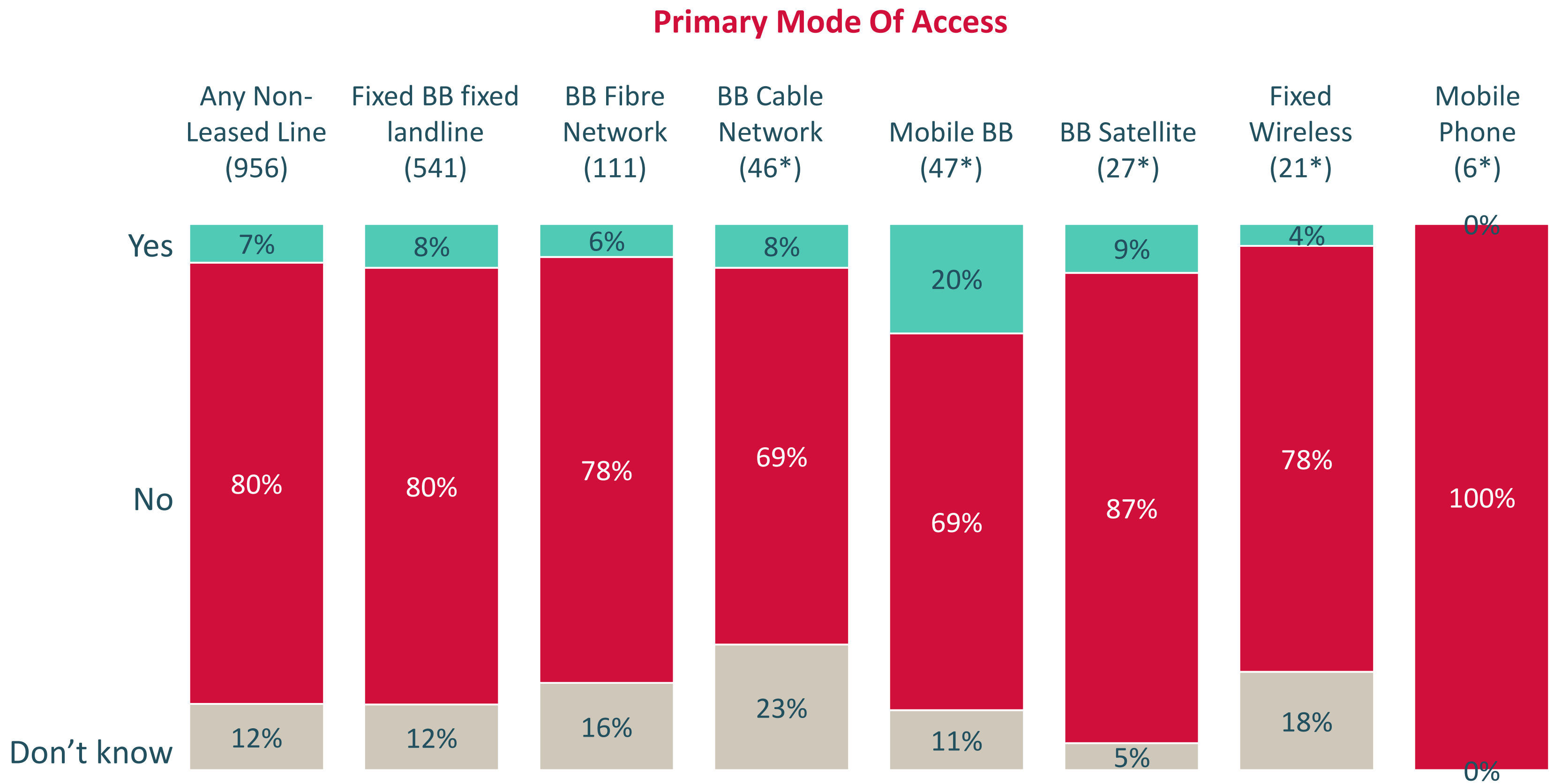


The primary reasons for previous leased line owners cancelling their leased line is cost (38%).

Plan on Getting Leased Line in the Next 12 Months?

(Base: All not using Leased Line services - 956)

Q.152 Do you plan on getting leased line access for your business in the next 12 months?



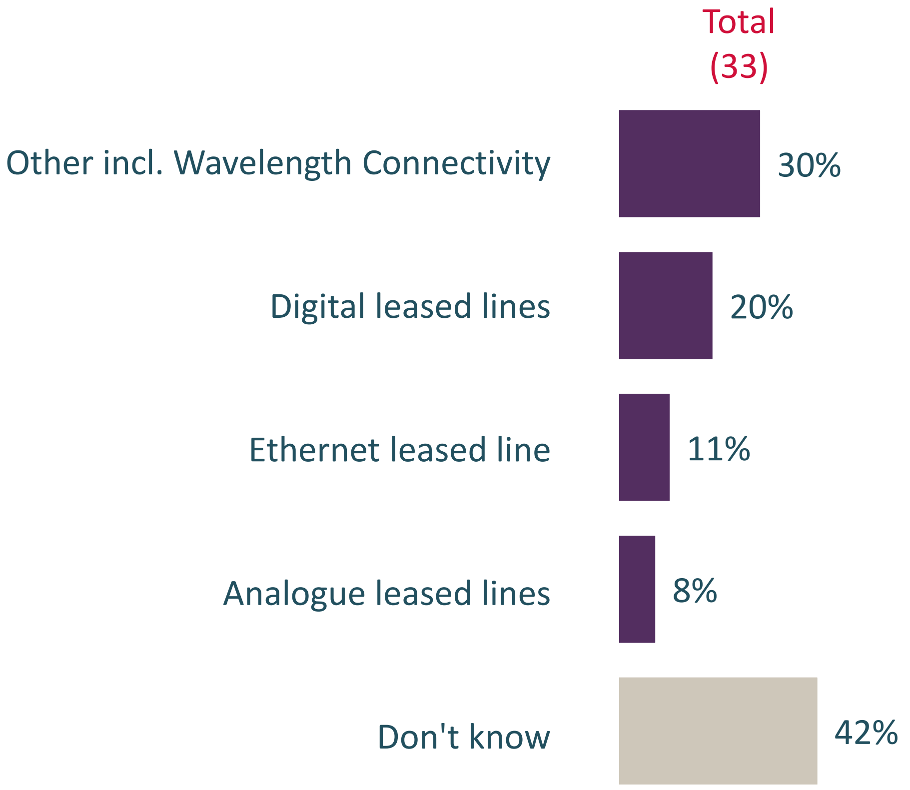
* Small Base

The percentage of business without leased lines and planning on getting leased lines in the next 12 months is low at 7%.

Intended Future Leased Line uptake*

(Base: All not using Leased Line services and intending to get Leased line in future - 33)

Q.155 You mentioned that you are planning on getting leased line access for your business in the next 12 months. Can you tell me which leased line mode of access you would consider?



*Small Base

Other incl. wavelength connectivity is the leased line type most likely to be purchased in the future (30%).

THANK YOU

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