Commission for
Communications Regulation

Consultation Paper

Review of the ComReg Quarterly Report

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All responses to this consultation should be clearly marked:- "Reference: Submission re ComReg 05/09" as indicated above, and sent by post, facsimile, e-mail or on-line at www.comreg.ie (current consultations), to arrive on or before 5.30pm, 18th March 2005, to:

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Please note ComReg will publish all submissions with the Response to Consultation, subject to the standard confidentiality procedure.

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1 Introduction

1.1 The ComReg Quarterly Report has provided a helpful overview of the development of the Irish Communications market over the past four years. The report is widely accessed by both industry and the public, and is quoted regularly as a useful source of information on developments in the Irish Communications market. In order to ensure that the Report is fresh, up-to-date and informative in a rapidly changing communications market, ComReg proposes to conduct a review of the Report in consultation with all interested parties.

1.2 During its recent reviews of relevant electronic communications markets under the new regulatory framework, ComReg sent out a number of market analysis questionnaires aimed at feeding into the market review process. ComReg has since gained valuable experience on the data requirements for such market reviews. As the market reviews progressed, it became evident that some of the data which was requested may have been surplus to requirement, was insufficient for market analysis purposes, was incorrectly answered or had led to ambiguity across operators. It, thus, became necessary for ComReg to make subsequent information requests in order to obtain further information on the specific characteristics of certain markets in Ireland, including, for example, the leased line markets, the wholesale mobile access and call origination market and the interconnection markets. It also became evident that much of the information that is collected on a quarterly basis overlaps with that which is required for market analysis.

1.3 ComReg thus recognises the need to:

- Assess the value of the current report to ComReg, industry and the public in general;
- Based on the above assessment, update and improve the current Quarterly Report data collection, focusing on the value of the data that has been requested in the past along with future needs arising from ComReg's obligation to conduct market analyses;
- Assess the ability of industry to provide such information, and
- Assess the overall structure of the Report and how it can be improved

1.4 The following sections incorporate a review of each section of the report as it currently stands, with the opportunity for interested parties to submit views on how the Report could develop. ComReg proposes that the data collected should form part of the data collection process for future market analysis, thus promoting a more efficient and accurate data collection process and reducing the burden on operators in future market reviews.

1.5 The consultation period will run from 4th February 2005 to 18th March 2005 during which ComReg welcomes written comments on any of the issues raised in this paper. It would make the task of analysing responses easier if comments made were referred to the relevant consultation question in this document and, where comments are being made on the questionnaires, to the particular section of the questionnaire. Having analysed and considered the comments received, ComReg will then publish a report on the consultation which will, *inter alia,* summarise the responses to the consultation.

1.6 In order to promote further openness and transparency ComReg will publish the names of all respondents and, subject to its obligations of confidentiality, may make available for inspection responses to the consultation at its Offices and on its website.

1.7 The remainder of this consultation is structured as follows:

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

1.8 The proposed questionnaires and a full list of consultation questions are attached in the Annexes.

2 Quarterly Report Content

2.1 Since its inception in 1999, the Quarterly Report (QR) has grown in importance and is consistently one of the the most quoted and accessed document on the ComReg website. The report's value lies in the provision of current aggregate statistical data on the Irish communications market and the ability to identify market trends quarter on quarter and year on year. In the ensuing 5 years, there has been a good deal of progress and development in the Irish communications market, both economic and technical. In recognition of this ComReg would like to ensure that the quality of the report is maintained and improved upon and ensure that those sections which attract most interest are maintained at a high standard. To do this it is necessary to identify which sections are of most interest and value to our stakeholders and what additional changes 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 current Quarterly Report consists of 2 parts, a Key Data report which presents quarterly statistics on the Irish market and a Commentary report which summarises regulatory developments and initiatives such as market surveys commissioned by ComReg in the previous quarter. The Key Data Report which contains all the key data statistics of the previous quarter arguably includes the most relevant data on market activity by sector.

2.3 As part of this process ComReg is hoping to be able to offer more detailed data on the developments in the market place. ComReg also intends to provide, where possible, quarterly information more aligned with the markets as defined in the recent market review process. ComReg also proposes that some of the key data is made available on the ComReg website directly under a market information section. However, any data reported will of course continue to satisfy confidentiality and commercial sensitivity requirements.

2.4 ComReg also collects supplementary end-user data by means of surveys commissioned from market research agencies. To date these surveys have been published alongside the quarterly report and analysed in the Commentary report. It should be noted that ComReg will no longer be publishing a separate Commentary Report as much of this information is already contained in the ComReg Newsletter and a summary of key statistics will instead be part of the revised Key Data Report. ComReg also intends to publish future surveys separately. This would allow ComReg to comment in more depth on each survey and to bring them to the attention of a wide audience.

2.5 These proposed developments will be reflected in changes to the questionnaires which are discussed below.

2.6 Finally, ComReg proposes to retain the frequency of the Report on a quarterly basis.

Information Published in the Report

Overall Market Data

2.7 The section on Overall Market Data on communications revenues and employees should be retained as a useful indicator of the health of the overall electronic communications sector. In the past both GDP and GNP[1] have been used to illustrate the growth of the electronic communications sector relative to the Irish economy as a whole. While the OECD, the ITU and the European Commission prefer to rely on the more commonly used indicator GDP, there are merits in using both indicators, and ComReg proposes to continue using both reporting methods going forward.

Fixed Line Data

2.8 ComReg proposes to:

- Publish overall fixed line revenues along with Other Authorised Operators (OAOs) market share, with the revenue shares also broken out by market where possible;
- Provide an illustration of activity in Direct/Indirect Access market, including a comparison of eircom versus OAO PSTN and ISDN CPS/WLR lines;
- Where possible publish a market shares for retail access and call traffic categories by volume and revenue with an eircom versus OAO market share split;

[1] GDP is the value of goods and services produced within a country while GNP is the value of goods and services produced by citizens of a country.

- Publish an internet section split between narrowband and broadband. The narrowband section will provide information on metered and unmetered subscriptions and revenues. Due to the innovative nature of and the impressive growth evident in the broadband market, ComReg proposes to continue collecting information on broadband services on a quarterly basis. There are a number of different types of broadband technologies available to consumers and ComReg intends to improve this section of the report to better reflect trends in provision of these services. The broadband section will include an overall figure for subscriptions with a breakdown by DSL, cable modem, FWA and Satellite take-up, market shares of eircom versus OAO would also be provided, and
- Provide data on point-to-point capacity products (by circuit and by revenue) for retail and wholesale services. ComReg proposes to provide information on eircom versus OAO market shares by circuit and by revenue.

Mobile Data

2.9 ComReg proposes to:

- Provide a time series development of the Irish mobile penetration rate;
- Provide aggregate mobile revenues with market shares;
- Publish mobile traffic by destination with market shares;
- Provide overall mobile subscription numbers broken down by 2G/3G and post paid/pre-paid with accompanying market shares;
- Provide the number of SMS and MMS messages sent by end users and the number of SMS and MMS messages sent by MNOs / service providers, and
- Publish the mobile ARPU comparison across EU States and data revenues as a percentage of overall retail revenues by operator.

Broadcasting Data

2.10 ComReg proposes to:

- Publish cable/MMDS analogue and digital subscriptions along with digital satellite subscriptions;

- Publish number of households passed for analogue and digital services, and
- Publish Cable/MMDS revenues.

Teligen Pricing Data

2.11 The Teligen pricing baskets currently included in the QR have proven to be one of the most widely quoted sections of the Report. 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 other Member States in relation to telecom tariffs.

2.12 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 have not, to date, included the ten new members that joined on 1st May as prices in these countries are not yet comparable to the EU-15. The baskets of services examined in this section include:

- National PSTN;
- International PSTN;
- National Leased Lines;
- International Leased Lines;
- ISDN and ADSL Baskets, and
- Pre-paid and post paid mobile baskets

2.13 Due to the substantial reference to these baskets both within and outside ComReg, it is proposed that this section of the Report be retained.

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.

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.

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.

2.14 Section 3 below addresses issues with current data collection methods and proposals for changes to the approach to future QR and market analysis data collection.

3 Data Collection

3.1 ComReg has historically collected data on a voluntary basis for the purposes of providing quarterly updates on developments in the Irish Communications Market. ComReg recognises the high degree of compliance by operators in the past to the voluntary submission of quarterly report data and thanks all operators for their cooperation with this process. As a result of the implementation of the new EU regulatory framework, ComReg is now also obliged to obtain data for the purpose of market definition and analysis.[2]

3.2 A necessary preliminary stage in the process of market definition and analysis is the collection of data from undertakings for the purpose of defining and analysing the relevant market. The Framework Regulations and the Authorisation Regulations[3] both contain a variety of data collection powers.

3.3 As discussed below, ComReg proposes to collect all data included in the revised questionnaires for the purposes of the market analysis as well as to feed into the QR. Thus, all information will be gathered under powers provided for in the Framework Regulations and the Authorisation Regulations. This information will also supplement an annual market analysis questionnaire which is aimed at collecting market analysis information not required on a quarterly basis (see Annex B).

[2] Regulation 26 of the Framework Regulations imposes a legal obligation on ComReg to define relevant markets for the purposes of the Framework Regulations. Regulation 27 of the Framework Regulations imposes a legal obligation on ComReg, as soon as possible after it defines a relevant market, to carry out an analysis of such a market. Regulation 20 of the Framework Regulations imposes a legal obligation on ComReg to contribute to the development of the internal market by co-operating with national regulatory authorities in other EU Member States and with the EU Commission in a transparent manner to ensure the consistent application of the provisions of the Framework Directive and the Specific Directives.

[3] S. I. No. 306 of 2003 the European Communities (Electronic Communications Networks and Services (Authorisation) Regulations 2003 which transposes Directive 2002/20/EC of the European Parliament and the Council of 7 March 2002 on the authorisation of, electronic communications networks and services.

However, ComReg notes from experience that as market reviews evolve it may become necessary for ComReg to request some market analysis information outside the quarterly questionnaires but more frequently than the annual questionnaires. This would become apparent over time.

Relevance and quality of Quarterly Report Data

3.4 The quarterly data that has been collected in the past has proven useful to ComReg in decision making and in the formulation of regulatory strategies and has supported the recent market analysis process. The QR has gained a reputation for its key data which is quoted by both press and operators. Particularly of interest is market share and penetration data along with tariff data.

3.5 ComReg would thus like to ensure that the data arising out of this process is, in future, as accurate and as relevant as possible. The proposed level of detail required going forward on a quarterly and annual basis is reflected in the revised questionnaires attached (see Annexes A & B).

3.6 As there is substantial overlap between the data that would be collected under the QR and that which would be required for market analysis, ComReg proposes to use the QR data in future for market analysis purposes also. This would reduce the burden on operators by ensuring that relevant data is collected only once. In turn, requiring that future data provided is sufficient for market analysis purposes ensures the quality of the data ComReg proposes to report in future quarters. In addition an annual market analysis questionnaire would be issued to supplement the data collected on a quarterly basis (see Annex B).

3.7 Thus, all future submissions should be of a quality sufficient for market analysis purposes. The data collected for market analysis is used to conclude on many regulatory decisions and ComReg needs to assure itself that the data submitted is robust and sufficiently detailed to support such decisions.

3.8 Previously ComReg has asked for senior officer sign-off on such data submissions, however, ComReg is considering a number of options including disclaimers and assurance letters to ensure that data has been reviewed and submitted as accurately as possible.

3.9 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 quarterly reports.

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 welcomes any suggestions on how this process could be improved or better facilitated by ComReg in future.

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.

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

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?

Market Share Data

3.10 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 listenership and Television viewers (JNLR).

3.11 In addition to the publication of some of this information in the QR, ComReg proposes to continue collecting much of this information on a quarterly basis to help facilitate correct and timely market reviews in future (see Annex A). However, ComReg notes that this list of market share indicators is 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 develop and evolve over time. In addition, ComReg will gather information using annual market analysis questionnaires to supplement the data that is gathered each quarter (see Annex B).

3.12 ComReg 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.

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

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.

3.13 Section 4 below reviews changes made to the existing QR Questionnaires addressing the issues highlighted in the previous two sections.

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.

4 Revision of Existing Quarterly Report Questionnaires

4.1 The intention of this section is to revise the existing quarterly report 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 expects that the new questionnaires will in future be revised as products and services in the market place evolve. ComReg is seeking the views of respondents on suggested changes to the questionnaires as well as on the value and frequency of the quarterly questionnaires.

4.2 ComReg requests that all responses be elaborated upon and that alternatives are offered where appropriate. This will ensure that a revised report meets the needs of all interested parties. The following amendments to the existing questionnaires described below can be seen in the revised questionnaires in Annex A.

4.3 In future, operators will be asked to provide their overall revenues from the provision of electronic communications services. If this amount exceeds the total revenues provided in the information below, operators should indicate what services account for this additional revenue.

4.4 The following sections examining the current QR questionnaires should be read in conjunction with the proposed new questionnaires contained in Annex A. Where appropriate, ComReg has added suggested definitions in footnotes to the questionnaires, but welcomes suggestions on how best to define these products and services to ensure a common understanding across all operators (e.g. residential v. non-residential, access lines v. access channels, etc.).

Fixed Networks

4.5 The following section examines the current fixed network QR Questionnaire.

Subscriptions and Access

Direct Access

PSTN Services:

4.6 ComReg proposes to retain the Subscribers and Access Lines categories for Wholesale, Residential and Non-residential but to remove Access Channels as it provides no additional information. Wholesale refers to Wholesale Line Rental (WLR) 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.

ISDN Services:

4.7 ComReg proposes to maintain the same categories as above. In addition, the access line multipliers that ComReg will use to calculate number of ISDN access paths (x2, x16 and x30 for Basic Rate, Fractional Rate and Primary Rate ISDN respectively) are highlighted in a footnote.

Indirect Access – PSTN Services [and ISDN Services]

Carrier Pre-Selection:

4.8 ComReg proposes a split in the existing section between CPS-only retail services and retail services that involve both WLR & CPS. These two categories have been further split between PSTN and ISDN as for direct access above. However, the wholesale category has been removed as it is of limited use and has caused confusion in the past. The new sections on PSTN and ISDN will require a breakdown on subscribers and access lines. For PSTN one line will equate to one access channel. For ISDN, the multipliers referred to above will be used by ComReg in determining the number of ISDN access channels. In addition, a breakdown of call types (i.e. all calls, national calls, etc.) is no longer required, as the usefulness of this data is limited and not readily available from all operators.

Other forms of indirect access – Carrier Access & Carrier Selection:

4.9 ComReg proposes to retain this section in its current format but to remove number of indirect access channels as this has proved to be of limited use in the past.

Payphones

4.10 ComReg proposes that this section should be retained and should be split into two types of payphone (i.e. between those that are in publicly owned spaces and all others)

Footnotes

4.11 ComReg has attempted to include footnotes which clearly define what is being requested for each of the categories in this section.

Voice Services

Fixed Telephony – Retail Traffic

4.12 ComReg proposes to retain most of the categories in this section. However, this section no longer includes narrowband (dial-up) **internet** services. ComReg proposes that metered and un-metered narrowband dial-up internet services should, in their entirety, be addressed in a section devoted entirely to internet services (currently Section C). This also applies to the following three sub-sections.

4.13 In addition, traffic that was previously collected under the 'Other' category now falls under a new sub-section called Advanced Voice Services. This sub-section also includes international Virtual Private Network Traffic.

4.14 Wholesale in this section refers to minutes for resale.

Interconnection and Other Traffic

4.15 This section now has four termination categories to better reflect the various types of call termination that are possible. Ancillary services are no longer included as a distinct category. Mobile to mobile transit is captured here while direct interconnection is also for the first time included as a separate category. The changes included in this section are aimed to better reflect the characteristics distinguishing the various fixed interconnection services in the market place.

Fixed Telephony – Retail Revenues

4.16 Traffic revenues will reflect categories as segregated for retail traffic above. The category for 'installation, connection, rental and other charges' has been split between direct revenues and WLR revenues. The WLR category should capture, in the 'wholesale' column, revenues for the provision of wholesale line rental to other operators, while operators providing this service to the end-user should report such retail revenues in the residential/non-residential columns.

4.17 If it is not possible to provide revenues in the categories set out previously, or if the categories proposed overlook and do not capture all relevant minute/revenue information, ComReg invites submissions from interested parties on why provision of data along these lines may not be possible or appropriate, and welcomes alternative suggestions.

Interconnection and Other Revenues

4.18 Revenues should reflect traffic as segregated above. If it is not possible to provide revenues in the categories set out above or if the categories proposed above overlook and do not capture all relevant minute/revenue categories, ComReg welcomes submissions from interested parties on why provision of data along these lines may not be possible or appropriate, and invites alternative suggestions.

Footnotes

4.19 ComReg has attempted to include footnotes which clearly define what is being requested for each of the categories in this section.

<u>Narrowband Data Services</u>

FRIACO / Dial-up Internet Subscriptions

4.20 As discussed above, ComReg proposes that all types of narrowband internet traffic and revenues/outpayments are captured in this section. This section has been split between subscriptions, traffic and revenues for narrowband dial-up internet options (1890, 1891, 1892 and 1893 numbers). The wholesale category has been removed from this section as its usefulness has been limited in the past.

Fixed line SMS

4.21 In addition, ComReg intends to collect information on fixed line SMS. This sub-section will require undertakings to provide information on residential and non-residential traffic and revenues.

Broadband Services

4.22 This section of the questionnaire has been re-constructed to better reflect the wholesale and retail broadband services that are available. This section also includes some narrowband categories for technologies where both narrowband and broadband services are offered.

Point-to-point capacity products

4.23 To provide more transparency on the development of these services, ComReg hopes to publish further information on wholesale and retail bandwidth and technology in future.

4.24 In the past ComReg has only collected data on traditional leased lines broken down by bandwidth. ComReg now proposes to collect information for all products that fall within the functional definition of a leased line (i.e. point-to-point capacity products).[4] This will also meet the needs of future market analyses. However, in light of the potential difficulty in providing such data sufficient for market analysis purposes on a quarterly basis, ComReg welcomes suggestions on how best to capture such data on point-to-point capacity products.

4.25 ComReg also proposes that to collect data on international point-to-point capacity products by revenue and by circuits.[5]

Web-hosting, Co-location Services and Other Data Revenues

4.26 This section has been shortened to capture revenues only as the additional information has proven to be superfluous in the past. In addition, some of the categories on Other Data Revenues have been removed where there is an overlap with information that will be collected under Leased Line data collection in the future.

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[4] ComReg Document 05/03 – The functional definition of a leased line: point to point symmetric capacity between network termination points, whether contended or uncontended, which does not include 'on demand switching' or routing functions controlled by the end user.

[5] An international point-to-point capacity product is one where the A end is in Ireland and the B end is in another county.

Broadcasting Transmission Services

4.27 The following section examines the current sections on broadcasting in the fixed networks QR Questionnaire.

Cable/MMDS Subscriber Services – Analogue

4.28 ComReg proposes that this section should refer to analogue subscriptions only and not to subscriptions which are at the same time both analogue and digital subscriptions. The cable operators require that all cable/MMDs subscribers to digital services also must subscribe and pay for an analogue TV service. It is thus impractical to regard a customer as both an analogue and a digital customer at the same time. In addition, this proposal should also eliminate any risk of double counting. ComReg also proposes to remove the section on 'subscriptions to other services' as this category has proven superfluous in the past.

Cable/MMDs Subscriber Services – Digital

4.29 This section should include all cable/MMDS customers that have a digital subscription. ComReg proposes to remove the section on 'subscriptions to other services' as this has proven to be a superfluous category in the past.

Connections

4.30 ComReg proposes that this section should be split between broadband services and connections. In addition, number of new connections and disconnections in the period is no longer necessary (and may be collected under the annual market analysis questionnaire instead).

Cable/MMDS Revenues

4.31 ComReg has proposed some small changes in this section to better reflect the services that are actually offered.

Satellite Services

4.32 Since the main retail provider has not supplied data in the past and ComReg has had to rely purely on published information they will not be specifically approached in the QR questionnaires. However satellite providers will be included in the annual Market Analysis questionnaire.

Footnote

4.33 Footnotes have been added to make the data requirements clearer.

Mobile Networks

4.34 ComReg has made some changes to this questionnaire where the information requested has not been available in the past. This includes a split between normal and premium SMS messages and a split between domestic and international interconnect traffic. These categories have now been combined. In addition off-net mobile to mobile traffic is to be provided for traffic going to each mobile network. Otherwise the questionnaire remains unchanged.

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.

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.

Market Analysis Requirements

4.35 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 (see Annex B).

Annex A - Revised Quarterly Questionnaires

Overall Revenues:[6]

		€000s	
		Wholesale	**Retail**
Fixed services			
Mobile services			
Broadcasting services			

Notes:

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[7]	Non-residential	Residential

[6] If this amount exceeds the total revenues provided in the questionnaire, you should indicate in the Notes section what other services account for this additional revenue.

[7] 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.

PSTN Services:				
Subscribers[8]				
Access Lines				
ISDN Services:				
Basic Rate Services:				
Subscribers				
Access Lines[9]				
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			

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

[9] 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.

Access Lines			
CPS ISDN Services:			
Basic Rate Services:			
Subscribers			
Access Lines			
Fractional Rate Services:			
Subscribers			
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			

<u>A.3 - Payphones:</u>[10]

Public		
Private		

Notes:

[10] 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).

Section B: Fixed Networks – Narrowband Retail Services

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

		Wholesale[11]	Non-residential	Residential
Basic Voice Services:				
Local[12]				
National[13]				
International				
Fixed to Mobile[14]				
Payphone				
Total				
Advanced Voice Services:[15]				
Premium Rate Services				
Freephone				
National Virtual Private Network				
International Virtual Private Network				
Other advanced voice services				
Total				
Overall Voice Traffic				

[11] Wholesale here refers to minutes for resale.

[12] 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.

[13] Calls to Northern Ireland should be included in this category.

[14] Including calls to mobile in Northern Ireland.

[15] These minutes should not be included in preceding voice categories.

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

		Third-party
Primary Call Origination		
Primary Call Termination to end users		
Primary Call Termination to service providers[16]		
Primary Call Termination to internet services (excl. FRIACO)		
Primary Call Termination to FRIACO services		
Transit[17]		
International Access[18]		
International Terminating Traffic[19]		
Mobile to mobile fixed tandem conveyance		
Direct Interconnection		

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

		Wholesale[20]	Non-residential	Residential
Basic Voice Services:				
Local[21]				
National				
International				

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

[17] Transit is any traffic, that is conveyed through own tandem or double-tandem exchange.

[18] Outbound traffic through own international gateway exchange.

[19] Traffic which originates internationally and terminates in Ireland.

[20] Wholesale here refers to revenues from resale.

[21] 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.

Fixed to Mobile[22]				
Payphone				
Total				
Advanced Voice Services:[23]				
Premium Rate Services				
Freephone				
National Virtual Private Network				
International Virtual Private Network				
Other advanced voice services				
Total				
Direct installation, connection, rental and other charges[24]				
WLR installation, connection, rental and other charges[25]				
Overall Revenue				

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

		Third-party
Primary Call Origination		
Primary Call Termination to end users		

[22] Including Northern Ireland.

[23] These minutes should not be included in preceding voice categories.

[24] This does not include revenues from WLR.

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

Primary Call Termination to service providers[26]		
Primary Call Termination to internet services (excl. FRIACO)		
Primary Call Termination to FRIACO services		
Transit[27]		
International Access[28]		
International Terminating Traffic[29]		
Mobile to mobile fixed tandem conveyance		
Direct Interconnection		

Notes:

Section C: Narrowband / Broadband Internet Access Services and LLU

C.1 - Subscribers to Narrowband Internet Access Services

		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			

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

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

28 Outbound traffic through own international gateway exchange.

29 Traffic which originates internationally and terminates in Ireland.

Number of Wireline Public Points of Access to Internet			

C.2 - Retail Narrowband Internet Access Traffic

Dial-up internet:[30]		**Non-residential**	**Residential**
Geographic termination			
1890			
1891			
1892			
FRIACO 1893			
Other termination			
Total			
Fixed SMS[31]			

C.3 - Retail Narrowband Internet Access Revenue

Dial-up internet:[32]		**Non-residential**	**Residential**
Geographic termination			
1890			
1891			
1892			
FRIACO 1893			
Other termination			
Total			
Fixed SMS[33]			

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[30] If cannot be broken out by code, enter under 'Total'.

[31] 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.

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

Broadband Services[34]

C.4 - ADSL[35]

		Bitstream	Simple Resale
Number of agreements			

		Wholesale[36]	Non-residential	Residential
ADSL Lines				
ADSL Revenues				

C.5 - Simple Resale (OAO entry only) [37]

		Wholesale[38]	Non-residential	Residential
Simple Resale Lines				
Simple Resale Revenues				

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

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

[35] Includes ADSL provided through LLU.

[36] High speed bit stream access lines made available to third parties.

[37] 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.

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

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		

		Narrowband[39]	Broadband
Subscribers on licensed FWA			
Subscribers on unlicensed FWA			
Revenues from provision of FWA services			

C.9 - Satellite / Free Space Optics

		Narrowband[40]	Broadband
Satellite Subscribers			
Free Space Optic Links			

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

[40] Indicate in Notes what these subscribers primarily use service for.

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 (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:

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

Point–to-point Capacity Products

D.1 – Retail Point-to-point Capacity Products[41]

	No. of Connections	Revenues (000s euro)
Analogue Circuits		
64k-128k (inclusive)		
192k-512k (inclusive)		
576k-1024k (inclusive)		
1088k1984k (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 Total[42]		

[41] 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 county.

[42] Includes both national and international retail point-to-point capacity products

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

	Wholesale Leased Lines		PPCs	
	No. of Connections	**Revenues (000s euro)**	**No. of Connections**	**Revenues (000s euro)**
Analogue Circuits				
64k-128k (inclusive)				
192k-512k (inclusive)				
576k-1024k (inclusive)				
1088k1984k (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:

Section E: Cable/MMDS & Satellite Transmission Services

E.1 - Cable/MMDS Subscribers

Analogue-only[43]		
Digital		
Total Subscribers		

E.2 - Cable/MMDS Broadband Services[44]

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[45]		
Premium Usage		
Cable Modem Revenues		
Other (Please specify in Notes)		
Total Cable/MMDS Services Revenues		

[43] As all digital subscribers also have an analogue subscription, this number should not include households that have upgraded to digital.

[44] Broadband is defined as speeds of 144kbit/s or greater.

[45] Includes both analogue and digital subscriptions.

Notes:

Revised Mobile Quarterly Questionnaire

1 - Prepaid Subscribers

		2G	3G	Total
Subscribers at start of period[46]				
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[47]				

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

4 - Number of Minutes (Prepaid & Contract)

		000s
Minutes to Fixed Lines		
On-net mobile minutes		
Off-net mobile minutes		
- to Vodafone		
- to O2		
- to Meteor		
- to Hutchinson		
Outgoing International Minutes		
Minutes whilst roaming abroad		
Other mobile services[48]		
Total Minutes		

5. - SMS (Prepaid & Contract)[49]

		000s
SMS Messages sent by end users[50]		
Revenues from SMS sent by end users		
Other SMS Messages sent by customers[51]		
Other SMS Revenues		

[47] 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.

[48] Including for example, Data Services, Voicemail, DQ, Call Completion, etc.

[49] Includes premium SMS messages

[50] Includes messages sent by people only.

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

6. - MMS (Prepaid & Contract)

		000s
MMS Messages sent by end users[52]		
Revenues from MMS sent by end users		
Other MMS Messages sent by customers[53]		
Other MMS Revenues		

7. - Mobile Telephony Revenues (Prepaid & Contract)

Gross Handset Sales		
Connection Rental and other charges		
Domestic traffic revenues		
International Roaming revenues[54]		
Premium Rate Services		
Other mobile services[55]		
Total Revenues		

52 Includes messages sent by people only.

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

54 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.

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

		Prepaid	Contract	Total
Average Revenue Per User[56]				

8. - Interconnect Traffic

		Peak	Off-peak	Weekend	Total
Terminating Voice Traffic[57]					
Terminating SMS Traffic					

9. - Interconnect Revenues (euro 000s)

		Peak	Off-peak	Weekend	Total
Terminating Voice Traffic Revenues[58]					
Outpayments to other operators for voice traffic					
Terminating SMS Traffic Revenues					
Outpayments to other operators for SMS traffic					

[56] 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.

[57] Includes termination from abroad.

[58] Includes termination from abroad.

		Fixed Operator	**Mobile Operator**
Number of interconnection agreements			

10. - Coverage

Number of base stations			
		2G	**3G**
Population			
Geographic			

Notes:

Annex B – Annual Market Analysis Questionnaire

ComReg intends to collect additional information for the purposes of market analysis on an annual basis. This will include any information necessary to complete an analysis of a market (including any outstanding historic market share data), any information that was subsequently requested from operators following the initial market analysis data collection in February 2003 and should include questions relating to the following areas:

- Network Infrastructure
- Capital Investment
- Point-to-point capacity product information on revenues, pricing, circuits, trends, etc. (including traditional leased lines and services such as IP VPN, ATM VPN, Frame Relay VPN and Ethernet)
- Geographic Scope of Services
- Pricing
- Nature of Competition (e.g. largest customers, barriers to competition, payment flows, etc.)
- SMS Services
- Wholesale Agreements
- Qualitative Information / Feed Back

ComReg expects to issue a market analysis questionnaire in mid-2005 aimed at collecting market analysis information for 2003 and 2004 and for market analysis information not required on a quarterly basis.

Annex C – Consultation Questions

List of Questions