



Commission for
Communications Regulation

Response to Consultation

Review of the ComReg Quarterly Report

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1 Introduction

1.1 On 4 February, ComReg issued a national consultation on its Review of the Quarterly Key Data Report (ComReg Document 05/09). Interested parties were asked to submit comments by 18 March 2005 on a number of questions pertaining to the proposals for the new structure and content of the Key Data Quarterly Report ('the QR'). ComReg received detailed submissions from the ten respondents listed below by the close of the consultation period. Those highlighted in bold responded specifically to the questions posed, others provided general comments on ComReg's proposals. The ten submissions to the consultation were:

1. 3;
2. Alto;
3. **eircom;**
4. **BT Ireland (formerly EsatBT);**
5. MCI;
6. Meteor;
7. **O2;**
8. Peter Weigl;
9. Tif and
10. **Vodafone.**

1.2 ComReg wishes to thank all respondents for their submissions. Having considered the views of all respondents, ComReg sets out in this document its conclusions regarding the structure and content of the QR. Comments relevant to each consultation question are addressed in the following sections. All responses received are available for inspection (with the exception of material supplied on a confidential basis) at ComReg's office.

1.3 In the initial consultation ComReg's objectives were to:

- Assess the value of the current report to ComReg, industry and the public in general;
- Based on the above assessment, make proposals on how to update and improve the current QR data collection process, focusing on the value of the data that had been requested in the past and also being cognisant of the future needs arising from ComReg's obligation to conduct market reviews;
- Assess the ability of industry to provide such information, and
- Assess the overall structure of the Report and how it could be improved

1.4 ComReg requested interested parties to submit views in relation to the proposed changes to the report as it previously stood and requested suggestions on how this could be developed. Additionally views were requested on ComReg's proposal to

integrate data collected on a quarterly and annual basis.

- 1.5 ComReg has addressed comments as received in response to relevant questions, these are outlined below. Additionally, respondents' views have been taken on board in drafting the new format of the QR, which has been published (based on data collected for Q1 2005) in parallel with this document. Furthermore, ComReg suggested in the initial consultation that it would publish raw market data on the ComReg website, this service will be known as ComStat (details of which are outlined below). The content and presentation of data in the form of the QR and ComStat¹ incorporate as much as possible the views of respondents. ComReg notes that in the publication of this quarter's report there was not sufficient time or data to reflect all of the changes proposed. The Report for this quarter is a hybrid of the old and new and the new format will be finalised in the next quarter.
- 1.6 ComReg welcomes continued interaction with all stakeholders both on the QR and the data collection process. ComReg intends to carry out an industry workshop with stakeholders, the objective of which is to seek feedback from operators on the data collection process and to ensure a consistent understanding among respondents of ComReg's data requests. This will be followed with optional one-to-one meetings with operators.
- 1.7 ComReg intends to issue data requests in the form of questionnaires on a quarterly and an annual basis. When considering what data should be collected on a quarterly, as opposed to an annual basis, ComReg was cognisant of a number of factors including the need to (i) provide timely market data to stakeholders; (ii) monitor market developments; (iii) minimise the burden on those providing data.
- 1.8 It is ComReg's objective is to ensure all data requests are:
 - Clear and facilitate the provision of accurate data;
 - Justified;
 - Proportionate and
 - Transparent (in terms of the purpose for which data is requested).
- 1.9 The proposed data collection methodology is outlined in Figure 1 below. This process aims to integrate market data collected from the QR and Market Analysis questionnaires. Data collected on a quarterly basis will be used for the following purposes:
 - a) To be published as part of the quarterly report,

¹ www.comreg.ie

- b) To allow ComReg to monitor relevant markets (to assess whether market definitions are appropriate and imposed obligations are effective),
- c) To respond to data requests from third parties (EU Commission, OECD, ITU).

1.10 It is proposed to collect quarterly data which is either essential to ComReg's monitoring obligations under the Market Reviews or contributes to an understanding of the markets as reflected in the Quarterly Review

1.11 It is proposed to collect data at a similar level of detail, on a quarterly basis, to what was previously collected. Where possible ComReg has reviewed the old quarterly questionnaire and has removed any data elements which were not directly essential to ComReg's ongoing requirements. A draft of the new quarterly questionnaire is contained in Annex A which requests information necessary to enable ComReg to carry out particular tasks and exercises for which the information is sought.

1.12 It is envisaged that there will be an additional and more detailed market analysis questionnaire which will supplement the quarterly questionnaire. No data collected on a quarterly basis will be included in the annual questionnaire. Data requested will be more detailed to facilitate more in-depth analysis as part of the Market Reviews. It is essential that ComReg has data of this level of granularity available to it to appropriately analyse the markets. It would not be proportionate to expect operators to provide this level of detail on a quarterly basis. ComReg will issue the questionnaire on an annual basis.

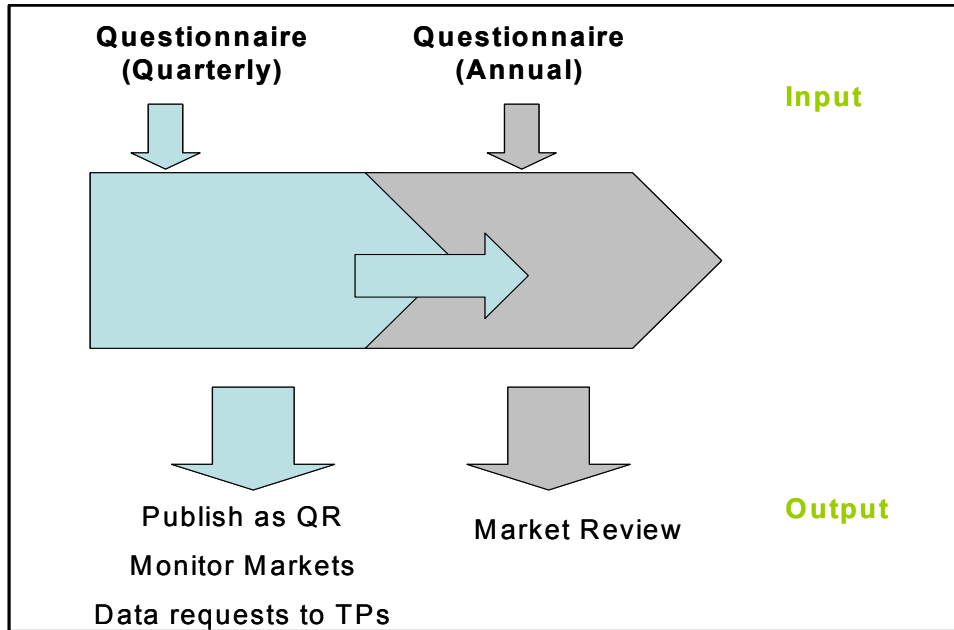


Figure 1.1 Data Collection Methodology²

1.13 The remainder of this consultation is structured as follows:

- Section 2 focuses on proposed changes to the current QR;
- Section 3 addresses data collection issues and proposals, and
- Section 4 addresses the revisions to the existing QR questionnaires, proposals for amendment and what data should be collected instead, on an annual basis, for market analysis purposes;

1.14 The proposed questionnaires are attached in the Annexes.

² TP=third parties

2 Quarterly Report Content

- 2.1 In the initial consultation paper ComReg aimed to ensure that the quality of the Report was maintained and where possible improved upon. To do this it was necessary to identify which sections were of most interest and value to stakeholders and what amendments should be made to improve the Report.

Proposed Changes to the Structure of the Report

- 2.2 ComReg publishes the QR in March, June, September and December each year. The old QR consisted of two parts, a Key Data Report which presented quarterly statistics on the Irish market and a Commentary Report which summarised regulatory developments and initiatives such as market surveys commissioned by ComReg in the previous quarter. The Key Data Report which contained all the key data statistics of the previous quarter included the most relevant data on market activity by sector.
- 2.3 The objective of this review was to be able to offer an improved report and more detailed data on the developments in the market place and where possible, present quarterly information more aligned with the markets as defined in the recent market review process.
- 2.4 ComReg proposed that the Commentary Report should be discontinued as much of this content will either be published separately in the case of surveys or reflects information already published by ComReg. It was intended that the Key Data Report should contain a greater depth of analysis on the interpretation of the key data. ComReg proposed to retain the frequency of the Report on a quarterly basis.
- 2.5 ComReg also proposed that some of the key data be made available on the ComReg website directly under a market information section; this was caveated by the guarantee that any data reported would satisfy confidentiality and commercial sensitivity requirements.

Information Published in the Report

- 2.6 In the consultation document, ComReg outlined the proposed content and structure of the new Report which is summarised below. Views were sought from respondents on the specifics of the data.

Overall Market Data

- It was proposed that the section on Overall Market Data with reference to communications revenues and employees should be retained as a useful indicator of the health of the overall electronic communications sector.

Fixed Line Data

- ComReg proposed to publish overall and individual fixed market revenues. Market shares would be provided for eircom and OAOs (combined, rather than individually). It was also suggested that data would be provided on Direct/Indirect Access. The proposed internet section would include a split between narrowband and broadband providing a greater level of detail on broadband data and point-to-point capacity products for retail and wholesale services.

Mobile Data

- ComReg proposed to publish data on mobile penetration rates and aggregate mobile revenues with market shares. It was also proposed that data on; mobile traffic by destination, 2G/3G and post paid/pre-paid services would be published and accompanied by market shares. There was also a suggestion that ComReg would publish the number of SMS and MMS messages sent by end users and the number of SMS and MMS messages sent by MNOs / service providers.

Broadcasting Data

- ComReg proposed to publish cable/MMDS analogue and digital subscriptions and revenues, digital satellite subscriptions; the number of households passed for analogue and digital services.

Teligen Pricing Data

- 2.7 ComReg consulted on the proposition to retain the presentation and analysis of Teligen pricing data.

Consultation Question

Q. 1. Do you agree with ComReg’s proposals to make available the electronic communications market information set out in this chapter in future Quarterly Reports? Please expand in your response.

General

Respondents’ views

- 2.8 There was a significant difference in opinion among respondents in relation to the appropriate level of granularity of the data to be published. Some respondents requested considerably greater level of detail while others took the view that the current level of detail was excessive. Other respondents suggested that the existing

level of detail was adequate but that ComReg should improve on its presentation.

- 2.9 One respondent felt that in seeking new information for the QR, ComReg should provide adequate reasoning and that the principle of proportionality should apply. Furthermore they submitted that ComReg needed to take due regard of the commercial sensitivity of data collected particularly in markets with a small number of operators and where published data could be easily disaggregated.
- 2.10 With regard to ComReg's proposals outlined in the initial consultation, three respondents, notably focused on the protection of *commercially sensitive information* which, it was held, that if published could cause distortions in the market. They highlighted the risk of operators being able to disaggregate the data using their own input, such that commercially sensitive data could be gained where it would otherwise not be available. They noted particular areas of concern relating to nascent products such as MMS and identifying traffic volumes by destination. All respondents raised concerns relating to the commercial sensitivity of publishing data on:
- mobile traffic by destination with market share
 - subscriber numbers broken down by 2G and 3G
 - number of SMS and MMS messages sent by end users.
 - volume of prepaid and post paid traffic
 - Segment shares offer a level of detail that is excessive.
- 2.11 One respondent noted concerns from a new entrant perspective. As a new market entrant they were concerned about the protection of the confidentiality of sensitive information. They held that access to detailed information on new entrants can only work to the benefit of incumbents. They felt that generally the publication of information by incumbents helped to rectify the imbalance of information which may be available in the market place. With regard to the proposal to publish customer numbers and revenue for certain services (2G/3G services, post paid and pre paid breakdown,, mobile traffic destination) it was suggested that it would not be difficult for competitors to extract valuable information regarding pricing bundles which were key to the success of market entry strategy.
- 2.12 Some respondents took the view that data not published should not be collected. Additionally the respondents argued that there had not been sufficient support or justification for why additional data would result in a better report and that no consideration had been made of the General Authorisation which required that any additional data must be justified and shown to be proportionate. With regard to collecting further data they held that this was increasingly onerous.

- 2.13 One respondent further argued that additional granularity of information may serve to reduce clarity and accessibility of the report and felt that proposals had not been justified in terms of the rationale or benefit which more detailed data publication may provide. Furthermore they noted the requirement for consistent definitions. They recommended that commercially sensitive data should be aggregated and clear definitions provided.
- 2.14 These views were contrasted with another respondent's, who held that it would be very helpful if operators could trace their own results to total market results to understand own standing in the market.

ComReg's Position

- 2.15 ComReg notes that the existence of the QR is justified on the basis that all respondents supported its continued publication.
- 2.16 ComReg's approach with respect to data considered confidential and commercially sensitive will be to present the data in such a manner that respects its confidentiality or commercially sensitive nature, by means of anonymising, redacting or aggregating the data or other methods. ComReg recognises the need to exercise particular caution with respect to commercially sensitive information, the publication of which could potentially be injurious to the operator (or advantageous to his competitors or others) if it were released.
- 2.17 ComReg holds that a balance must be reached in respect to providing market data which will be at a sufficient level of detail to be beneficial to stakeholders while not being overly burdensome to collect or commercially transparent if published. ComReg has reconsidered the publication of some data (such as market share per mobile operator for certain services) which was proposed in the initial consultation and has decided that in some cases, data will be published in less detail than was initially anticipated. ComReg has concluded that the level of granularity contained in the Q1_2005 QR (*ComReg Document Number 05/43*) meets a balance between minimising the risk of exposing commercially sensitive data and has sufficient detail to provide meaningful market overview.
- 2.18 ComReg does not agree with the respondent which argued that greater detail of information would reduce clarity. In the review of the QR ComReg has sought to present market data in a clear and concise format for easy dissemination of figures. Additionally, ComReg will publish an explanatory memorandum with a glossary of terms to ensure that there is consistent understanding in the interpretation of market data.

Teligen

Respondents' views

- 2.19 There was general support among respondents for the continued publication of the Teligen pricing information. However one respondent suggested that the data reported for Ireland in the post paid mobile baskets should be adjusted by ComReg to better reflect the higher than average minutes of usage. Additionally, another respondent submitted that if ComReg decided to continue to use ARPU (which they believed has serious shortcomings), it should be qualified by average minutes per user measure.
- 2.20 Another respondent supported further publication of Teligen price basket information and also noted that ComReg should provide an explanation of how data is derived, publish (Purchasing Power Parity) PPP conversion rates, further explanation of ADSL pricing baskets and that figures should be published inclusive/exclusive of VAT.

ComReg's Position

- 2.21 ComReg supports the respondents' view that Teligen data should continue to be published. However, it also considered it appropriate to make amendments to the presentation. Firstly, ComReg has decided to discontinue the publication of Leased Line and ISDN tariff data. These baskets either do not reflect the market realities and complex pricing or those components are captured elsewhere. Furthermore, ComReg agrees with respondents that it would be advantageous that data presented in the post paid mobile baskets would be supported by data on relative usage by end users. ComReg would expect those operators to supply such information in their submissions.
- 2.22 ComReg intends to publish an explanatory memorandum in conjunction with the QR which will provide an explanation of how data is derived. ComReg will continue the use of PPP as such a variable it is required to establish customer buyer power and enable a more meaningful country by country comparison. Where PPPs are provided ComReg will publish the PPP conversion rates, these are contained in the Explanatory Memorandum to Quarterly Key Data Report (ComReg Document Number 05/44).
- 2.23 It should be noted that the PPP is calculated based not only on exchange rates, which is a purely financial index, but also on the cost of living in each country. A "basket" of goods is costed for each country, and from this an index is derived

which is far more stable than the exchange rate. PPPs are linked to exchange rates through comparative price levels, which are relative to GDP:

PPP rate = (exchange rate*100)/comparative price levels.

- 2.24 This index can be used for the comparison of any goods or service. Assuming that the price index of the GDP is 100, a comparative price level of 100 indicates that the prices being compared are about the level one would expect given the performance of the national economy relative to its international competitors. A score of greater than 100 means that the prices in that country appear to be expensive, while a score of less than 100 means that the prices are cheaper than would be expected. The PPP will generally differ somewhat from the exchange rate, giving a truer picture of the cost of service.
- 2.25 The respondent also requested that further explanation of ADSL pricing baskets be provided, however ComReg holds that the information provided in terms of price and upstream and downstream speed is sufficient. The provision of any further detail would be disproportionate to the detail presented in respect of other tables. ComReg has considered the publication of data including and excluding VAT, however, through analysis it was found that presentation of both sets of data would not add any benefit to the report. When ComReg excluded VAT from its ADSL pricing calculations, the only difference found was that two countries moved above the EU Average, Ireland thus ranked first behind the EU Average as opposed to third; the relative differences between the counties did not change significantly. ComReg concludes that the inclusion of VAT is appropriate as this is the real cost to the consumer.
- 2.26 Additionally, ComReg notes that Teligen are currently reviewing their pricing baskets, thus ComReg would expect subsequent change to their presentation and content. ComReg intends to input its own and respondent's comments as part of this review.
- 2.27 ComReg intends to publish data relating to all twenty five European Member States where available.

Consultation Question 2

Q. 2. Are there additional key data areas that you would like to see covered in future reports (bearing in mind operators' abilities to provide such data)? Please expand in your response.

General

2.28 One respondent was in overall agreement with ComReg’s proposals, subject to amendments. However they further proposed that data should be published (by volume and revenue) for total mobile and fixed markets by individual operators.

2.29 ComReg holds that it would not be appropriate to publish data market share by volume and revenue for mobile and fixed markets for individual operators. This level of granularity would be disproportionate and not justified in terms of ComReg’s objectives. Such market data could potentially have negative consequences on new entrants and smaller operators.

VoIP

2.30 A number of respondents believed that ComReg should collect data on the increasing use of emerging technologies such as Voice over Internet Protocol (VoIP). One respondent recognised that this data may be difficult to collect directly and so methods such as consumer surveying and market research may have to be employed.

2.31 ComReg supports the respondents’ recommendation that VoIP should be examined where possible. This suggestion has been incorporated into the new structure of the QR (Irish Communications Market: Quarterly Key Data - June 2005 (05/43)), where a discussion of VoIP under the new section entitled ‘Emerging Trends’ of the QR is included. Additionally, ComReg will attempt to collect data on take up of VoIP services. ComReg is currently participating in discussions at European level with other NRA’s to investigate what data on VoIP can be collected in the near term.

Comparative Data

2.32 One respondent recommended that further comparative detail be provided for example they believed that it may be pertinent for ComReg to publish, alongside broadband figures, comparative figures for other Member States.

2.33 ComReg supports the respondent’s recommendation that comparative data should be provided by ComReg where possible. This suggestion has been incorporated into the new structure of the Report (Irish Communications Market: Quarterly Key Data - June 2005 (05/43)).

Consultation Question 3

Q. 3. Do you think the Quarterly Report should continue to be published on a quarterly basis or any other time period? Please expand in your response.

Timeliness of Publication

2.34 Three of four respondents agreed that the publication of the Report on a quarterly basis was adequate and appropriate. One respondent added that the publication of the Report on a quarterly basis provided general information on the development of the market but also allowed key market developments to be identified in a timely manner. However, another respondent believed that the QR should be published on a bi-annual basis to lessen the burden on the industry and that this bi-annual report should represent the basis of the Market Analysis that ComReg is obliged to do under the new Framework.

2.35 ComReg concludes that it is appropriate to publish the Report on a quarterly basis, to provide market data on a timely basis. It is hoped that better co-ordination between the quarterly and annual questionnaire will reduce the burden on operators in the provision of data.

Presentation of Market Data

Respondents' views

2.36 All but one respondent welcomed ComReg's proposal to discontinue the Commentary Report and to publish the surveys separately. The one respondent believed that ComReg should continue to publish the Commentary report in its present format. If this approach was not adopted they requested further detail on how Commentary subject matter could be incorporated and published in the ComReg Newsletter.

2.37 The same respondent supported the importance of the Quarterly Review to the industry. They suggested that ComReg should provide the industry with a preview each year of the proposed list of surveys to allow industry to offer feedback on their appropriateness. Additionally, they requested that ComReg provide further detail in relation to the proposal to publish key data on its website. They highlighted that there could be issues relating to confidentiality depending on the

level of detail proposed to be published. The respondent requested that ComReg provided a number of examples to the industry prior to any publication.

ComReg Response

2.38 ComReg has concluded that it will discontinue the Commentary Report. From this point forward market data will be presented in the following three formats:

- **Key Data Quarterly Report (QR)** – presentation of key market data in trend format with comparative analysis where appropriate. The QR for Q1 2005, has been published in parallel with this document (Irish Communications Market: Quarterly Key Data - June 2005 (05/43)).
- **Web site- ComStat** - dedicated area on the ComReg website called ComStat - this will encompass the presentation of key market data in raw and aggregated form on the ComReg website. The level of detail will be more high level or the same as that published in the QR . The objective of the publication of market data in this format is to allow users to download and manipulate data to meet their specific demands, as the current publication format in Adobe Acrobat does not permit background data to be extracted. Additionally, ComReg will include a number of key graphs which will provide users with a quick overview of the Irish Communications market in an easily disseminated format. The format of the ComStat data will be similar to that published on the CSO website³. ComReg would welcome feed-back as part of the industry workshop on the presentation of data on ComStat, however, re-emphasises that content rather than presentation was a priority in the publication of Q1 2005 data. Data will be published on a quarterly basis. A selection of raw data for Q1 2005, has been published in parallel with this document and the ComStat service will be developed more fully in the coming months.
- **Newsletter** – As a result of the decision to discontinue the Commentary Report the key regulatory developments and consumer issues which took place within the period will be discussed in the ComReg Newsletter. ComReg will include a greater level of analysis in the QR. The ComReg NewsLetter is published on a quarterly basis and is available from the ComReg website.

2.39 ComReg would welcome any comments or suggestions in relation to its market surveys. The surveys are intended to understand attitudes of consumers from many market segments to developments in the sector and ICT generally.

³ <http://www.cso.ie/px/pxeirestat/database/eirestat/eirestat.asp>

2.40 ComReg notes published data on the ComReg website is at the same level of granularity as that published in the QR. Therefore the risk of exposure or issues of commercial sensitivity should not be a difficulty.

3 Data Collection

Relevance and quality of Quarterly Report Data

- 3.1 ComReg proposed to use quarterly data for future market analysis purposes. It was intended that this would reduce the burden on operators (e.g. eliminate duplication of data collected for QR and market analysis) while at the same time building a catalogue of data suitable for market analysis purposes. In addition an annual market analysis questionnaire would be issued to supplement the data collected on a quarterly basis.
- 3.2 Previously ComReg has asked for senior officer sign-off on such data submissions, however, ComReg considered a number of options including disclaimers and assurance letters to ensure that data has been reviewed and submitted as accurately as possible.
- 3.3 ComReg sends out to OAOs, each year, a calendar of the date of issue and return dates for questionnaires and expected publication dates for the four QRs. The questionnaires are aimed at collecting data for publication a quarter in arrears. To date, quarterly questionnaires and subsequent submissions have been transmitted by email. ComReg welcomed any suggestions on how this process could be improved or better facilitated by ComReg in future.

Consultation Question 4

Q. 4. What do you think of the extent of the data currently gathered by ComReg on a quarterly basis from authorised operators? Please expand in your response.

Request for Data - Legal basis data

- 3.4 One respondent highlighted that the principles of proportionality and transparency represent key requirements against which all proposed information requests should be assessed. The respondent further pointed to Regulation 17 of the Framework Regulations which applied to those situations in which the NRA was seeking to ensure compliance with decisions made under the new framework.
- 3.5 They noted that for Regulation 17 to apply to an information request, there must be an **initial decision or determination in existence**. Their view was that as a result, an information request made for the purposes of market analysis process did not

fall within the terms of Regulation 17 as such a request could not be said to be for the purpose of ensuring compliance with any pre-existing ComReg decision or determination. The respondent submitted that Article 11 (2) and Regulation 18 (3) required that all information requests must be accompanied by a clear statement of specific purpose for which information is to be used. They submitted that where ComReg wished to collect data previously uncollected for market analysis purposes, then the potential relevant market being considered by ComReg or how ComReg proposed to use the data must be part of the information request. They further noted that ComReg must take account of the SMP Guidelines which outlined the importance of the principle of proportionality. The respondent recognised the need to collect data under the General Authorisation (Regulation 18 of the Authorisation regulation), but questioned the manner in which ComReg presented this power in the Consultation Paper. It was argued that ComReg presented that obligation to supply information as being of a general nature when in fact the regulations were quite specific in stating the purpose and circumstance in which ComReg can collect information from operators.

- 3.6 The respondent argued that when formulating information requests ComReg must:
1. State the purpose of each information request i.e. whether it related to issues associated with compliance, ComReg's wish to monitor an existing relevant market or investigations as to the possible existence of a new relevant market i.e. market definition.
 2. Consider the requirement of proportionality.
- 3.7 Another respondent identified a number of data elements requested in the quarterly questionnaire that are not published. They suggested that the quarterly questionnaire should be reviewed to remove any data elements that are not required for Market Analysis purposes.
- 3.8 Finally, one respondent believed that the extent of the data collected currently was overly onerous on operators and in some cases not very revealing of current telecoms issues. They provided an example of how data on broadband subscribers, without any analysis of penetration level or comparisons with other member states was not very informative. They also recommended that definitions embedded in the current data collection be reviewed to avoid any future ambiguities or inconsistencies. Once the questionnaire is complete, they suggested that ComReg should host a workshop for the industry to go through the various categories of data collection to ensure that there was a common understanding. It was their recommendation that an explanatory guide should also be published.

ComReg's Position

- 3.9 It was suggested by one respondent that for Regulation 17 of the Framework Regulations to apply to information request, there must be an initial decision or determination in existence. As a result, an information request made for the purposes of the market analysis process for example would not fall within the terms of Regulation 17 as such a request could not be said to be for the purpose of ensuring compliance with any pre-existing ComReg decision or determination. ComReg agrees with the first part of the respondent's interpretation of Regulation 17 of the Framework Regulations. However, in respect of a regulated market, the power to obtain data extends to all matters properly covered by any relevant SMP obligation imposed by the SMP decision.
- 3.10 It should be noted that while operators not subject to SMP obligations might not be subject to the same level of information requirements (e.g. financial and costing information), operators not designated with SMP have an obligation to comply with all information requests that are necessary (and proportionate) for monitoring market conditions in light of conclusions relating to market definition and market power, arising from previous market analyses conducted by ComReg under Regulation 27 of the Framework Regulations.
- 3.11 ComReg agrees that the purpose for which data is sought should be made clear to operators. This document sets out in this document the purposes for which information would be sought and used. Should the purpose for which the information is sought change, ComReg will seek the consent of operators for the use of information for such a different purpose, before taking any further action.
- 3.12 ComReg supports the objective that all data requests be proportionate and transparent. The purpose of this consultation was to set out ComReg's data requirements and to seek feedback from operators on how the burden of data collection could be minimised and the process could be made more efficient. ComReg has additionally sought to integrate requests for quarterly and market analysis to reduce any duplication and burden. Furthermore, ComReg intends to hold an industry workshop to meet with operators and discuss the proposals set out in this paper and ensure consistent interpretation and understanding of the process.
- 3.13 One respondent expressed the view that Regulation 18 (3) of the Authorisation Regulations required that all information requests must be accompanied by a clear statement of the specific purpose for which the information is to be used. ComReg agrees with this view and thus sets above in section one the purposes for which data has been requested. It is one of the purposes of this document to justify the collection of data set out in the draft quarterly questionnaire contained in Annex A.

ComReg does not support the argumentation from one operator that where ComReg wishes to collect data previously uncollected for market analysis purposes, then the potential relevant market being considered by ComReg or how ComReg proposes to use the data must be part of the information request.

3.14 ComReg has taken the utmost account of Regulation 18 (3) of the Authorisation Regulations, however holds that it is not necessary to account for every piece of data in terms of a defined market.

3.15 To fulfil its functions and objectives under sections 10 and 12 respectively of the Communications Act 2002, it is essential that ComReg has an understanding of the entire electronic communications sector in Ireland. ComReg requires market data for this purpose. These objectives are:

- (i) to promote competition
- (ii) to contribute to the development of the internal market, and
- (iii) to promote the interests of users within the European Union.

Consultation question 5

Q. 5. How do you think ComReg could ensure that high quality data is collected in future?

3.16 One respondent noted that that the question of “sign-off” of any communication was a matter of corporate governance to be determined by an operator. However, the respondent was willing to consider such proposals as ComReg might make in relation to this issue and to discuss appropriate assurances to accompany data submitted. They believed that the following wording would be appropriate in the circumstances:

"Operator X believes that it has used all reasonable endeavours to ensure that the attached data is accurate as at the time of submission."

3.17 Another respondent held that as data can be validated against recent trends in the market and data supplied in the market analysis exercise, they did not consider that disclaimers, assurance letters or senior officer signoff would add significant value to the data collection process. Such a requirement would serve a delay in the process and increase the burden on undertakings.

3.18 A third respondent believed that there was merit in seeking senior signoff or a standard letter of assurance.

ComReg's Position

3.19 ComReg concludes that to ensure the high quality of data and accountability, it is important to require senior management sign off. It is essential that the data

ComReg receives is of high quality because it is upon this data which ComReg bases its conclusions and decision. Furthermore, it is vital that this accuracy is consistent among respondents and over time.

- 3.20 There was support for this among all respondents except one who felt that this would be disproportionate. ComReg holds that getting such approval should not be overly burdensome on undertakings and can see no reason why this should delay the process. ComReg therefore will insist that all data provided from operators be submitted with an assurance that data reflects accurate evidence of the respondent's operations.

Consultation Question 6

Q. 6. In relation to the method by which ComReg collects data quarterly, how do you think ComReg could better facilitate/improve this process in future quarters?

- 3.21 One respondent held that definitions used should be subject to finalisation of market analysis and that the proposed questionnaire should not prejudge the outcome of reviews. The respondent recommend that a 'mock up' report should be provided to operators prior to the publication of the consultation and that ComReg should organise a trial of the revised data collection questionnaire. The respondent proposed that additional time be provided to operators in order to complete questionnaires, additional time will be contingent upon the level of additional data requested. The respondent provided a number of helpful guidelines to facilitate the collection of higher quality data. These recommendations emphasised clear explanatory notes, definitions, and consistent applications of those definitions, clear and unambiguous questionnaires.
- 3.22 Another respondent suggested that any changes should be consulted upon and that clear definitions should be included for each data element in the questionnaire. An explanatory memorandum should also be provided.
- 3.23 A third respondent believed that any ambiguity in relation to the data definitions could be assisted by an industry workshop where ComReg presented on the definitions of each category. Also an explanatory guide to filling in the report should be provided and clear definitions should be expressed to the industry. The respondent believed that the current process of e-mailing in a template questionnaire was the most practicable at this stage. They found that any web based submissions were more time-consuming and prone to error.

ComReg's Position

- 3.24 ComReg has taken on board the respondents' input on how the process of collecting data could be improved. ComReg intends to host an industry workshop to clarify definitions and ensure consistent understanding, this may be followed by one-to-one optional meetings with operators. These definitions will accordingly be published in an explanatory memorandum. ComReg welcomes the respondents' input to the process.
- 3.25 As noted above ComReg has published a draft of the QR in parallel with the response to this consultation. However, comments and observations are welcome on the presentation and content of the new report. As mentioned previously ComReg will host an industry workshop and set up one-to-one meetings with operators. It was concluded that the proposal to publish a 'mock up' of the report and the trial of the revised data collection questionnaire would be overly burdensome and unjustified in terms of time and resources for both ComReg and operators.

Market Share Data

- 3.26 Following the recent market review process undertaken as part of the new Regulatory Framework, ComReg has used the following data to, *inter alia*, calculate market shares for the markets identified in the *European Commission's Recommendation on Relevant Markets*:
1. **Lower level retail narrowband access** (Markets 1/2): Number of access lines via analogue exchange lines over copper, cable and FWA and ISDN BRA, also including 'hi-speed'.
 2. **Higher level retail narrowband access** (Markets 1/2): Number of access lines via ISDN FRA and PRA.
 3. **Retail Domestic Calls from a Fixed Location** (Markets 3/5): Retail revenue from domestic calls.
 4. **Retail International Calls from a Fixed Location** (Markets 4/6): Retail revenue from international calls.
 5. **Wholesale Terminating and Trunk Segments of Leased Lines and Retail Leased Lines** (Markets 7, 13, and 14): Provision of wholesale and retail leased lines services in terms of revenues and in terms of circuits.
 6. **Retail International Leased Lines** (Market 7): Number of retail international leased lines in terms of revenue and in terms of circuits.
 7. **Wholesale Call Origination** (Market 8): Self-supply and third-party provision of traffic volumes in minutes.

8. **Wholesale Call Termination** (Market 9): Self-supply and third-party provision of traffic volumes in minutes, for calls to end users and calls to service providers.
9. **Wholesale Transit Services** (Market 10): Self-supply and third-party provision of traffic volumes in minutes. International transit was found to be competitive
10. **LLU** (Market 11): Number of wholesale metallic local loops in Ireland.
11. **WBA** (Market 12): Number of retail access lines for Cable, FWA and ADSL.
12. **Mobile Access and Call Origination** (Market 15): Number of retail subscribers.
13. **Mobile Voice Call Termination** (Market 16): Number of retail subscribers.
14. **Wholesale National Market for Mobile International Roaming** (Market 17): N/A
15. **Wholesale Broadcasting Market** (Market 18): Number of cable/MMDS subscriptions. Number of satellite subscriptions. Number of broadcasters. Radio listener-ship and Television viewers (JNLR).

3.27 In addition to the publication of some of this information in the QR, ComReg proposed to continue collecting much of this information on a quarterly basis to help facilitate correct and timely market reviews in future. However, ComReg noted that this list of market share indicators was not exhaustive (e.g. there may be more than one method for measuring the market shares/size of a given market, such as revenue or volume) and would be revised as markets developed and evolved over time. In addition, ComReg noted that it would gather information using annual market analysis questionnaires to supplement the data that is gathered each quarter.

3.28 ComReg pointed out that is legally entitled to collect information on relevant markets which may fall outside the Recommendation or markets where ComReg has indicated it will monitor competitive developments in advance of future market reviews.

Consultation Question 7

Q. 7. Do you believe that there are additional market share indicators that should be collected for each market? Please expand in your response.

Market Share – Specific to Recommended Markets

3.29 In relation to the appropriate scope and detail of the market share data which should be included in the QR, there was significant variance among respondents. Some felt that there should be more detail to what had been previously included in the QR; while others felt that market data should only be provided for markets defined as part of the Market Review process (which were based on the European

Commission Recommendation). All views are presented below.

- 3.30 One respondent suggested a number of criteria which could be used to calculate market share. They proposed that voice and data markets be reported on a separate basis, due to different market dynamics. Additionally, it was their view that direct and indirect traffic volume should be collected to ensure the correct sizing of the market. The respondent proposed that certain call categories be reclassified to ensure that valid market shares could be calculated. They also suggested that there were a number of additional market share indicators that should be collected including broadband and VoIP. The respondent suggested that further detailed mobile data should be collected and published, in relation to retail and wholesale services.
- 3.31 Another respondent did not support this view and objected to the proposal to segment a single market and publish elements of particular service as separate markets. The respondent suggested that the proposal to publish data such as disaggregated mobile revenue in the QR as supplementary market share went beyond the requirements, for market analysis and thus could not be justified. They considered that handset revenues were not appropriate to the QR due to the fact that they were not directly linked to the provision of ECNs which, may include services provided by independent retail outlets. Notwithstanding that its inclusion would be inappropriate; the respondent felt that this would provide incomplete statistical information which would be of limited value to observers. It was their view that market share data should be limited to those markets defined as part of the new Framework.
- 3.32 Another respondent agreed with ComReg's proposed market share indicators, however, also indicated that if operators found merit in presenting market share for some other groupings that there should be some mechanism for new categories to be considered and published in the future. The same respondent questioned whether it was appropriate to publish market share data in terms of the eighteen Recommended Markets under the new Framework, they questioned whether this would be easily understood and of general public interest. They requested further clarification of what services were considered under fixed line data relating to services included in direct and indirect access and call traffic categories by volume and revenue.
- 3.33 Another respondent proposed that once the individual market reviews were complete, ComReg should amend questionnaires/definitions where necessary to ensure that questionnaires were consistent with determinations which arose either from the market reviews or any future reviews.

ComReg's Response

- 3.34 ComReg supports the respondent which suggested that voice and data markets be reported on a separate basis, due to different market dynamics. ComReg concludes that it is appropriate to present market data separately as this level of detail allows for greater insight in terms of the take up and migration of individual products and services. This would be more difficult to establish if data services is combined with voice services. Additionally ComReg intends to collect market data in terms of direct and indirect access, as this is vital to assess the level of service based competition and take up of products such as Wholesale Line Rental. These suggestions have been incorporated into the (Irish Communications Market: Quarterly Key Data - June 2005 (05/43)).
- 3.35 One respondent objected to ComReg's reference to segment a single market and elements of particular services as separate markets, ComReg holds that this objection is unfounded and that market data does not have to be presented strictly in terms of defined markets. ComReg agreed with another respondent that it may not be appropriate to limit the presentation of data to the markets defined as part of the market review process. The object of the QR is to provide a market overview to all and in consideration of all stakeholders it was concluded in the presentation of market data that a more holistic approach should be adopted. Publication of data is not limited to the markets corresponding to those reviewed under market analysis.
- 3.36 ComReg has the power to collect data for the purposes of the quarterly reviews under Regulation 18 of the Authorisation Regulations. If data is to be used for more than one purpose, the power authorising ComReg to seek it for a different purpose will be relied upon also. ComReg has express powers to publish data as part of the QR, subject to confidentiality.
- 3.37 Furthermore, ComReg supports two respondents' views that there may be additional markets for which data should be presented in the QR. There are a number of additional market share indicators that should be collected, broadband and VoIP. One of the respondents noted that if operators found merit in other categories that there should be some mechanism for new categories to be considered and published in the future, ComReg welcomes such recommendations.

Consultation Question 8

Q. 8. Do you agree that market shares should continue to be monitored in relevant markets found to be competitive, at least in the short to medium term? Please expand in your response.

Presentation of data of competitive markets

3.38 All respondents agreed that market shares should be continued to be monitored in relevant markets found to be competitive. One respondent took the view that such transparency would ensure that the competitive market was operating and the justification for the absence of regulatory intervention was visible.

3.39 Another respondent also believed that markets found to be competitive should continue to be monitored as these could subsequently become uncompetitive. It would be a useful tool for both ComReg and the Industry.

3.40 A third respondent believed that data collected on a quarterly basis should be sufficient to monitor the effect of the removal of obligations, while data collection for the purpose of Market Analysis would not be justified.

ComReg's Response

3.41 ComReg support the views of respondents and holds that it is appropriate to collect data relating to competitive markets on a quarterly basis. It was deemed that this would be more efficient than on an annual basis.

Consultation Question 9

Q. 9. Do you agree with ComReg's proposals to combine the Quarterly Report and market analysis data collection processes, in order to reduce overlap in data requirements and ensure the quality of all future data collected? Do you have any suggestions for how these processes can be combined? Please expand in your response.

Integrated Questionnaire

3.42 All respondents supported in principle the amalgamation of the quarterly and market analysis data collection, however some respondents questioned how the two questionnaires could be combined effectively.

3.43 One respondent supported ComReg's proposal to combine the quarterly and market analysis data collection processes, subject to protecting information as confidential.

The respondent urged ComReg to ensure that adequate safe guards were put in place to ensure that data collected was reliable and accurate, and that data quality control and verification procedures were put in place.

- 3.44 A second respondent saw merit in the utilisation of some information gathered as part of the QR exercise for Market Analysis purposes but considered the scope for combining data to be limited, given the distinct objectives and obligations that apply to each. It was suggested that the collection of detailed Market Analysis data on a quarterly basis could result in replication of tasks that could be carried out more efficiently on an annual basis. Such overlap could be better addressed by limiting the QR questionnaire to that data which is necessary for the QR publication, while taking account of the aforementioned need to protect commercial sensitivity. They suggested that data requirements should be clearly stated in advance to allow sufficient opportunity to identify and store the required data in the appropriate format. There was support from a number of other respondents that ComReg should not include questions in the QR survey which are not required for the QR.
- 3.45 Another respondent supported ComReg's initiative that aimed to reduce the burden of information requests on operators. While they supported the use of information which had already been collected for the QR for an annual market analysis they objected to additional data being collected on a quarterly basis that had no significance to the quarterly market review process.
- 3.46 A further respondent, which did not reply specifically to the consultation questions, welcomed the intention that the quarterly review will form part of the data collection for future market analysis. The respondent did not have any issue with the information requested as outlined in the initial consultation document as it had not changed significantly however they did make a number of comments regarding structure and proportionality of data collected for the annual market review. The respondent argued that the level of data requested as part of the market analysis review was too detailed and the lack of consultation caused resource, time and cost issues for all parties involved.
- 3.47 One respondent agreed that the QR and Market Analysis data collection process should be combined to relieve the burden on industry in relation to data collection. The respondent recommended that QR move to a bi-annual format and that any Annual Market Analysis questionnaire be kept to a minimum of information. They suggested that the MA questionnaire should be thoroughly defined to ensure that operators could easily collect data from their respective internal organisations. The respondent suggested that the annual questionnaire should not duplicate data requested on a quarterly basis.

ComReg's Response

- 3.48 With regard to one respondent's comment in relation to the confidentiality of published data ComReg shall ensure that in line with all published data it shall comply with the Guidelines on the Treatment of Confidential Information (ComReg Reference Number : 05/24).
- 3.49 As set out above it is intended that ComReg will provide high-level data on a quarterly basis for the purposes of; (i) continuously monitoring the Irish electronic communications market; (ii) for statistical purposes and; (iii) market review functions. To supplement this, ComReg will issue an annual market data questionnaire which will be more detailed in its questioning. When considering whether data should be collected quarterly as opposed to on an annual basis ComReg attempted to reach a balance between minimising the burden upon undertakings in collecting data and being able to carry out its objectives adequately.
- 3.50 ComReg does not support the view of one respondent that there has not been a sufficient level of consultation in the market analysis data collection process. ComReg is very willing to include operators in this process. There is an inherent difficulty associated with such a practice as it will be virtually impossible to satisfy each operator. ComReg must reach a balance which takes into consideration the resources available to each respondent, to ensure proportionality, without jeopardising the quality of the data ComReg receives which could ultimately effect conclusions reached. As part of this review ComReg has sought the views of operators of how this process could be improved, additionally, an industry workshop will be organised to discuss the conclusions reached.

4 Revision of Existing Quarterly Report Questionnaires

4.1 The intention of this section was to revise the existing QR questionnaires in order to reduce the burden on operators (e.g. eliminate duplication of data collected for QR and market analysis) while at the same time building a catalogue of data suitable for market analysis purposes. However, ComReg expected that the new questionnaires will, in future be revised as products and services in the market place evolve. ComReg sought the views of respondents on suggested changes to the questionnaires as well as on the value and frequency of the quarterly questionnaires. A draft of the new questionnaire is contained in Annex A.

Consultation Question 10

Q. 10. Do you agree with how ComReg has defined each of these services and proposals going forward for each of the questionnaires in Annex A? Please expand in your response, referring to the specific area of the questionnaire where appropriate.

ComReg's Position

4.2 A number of respondents requested details and clarification on the questionnaire contained in Annex A. ComReg have addressed and incorporated these comments into the publication of the QR which includes an explanatory memorandum and also contains a draft of the Q2 2005 questionnaire. The conclusions reached will be discussed at the planned industry workshop.

Consultation Question 11

Q. 11. Are there any areas of the questionnaires in Annex A where you think you may find it particularly difficult to provide such data on a quarterly basis? Please expand in your response.

Views of Respondents

4.3 One respondent noted that it should not be optional for operators to provide separate residential and non residential data. Adding, that self categorisation by the customers was the basis on which they segmented their customer base into residential and non residential customer types. While they recognised that this was fundamentally a subjective basis of segmentation, they were satisfied that the majority of customers are correctly classified.

- 4.4 The same respondent also noted that they would need to see and to have experience of the final questionnaire before forming a view of whether there were specific areas of the questionnaire that they would find onerous to complete.
- 4.5 Another respondent noted that they would have difficulty with a number of specific queries regarding, how some of the data sought had been defined, such as Off Net Minutes split by operator. They argued that this would cause difficulty due to commercial sensitivity and felt that this raised serious issues of proportionality given the amount of resources and time it would take to report this on a quarterly basis. They requested that ComReg refrain from splitting this information as they believed that ComReg had failed to demonstrate a need or benefit in splitting out the category of ‘Off-Net mobile minutes’.
- 4.6 Another respondent requested further clarification on the data requested, it was suggested that this clarification should be available via an industry workshop.

ComReg’s Position

- 4.7 ComReg requests that all respondents provide separate residential and non residential data where asked. In the initial consultation ComReg welcomed suggestions on how best to define these products and services to ensure a common understanding across all operators. ComReg did not receive satisfactory suggestions from respondents on categorisation. ComReg will present its conclusions and it is hoped that this and other matters relating to product and service definitions can be resolved through the planned industry workshop.
- 4.8 ComReg reiterates its view that data which could be commercially sensitive shall not be published in the QR in a disaggregated form. However it is essential that ComReg has detailed and accurate data available to it, in order to monitor markets and to meet its objectives as set out in the Communications Act 2002.

Market Analysis Requirements

- 4.9 All of the relevant information that was previously requested in the February 2003 market analysis questionnaires and which does not overlap with the revised QR Questionnaires in Annex A, shall now be included in an annual market analysis questionnaire. This annual questionnaire shall also include any additional information that would be deemed necessary to carry out a sufficient market analysis under the new Regulatory Framework. It is proposed that the Market Analysis questionnaire will be issued in June/July 2005 and will be followed by an Industry Workshop.

Annex A – Draft of Revised Quarterly Questionnaires

Overall Revenues:

	€000s	
	Wholesale	Retail
Fixed services		
Mobile services		
Broadcasting services		

Notes:

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Where respondents cannot provide a non-residential / residential split ComReg welcomes suggestions on how to overcome this issue. Conversely where respondents are able to provide this split, could they please explain how they arrived at the split, i.e. what criteria they use to differentiate the two types of customers.

Revised Fixed Quarterly Questionnaire

Section A: Fixed Networks - Subscriptions and Access

A.1 - Direct Access:

	Wholesale ⁴	Non-residential	Residential
PSTN Services:			
Subscribers ⁵			
Access Lines			

⁴ Wholesale refers to Wholesale Line Rental services. This category should only include the number of 'access lines' for which the operator provides Wholesale Line Rental services as a wholesale service not a retail offering to the customer and should currently only be filled out by eircom. The corresponding retail services provided by CPS – Single Billing operators are covered in the section on Indirect Access.

⁵ The term subscriber, hereafter, refers to active subscribers, i.e. those who have used the service within the previous three months.

ISDN Services:				
Basic Rate Services:				
Subscribers				
Access Lines ⁶				
Fractional Rate Services:				
Subscribers				
Access Lines				
Primary Rate Services:				
Subscribers				
Access Lines				

A.2 - Indirect Access:

		CPS-only	
		Non-residential	Residential
CPS PSTN Services:			
Subscribers			
Access Lines			
CPS ISDN Services:			
Basic Rate Services:			
Subscribers			
Access Lines			
Fractional Rate Services:			
Subscribers			

⁶ Only number of lines should be entered here. ComReg regards relationship between ISDN lines and narrowband access paths as: ISDN Basic line = 2 narrowband channels; ISDN fractional line = typically 16 narrowband channels; and ISDN primary line = 30 narrowband channels.

Review of the Quarterly Report – Response to Consultation

Access Lines			
Primary Rate Services:			
Subscribers			
Access Lines			

		WLR & CPS	
		Non-residential	Residential
WLR PSTN Services:			
Subscribers			
Access Lines			
WLR ISDN Services:			
Basic Rate Services:			
Subscribers			
Access Lines			
Fractional Rate Services:			
Subscribers			
Access Lines			
Primary Rate Services:			
Subscribers			
Access Lines			

		Other Forms of IA	
		Non-Residential	Residential
Carrier Access and Carrier Selection:			
Subscribers			

Access Lines			

A.3 - Payphones:⁷

Public		
Private		

Notes:

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Section B: Fixed Networks – Narrowband Retail Services

B.1 - Fixed Telephony – Retail Traffic (000s minutes):

		Wholesale ⁸	Non-residential	Residential
Basic Voice Services:				
Local ⁹				
National ¹⁰				
International				
Fixed to Mobile ¹¹				

⁷ Public – on the streets; Private – includes those that are generally accessible, such as in shopping malls transport interchanges (bus & railway stations, airports), those in tightly enclosed premises but used by the general public (restaurants pubs and clubs) and those with restricted access (other than by time of day) (such as in rented accommodation or student hostels).

⁸ Wholesale here refers to minutes for resale.

⁹ If a distinction is made between local and national calls, please specify how this distinction is made. If no distinction is made between local and national calls, please enter figure for all domestic calls under national minutes.

¹⁰ Calls to Northern Ireland should be included in this category.

Payphone			
Total			
Advanced Voice Services:¹²			
Premium Rate Services			
Freephone			
National Virtual Private Network			
International Virtual Private Network			
Other advanced voice services			
Total			
Overall Voice Traffic			

B.2 - Fixed Interconnection (000s minutes):

	Third-party
Primary Call Origination	
Primary Call Termination to end users	
Primary Call Termination to service providers ¹³	
Primary Call Termination to internet services (excl. FRIACO)	
Primary Call Termination to FRIACO services	
Transit ¹⁴	
International Access ¹⁵	
International Terminating Traffic ¹⁶	

¹¹ Including calls to mobile in Northern Ireland.

¹² These minutes should not be included in preceding voice categories.

¹³ This includes access to advanced voice services, e.g. premium rate services, freephone, etc. but excludes access to internet services.

¹⁴ Transit is any traffic, that is conveyed through own tandem or double-tandem exchange.

¹⁵ Outbound traffic through own international gateway exchange.

¹⁶ Traffic which originates internationally and terminates in Ireland.

Mobile to mobile fixed tandem conveyance		
Direct Interconnection		

B.3 - Fixed Telephony – Retail Revenues (000s euro):

	Wholesale¹⁷	Non-residential	Residential
Basic Voice Services:			
Local ¹⁸			
National			
International			
Fixed to Mobile ¹⁹			
Payphone			
Total			
Advanced Voice Services:²⁰			
Premium Rate Services			
Freephone			
National Virtual Private Network			
International Virtual Private Network			
Other advanced voice services			
Total			
Direct installation, connection, rental and other charges ²¹			

¹⁷ Wholesale here refers to revenues from resale.

¹⁸ If a distinction is made between local and national calls, please specify how this distinction is made. If no distinction is made between local and national calls, please enter figure for all domestic calls under national revenues. This category also includes Northern Ireland.

¹⁹ Including Northern Ireland.

²⁰ These minutes should not be included in preceding voice categories.

²¹ This does not include revenues from WLR.

WLR installation, connection, rental and other charges ²²				
Overall Revenue				

B.4 - Fixed Interconnection (000s euro):

	Third-party
Primary Call Origination	
Primary Call Termination to end users	
Primary Call Termination to service providers ²³	
Primary Call Termination to internet services (excl. FRIACO)	
Primary Call Termination to FRIACO services	
Transit ²⁴	
International Access ²⁵	
International Terminating Traffic ²⁶	
Mobile to mobile fixed tandem conveyance	
Direct Interconnection	

Notes:

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Section C: Narrowband / Broadband Internet Access Services and LLU

C.1 - Subscribers to Narrowband Internet Access Services

²² Wholesale here refers to revenue from WLR. The non-residential and residential categories should only include retail revenues from WLR customers.

²³ This includes access to advanced voice services, e.g. premium rate services, freephone, etc. but excludes access to internet services.

²⁴ Transit is any traffic, that is conveyed through own tandem or double-tandem exchange.

²⁵ Outbound traffic through own international gateway exchange.

²⁶ Traffic which originates internationally and terminates in Ireland.

	Non-Residential	Residential
Dial-up internet subscribers with no monthly subscription		
Dial-up internet subscribers with monthly subscription excl. FRIACO		
FRIACO internet subscribers		
Other narrowband internet subscribers (please specify in Notes)		
Number of Ports		
Number of Wireline Public Points of Access to Internet		

C.2 - Retail Narrowband Internet Access Traffic

Dial-up internet:²⁷	Non-residential	Residential
Geographic termination		
1890		
1891		
1892		
FRIACO 1893		
Other termination		
Total		
Fixed SMS²⁸		

C.3 - Retail Narrowband Internet Access Revenue

Dial-up internet:²⁹	Non-residential	Residential
Geographic termination		
1890		

²⁷ If cannot be broken out by code, enter under 'Total'.

²⁸ Wholesale refers to provision of fixed SMS services to CPS operators. If retail SMS traffic cannot be split between non-residential/residential, the total should be entered under residential.

²⁹ If cannot be broken out by code, enter under 'Total'. Includes revenue from subscription.

1891			
1892			
FRIACO 1893			
Other termination			
Total			
Fixed SMS³⁰			

Broadband Services³¹

C.4 - ADSL³²

		Bitstream	Simple Resale
Number of agreements			

		Wholesale³³	Non-residential	Residential
ADSL Lines				
ADSL Revenues				

C.5 - Simple Resale (OAO entry only)³⁴

		Wholesale³⁵	Non-residential	Residential
Simple Resale Lines				
Simple Resale Revenues				

³⁰ Wholesale refers to number of fixed SMS messages carried by the eircom for CPS operators. If retail SMS revenues cannot be split between non-residential/residential, the total should be entered under residential.

³¹ Broadband access is defined as speeds of 144kbit/s or greater. Broadband cable modem services are captured in a separate broadcasting questionnaire.

³² Includes ADSL provided through LLU.

³³ High speed bit stream access lines made available to third parties.

³⁴ High speed bit stream access lines that have been made available to a third party and then resold to another OAO to enable it to provide high speed services to end users.

³⁵ This wholesale category should only include lines and revenues for provision of simple resale to other OAOs.

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C.6 - SDSL

	Wholesale	Non-residential	Residential
SDSL Subscribers			
SDSL Lines			
SDSL Revenues			

C.7 - VDSL

	Wholesale	Non-residential	Residential
VDSL Subscribers			
VDSL Lines			
VDSL Revenues			

C.8 - Fixed Wireless Access

FWA Base Stations	

	Narrowband³⁶	Broadband
Subscribers on licensed FWA		
Subscribers on unlicensed FWA		
Revenues from provision of FWA services		

C.9 - Satellite / Free Space Optics

	Narrowband³⁷	Broadband
Satellite Subscribers		

³⁶ Please indicate in Notes whether these subscribers use service primarily for voice services, internet access services or both.

³⁷ Indicate in Notes what these subscribers primarily use service for.

Free Space Optic Links			
Revenue from provision of service			

C.10 - WLANs

Do you provide broadband WLAN services to end users		
Number of WLAN access points		
Revenues from provision of WLAN services		

Local Loop Unbundling

C.11 - LLU (the respondent [eircom] entry only)

		Full LLU	Shared LLU
Number of agreements			
Number of LLU lines ordered, but not yet installed			
Number of LLU lines installed			

C.12 - LLU (OAOs entry only)

		Non-residential	Residential
Number of full LLU lines installed			
Number of shared LLU lines installed			

Notes:

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Section D: Point-to-point Capacity Products and Other Services

Point-to-point Capacity Products

D.1 – Retail Point-to-point Capacity Products³⁸

	No. of Connections	Revenues (000s euro)
Analogue Circuits		
64k-128k (inclusive)		
192k-512k (inclusive)		
576k-1024k (inclusive)		
1088k-1984k (inclusive)		
2 Mbps		
34 Mbps		
45 Mbps		
155 Mbps		
Above STM-1		
Managed Services (up to and including 2Mb/S)		
Managed Services (above 2Mb/S)		
National Total		
International		
Retail Total³⁹		

D.2 – Wholesale Point-to-point Capacity Products

	Wholesale Leased Lines		PPCs	
	No. of	Revenues	No. of	Revenues

³⁸ A national product is defined as one where the A end and B end are both located within Ireland, or an international product with an A end in another country and the B end in Ireland. An international product is one where the A end is in Ireland and the B end is in another country.

³⁹ Includes both national and international retail point-to-point capacity products

	Connections	(000s euro)	Connections	(000s euro)
Analogue Circuits				
64k-128k (inclusive)				
192k-512k (inclusive)				
576k-1024k (inclusive)				
1088k-1984k (inclusive)				
2 Mbps				
34 Mbps				
45 Mbps				
155 Mbps				
Above STM-1				
Total				

D.4 - Web-hosting, Co-location and Other Services (000s euro)

Revenues from web-hosting services		
Revenues from co-location services		
Revenues from sale and maintenance of CPE		
Revenues from directory publications		
Other revenues (specify in Notes)		

Notes:

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Section E: Cable/MMDS & Satellite Transmission Services

E.1 - Cable/MMDS Subscribers

Analogue-only ⁴⁰		
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⁴⁰ As all digital subscribers also have an analogue subscription, this number should not include households that have upgraded to digital.

Digital		
Total Subscribers		

E.2 - Cable/MMDS Broadband Services⁴¹

Cable Modem Subscribers		
Households passed for broadband services		

E.3 - Connections

Total number of households passed for TV services		
Households passed for digital TV services		

E.4 - Cable/MMDS Revenues (000s euro)

Installation, connection and rental		
Basic Usage ⁴²		
Premium Usage		
Cable Modem Revenues		
Other (Please specify in Notes)		
Total Cable/MMDS Services Revenues		

Notes:

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⁴¹ Broadband is defined as speeds of 144kbit/s or greater.

⁴² Includes both analogue and digital subscriptions.

Revised Mobile Quarterly Questionnaire

1 - Prepaid Subscribers

		2G	3G	Total
Subscribers at start of period ⁴³				
New Subscribers during period				
Subscribers disconnected during period				
Total Prepaid Subscribers				

2 - Contract Subscribers

		2G	3G	Total
Subscribers at start of period				
New Subscribers during period				
Subscribers disconnected during period				
Total Contract Subscribers				

3 - Churn Rate

		Prepaid	Contract	Total
Churn Rate ⁴⁴				

4 - Number of Minutes (Prepaid & Contract)

		000s
Minutes to Fixed Lines		

⁴³ The term 'subscribers' refers to active subscribers – i.e. those who have made a call on the network within the previous 3 months.

⁴⁴ Churn is calculated by expressing the sum of disconnections for the preceding twelve months as a percentage of the weighted average number of customers for the same period.

On-net mobile minutes		
Off-net mobile minutes		
- to Vodafone		
- to O2		
- to Meteor		
- to 3		
Outgoing International Minutes		
Minutes whilst roaming abroad		
Other mobile services ⁴⁵		
Total Minutes		

5. - SMS (Prepaid & Contract)⁴⁶

		000s
SMS Messages sent by end users ⁴⁷		
Revenues from SMS sent by end users		
Other SMS Messages sent by customers ⁴⁸		
Other SMS Revenues		

6. - MMS (Prepaid & Contract)

		000s
MMS Messages sent by end users ⁴⁹		
Revenues from MMS sent by end users		

⁴⁵ Including for example, Data Services, Voicemail, DQ, Call Completion, etc.

⁴⁶ Includes premium SMS messages

⁴⁷ Includes messages sent by people only.

⁴⁸ Specify in Notes what types of SMS messages (other than those sent by end users) are included in this number

⁴⁹ Includes messages sent by people only.

Other MMS Messages sent by customers ⁵⁰		
Other MMS Revenues		

7. - Mobile Telephony Revenues (Prepaid & Contract)

Gross Handset Sales ⁵¹		
Connection Rental and other charges		
Domestic traffic revenues		
International Roaming revenues ⁵²		
Premium Rate Services		
Other mobile services ⁵³		
Total Revenues		

		Prepaid	Contract	Total
Average Revenue Per User ⁵⁴				

8. - Interconnect Revenues (euro 000s)

		Peak	Off-peak	Weekend	Total
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⁵⁰ Specify in Notes what types of SMS messages (other than those sent by end users) are included in this number

⁵¹ To be reviewed.

⁵² International roaming revenues include revenues from foreign roamers making calls on the operator's own network in Ireland, as well as any revenues gained from own network subscribers roaming on foreign networks abroad.

⁵³ Including for example, Data Services, Voicemail, DQ, Call Completion, etc.

⁵⁴ ARPU is calculated by dividing the total service revenue from sales to customers for the preceding 12 months by the weighted average number of customers for the same period. Total service revenue includes voice revenue, data revenue, interconnection revenue and roaming revenue.

Review of the Quarterly Report – Response to Consultation

Net Revenue – Interconnect					
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