Commission for
Communications Regulation

Irish Communications Market

Quarterly Key Data

June 2003

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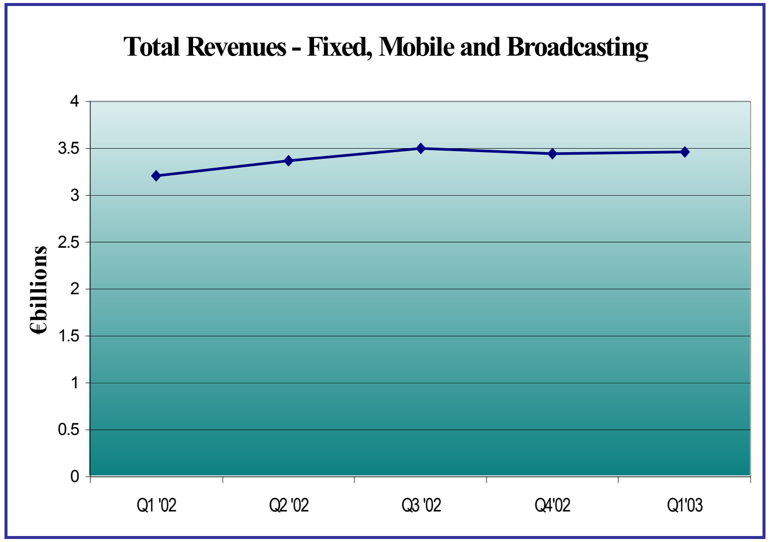
Legal Disclaimer

1 Overall Market Data

The data in this review is based on returns from licensees for the period 1st January 2003 to 31st March 2003. The report is based on submissions from 39 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



[1] ComReg does not collect data from unlicensed operators.

- Total revenues for fixed, mobile & broadcasting markets now stands at an estimated €3.46 billion per annum on an annualised basis.
    - Increase of approximately 0.6% since last quarter.
    - Increase of approximately 8% since June 2002.

1.2 Telecoms Sector as a % of GDP

- Telecoms sector is estimated to account for approximately 2.7% of Irish GDP (2001)[2].
- Overall revenues have increased by €20 million on an annualised basis since last quarter.

[2] Figure was calculated using GDP at market price (2002) – ESRI Quarterly Economic Commentary, Spring 2003. Last quarter the figure was 3% which was calculated using GDP at market prices 2001.

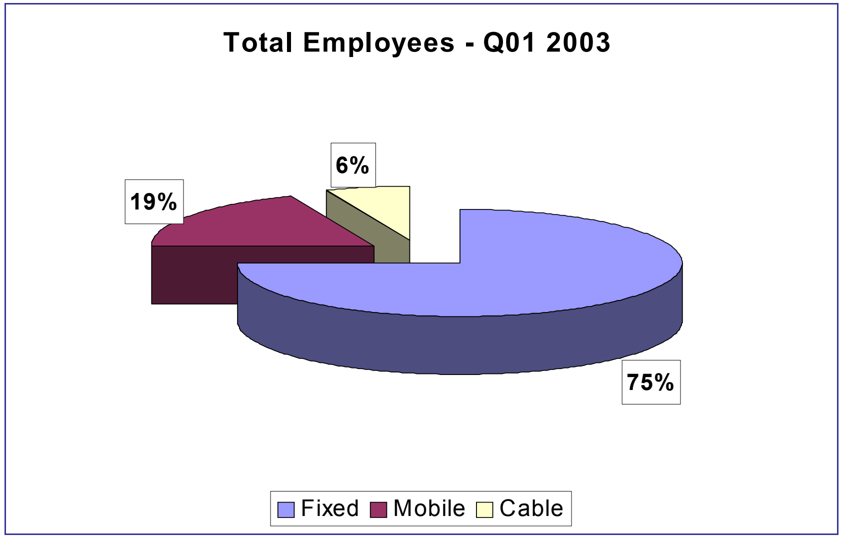
1.3 Number of licenses

- To date 48 General and 46 Basic licences[3] are in issue in the Irish market.
- There are 23 operators[4] providing services under General licences[5] (June 2002; 20) and 17 under Basic licences (June 2002; 18)[6].

1.4 Employees

- The number employed in the telecommunications sector is approximately 14,700.
  - Decrease of 1.5% since last quarter.
  - Decrease of 10% since last year.
- The fixed, mobile & broadcasting markets account for approximately 75%, 19% and 6% of the total figure respectively. The proportions were 76%, 18% and 6% last quarter.

Figure 1.1.2 Total Employees



[3] Basic licences were awarded to Airspeed Communications Ltd., Aramiska BV, Callidus Telecom Europe Ltd., Greenbeam Networks Ltd., Last Mile Ltd., Megabeam Networks Ltd. and Onecall Ltd. Basic licences were revoked from IDirect Inc., Lake Communications, Torc Telecom, Universal Access Ireland and Next Telecom. Smart Telecom plc acquired Alord Holdings Ltd. (t/a Switchcom). 360 Atlantic Ireland Ltd. transferred basic licence to CVC Acquisition Company (Ireland) Ltd.

[4] Dome Telecom Ltd. were operational this quarter

[5] Metromedia Fibre Network Ireland changed name to Global Voice Networks Ltd. Genuity International Inc transferred general licence to Level 3 Communications Ltd. GTS Business Services Ireland Ltd. transferred general licence to Access Telecom Ltd.

[6] These figures are based on a number of operators that are operational rather than on the number of operational licences. For example eircom have both a general and a basic licence (Indigo) and have been included in the general category only.

2 Data By Sector

2.1 **Fixed Line**

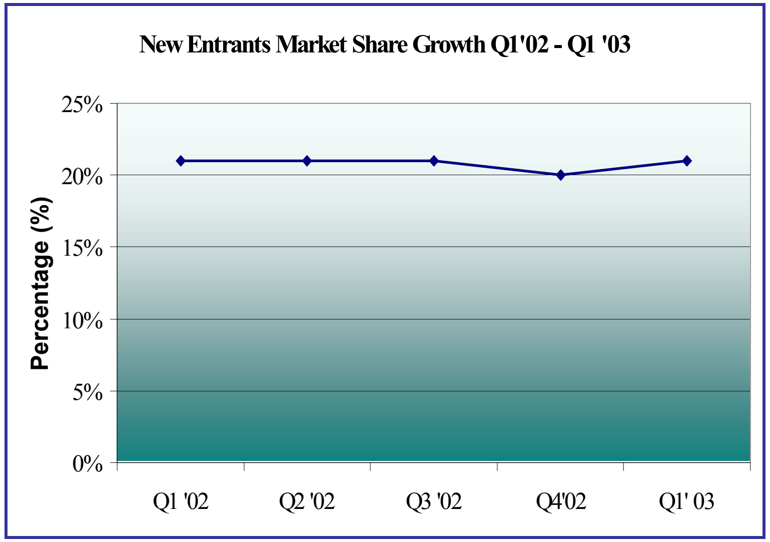
2.1.1 Fixed Line Revenue

- Total fixed line revenue[7] is approximately €516 million.
    - Increase of approximately 0.4% since last quarter.
    - Annualised fixed line revenue figure accounts for 60% of total telecoms revenue.

2.1.2 OLO Market Share

- OLO market share is approximately 21%.
    - Increase of 1% since last quarter.
    - Remains the same as last year.

Figure 2.1.1 OLO Market Share

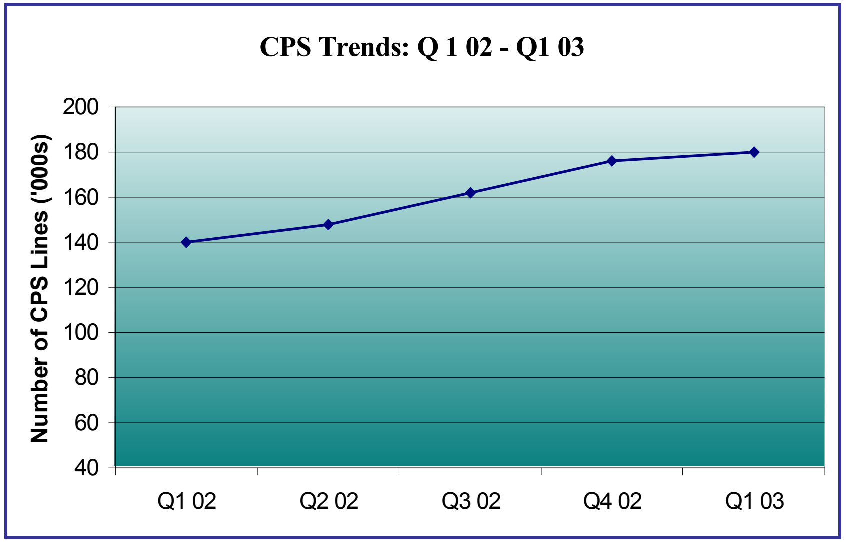


Source: ComReg Quarterly Review Questionnaire

[7] This figure includes revenue from retail traffic (local, national, international, mobiles, internet, payphone & other), Internet services, leased lines, switched data and other services such as directory publication and maintenance of customer equipment. Data based on returns from licensed operators only.

2.1.3 Carrier Pre Selection

Figure 2.1.2 Carrier Pre Selection



- The CPS figure is reported to ComReg by *eircom* and remains stable since last quarter. ComReg has concerns over the metrics and are investigating the basis of the calculation as part of the ongoing CPS review[8].

- Of the total number of CPS lines, 98%, 1% and 1% are apportioned to all calls, national & international calls, and international calls only respectively.

2.1.4 Telecom Access Paths

- There are approximately 5 million telecom access paths[9].
  - 0.6% increase since last quarter.
  - Increase of approximately 2% since last year.

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 385,000 ISDN access channels.
  - Increase of 12% since last year.
  - Increase of 2% since last quarter.
  - Accounts for 8% of total access paths, increase of 1% since last year.
- The proportion of primary, fractional & basic rate ISDN is 45%, 6% and 49% respectively of the total number of ISDN access channels.

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[8] Both business & residential. ComReg Document No 03/44 – A review of Carrier Pre Selection (CPS) in the Irish market.

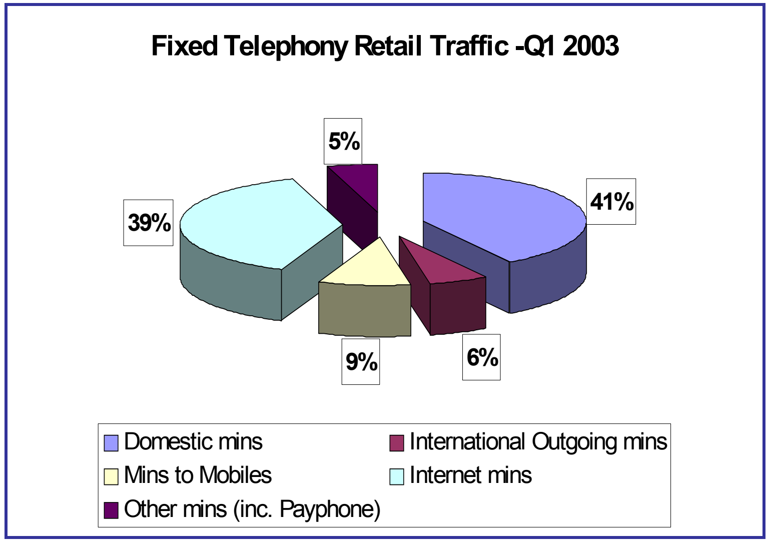
[9] Total access paths consists of PSTN, ISDN and mobile

2.1.7 Mobile Subscribers

- 3.1 million mobile subscribers.
- Mobile subscribers account for approximately 62% of total access paths.

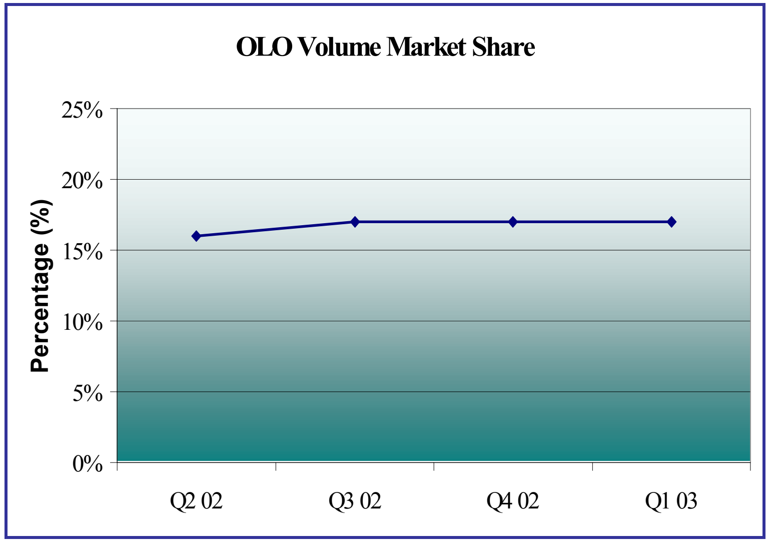
2.1.8 Retail Traffic

Figure 2.1.3 Retail Traffic



- Retail traffic has increased overall by approximately 1.6% since last quarter.
    - Total minutes increased by 6% in the same quarter last year.
    - Last year domestic minutes accounted for 43% of overall minutes, Internet 36%, Mobile 9%, International 6% and Other 6%.
- Domestic minutes retain the highest proportion of total retail traffic, followed by internet minutes.
- OLO market share based on volumes[10] is 17%

Figure 2.1.4 OLO Volume Market Share



2.1.9 DSL

- Approximately 3,850[11] DSL lines have been installed, of which 12% are non-incumbent lines. The take up of DSL has continued to increase

[10] Includes domestic, international, mobile, internet, payphone & other mins from licensed operators only. The volume calculation includes some elements of wholesale traffic in order to give a fair reflection of traffic volumes in the market.

following a reduction in price in May. Approximately 50% of all lines in Ireland are enabled for DSL.

2.1.10 Cable Modems

- Approximately 3,000 cable modems supplied by Ntl, Chorus and Casey CableVision (Dungarvan).
  - Increase of approx 30% since last quarter.

2.1.11 Fixed Wireless Access

- Approximately 5,300 residential and business subscribers.
  - An increase of approx 6% since last quarter.

2.1.12 Leased Lines

- There are approximately 22,000 retail leased line circuits.
- There are approximately 8,600 wholesale leased line circuits.

The following table sets out the rolling three month average delivery time for circuits delivered by *eircom* to OLOs.

[11] This figure includes the incumbent and OLO lines and is based on the number of lines installed. Last quarter we reported the number of lines ordered.

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

	Jan '03	Feb '03	Mar '03	April '03
All Leased Lines	*17*	*17*	*18*	*17*
Of Which:				
Sub 2Mbit Lines	*17*	*17*	*18*	*18*
2Mbit Lines	*16*	*20*	*19*	*13*

- The rolling three month average delivery time for 100% leased line circuits ordered by OLOs for December 2002 was between 19 and 22 days[12].
- Since December this figure has decreased from 19 to 18 days for Sub 2Mbit Lines, from 22 to 13 days for 2 Mbit Lines[13], with a fall in the average delivery time for all Leased Lines from 19 to 17 days[14].

[12] The figures reported in the table above are for 95% of orders i.e the average of the first 95% of orders to be delivered. This removes the effect that any anomalies may have had on the figures and presents a true reflection of how fast the majority of circuits were delivered. Figures relating to the 100% of orders are published on eircom's website.

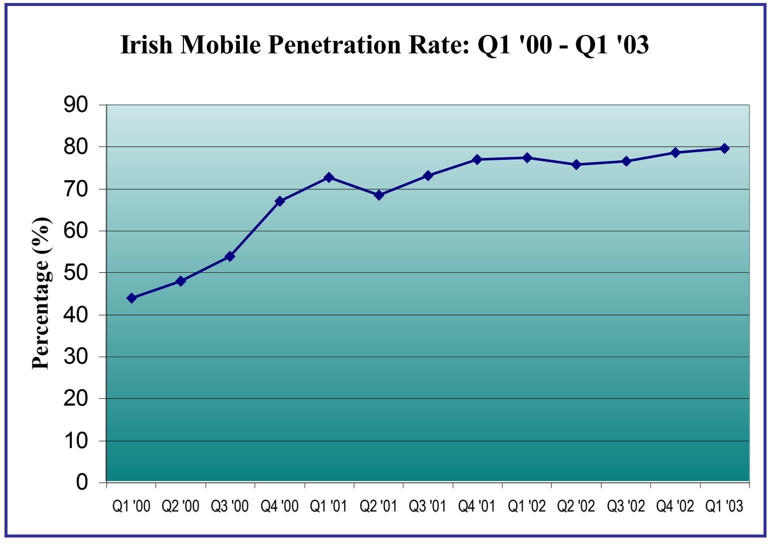
[13] There are an unusually small number of orders for 2Mbit leased lines for April leading to a fall in average delivery time.

[14] 1) Delivery lead-time is shown for 95% 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.

2.2 Mobile

2.2.1 Irish Mobile Penetration Rate

Figure 2.2.1 Irish Mobile Penetration Rate

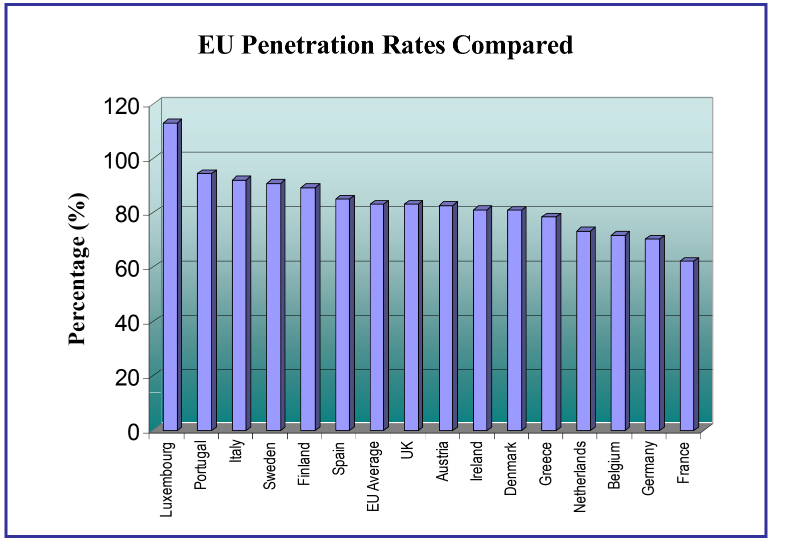


Source: Baskerville and ComReg Estimates

- Irish mobile penetration rate now stands at 80%.
  - Increase of 1% since last quarter.
  - Increase of 3% in the last 12 months.

2.2.2 EU Penetration Rates

Figure 2.2.2 EU Penetration Rates



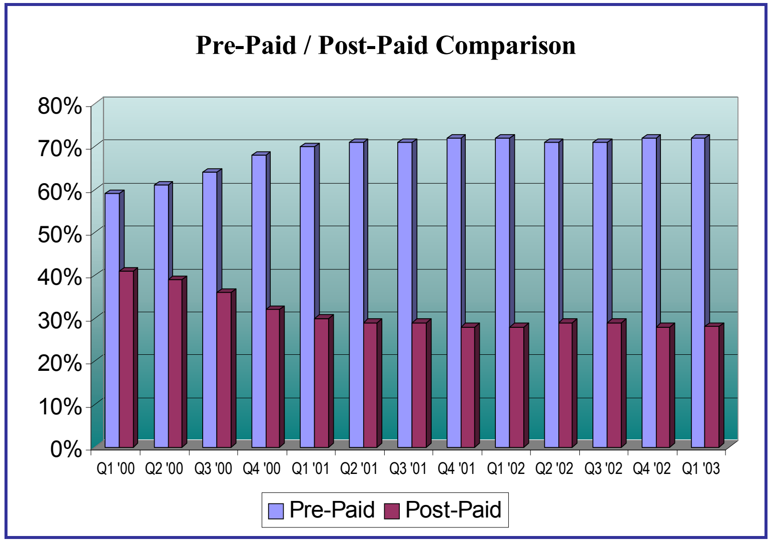
Source: Baskerville

- Ireland has the 9th highest penetration rate in the EU, three places behind the EU average and two places behind the UK.

2.2.3 Subscribers

- Approximately 3.1 million mobile subscribers at the end of March 2003.
  - Increasing from approximately 2.97 million at the end of March 2002.

Figure 2.2.3 Pre-Paid / Post Paid Comparison

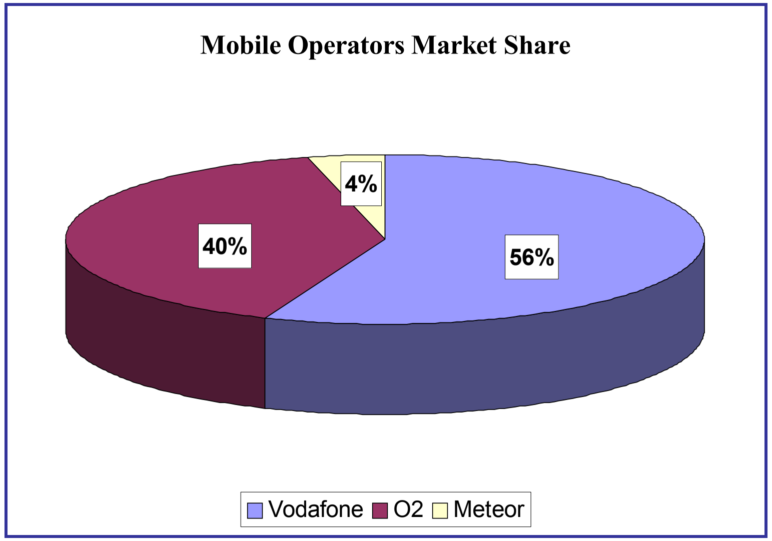


Source: ComReg Quarterly Review Questionnaires

- Pre-paid and Post-paid subscribers account for 72% and 28% of the overall mobile subscribers respectively.

2.2.4 Market Shares

Figure 2.2.4 Mobile Operators Market Share[15]



Source: ComReg Quarterly Review Questionnaire

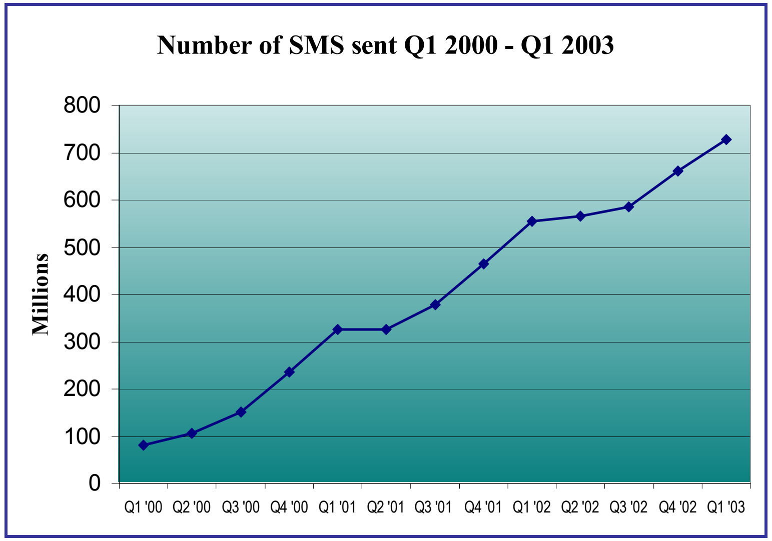
- Vodafone - 56%, 0_2 – 40%, Meteor – 4%.

- No change since our last review, all operators increased their subscriber base this quarter.

[15] Market share based on the number of subscribers

2.2.5 SMS

Figure 2.2.5 Number of SMS Messages sent

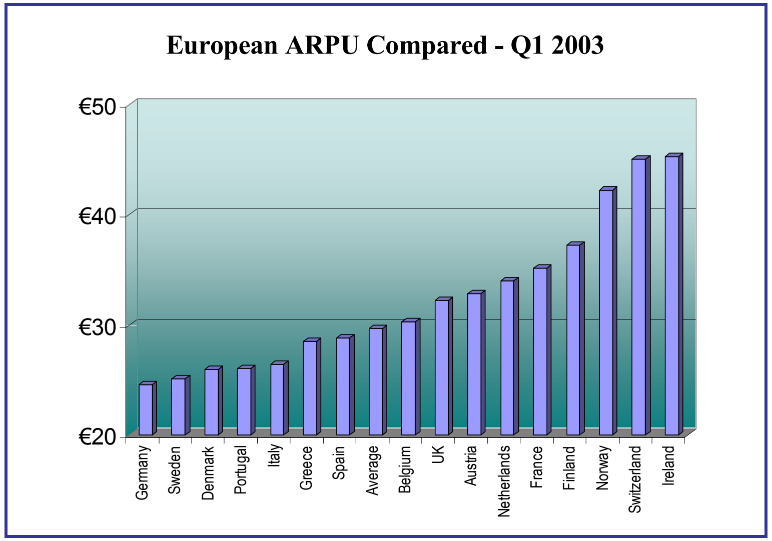


Source: ComReg Quarterly Review Questionnaire

- Approximately 728 million messages sent during the quarter.
    - 78 SMS messages sent on average per month, increase of 10% on the previous quarter.
    - 31% increase in the number of messages sent in 12 months.

2.2.6 ARPU

Figure 2.2.6 European ARPU Compared



Source: The Yankee Group

- Irish Mobile Operator's ARPU is estimated at €45 per month, remaining the same since the last quarter, while the EU average is €30[16].

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[16] As far as possible, ARPU figures are obtained directly from operators. Where unavailable, ARPU is calculated by dividing annual service revenues by the mid-term installed base (the sum of the opening and closing customer bases for the period divided by two). Once the Yankee group has obtained or calculated all individual ARPU figures, they are applied to each operator's mid-term user 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 to derive country-level ARPU

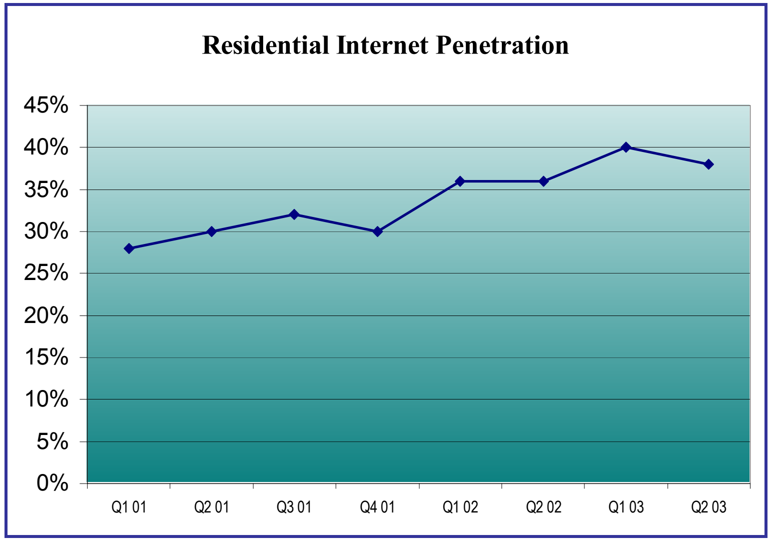
2.3 Internet

The results of the *Amárach* Internet research, commissioned by ComReg, are referred to throughout this section. Internet research is among a nationally representative sample of 1,000 adults aged 15 – 74[17]. Of those surveyed 83% have a fixed line at home. The results of *Amárach's* research will refer to those with a fixed line unless otherwise stated.

Residential Internet penetration stands at 38% and has grown over the last year by 2%. It should be noted however that by including those who do not have a fixed line the Internet penetration figure would be 32% of households in Ireland.

2.3.1 Ireland's Internet Penetration Rate

Figure 2.3.1 Ireland's Internet Penetration Rate



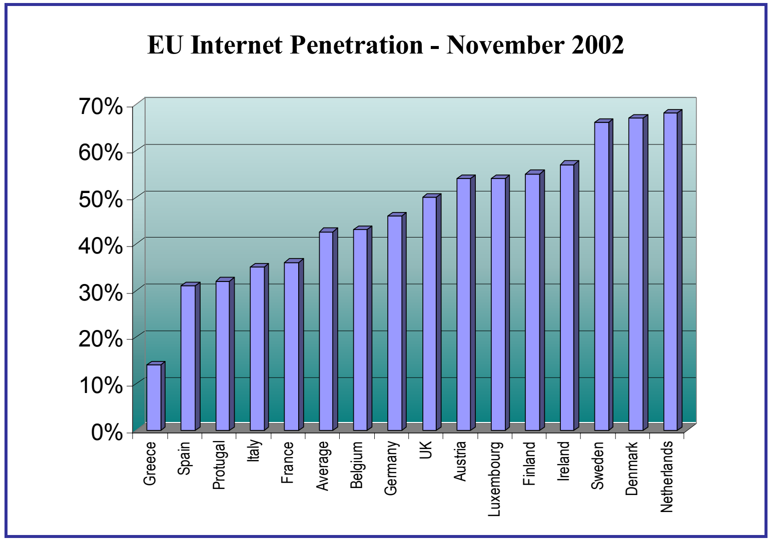
- Residential Internet penetration is estimated at 38%. Allowing for statistical margin of error, in effect Internet penetration remained stable.
- An increase of 2% from the same period last year.

[17] *Amárach* carried out face to face research of 1,000 adults aged 15 – 74 years during May 2003. The Internet penetration figure is nationally representative of the adult population with a fixed line, with a margin of error of +/- 3.4%.

2.3.2 EU Internet Penetration

According to the results of the European Commission's Flash Eurobarometer[18] report, Ireland was 4th in terms of Internet penetration in the EU at November 2002.

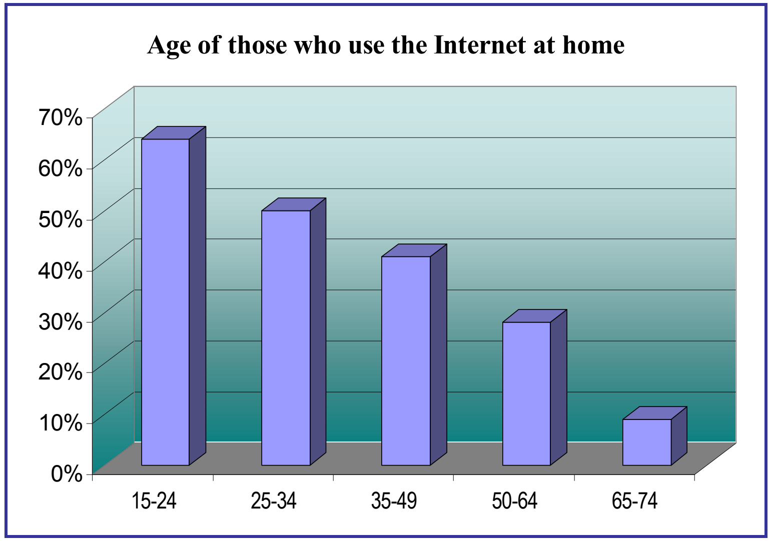
Figure 2.3.2 EU Internet Penetration



[18] Millward Brown IMS were commissioned by the European Commission to carry out the research in Ireland for the EU benchmarking report. The sample sizes in each country amounted to 2,000 respondents. Each sample is representative of the continental population aged 15 and over, interviewed by telephone. A weighting factor is applied to the national results in order to compute a marginal total where each country contributes to this total result in terms of its total population.

2.3.3 Average Internet Usage

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



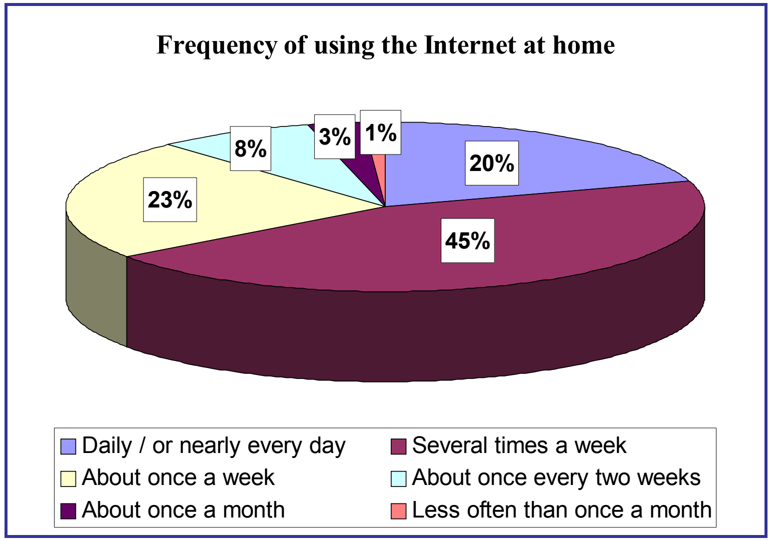
- Usage is highest amongst 15 – 24 year olds (64%), 25 -34 year olds (50%) and 35 – 49 year olds (41%).

2.3.4 Methods of access to the Internet at home

- PSTN is the predominant form of home Internet access (87%) followed by ISDN (7%)

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, one in five use it daily or almost every day; while over two in five use it several times a week.
- On average those who personally use the Internet at home estimate that they spend 6 hours on line in a typical week, an increase of 2 hours since our last survey[19].

2.3.6 E-Commerce

- 38% have used the Internet to purchase a product or service in the last three months.
- The most common products or services purchased on the Internet in the last three months were airline tickets (60%), concert tickets (28%) and package holidays (21%).

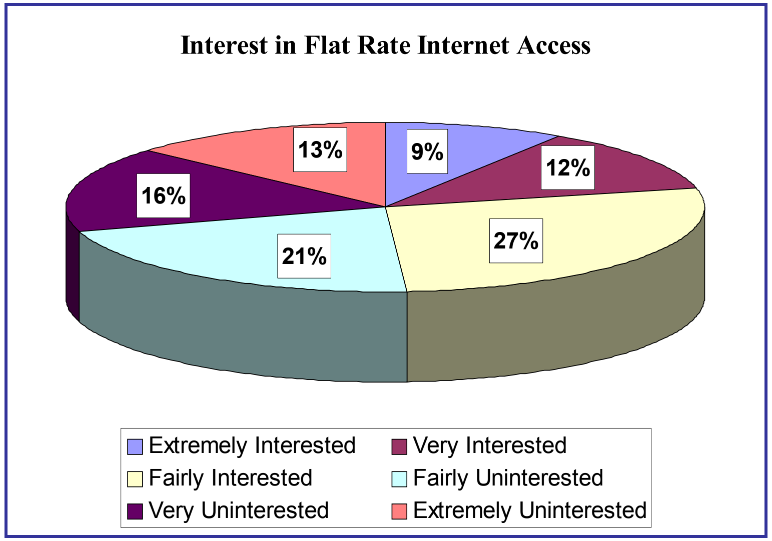
2.3.7 Internet Minutes

- Internet minutes account for 39% of all fixed retail traffic.
- An increase of 2% since our last review.

[19] It should be noted that estimates of time spent on-line are based on respondent's perceptions.

2.3.8 Flat Rate Internet Access

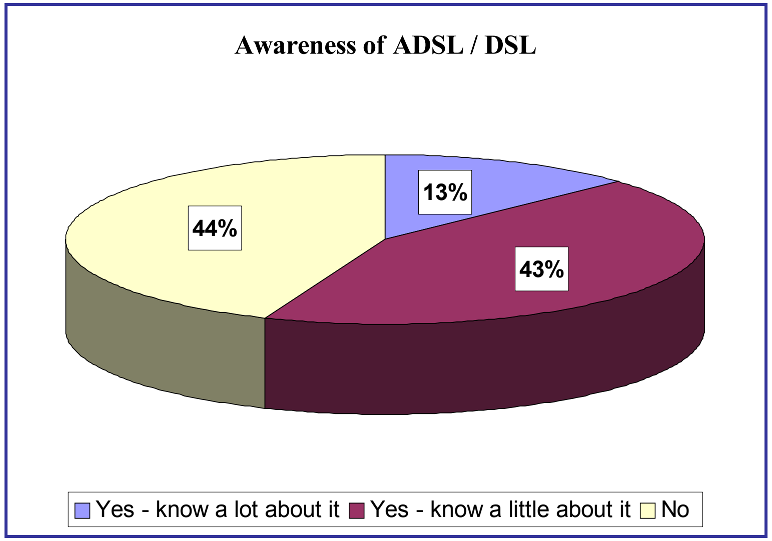
Figure 2.3.5 Interest in Flat Rate



- 48% demonstrate some interest in a flat rate option.
- 34% were interested at a cost of €40 for an Internet service providing up to 120 hours per month. 10% indicated a strong level of interest.
- 46% were interested at a cost of €30 per month.
- The main reasons given for interest in a flat rate service were, cost savings (42%), could spend more time on-line (36%), and cost control (35%).
- 50% indicated interest in a partial flat rate service offering 30 hours per month at a cost of €15.

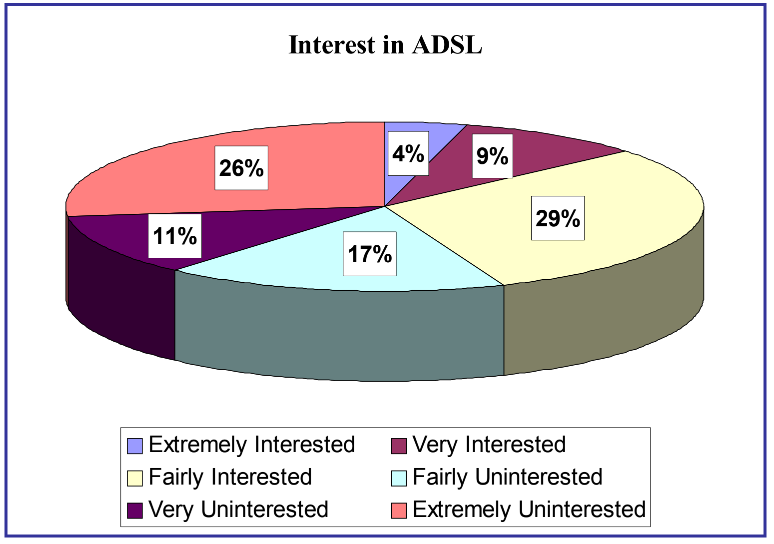
2.3.9 ADSL

Figure 2.3.6 Awareness of ADSL or DSL



- Over half were aware of ADSL or DSL (57%).

Figure 2.3.7 Interest in ADSL



- 42% expressed some interest in ADSL.
- 17% expressed an interest at a cost of €55 per month and an installation fee of €199.
- Speed of Internet connection was the main reason for those who expressed an interest in ADSL (38%).
- Those who were not interested claimed that ADSL was too expensive (53%).
- 62% of respondents stated that it was not likely that they would subscribe to ADSL.

2.4 **Cable/MMDS & Satellite**

2.4.1 Cable/MMDS Subscribers

- Approximately 572,000 cable/MMDS subscribers to basic television services in Ireland.
  - Increase of approximately 4% since last quarter[20].

2.4.2 Digital Subscribers

- Approximately 13% of cable/MMDS subscribers have upgraded to digital compared to 5% in June 2002.
  - An increase of 1% since last quarter.
- 279,000 subscribers to BSkyB[21]
  - Increase of 3 % since last quarter.
  - This figure has increased by 47,000 since June 2002.
- Approximately 353,000 cable/MMDS and satellite digital subscribers
  - This figure has increased by 93,000 since June 2002.
  - Represents approximately 27% of all households with a television[22].

[20] This increase relates to an adjustment in the way subscribers are accounted for.

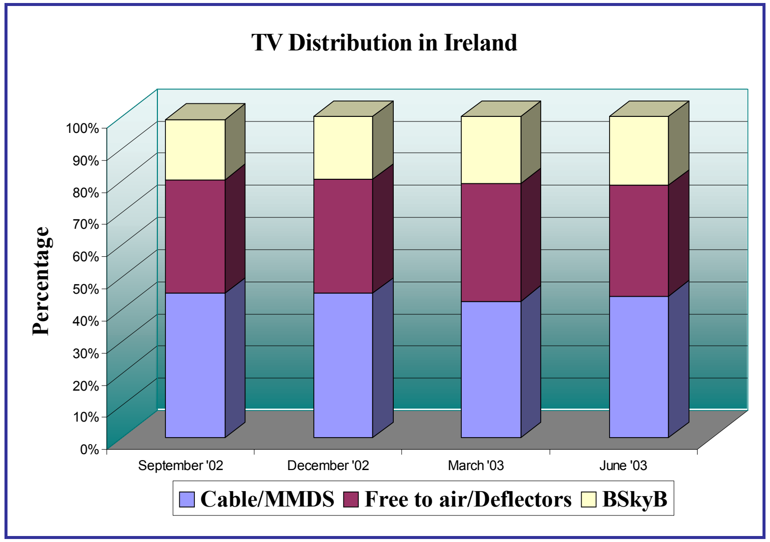
[21] BSkyB interim report, 13th May 2003

2.4.3 Households Passed

- Over 1 million households passed.
  - Approximately 64% are passed for digital services.

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.

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

3 Tariff Data

This section compares movements in incumbents' tariffs for a range of telecommunication services. The tariff comparisons, generated from the pricing of a number of baskets of telecom services, rank Ireland's position against all other Member States in relation to telecom tariffs[23]. It should be noted that competing operators sometimes offer cheaper tariffs and this would also be true in the other countries surveyed. 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 the other Member States 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
- ISDN and ADSL Baskets
- Pre-paid and post paid mobile baskets

This is the first quarter that we have included ISDN and ADSL baskets. These are not OECD baskets. The ISDN baskets are however constructed by Teligen using the OECD residential and business PSTN usage profiles, plus an internet usage element for basic rate baskets, on the assumption that voice usage would not change and ISDN is required for simultaneous internet access.

Due to the lack of any ultimate comparison methodology of such a diverse service we feel it is necessary to view the ADSL prices using two methods. The first method, normalised lowest monthly rental (per Mbit/s), reflects the cost of ADSL on a per Mbit basis and may favour operators that offer higher speeds. The second method is minimum monthly rental which shows, regardless of access speeds, the lowest cost for ADSL.

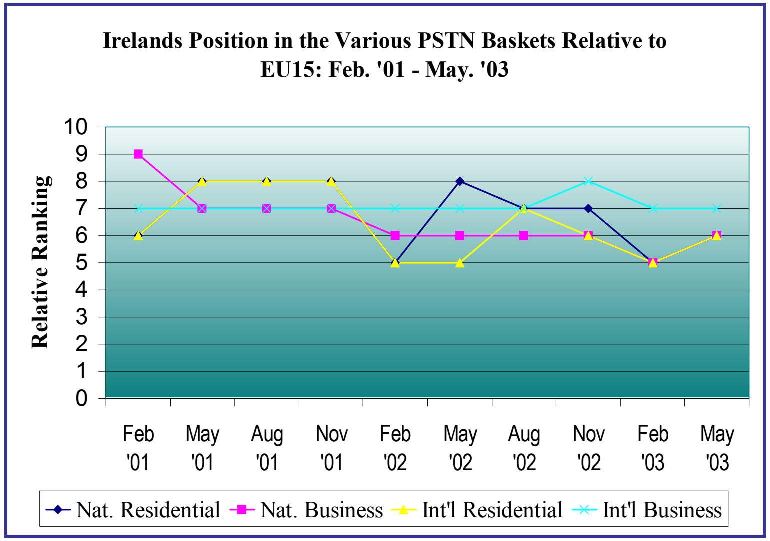
[23] While still using baskets constructed by Teligen using an OECD approved methodology, only comparisons between the 15 Member States are examined.

3.1 Overview

3.1.1 PSTN

- Figure 3.1.1 shows the movement in Ireland's position relative to the EU15 in all PSTN baskets since February 2001. Ireland's relative position has gone down one place in all PSTN baskets except for the international business basket which remains unchanged. These changes would be largely due to an increase in line rental charge introduced by eircom since the last quarter.

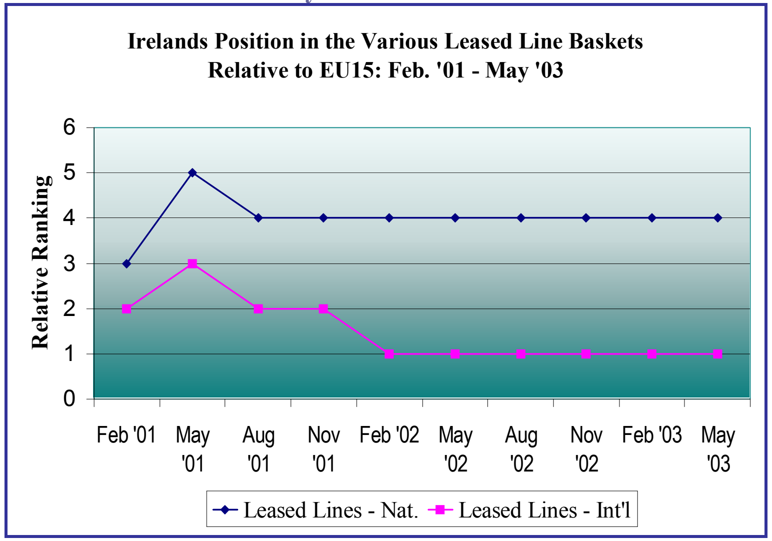
Figure 3.1.1: Ireland's Relative Position for Various PSTN baskets: Feb. '01 – May '03



3.1.2 Leased Line

- Figure 3.1.2 below shows movement in Ireland's position relative to the EU15 in the leased line baskets since February 2001. Ireland's position in both baskets remains unchanged since last quarter.

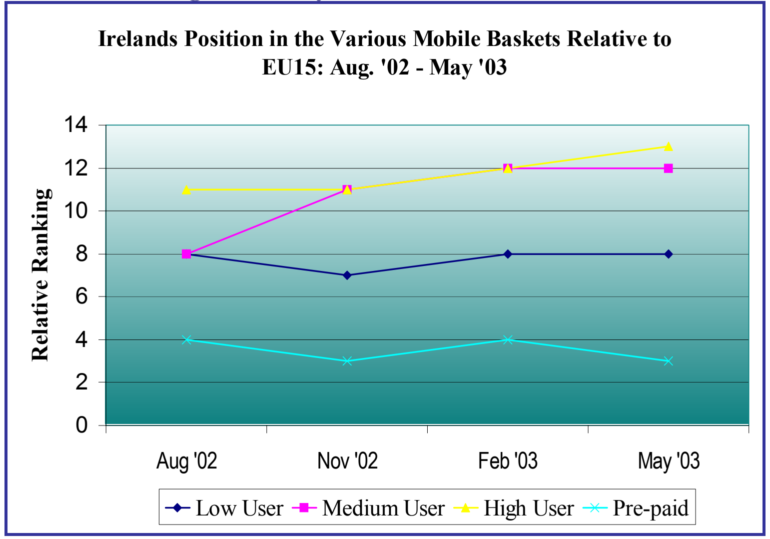
Figure 3.1.2 Irelands Relative Position in the Leased Line Baskets: Feb. '01 – May '03



3.1.3 Mobile

- Figure 3.1.3 shows the movement in Ireland's position relative to the EU15 in all mobile baskets since August 2002[24]. Ireland's relative position has improved one place to 3rd in the pre-paid basket, gone down one place to 13th in the high user basket and remains the same in the rest.

Figure 3.1.3: Ireland's Relative Position for Various Mobile baskets: Aug. '02 – May '03



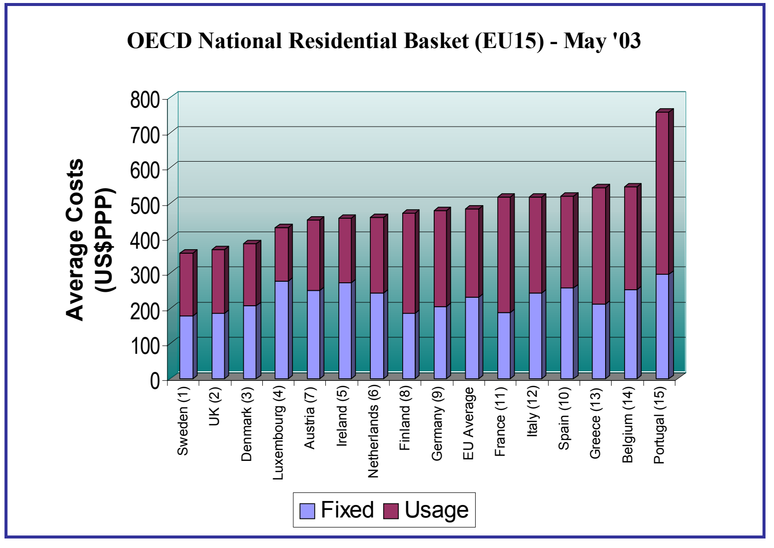
[24] This graph reflects the implementation of the revised OECD methodology agreed for mobile baskets in October 2001 and is based on the operator with the lowest available tariff in each country

3.2 **PSTN Baskets**

3.2.1 National Residential Basket

- Ireland has dropped one place in this basket since last quarter, moving down to 6th place and is now four positions ahead of the EU15 average.

Figure 3.2.1: OECD National Residential Basket (EU15) – May 2003

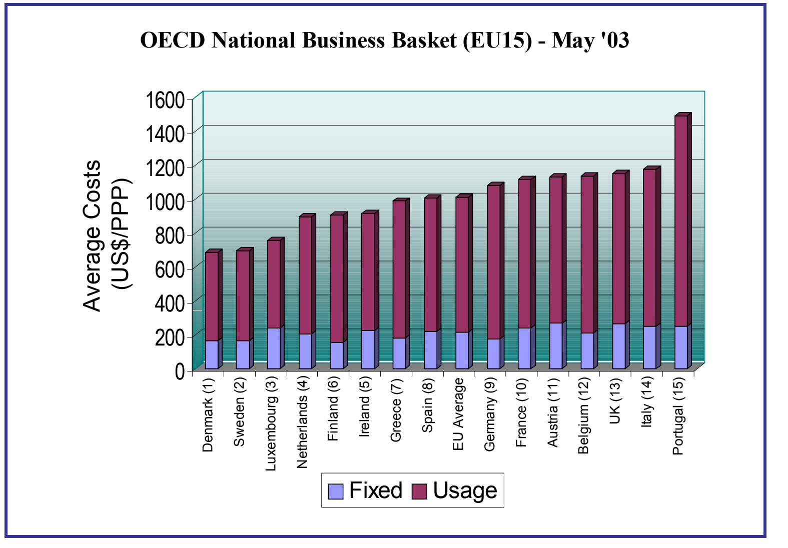


NB: The numbers in brackets represent each Member States respective rankings as at Feb. 2003.

3.2.2 National Business Basket

- Ireland has moved down one place from 5th to 6th and is now three positions ahead of the EU15 average.

Figure 3.2.2: OECD National Business Basket (EU15) – May 2003

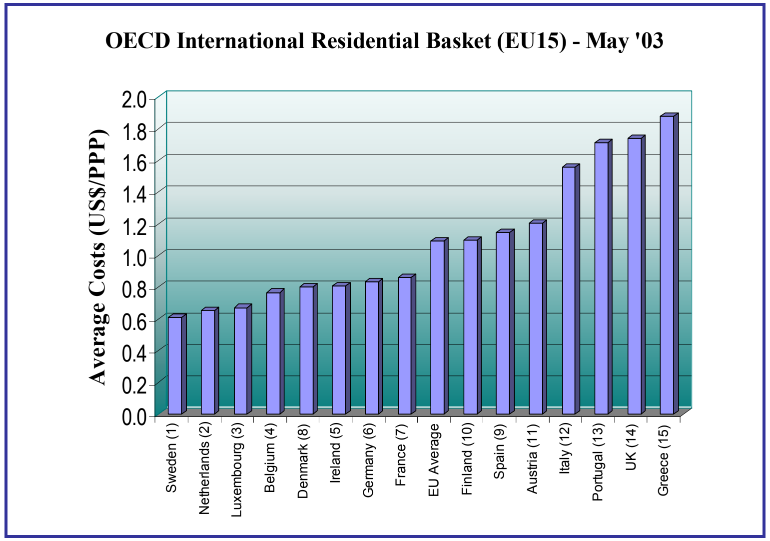


NB: The numbers in brackets represent each Member States respective rankings as at Feb. 2003

3.2.3 International Residential Basket

- Ireland has moved into 6th place from 5th and is three positions ahead of the EU15 average.

Figure 3.2.3 OECD International Residential Basket (EU15) – May 2003

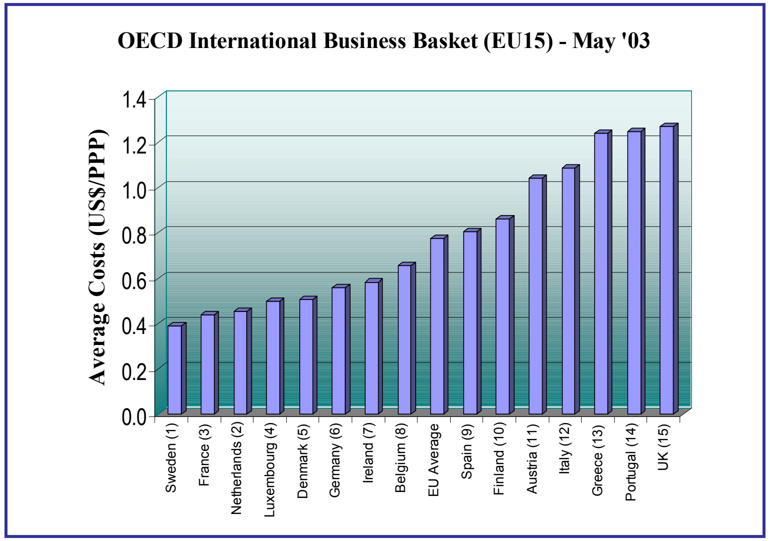


NB: The numbers in brackets represent each Member States respective rankings as at Feb. 2003

3.2.4 International Business Basket

- Ireland position is unchanged in this basket remaining two places ahead of the EU average.

Figure 3.2.4: OECD International Business Basket (EU15) – May 2003



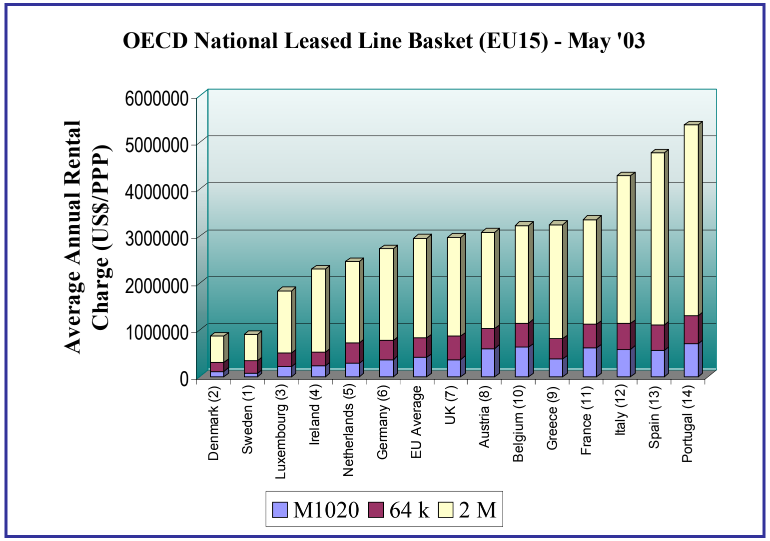
NB: The numbers in brackets represent each Member States respective rankings as at Feb. 2003

3.3 Leased Line Baskets

3.3.1 National Leased Lines

- Ireland remains in 4th place and is three positions ahead of the EU15 average[25].

Figure 3.3.1 OECD National Leased Line Basket (EU15) – May 2003

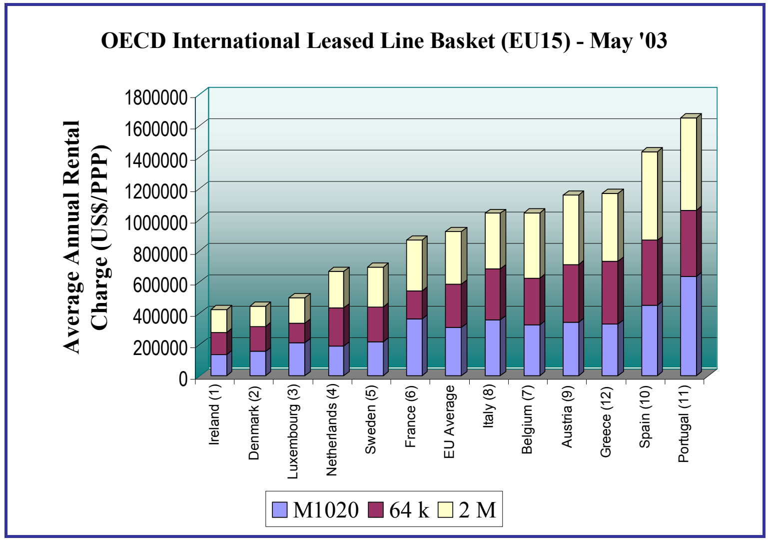


NB: Data for Finland is unavailable. The numbers in brackets represent each Member States respective rankings as at Feb. 2003

3.3.2 International Leased Lines

- Ireland remains in 1st position[26].

Figure 3.3.2 OECD International Leased Line Basket (EU15) – May 2003



NB: Data for Germany, Finland and UK is unavailable. The numbers in brackets represent each Member States respective rankings as at Feb. 2003

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

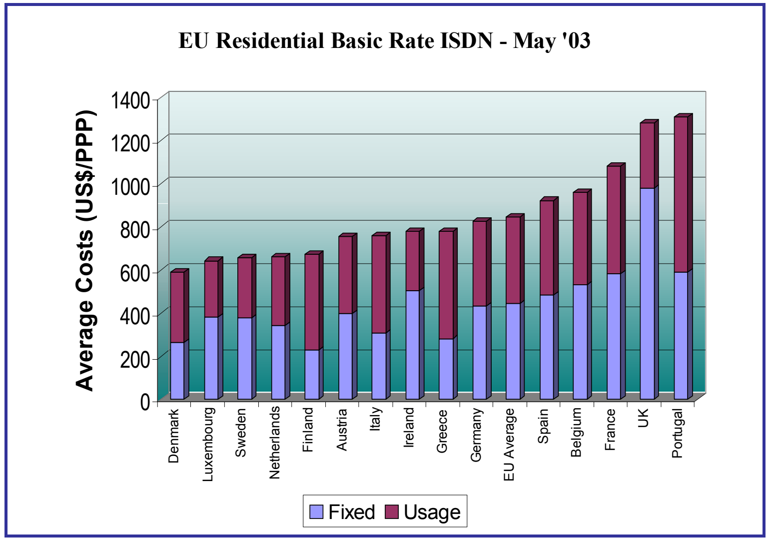
[26] The prices for these circuits are devised from the weighted average of half-circuits to all other OECD countries, using the traffic volume weighting method proposed by Teligen.

3.4 ISDN Baskets[27]

3.4.1 Residential Basic Rate ISDN Basket[28]

- Ireland is in 8th place and three places above the EU average in the residential ISDN basket.

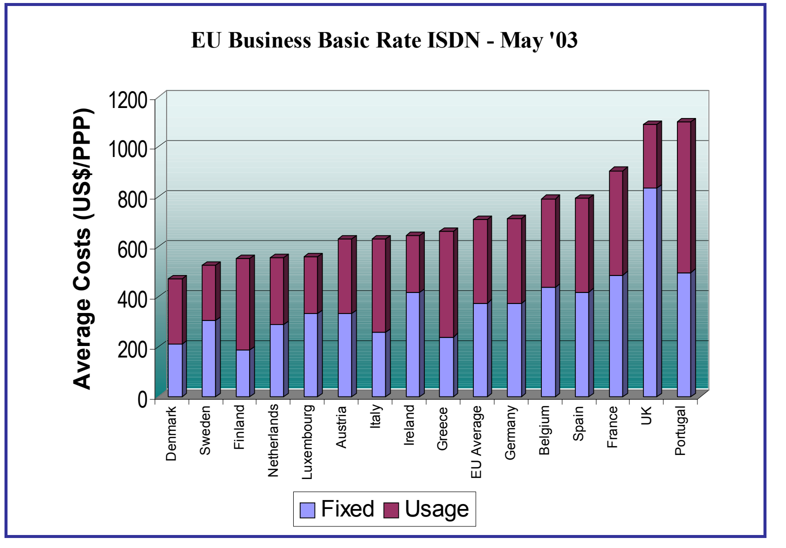
Figure 3.4.1 Residential Basic Rate ISDN Basket – May '03



3.4.2 Business Basic Rate ISDN Basket[29]

- Ireland is in 8th place and two places above the EU average in the business basic rate ISDN basket.

Figure 3.4.2 Business Basic Rate ISDN Basket – May '03



[27] The ISDN baskets are constructed using OECD PSTN business and residential usage profiles and non-recurring charges (such as installation). Basic Rate ISDN involves 2 user channels while Primary Rate involves 30 user channels.

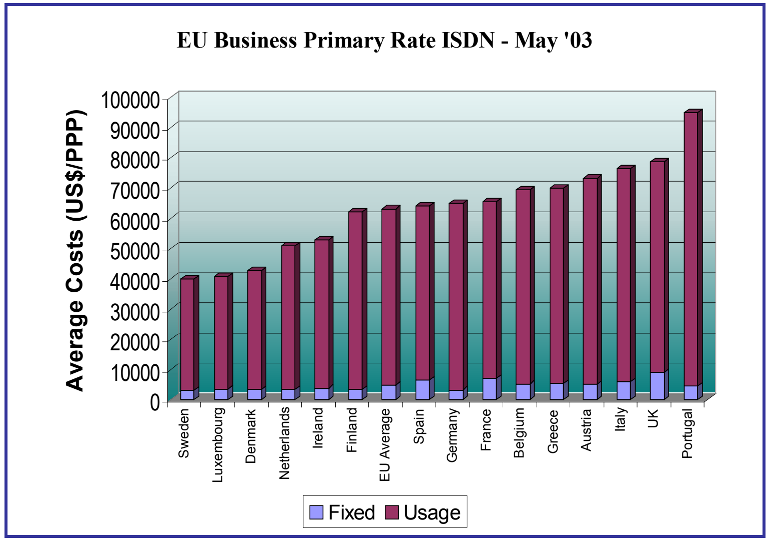
[28] Same home usage profile as OECD residential PSTN basket with an additional internet usage included for off-peak times.

[29] Same usage profile as OECD business PSTN basket with an additional internet usage included for off-peak times.

3.4.3 Business Primary Rate ISDN Basket[30]

- Ireland is in 5th place and two places above the EU average in the business primary rate ISDN basket.

Figure 3.4.3 Business Primary Rate ISDN Basket – May '03



[30] Same usage profile as OECD business PSTN basket. Internet usage is not included in this basket, as we assume that a company of medium size would use more appropriate means of Internet access, such as dedicated lines.

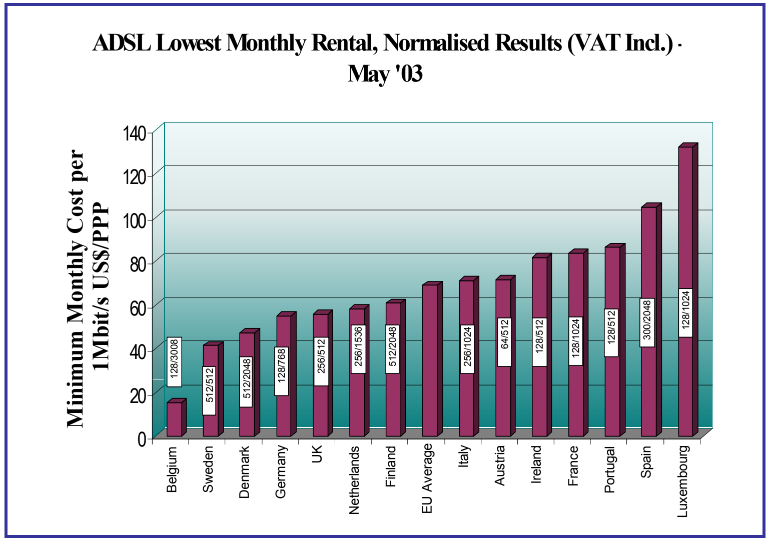
3.5 ADSL Baskets

The following two ADSL baskets should be looked at together to get the most complete picture of ADSL prices across the EU.

3.5.1 Lowest Monthly Rental ADSL Basket (Normalised)[31]

- Ireland lies in 10th place in this basket, three places below the EU average.

Figure 3.5.1 Lowest Monthly Rental ADSL Basket (Normalised) – May '03

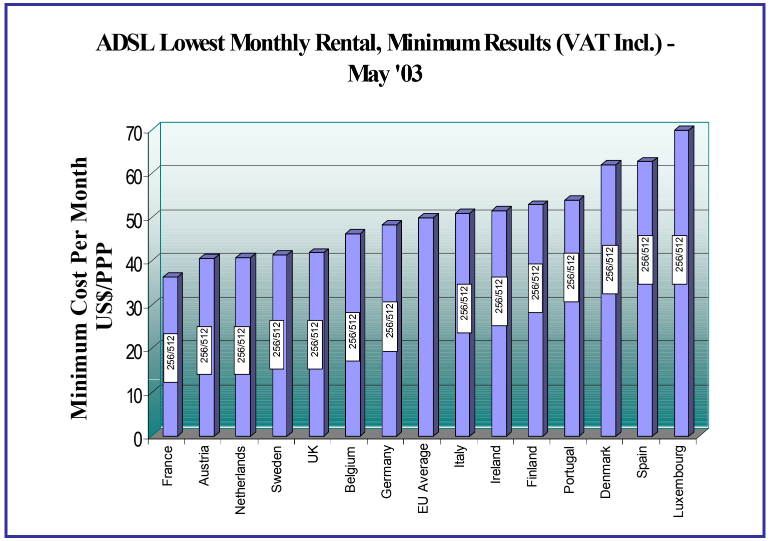


N.B. Greece has been excluded this quarter because the service has only recently been introduced

3.5.2 Lowest Monthly Rental ADSL Basket (Minimum)[32]

- Ireland is in 9th position in this basket, two places below the EU average.

Figure 3.5.2 Lowest Monthly Rental ADSL Basket (Minimum) – May '03



N.B. Greece has been excluded this quarter because the service has only recently been introduced

[31] The normalised (1Mbit/s) results show the cheapest offering in each country, per 1 Mbit/s of service. This method may favour countries offering higher speeds. Figures in boxes represent the upload / download speed (kb/s) of the service offered.

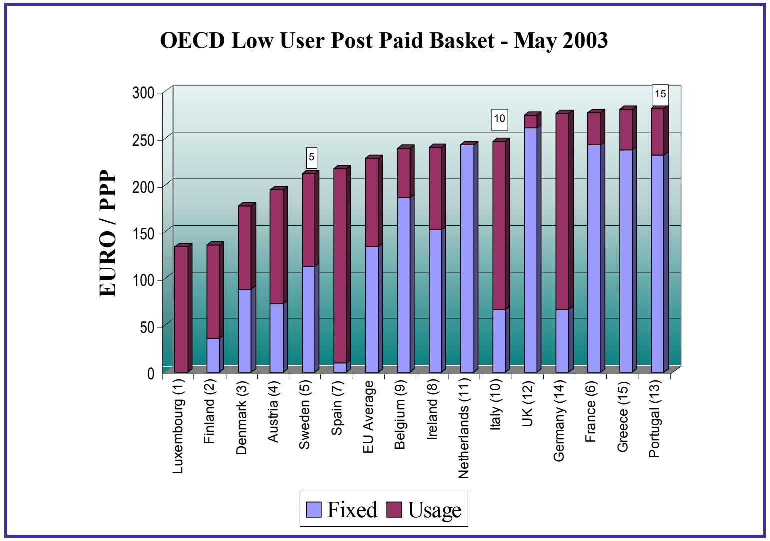
[32] The minimum results show the lowest monthly rental charge offered in each country. This method may favour countries offering lower speeds. Figures in boxes represent the upload / download speed (kb/s) of the service offered

3.6 Mobile Baskets

3.6.1 Low User Post Paid Mobile Basket

- Ireland remains in 8th position, two places below the EU average and three places above the UK.

Figure 3.6.1 OECD Low User Post Paid Mobile Basket (EU15) – May '03

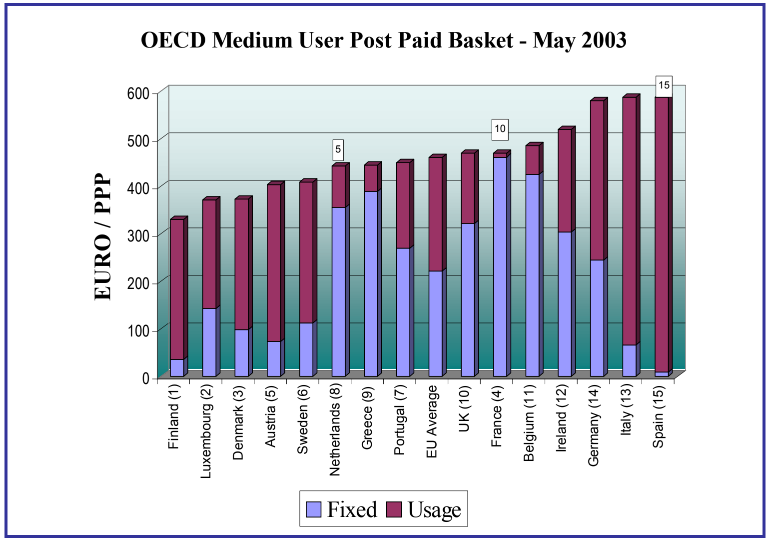


NB: The numbers in brackets represent the countries respective rankings as at Feb. 2003

3.6.2 Medium User Post Paid Mobile Basket

- Ireland position is unchanged since last quarter. Ireland remains in 12th position and is now four places below the EU average.

Figure 3.6.2 OECD Medium User Post Paid Mobile Basket (EU15) – May '03

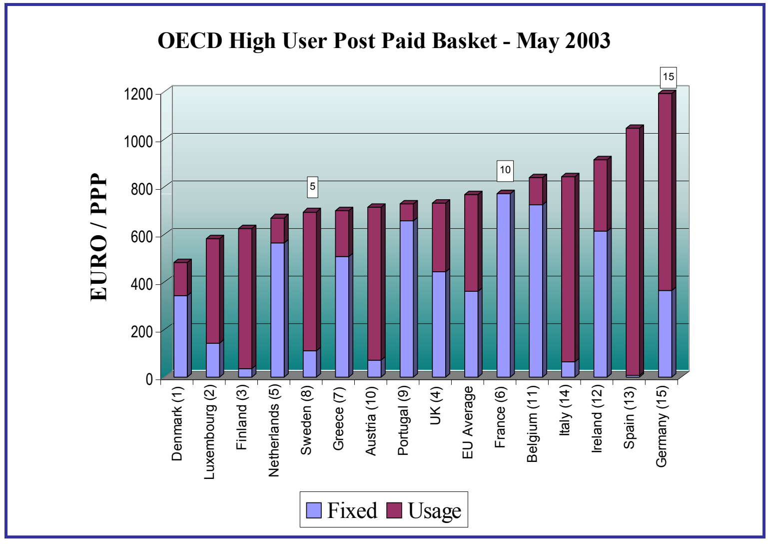


NB: The numbers in brackets represent the countries respective rankings as at Feb. 2003

3.6.3 High User Post Paid Mobile Basket

- Ireland lies in 13th position in the high user post paid mobile basket. This is down one place since last quarter.

Figure 3.6.3 OECD High User Post Paid Mobile Basket (EU15) – May '03

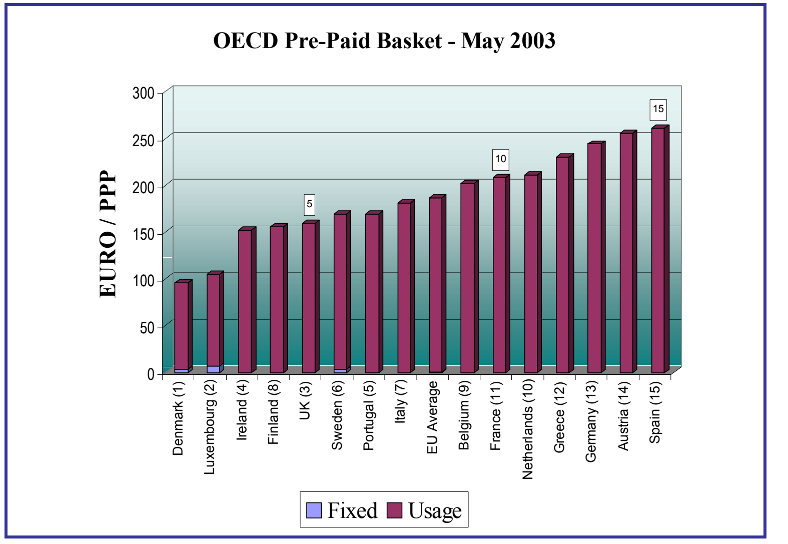


NB: The numbers in brackets represent the countries respective rankings as at Feb. 2003

3.6.4 Pre Paid Mobile Basket[33]

- Ireland lies in 3rd position for the pre-paid mobile basket, up one place since the last quarter.

Figure 3.6.4 OECD Pre Paid Mobile Basket (EU15) – May '03



NB: The numbers in brackets represent the countries respective rankings as at Feb. 2003

[33] The OECD has found that there is little difference between the average pre-paid usage and low-user post-paid usage. This pre-paid basket thus refers to the average pre-paid user and is based on low user post-paid usage.

Appendix - Licensees

GENERAL LICENSEES

FIXED OPERATORS[34]

Licensee	*Operational*	*Responded to QR*
Access Telecom (Ireland) Ltd.	YES	NO
Access Telecom Ltd.	YES	NO
Alphyra Group plc	YES	NO
Aurora Telecom	YES	YES
BT Global Networks Ltd.	NO	YES
Budget Telecommunications Ltd.	YES	YES
Cable & Wireless Services (Ireland) Ltd.	YES	YES
Colt Telecom Ireland Ltd.	YES	YES
Conduit Enterprises Ltd.	YES	YES
CVC Acquisition Company (Ireland) Ltd.	NO	NO
Dome Telecom Ltd.	YES	NO
eircom Ltd.	YES	YES
Energis Holding Ltd.	YES	YES
Esat Inland Ltd.	YES	YES
Esat Net Ltd.	YES	YES
Esat Telecommunications Ltd.	YES	YES
Global Crossing Ltd.	YES	YES
IDT Dutch Holdings BV	NO	YES
Infonet Broadband Services Corporation	YES	YES
Interoute Ireland Ltd.	NO	NO
IXC Communications Services Europe Ltd.	NO	NO
LCN Ireland LLC	NO	NO
LDMI Telecommunications Ireland Ltd.	NO	NO

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

Mastercall International Ltd.	NO	NO
Ocean Communications (Ireland) Ltd.	YES	YES
Opera Telecom (Ireland) Ltd.	NO	NO
Primetec UK Ltd.	NO	NO
Primus Telecommunications Ltd.	NO	YES
Sigma Telecom Ltd.	NO	NO
SM Communications Ltd.	YES	YES
Smart Telecom Ltd.	YES	YES
Startec Global Communications (UK) Ltd.	NO	NO
Swiftcall Centre Ltd.	YES	YES
Talkshop Ltd.	NO	NO
TCSI Ltd.	NO	NO
Tele2 Telecommunications Services Ltd.	NO	NO
Teleglobe Ireland Ltd.	NO	NO
Transaction Network Services Ltd.	YES	YES
Vartec Telecom (UK) Ltd.	YES	NO
Viatel (I) Ltd.	NO	NO
WorldCom Telecommunications Ireland	YES	YES
Yac Ltd.	NO	YES

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[35]

[35] Cable operators who hold a general telecommunications licence

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

BASIC LICENCES

FIXED OPERATORS[36]

Licensee	*Operational*	*Responded to QR*
Airspeed Communications Ltd.	NO	NO
Amocom Technologies Ltd.	NO	NO
Aramiska BV	NO	NO
AT&T Global Network Services Ireland Ltd.	YES	NO
Axis Communications Ltd.	NO	NO
Berney Crossan & Sons Ltd.	NO	NO
Broadband Communications Ltd.	NO	YES
Broadband Partners (Ireland) Ltd.	NO	NO
Broighter Networks Ltd.	NO	YES
Callidus Telecom Europe Ltd.	NO	NO
Cargo Community Systems Ltd.	YES	YES
Cinergi Telecom Ltd.	YES	YES
Digiweb Ltd.	NO	NO
eNasc Eireann Teoranta	NO	NO
Equant Network Systems Ltd.	YES	YES
ESB Telecoms Ltd.	NO	YES
European Access Providers Ltd.	NO	NO
Flag Telecom (Ireland) Ltd.	NO	NO
Genesis Internet Service Provider Ltd.	NO	NO
Global Voice Networks Ltd.	NO	NO
Greenbeam Networks Ltd.	NO	NO
GTS Network (Ireland) Ltd.	NO	NO
Indigo Services Ltd.	YES	YES
Irish Broadband Internet Services Ltd.	YES	YES
Irish Wisp Consultants Ltd.	NO	NO

[36] Fixed operators who hold a basic telecommunications licence

IXnet UK Ltd.	NO	NO
Kokomo Telecom Ltd.	NO	NO
KPNQwest Carrier Services BV	NO	NO
Last Mile Ltd.	NO	NO
Level 3 Communications Ltd.	YES	NO
Megabeam Networks Ltd.	NO	NO
Onecall Ltd.	NO	NO
Radianz Connect Services	NO	NO
Rillbank Ltd.	YES	YES
Savvis Europe BV	YES	YES
Skynet Telecom Ltd.	NO	NO
SITA	NO	NO
Solutions by Netsource Ltd.	NO	NO
Sonic Telecom Ltd.	NO	NO
Sprintlink Ireland Ltd.	YES	YES
Tarwin Trading Ltd.	NO	NO
TeleMedia International Ltd.	NO	NO
Timas Ltd.	YES	YES
Waterland Technologies Ireland Ltd.	NO	NO
Web-Sat Ltd.	NO	YES

CABLE OPERATORS[37]

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

[37] Cable operators who hold a basic telecommunications licence