



Commission for
Communications Regulation

Annual Report

YEAR ENDED JUNE 2004



Presented to the Minister for Communications,
Marine and Natural Resources in accordance with Section
32 of the Communications Regulation Act, 2002

Mission Statement

To regulate with integrity, impartiality and expertise to facilitate the rapid development of a competitive leading-edge telecommunications sector that provides the best in price, choice and quality to the end user, attracts business investment and supports ongoing social and economic growth, and to work with the same focus on providing for users within the framework set for postal regulation.

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Commissioners

Mike Byrne

Commissioner

Isolde Goggin

Commissioner (Chairperson)

John Doherty

Commissioner



Executive Management Team



Donal Leavy
Finance and Regulatory
Accounts Director



David Gunning
Market Framework Director



Gary Healy
Market Development
Director



Shay O'Malley
Human Resources Director



Sebastian Farr
Senior Legal Advisor

Organisational Structure

The Commission for Communications Regulation (ComReg) was established on December 1, 2002. ComReg is led by three Commissioners: Isolde Goggin (Chairperson) John Doherty and Mike Byrne. It consists of five Divisions supported by the Senior Legal Advisor and a Public Affairs Unit. The structure is based on cross-functional teams operating in a multi-disciplinary environment.

ComReg has a wide range of responsibilities in electronic communications services and networks, post and spectrum management. ComReg implements three major Acts in the arena of telecommunications, thirteen in the area of wireless telegraphy and spectrum management, and numerous statutory instruments covering all three sectors. ComReg is responsible for promoting competition, for protecting consumers and for encouraging innovation. Our job involves dealing with complex issues of law, economics and technology, and ensuring that our decisions are taken fairly and are clearly explained.

The Commission operates as a collegiate body, with decisions taken collectively by the three Commissioners. We see this as important in fulfilling the spirit of the Communications Regulation Act, 2002, which established the Commission. The Commissioners also have individual roles, which are intended to add value to the work of the organisation, make access easier for external stakeholders such as the telecoms industry, Government, consumers, business and representative groups and facilitate internal communications.

Chairperson of the Commission - Isolde Goggin

Isolde Goggin is responsible for the Innovation role. This covers both regulatory innovations, such as the completion of the first round of market reviews under the new European regulatory framework, and technical innovations. The role covers the revision of ComReg's spectrum strategy, new initiatives in the wireless licensing area, and the promotion of Ireland as a test bed for innovative uses of spectrum. It also covers the development of a forward-looking telecommunications regulatory strategy, taking into account new technical, economic and regulatory trends, the evolution of postal services and the associated regulatory framework.

Commissioner John Doherty

John Doherty takes charge of the Competition portfolio. This involves enabling maximum competition in Broadband, Voice and Voice over Internet Protocol through a range of measures, including LLU, bitstream, wireless broadband (including mobile wireless broadband), cable and alternative infrastructure. He also leads on promoting enhanced competition in mobile via MVNO entrants, reviewing and making adjustments in the fixed network wholesale pricing regime, and overseeing operators' compliance with obligations under the regulatory frameworks for telecoms, spectrum and the postal service.

Commissioner Mike Byrne

Mike Byrne leads the organisation on Consumer Affairs and in the promotion of the interests of users. This role covers both business and residential consumers, as well as major consumer representative organisations, and spans telecommunications, spectrum licensing operations and postal services. It includes regulatory developments which affect retail consumers, including the application of the consumer protection provisions of the Universal Service and Postal Directives. Mike oversees both proactive consumer information measures, such as consumer guides and the forthcoming Comparative Pricing Website, and the consumer care function within ComReg. The role also oversees the strategic development of the Licensing Operations function within ComReg, which deals with more than 16,000 licences per year.

Contact:

Marie Cussen,
Executive Assistant to the Commission
Tel: 01 8049689

Colette Andrews,
Assistant to the Commission
Tel: 01 8049644

The Five Divisions and their Directors are:

Market Development - Director:

Gary Healy

Market Development is responsible for developing and maintaining an understanding of the status and potential development of the communications sector. Identifying and gathering relevant information to enable ComReg to forecast any new developments and future trends is a core activity of this Division. It is also responsible for conducting market reviews as set out in the EU regulatory framework and for notifying the European Commission on the outcome of ComReg's analysis. Market Development issues Market Information Updates and liaises regularly with international telecommunication bodies such as the OECD on market data.

Contact: Sonja Owens,
Divisional Assistant at 01 8049738

Market Framework - Director:

David Gunning

Market Framework is responsible for managing the general authorisation regime for the electronic communications sector in Ireland and monitors compliance with general authorisation conditions. Market Framework also manages radio spectrum and issues approximately 16,000 Wireless Telegraphy licences to various companies and individuals per annum. In addition, Market Framework administers Ireland's National Numbering Plan, as well providing the framework for new regulatory products for both fixed and wireless markets.

Contact: Sinead Devey,
Divisional Assistant at 01 8049621

Market Operations - Director:

Vacancy

Market Operations handles day-to-day issues concerning the regulation of the market including such issues as interconnection, dispute resolution and unbundling the local loop. Supervision of pricing and ensuring a universal service for all consumers in respect of eircom is a principal activity of Market Operations. This Division also administers the Consumer Affairs section providing advice and help to consumers who are having problems with their service providers. The Regulation of the postal sector falls within the remit of Market Operations.

Contact: Michelle Townshend,
Divisional Assistant at 01 8049654

Finance and Regulatory Accounts - Director:

Donal Leavy

This Division manages the financial control of ComReg and the regulatory financial aspects of the telecommunications and postal sectors.

Contact: Sharon Ward,
Divisional Assistant at 01 8049710

Human Resources - Director:

Shay O'Malley

This Division develops and implements leading-edge human resources strategies designed to enhance organisational performance and effectiveness. Our Human Resources Division is responsible for the human resources, information systems, freedom of information and general facilities management functions.

ComReg has attained a number of major HR awards, including the Excellence through People Standard and the Irish Institute of Training and Development's national training award. These prestigious awards recognise organisations which demonstrate best practice in human resources and an ongoing commitment to human resource development.

Contact: Celine Gorman,
Divisional Assistant at 01 8049751

Organisational Structure

continued

The Organisation is supported by a Senior Legal Advisor and a Public Affairs Unit.

Senior Legal Advisor

Sebastian Farr

The Senior Legal Advisor advises on all major legal matters and on the legal implications of communications policies in Ireland and the EU.

Contact: Clare Kelly,
Divisional Assistant 01-8049628

Public Affairs Unit

The Public Affairs Unit issues press releases and communicates messages and statements on behalf of ComReg to the media and general public. This Unit also manages our website, organises conferences and seminars and publishes our Annual Reports and other publications, including ComReg's quarterly newsletter.

Contact: Tom Butler,
Public Affairs Manager at 01 8049639

ComReg's Role

ComReg is the statutory body responsible for the regulation of the electronic communications (telecommunications, radio communications and broadcasting) and the postal sectors. ComReg is the national regulatory authority for these sectors in accordance with Irish and EU Law.

Our remit covers telecommunications networks and services including:

- Traditional telephone systems;
- Mobile networks providing voice and data services;
- Radio Communications including fixed wireless providing a variety of services;
- Traditional television and radio transmission;
- Cable Television;
- MMDS and deflector operations providing TV services;
- Licensing Framework for Satellite Services in Ireland.

In addition, according to Section 10 and Section 12 of the Communications Regulation Act 2002, ComReg has a range of functions and objectives in relation to the provision of electronic communications networks, electronic communications services and associated facilities and post. These include:

- to ensure compliance with obligations;
- to promote competition;
- to contribute to the development of the internal market;
- to promote the interests of users within the European Community;
- to ensure efficient management and use of the radio frequency spectrum and numbers from the national numbering scheme;
- to promote the development of the postal sector and in particular the availability of a universal service within, to and from the State at an affordable price for the benefit of all users, including disabled users

ComReg is also required to comply with Policy Directions issued to it by the Minister for Communications, Marine and Natural Resources. A second set of policy directions was issued to ComReg in March 2004.

This Annual Report is structured to deal with ComReg's activities in relation to all of these areas.

ComReg enables competition in the communications sector by facilitating market entry through general authorisation to provide networks and services, and by regulating access to networks so as to develop effective choice for businesses and residential consumers. In a rapidly evolving sector, both in technological and commercial terms, ComReg provides the framework for the introduction of a range of new services including, for example, Fixed Wireless Access Local Area (FWALA).

The focus of regulation for the postal service in the partly liberalised market is the maintenance of the Universal Service Obligation (USO) and in ensuring that An Post's prices are geared to cost. ComReg is also responsible for overseeing improvements in quality of service by setting targets for the delivery of mail and to monitor quality of service performance against targets set in accordance with European standards.

Our activities focus on business & residential users of communications and operators.

This Annual Report covers our key activities from July 2003 to the end of June 2004.

Chairperson's Review of the Year



ComReg's aim is to ensure that Ireland has a competitive telecommunications sector which gives consumers and businesses a choice of high-quality services at competitive prices. The sector plays a very important role at the heart of both our economy and society. ComReg is committed to promoting choice and competition, as it is in all of our interests to have a vibrant communications sector.

The period of this Annual Report, from July 2003 to June 2004, was one characterised by steady growth and improvement within the telecommunications sector. Turnover for the sector rose by over 5% triggered by the roll-out of new services such as fixed and wireless broadband and the further growth in the use of mobile phones.

During the period under review, ComReg began to carry out reviews of 18 key electronic communications markets as set out under the EU Regulatory Framework which came into effect in July 2003. This new regime has fundamentally altered the way authorities such as ComReg regulate the electronic communications sector. ComReg moved quickly to conduct reviews and assess the levels of competition in a range of markets including fixed telephony, mobile, broadband and broadcasting.

Under the new system, ComReg's basis for intervening in a market is now based on finding an operator or operators dominant in a given market. ComReg decisions on competition in the marketplace are referred to the European Commission. I am pleased to say that Ireland is among the leading group of countries working its way through the market review process.

ComReg's 2005 work programme is available on the ComReg website (www.comreg.ie). The programme contains the targets set out in ComReg's Strategy Statement 2003-2005. In my view significant progress has been made in relation to objectives contained in our Strategy Statement such as the introduction of full mobile number portability, the market review process and a new postal authorisations framework, among others.

Overview of Progress

Following on from an international industry downturn in 2001/2, the telecoms industry in Ireland made good progress in many areas in the period July 2003 to June 2004.

- Overall revenues for the fixed, mobile and broadcasting sectors increased by 5% on the previous year to almost €3.7bn. The market share of Other Authorised Operators [OAOs] was sustained at around 20% for this period.
- The mobile sector continued to grow with the Irish mobile penetration rate reaching 89% which was up by 8% on 2003. There were 3.5 million mobile subscribers in this period, while usage of SMS grew by 25%. ComReg welcomed reductions in mobile termination charges which have helped keep rates here low by European standards.
- The new 3G mobile telecommunications networks continued to be rolled out by the relevant mobile operators in line with licence conditions. ComReg looks forward to the further development of 3G services and products in the years ahead.
- The increasing use of the internet is a reflection of an increasingly confident residential and business population and is confirmed by the encouraging e-commerce data contained in our quarterly Internet surveys. This, coupled with the positive uptake of flat-rate products since the launch of FRIACO at the end of June 2003 and the roll-out of competitively-priced broadband products, bodes well for the future. The June 2004 household survey by the CSO showed further growth in internet penetration levels to 38.2%. The continued growth of Internet penetration and its utilisation are key elements in achieving the twin national objectives on broadband take-up and competitiveness.
- ISDN access channels increased 9% year-on-year to 423,000.
- Digital TV subscribers in Ireland grew by 5% to 33% of all households with a television.

Fixed-Line developments

For consumers one of the most significant developments during the year was the launch of the Single Billing/ Wholesale Line Rental product. After Denmark, Ireland is currently the only other EU country to have launched single billing. The product allows consumers for the first time both to select an alternative provider if they wish and to be able to have a single bill for both their fixed line rental and calls. The introduction of this product has also stimulated the increased availability of a range of new and innovative product bundles at all-in specific price points. Take-up of the product has been encouraging with over 17,000 electing to take the product in the first two months. This figure is expected to exceed 100,000 within the next six months.

Broadband

The increasing availability of competitively priced broadband services has led to a significant growth in the take-up of broadband. If Ireland is, however, to have the levels of penetration enjoyed internationally then continued focus is required on both supply and demand led initiatives.

During the year ComReg organised a number of initiatives to help increase both the awareness and the take-up of broadband by businesses and residential users. On October 1, 2003 ComReg's annual National Conference entitled "Get Connected" took place in the Royal Hospital Kilmainham in Dublin. The purpose of the conference was to explore new ways of stimulating demand for broadband among businesses and consumers. At the end of the period of this report over 55,000 subscribers had taken up broadband. ComReg continues to work with industry and service providers to ensure that Irish consumers can get access to broadband at competitive prices and believes that regulatory initiatives such as the Fixed Wireless Access Local Area Licensing Scheme (FWALA) will help further stimulate broadband competition.

Mobile

Mobile penetration reached 89% or 3.5 million during the period of this report. There were a number of notable developments within the mobile phone sector too in this period. By the end of June 2004, an estimated 142,000 customers had ported their mobile numbers since the facility first became available in July 2003. Mobile Number Portability allows consumers to move between networks to avail of competitive offerings without incurring additional costs or dealing with the inconvenience of changing numbers.

Innovation

ComReg also seeks to help companies to provide new and innovative communications services to the public. These include such services as Voice over Internet Protocol, migration to Next Generation Networks, and developments in user access and content delivery. In responding to such issues, ComReg has tried to promote innovation and to minimise barriers to entry. This allows companies to bring new technologies and new consumer products to the market quickly.

I would like to thank the industry and all of those who shared with us their views during the course of the many consultations initiated by ComReg. ComReg will not always share the views of those companies within the sector it regulates. Although differences of opinion and emphasis may exist on certain issues, I appreciate the effort made by all of those who engaged in dialogue with ComReg through our consultation process.

In regulating such a dynamic industry as electronic communications, it is important that ComReg remains informed of potential future developments and trends in other markets. In this context, ComReg has, in addition to its Forward-Looking Panel, established an Expert Advisory Group. The Group is comprised of national and international experts in the sector who meet and advise ComReg's senior management team on a quarterly basis.

Finally, I wish to thank all of my colleagues at ComReg for the dedication and professionalism they have shown throughout the year. We as an organisation are very conscious of the need for regulators to demonstrate best practice in terms of transparency and accountability. We have also continued to meet the highest professional standards in terms of corporate governance. It has been very satisfying to work with such a committed and energetic team of people.

Isolde Goggin

Chairperson

Human Resources

Human Resources Division

The Human Resources Division develops and implements leading-edge human resources strategies and policies, designed to enhance operational performance. The Division is also responsible for managing the following organisational functions:

- information systems;
- freedom of information;
- facilities.

Human Resources Development Award

ComReg recognises that human resource development is a key element in our continued success and that excellent performance can only be achieved through ongoing investment in, and commitment to, our staff. We were pleased that our policies and systems were recognised externally, through the renewal of the "Excellence Through People" national standard for human resource development. This standard recognises organisations in Ireland who demonstrate best practice and an ongoing commitment to human resource development.

Top Management Appointments

The Minister for Communications, Marine and Natural Resources announced the establishment of the Commission for Communications Regulation (ComReg) on 1 December 2002. John Doherty was appointed Chairperson of the Commission on 1 December 2003, replacing Etain Doyle, who retired from the Commission on 30 June 2004.

The Commission, with the Management Policy Committee (MPC), is responsible for the strategic and operational management of the organisation. During the period under review, ComReg appointed one new member to the MPC – Sebastian Farr as Senior Legal Adviser.

Information Systems

The mission of ComReg's information systems function is to support the organisation at an operational level; to provide tactical mobilisation of MIS applications and information systems, while enabling strategic initiatives, as required.

The information systems function continued to act as a valuable business enabler for ComReg. During the period, it initiated and facilitated a broad range of projects such as the implementation of on-line registers and search facilities for authorised postal and telecommunications service providers.

In addition, on-line applications for Postal Authorisations were implemented. IT services, including Wireless Internet Access, were provided for a range of meetings and conferences, including ComReg's National Conference. Other projects included implementation of a technical solution for ComReg's teleworking pilot and input into the Interdepartmental Committee on Network and Information Security.

Freedom of Information

The Commission is fully supportive of the Freedom of Information legislation and, during the period under review, we had 10 requests for information under the FOI Act. The focus of the records management project - designed to promote the exchange of information and provide access and security for the information created, used and stored by the organisation - was on staff training and compliance. Work commenced on the implementation of software to manage and track FOI and Data Protection requests and correspondence.

The Communications sector at a Glance

The global slowdown in the communications market, which had an impact on the Irish communications market between 2001 and 2002, eased somewhat by the end of June 2004. The period of this review saw the growth of further competition with the entry of a number of new operators in both the residential and business market segments. The roll-out of broadband in the period, growing awareness of the benefits of broadband and lower prices helped increase demand throughout the year.

Growth also continued in the mobile market with penetration reaching the 89% level. In particular, the introduction of a world class mobile number portability process by ComReg has been a success. It has given consumers greater choice by allowing them to switch operators without changing numbers, at a minimal cost.

Total revenues for the communications market (fixed, mobile and broadcasting markets combined) were estimated at €3.7bn between July 2003 and June 2004, an increase of 5% on the previous year. These revenues represented approximately 3.3% of Irish GNP.

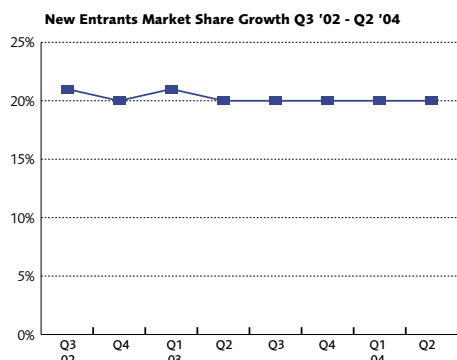
Number of operators

On July 25, 2003 under the new EU regulatory framework the previous licensing system was replaced by a new authorisations process. From this date it was not necessary to hold a telecommunications licence. Instead, there is a general entitlement for operators to provide electronic networks and/or services subject to compliance with standard conditions.

Any person may provide an electronic communications network and/or service, provided they have notified ComReg in advance. Operators are free to commence operations once a completed notification form has been received, but operations are subject to the conditions set out in a General Authorisation. In the period, 198 notifications by operators were received by ComReg.

OAOs share of total fixed line revenue

ComReg estimated that new entrants' share of the total fixed line revenues remained stable within a range of 20% to 21% over the period of this report.



Carrier Pre-Selection (CPS)

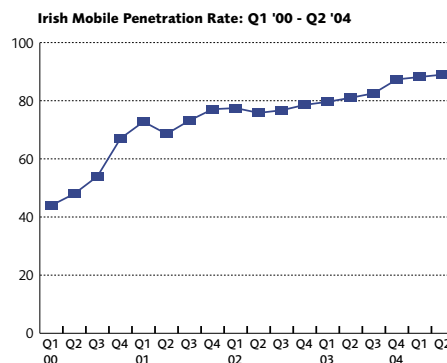
CPS involves the provision of call services to a customer by an operator who provides their service over another operator's network. This enables competition between operators, particularly on price. At the end of June 2004 there were approximately 276,000 CPS lines, both business and residential, up almost 60% since June 2003. This figure represented approximately 17% of PSTN lines.

Communications Channels

The number of PSTN lines was unchanged at 1.6 million lines although the PSTN share of communication channels fell from 31% to 29% year on year, primarily due to the continued growth of mobile. There were 423,000 ISDN access channels, an increase of 9% on the previous year. ISDN access channels accounted for almost 8% of total access channels. Mobile connections accounted for 63% of total access paths by the end of June 2004.

Mobile

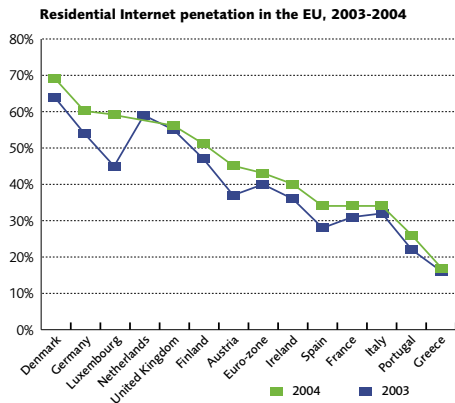
The number of mobile subscribers at the end of June 2004 stood at circa 3.5 million, up from 3.17 million subscribers in June 2003. The penetration rate was 89%, up 8% on the previous year. SMS or text messaging maintained the strong growth rates of previous years. An average of 85 SMS messages was sent by each mobile subscriber per month by the second quarter of 2004, and there was a 25% increase in the total number of SMS messages sent between July 2003 and June 2004. This equated to a total of 896 million messages for the three months to June 2004. An estimated 142,000 subscribers ported their number from one mobile operator to another between July 2003 and June 2004. Irish mobile operators' average revenue per user (ARPU) continued to be among the highest in Europe at €47 per month.



Internet

ComReg previously measured the levels of Internet access in Ireland by means of a quarterly survey carried out by Amárach Consulting. Under the European Commission's E-Europe 2005 Action Plan, the Central Statistics Office carries out an annual survey which examines household and individual use of computers and the Internet. Their second survey, issued in December 2004¹, indicated that 38.2%* of all Irish households had some form of Internet access in June 2004, up from 33.5% in June 2003. With the introduction of FRIACO or flat-rate Internet access, the number of subscribers to flat-rate Internet access was approximately 82,000 in June 2004 up from 6,500 in June 2003.

*(38.2% is Internet Access via PC while 40% is internet access via any device e.g. mobile, PC and TV etc.) The chart below compares household Internet penetration rates on multiple devices across the EU based on data compiled by Eurostat.



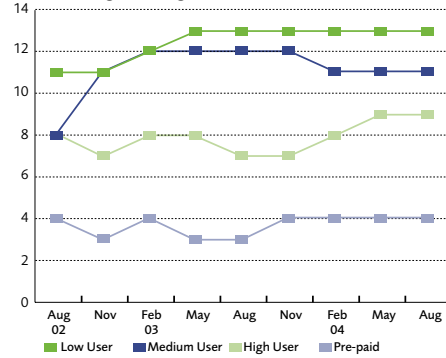
Broadband

Although, the roll-out of competitively-priced broadband in Ireland was late by international standards, demand for broadband services grew strongly in the year to June 2004. There were approximately 55,000 DSL lines, up from 7,350 in June 2003, and 5,380 cable modems installed by the end of June 2004. There were also approximately 4,000 business and residential fixed wireless access (FWA) subscribers.

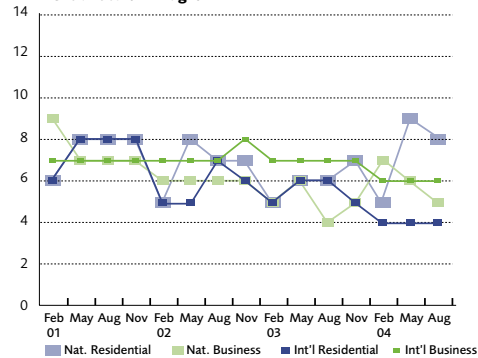
Broadcasting

There were approximately 526,000 basic (i.e. analogue) cable and MMDS subscribers in Ireland in June 2004 and approximately 849,000 pay-TV subscribers of which almost 450,000 subscribed to digital cable services. Customers continued to migrate from basic or analogue TV services to digital services and by June 2004 digital subscribers represented almost 33% of households with a TV.

Ireland's Position in the Various Mobile Baskets Relative to EU15: Aug. '02 - Aug '04



Ireland's Position in the Various PSTN Baskets Relative to EU15: Feb. '01 - Aug '04



Tariffs

Fixed-line PSTN and mobile tariffs remained relatively constant in this period compared with tariffs in other EU countries. During the period International leased lines continued to be the most competitive in the EU as benchmarked by the OECD.

Employees

The total number of employees in the communications sector at the end of June 2004 was approximately 14,440. This was a decrease of 0.5% from 2003 in marked contrast to a drop of 9% in 2002. The fixed, mobile and broadcasting sectors accounted for 74%, 19% and 7% respectively of this total figure.

¹ CSO. Information Society Statistics 2004, December 2004.

Competition

One of ComReg's core responsibilities is to foster effective competition in the electronic communications markets. Competition is the best guarantee of other key objectives such as the promotion of the interests of end users. Where there is effective competition, ComReg will intervene as little as possible in the operation of the market. Where there is not, our aims are to promote competition and to protect consumers against the exercise of market power.

In Ireland, the new Communications Regulatory Framework was transposed within the prescribed period and took effect on July 25, 2003. As required by the new framework ComReg commenced a process of conducting market reviews in communications markets using competition law principles in order to identify whether operators have Significant Market Power (SMP) and where competition is not yet effective. Where competition is not effective ComReg may take appropriate steps to sustain or stimulate the market in order to promote effective competition.

While a price cap is in place at the retail level to ensure consumers are protected from excessive pricing on the less competitive retail services, very often ComReg's work is targeted at the wholesale level where, in many communications markets, it has sought to ensure that new entrants to the market since liberalisation are treated on a fair and non discriminatory basis by incumbent operators. ComReg has also sought to increase choice by encouraging competition across different technologies and alternative delivery platforms. For example, during the period 38 Fixed Wireless Access Local Area licences were issued which allow operators to provide broadband and other services using wireless technology on a local area basis.

As was the case in previous years, much of ComReg's effort in this area was directed at the fixed telecommunications sector where significant progress was made in relation to traditional voice markets, broadband and point-to-point services. This period also saw the start of ComReg's economic analysis of certain mobile markets which is described in more detail in this section. The measures proposed by ComReg, aimed at stimulating competition in mobile markets, are directed at the wholesale level of the mobile market rather than at the retail level.

Fixed Networks and Services

Voice

In Ireland, in common with most markets, much competition for voice services is based on Carrier Selection (CS) and Carrier Pre-Selection (CPS). These wholesale services, which eircom must offer on a non discriminatory basis to alternative operators, allow a competing operator to extend network reach nationally by allowing it to originate calls on eircom's network before transiting or terminating calls on its own, or a third party's network. ComReg took several steps during the year to address certain difficulties being experienced in the market and to implement wholesale measures designed to allow new entrants offer an improved service to their customers.



Competition

continued

In September 2003, ComReg issued a Direction dealing with customer acquisition practices in the retail market. This Direction was informed, in particular, by concerns over excessive churn in the CPS market which made it more difficult for operators to trade profitably. The "no contact" period is the period of time during which an operator who has lost a customer is prevented from contacting that customer. This period was extended from one month to three months. The Direction also contained guidance on promotional material and on anti-slamming practices. Slamming is the unauthorised transfer of a customer from one operator to another. These measures resulted in strong growth in CPS and by June 2004, 17% of lines were being retailed to customers via CPS. This amounted to an estimated 276,000 lines.

At the wholesale level much work was done with industry in relation to the development of the Wholesale Line Rental (WLR) product. This product allows eircom's wholesale customers to provide a full voice service to their customers on a single bill. Previously, users availing of CPS received two bills, one for calls from the CPS Operators and one from eircom for line rental.

Single Billing for CPS

The commercial launch of Single Billing through Wholesale Line Rental (SB-WLR) in June was one of the major milestones in 2004. Single Billing through WLR enables customers to avail of choice in the fixed telecoms market and receive just one bill from their chosen provider, rather than a bill for their calls and a separate bill from eircom for their line rental.

Following the launch of the manual process for WLR in June 2003, participating CPSOs continued to test the product via the WLR Service Establishment Process. During this time ComReg continued to co-ordinate the development and testing of this complex new technical and operational framework to facilitate CPS Single Billing. The development of inter-operator processes and billing information transfer systems for WLR proved to be a very complex task as they must cater for the seamless provisioning of all aspects of the customer experience via the CPSO such as order handling, provisioning and billing information systems, ancillary services and national directory status.

In March 2004, the Minister for Communications, Marine and Natural Resources issued Policy Directions to ComReg on a range of issues including the introduction of a Wholesale Line Rental (WLR) product by March 31, 2004. WLR was successfully made available to Other Authorised Operators (OAOs) on the same day. The subsequent launch of retail services incorporating this product by several OAOs demonstrated an initial positive impact on the fixed line telephony market. In April 2004 the first OAO announced its intention to start taking WLR orders and in the period of this report, at the end of June 2004, there were approximately 500 WLR lines.

Since launch, there are four OAOs processing WLR orders and seven service providers offering a Single Billing product in the market, with at least five more to offer service in the coming months. Single Billing has proven to be popular with consumers. ComReg is continuing to work with industry on the development and enhancement of the WLR product.

Pricing for WLR was revised in March 2004. The differential between the price of WLR and the price of retail line rental was increased from 8.5% to 10%. The price for placing an order with eircom was reduced from €24.61 to €9.05 per line on April 1, 2004. Take up of WLR to date has been encouraging: at the end of December 2004 over 74,000 users had availed of the service.

An important constituent of the cost to an OAO of providing a voice service is the rates charged by eircom to originate or terminate calls, known as interconnect conveyance rates. A review of final interconnect rates for the year to March 2003 was ongoing during the year and were finally determined on September 23, 2004. A consultation on certain costing issues relating to the conveyance rates was launched on June 11 2004. Interconnect conveyance rates remained among the cheapest in the EU during the period.

During this period ComReg also consulted upon the possibility of introducing a wholesale price cap on conveyance rates. Responses to this proposal were generally positive and ComReg committed itself to reviewing this proposal as part of its market review process.

Competition

continued

Local Loop Unbundling and Broadband

(i) Digital Subscriber Line (DSL)

DSL is a broadband technology which allows for the provision of broadband services over existing telephone lines. It is the principal, but by no means the only method of providing broadband services in many countries, including Ireland.

(ii) Local Loop Unbundling

Local Loop Unbundling (LLU) is the mechanism whereby an alternate operator rents the local loop (the line between the customer premises and the local serving exchange) from eircom and connects it directly to its own network. This operator can then provide either broadband or combined broadband and traditional voice services over the loop, depending on the type of unbundling. The principal advantage of LLU is that it gives an operator a high degree of control over the types and quality of services to be provided to the end user. LLU offers competing operators the opportunity to provide more value added services rather than the simple resale of the incumbent's product range. ComReg believes therefore that LLU is the key to stimulating the take-up of broadband in Ireland.

ComReg issued a Direction to eircom in May 2003 to implement a price of €14.67 per month for a fully unbundled loop. This decision was challenged by way of judicial review. The case was settled during the course of Summer 2003 and a new process initiated to arrive at a price. As part of that process ComReg consulted on an appropriate methodology to measure the level of operating cost that would be associated with an efficient network and consulted also in relation to the cost of certain elements of an access network. ComReg finally directed a price of €14.65 as the monthly charge for LLU to be effective from December 1, 2004.

(iii) Bitstream

Bitstream is a wholesale broadband service provided by eircom using Digital Subscriber Line (DSL) technology which allows other operators to provide a broadband service using eircom's equipment. The period in question witnessed significant developments with prices falling and broadband penetration increasing. Throughout the period ComReg endeavoured to ensure that reductions in retail prices were matched by reductions in wholesale price levels such that alternative operators were able to compete with eircom. At the start of the period eircom's entry level price for broadband was €45 per month excluding VAT with a corresponding wholesale price of €27. By period end the corresponding retail price was €33.05 and the wholesale price was €20.10. The number of DSL subscribers had risen in the period from around 7,000 to 55,500, an increase of 750%.

(iv) Fixed Wireless Access Local Area (FWALA)

The second half of 2003 saw the launch of a local area licensing scheme for wireless broadband access under the Fixed Wireless Access Local Area (FWALA) licensing regime. This scheme aimed to re-vitalise the wireless broadband access sector providing competition in geographic areas where alternative platforms such as ADSL were already available and facilitating broadband access roll-out in areas not currently serviced by the existing platforms (with the exception of satellite access). Building on the experience of fixed wireless access in the late 1990s and early 2000, ComReg adopted this new local area approach to facilitate a scalable deployment of fixed wireless access and the introduction of new market players in this sector.

By the end of June 2004, ComReg had issued a total of 38 local area licences for the provision of wireless broadband access to seven different operators.

Of this total, 37 licences were issued in the 3.5GHz band following a comparative evaluation of over 100 applications during Phase 1 of the licensing regime. This licensing process is on-going with licences being issued where possible on a first-come, first-served basis.

One licence was issued under the local area scheme in the 10.5GHz band. Further growth is anticipated in this band for enterprise service provision. By June 2004, there were over 2200 users of licensed wireless broadband paying prices comparable to DSL.

Competition

continued

(v) Data Services

Following a review of the need to enhance competition in the leased line market, ComReg issued a Direction to introduce a Partial Private Circuit (PPC). PPCs were introduced by eircom during 2003 on foot of ComReg's direction. PPCs allow an OAO to offer leased lines to end users by combining in an efficient manner elements of eircom's network with elements of their own infrastructure to provide a complete end to end link. Prior to the introduction of PPCs, OAOs had no choice but to use either eircom's wholesale leased line product, which is built exclusively on eircom's network or to build the entire link themselves. PPCs therefore removed a significant barrier to entry in the point-to-point services market.

In July and August 2003 ComReg published a number of prices for elements of the PPC service. PPC prices were reviewed, and new prices subsequently introduced on January 22, 2004. These new prices significantly reduced the rental prices for End User Links.

Mobile

In line with the new legislative regime in the electronic communications sector, ComReg is continuing its analysis of competition in certain mobile markets, the wholesale mobile call origination market and wholesale voice call termination on individual mobile networks.

Wholesale mobile access and call origination

As part of its series of market reviews, ComReg launched a consultation seeking views on its analysis of the wholesale mobile call origination market.

ComReg expressed in the consultation its concerns regarding the level of competition in the retail mobile markets examined and the lack of wholesale agreements. To enhance competition, ComReg proposed to introduce national roaming, strengthening the competitive offering of the other mobile network operators, by enabling them to give greater phone coverage to their customers throughout the country. In proposing appropriate remedies for this market, ComReg has taken into consideration the Ministerial Policy Direction in relation to national roaming. ComReg is also consulting on whether Vodafone and O₂ should also be obliged to provide access to Service Providers, such as Mobile Virtual Network Operators ("MVNOs"). Allowing service based telecom companies to compete could also enhance competition in the mobile market.

Competition

continued

Wholesale Mobile Voice Call Termination

Also published under the new EU regulatory framework was ComReg's response to consultation and notification on the market for wholesale voice call termination on individual mobile networks. Having conducted a market analysis on this relevant market, ComReg found that the market for voice call termination services was not competitive and has decided that each Mobile Network Operator (MNO) in Ireland, namely Vodafone, O₂, Meteor and '3', should be designated as having Significant Market Power in the relevant market for the termination of voice calls on their respective mobile networks in Ireland.

Market forces are insufficient to ensure that the pricing of mobile voice call termination services is set at an efficient level. Following the market analysis, ComReg has concluded that mobile voice call termination rates need to be cost orientated and is proposing a combination of remedies to reduce voice call termination charges to efficient operator levels. ComReg is consulting in more depth on the proposed detailed implementation of these remedies.

The changes made in mobile termination rates by Vodafone and O₂ will further enhance Ireland's position in terms of mobile termination rates. ComReg notes that the recent commitments to reduce mobile termination rates by Vodafone and O₂ will - provided that these reductions are passed on to fixed line and mobile consumers - ensure that Irish consumers benefit from reduced retail rates. ComReg expects that the resulting reduced voice call termination charges by Vodafone and O₂ will now act as a ceiling on the voice call termination charges of these operators until September 2005.

3G

3G mobile telecommunications represents an evolution in mobile technology allowing for the rapid transfer of data over mobile phones and plug-in data cards. Wireless internet, audio on demand, video conferencing and traffic and travel information are some of the applications that are potentially available with 3G.

Three companies, Vodafone, O₂ and Hutchison were licensed in 2002 to provide 3G services in Ireland. Vodafone launched its services in May 2003 and was followed by Hutchison '3' and O₂ in December. Following the voluntary offerings by the three 3G licensees during the competition, which were inserted into their licences as binding commitments, ComReg published the schedules setting out the terms of their rights of use for each of the licensees in February 2004. The roll-out of these services continues and the three operators continue to meet their licence conditions.

Innovation/Market Review Process

Market Reviews

Under the new framework each National Regulatory Authority (NRA) is required to assess the state of competition in 18 defined markets, in accordance with the market review procedure outlined in the EU's Framework Directive. The Framework Directive aligns the concept of Significant Market Power (SMP) with the concept of dominance under EU competition rules.

The EU Commission has defined 18 candidate markets for review, namely:

Wholesale Level

- Call origination on the public telephone network provided at a fixed location.
- Call termination on individual public telephone networks provided at a fixed location.
- Transit services in the public fixed telephone network.
- Wholesale unbundled access (including shared access) to metallic loops and sub-loops for the purpose of providing broadband and voice services.
- Wholesale broadband access.
- Wholesale terminating segments of leased lines.
- Wholesale trunk segments of leased lines.
- Access and call origination on public mobile telephone networks, referred to (separately) in Annex 1(2) of the Framework Directive in respect of Directive 97/33/EC and 98/10/EC.
- Voice call termination on individual mobile networks.
- The wholesale national market for international roaming on public mobile networks.
- Broadcasting transmission services, to deliver broadcast content to end users.

Retail Level

- Access to the public telephone network at a fixed location for residential customers
- Access to the public telephone network at a fixed location for non-residential customers.
- Publicly-available local and/or national telephone services provided at a fixed location for residential customers
- Publicly-available international telephone services provided at a fixed location for residential customers.
- Publicly-available local and/or national telephone services provided at a fixed location for non-residential customers
- Publicly-available international telephone services provided at a fixed location for non-residential customers
- The minimum set of leased lines (which comprises the specified types of leased lines up to and including 2Mb/sec as referenced in Article 18 and Annex VII of the Universal Service Directive).

ComReg is obliged under the new regulatory framework to conduct a comprehensive review of the markets it defines in the Irish electronic communications sector. ComReg takes the utmost account of the list of markets outlined and in most cases follows closely the definition of the market provided by the EU Commission.

The reviews are forward-looking and take a prospective view of the level of competition in the markets defined. They assess whether an operator or operators possess market power in a market and, therefore, either singly or jointly have Significant Market Power (SMP) in that particular market. The new regulatory framework lists a number of obligations which regulators, if they consider it appropriate and justified in the light of their review of the market, may impose on the SMP operator or operators.

ComReg consults nationally on its findings and seeks the views of the Competition Authority before issuing its final view on SMP. Under the new framework ComReg makes the SMP market reviews available to the EU Commission and other telecommunications regulators for comment and the EU Commission has the ultimate power to reject the conclusions of a market review.

During the year ComReg issued a number of national consultations involving the following markets:

- Wholesale Broadcasting Transmission
- Wholesale Unbundled Access
- Wholesale Mobile voice call termination on individual networks
- Wholesale Broadband Access
- Wholesale Mobile Access and call Origination
- Wholesale national market for International Roaming
- Wholesale Terminating segments for Leased Lines
- Wholesale Trunk segments for Leased Lines
- Retail Market for minimum set of leased Lines
- Retail Market for leased lines above 2mbs
- Retail Market for International Leased Lines

ComReg also notified a number of these markets to the EU Commission and other NRAs. In all cases notified to the EU Commission, the Commission did not raise any doubts about the conclusions reached by ComReg in the markets notified. The markets notified under the New Regulatory Framework to the EU Commission were:

Markets Defined:	Designated SMP Operator
The Wholesale market for radio broadcasting transmission services on national analogue terrestrial networks	RTE Networks
The Wholesale market for television broadcasting transmission services on national analogue terrestrial networks	RTE Networks
Wholesale unbundled access (including shared access) to metallic loops and sub-loops for the purposes of providing broadband and voice services	Eircom
Wholesale Mobile voice call termination on individual mobile networks	Vodafone, O2, Meteor and Hutchison '3'

ComReg is among the first regulators in the EU to notify market reviews under the new regulatory framework. ComReg expects to complete all of the market reviews, with the exception of the Wholesale National market for International Roaming. This market review requires co-ordination with fellow EU regulators and it is expected to be completed during 2005.



Consumers

Under the 2002 Communications Regulation Act, ComReg has a statutory role to protect consumers. In carrying out this responsibility, ComReg seeks to ensure that consumers get value in terms of price, choice and quality. ComReg achieves these objectives in a number of ways:

- Providing relevant information to consumers to ensure that they can derive maximum benefit from the developing market;
- Monitoring compliance by eircom with its universal service obligation;
- Implementing a retail price cap on eircom as an operator with Significant Market Power;
- Dealing with complaints from the public when the code of practice for complaint handling operated by service providers fails to adequately address the complaint;
- Monitoring users of the radio frequency spectrum to ensure that emissions of non-ionising radiation are kept within internationally-accepted safe levels;
- Licensing end users directly to use radio apparatus: these uses include businesses such as taxi companies, ships and aircraft, and individuals. There are over 8,000 such licences in existence, and dealing with our direct customers is an important aspect of our role.

Market Information

ComReg aims to inform stakeholders of the development of competition in the Irish communications market by means of research through its Quarterly Market Commentary and Key Data reports. These reports are based on questionnaires completed by licensed or authorised operators, complemented by surveys on Internet access and usage and secondary research reports.

Consumer/residential telecommunications survey

This survey was based on interviews with 516 consumers between January 29 and February 5, 2004. The principal findings from the consumer survey were that 61% of consumers - an increase of 13% on the 2003 survey - were aware of the choices available to them from competition in the fixed line sector. Many had been actively approached by suppliers other than eircom offering services to them. While the majority of consumers still used eircom for their landline calls, 18% had switched to other providers, an increase of 60% from 12 months earlier; the main reason for switching was price.

Consumer awareness of Carrier Pre-Select (CPS) has increased with 40% of those surveyed indicating that they were aware of the service. The survey also noted that 42% indicated that they were unaware of the cost of calling a mobile customer on a different network compared to calling a customer on their own provider's network. The survey indicated that, while 61% of mobile users who used their phones abroad were aware that costs depended on the network selected, 68% users did not manually select the roaming network.

Internet Access Survey

This survey interviewed 1,105 consumers aged between 15 and 74 and was conducted between July 21 and August 29, 2003. This survey illustrated that 50% of Irish adults used a personal computer with the largest proportion of use at home (36%).

An estimated 32% of Irish adults have home internet access. It was found that using a standard fixed line to connect to the internet is by far the most common method of going online at home. On average, those using the internet at home estimated that they spend 4 hours a week online. Those spending the least amount of time online are more likely to be in the 50-74 year old age category.

In terms of e-commerce, the survey found that 40% of internet users had made a recent online purchase. Airline tickets were the most common online purchase, with 66% of those surveyed stating that they had purchased an airline ticket online in the previous three months. In terms of m-commerce, 5% of mobile phone owners said they had purchased a product or service using the text or internet function on their mobile phone where the cost was billed to their phone; this was found to be highest among 15-24 year olds.



Consumers

continued

Consumer Protection Activities

ComReg published guidelines on October 22, 2003 regarding the minimum set of requirements that providers of electronic services must include in contracts with end users. Under the new EU electronic communications framework, all electronic communication service providers are required to include a minimum set of terms and conditions in their subscriber contracts. The regulations provide that consumers should enjoy a minimum level of legal certainty in respect of their contracts with electronic communication service providers. This should include contractual terms, conditions, quality of service, condition for termination of the contract and the service, compensation measures and dispute resolution.

Tariff Presentation

ComReg initially consulted on a draft Code in January 2004. Following this consultation ComReg refined the Code into a set of three concise principles, the purpose of which is to ensure that consumers have access to accurate and comprehensive tariff information when using communications services. A further consultation was issued in June 2004. The three principles outlined in ComReg Decision Notice D11/04, published on the August 12, 2004 are as follows:

In presenting tariff information the service provider will ensure that

- Tariff information is accurate
- Tariff information is comprehensive
- Tariff information is accessible

The principles that tariffs shall be accurate, comprehensive and accessible are designed to ensure that service providers present transparent and up to date information on standard tariffs covering access, all types of usage charges, maintenance charges and including details of standard discounts applied and special and targeted tariff schemes.

Directory Enquiry Services

In June 2004 ComReg proposed measures to ensure consumers have adequate access to information in relation to directory enquiry services. In consulting on this matter ComReg had considered market research which indicated a lack of awareness of the cost of using directory enquiry services among consumers. In ComReg Decision Notice D12/04, published on the August 12, 2004, ComReg issued directions that:

- 1) When advertising or promoting its service a Directory Enquiry service provider shall indicate the applicable charges or where such information may be obtained

- 2) The Directory Enquiry service provider shall make available printed tariff information in response to requests from consumers.
- 3) A Directory Enquiry service provider shall provide tariff information when it offers call completion services.

Consumer Guides

As part of its consumer awareness role, ComReg produces consumer information guides to ensure that consumers are kept informed on specific issues of interest. ComReg recognises that informed consumers are one of the primary drivers of competition in the marketplace. An informed consumer can evaluate a range of suppliers and choose one that suits their communication needs based on a price/quality requirement. This ability to switch suppliers also encourages operators to compete for business and raise their quality standards. During the year under review, six guides were issued covering topics including fixed telephony services, directory enquiry services, making a complaint, phonecards, modem hijacking and unsolicited marketing calls.



Universal Service Obligations (USO)

In July 2003, with the introduction of the new regulatory framework and following a consultation process which began in December 2002, eircom was designated as the Universal Service Provider (USP) for a period of three years effective from July 25, 2003. USO obligations exist to ensure all end-users can receive a defined minimum set of services, at an affordable price, irrespective of location. The obligations which eircom are required to carry out are:

- The provision of a Telephone Line at a fixed location in response to a "reasonable request"
- The provision of Directory Services
- The provision of Public Payphones
- The provision of Services for Disabled Users
- Affordability of Tariffs

Consumers

continued

Consumer Complaint Handling

All operators are required to have a Code of Practice for handling complaints. Such Codes must meet minimum standards as set by ComReg and provide practical guidelines for consumers when dealing with operators. Where a consumer has exhausted an operator's complaint handling process they can contact ComReg. Depending on the issue, ComReg takes up the matter directly with the operator. ComReg seeks to achieve an adequate response for the consumer by requesting the operator to re-examine the consumer's complaint in the light of any regulatory obligations. ComReg monitors progress within this process and, once notified by the operator that the matter has been resolved, the customer will be contacted by ComReg.

During the year under review ComReg received 1,622 complaints from consumers, mainly residential customers, concerning the levels of service provided by their service provider. The main areas of complaint concerned billing, poor levels of customer care or quality of service and delays in the provisioning of new services. Where systematic issues were identified by ComReg through complaints received, these were taken up directly with the operators concerned in order that they could be addressed at a framework level.

Some 5,859 queries were also dealt with during the year.

Fixed Line queries related to:

- Internet speed
- Modem Hi-jacking
- Universal Service (USO)
- DSL rollout
- Single billing
- Requests for information on service providers
- Directory Enquiry call completion charges
- Number portability
- Claims of misleading advertising
- Confusion regarding Carrier Pre-Selection subscription process (Third Party Verification).

Mobile Network queries related to:

- Pricing
- Contract issues
- Equipment insurance
- Number portability
- Miscellaneous*

* All other queries outside of the remit of ComReg were passed on to the appropriate Regulatory Authority or body.

Monitoring of Non-Ionising Radiation

ComReg is the licensing authority for the use of the radio frequency spectrum in Ireland. A condition of wireless operators' licences is that they are compliant with the international guidelines for general exposure to electromagnetic fields. ComReg has in each of the past three years published a comprehensive audit report on the compliance of radio transmission sites with emission limits for non-ionising radiation.

Each audit has focused on compliance with the general exposure limits specified in the guidelines published by the International Commission on Non Ionising Radiation Protection (ICNIRP). On the basis of the work carried out in each of the audits it has been possible to confirm that all of the companies audited have procedures and processes in place to ensure compliance with these limits.

In 2003 an extensive programme was put in place to measure non-ionising radiation levels at up to 400 antenna sites around the country. Undertaking this programme involved measuring the highest emission level associated with each site. For each site, ComReg required that the measured levels of non-ionising radiation emissions should not exceed the ICNIRP limits in any part of the site or surrounding area where the general public has access. The ComReg website provides details of all site reports and the four interim reports related to these measurements.

A detailed breakdown of the sites measured is given in the table below:

Total Number of Sites Measured	401
Total number of sites nominated by members of the public	51
Total number of sites nominated by Department of Communications	32
Total Number of Mixed Sites ¹	41

For the 401 site measurements completed, there were no cases of site measurements exceeding the relevant ICNIRP level for that frequency.

Siteviewer facility

Based on information made available by the mobile phone companies, ComReg provides an on-line interactive database of mobile phone antenna/mast sites at www.siteviewer.ie

This website makes it possible for people to find a mast in a specific area using the location name such as a street name or a townland name. The site also contains such information as the operators located at the site, the frequency bands used at the site and the maximum power levels from the antenna on the mast.

¹ A mixed site is a site that has more than 1 radio service on site e.g. GSM and Broadcasting

Radio Licensing

Radio frequency spectrum is available for use for the provision of a variety of communications services and networks. These include radio networks, as outlined earlier in this report, but also incorporate such services as radio navigation systems, business radio, broadcasting, ships' radio and equipment used in industry, medicine and commerce.

The use of radio equipment in Ireland must be authorised by ComReg. This authorisation may take the form of either a licence, under the Wireless Telegraphy Act 1926, or under the Broadcasting Authority Act 1960, as amended (in the case of the RTÉ Authority), or under a Radio and Television Act, 1988 (in the case of the Broadcasting Commission of Ireland) or a licence exemption.

The Licensing section within Market Framework processes all such authorisation requests and ensures that licences are maintained in a manner which both maximises the efficient use of available spectrum and ensures that a quality service is available to all licensees.

As of June 30, 2004, the total number of radio licences on our database was 14,446. Of these 13,772 licences are renewable annually. An average of 4,000 applications, both for new licences or changes to existing systems are received and processed annually.

A major development in the year under review was the introduction of a new regulatory framework. ComReg's licensing regime under national legislation is now subject to the EU Regulatory Framework for Electronic Communications with effect from July 25, 2003. The conditions and obligations which can be included in a licence are set down in Part B of the Schedule to the European Communities (Electronic Communications Networks and Services) (Authorisation) Regulations, 2003.

An Information Notice¹ published in July 2003 detailed which conditions of the existing licences no longer applied as a consequence of the new framework. The new Licence formally incorporates the changes set out in that document.

Provision of a high quality customer service is a priority for ComReg. During this period, ComReg continued to work on its e-licensing project which was launched in 2004. With the introduction of e-licensing, licensees are able to view details of, and pay for outstanding invoices on-line. Applicants are encouraged to discuss their requirements with us prior to submitting applications, thereby avoiding unnecessary processing delays.

As indicated above, the requirement for spectrum is not confined to network provision. Outlined below are the services which are licensed by ComReg for private or private corporate use.

Business Radio

Business radio licences are issued to companies where a private mobile communications system is required, e.g. where companies require radios for direct two-way communications between a base and mobile personnel. Such systems would typically be used by taxi companies and transport companies as well as by government and state organisations and the emergency services. 504 licences were issued during the year compared to 297 in 2002-2003 representing a 70% increase. This increase, combined with last year's increase of 72% suggests a renewed demand for business radio. A contributing factor however could be the additional measures taken by ComReg, over the past 24 months, to ensure that all radio systems in operation throughout the country are appropriately licensed under the Wireless Telegraphy Act.

¹ ComReg document 03/84: Wireless Telegraphy Licences - Future Applicability of Licence Conditions

Community Repeater

Community Repeater services involve sharing a repeater station at a high site by a number of users. The repeater station is supplied, installed and maintained by a licensee who can then allow access to the repeater station on a commercial basis. This year six new licences were issued, compared to a single new licence in 2002-2003.

Aircraft Radio

These licences cover the use of radio transceiver equipment located on board aircraft and operating within the aeronautical frequency bands to airport control towers (either while the aircraft is on the ground or airborne). During the year 157 new licences were issued compared to 90 in 2002-2003.

Radio for Ships

These licences authorise the use of two-way communications with other vessels and with Coast Radio Stations. Coast Radio Stations allow radio operators to connect with the ordinary telephone network. All merchant ships, all sea-going passenger vessels and



Radio Licensing

continued

most fishing vessels must have radios installed and are obliged to have a radio licence. Most pleasure craft are not compelled to have a radio installed but more and more are doing so - in these cases licences must also be obtained. A ship's radio licence can only be issued in circumstances where the operator of the radio equipment holds an appropriate Certificate of Competency. This year 865 such certificates were issued and 661 new radio licences for ships were issued.

Mobile Radio Systems

Legislation was introduced in August 2002 (S.I. No. 435 of 2002), which facilitated the introduction of a new licensing regime for local area or on-site mobile radio systems which had not been specifically accommodated under previous legislation. The new regime covers systems such as trunked radio (a radio system which operates by dynamically assigning radio frequency channels from a group of channels assigned). Two new mobile radio licences were issued in the period.

Radio Experimenters

Radio Experimenter licences are issued to amateur radio enthusiasts who wish to use radio for recreational study of radio propagation effects. 35 new licences were issued in the past 12 months.

Radio Links

Where a dedicated radio transmission path is required between fixed locations, a radio link licence is required. Many telecommunications operators use radio to link their transmission sites together. In particular, mobile phone operators use radio links in the provision of their transmission network. During the reporting period, 972 new radio link licences were issued compared to 607 in the previous period. The increase can be attributed to network

expansion by the existing 2G operators and preparation for roll-out of services by the 3G operators.

Fixed Wireless Access

During the year, ComReg launched a local area licensing scheme for wireless broadband access under the Fixed Wireless Access Local Area (FWALA) licensing regime. By June 2004, a total of 38 local area licences were issued. Of this total 37 licences were issued in the 3.5GHz band and one licence was issued in the 10.5GHz band.

Satellite

Satellites are used for numerous purposes, including television broadcasts, meteorology, surveying and telecommunications. Satellite networks provide a flexible alternative to land-based fixed line and fixed radio link networks. Three categories of satellite earth stations are licensable; Large Earth Stations (LES), Transportable Earth Station (TES) and Very Small Aperture Terminals (VSAT). 135 licences were issued in the year under review.

Broadcasting

ComReg estimates that there were a total of 526,000 cable & MMDS subscribers in Ireland at the end of June 2004. 24% of the basic cable and MMDS subscriber base had upgraded to digital services.

Prior to the introduction of the new EU Regulatory Framework cable operators were licensed under the Wireless Telegraphy Act, 1926. Since the introduction of the new framework cable operators are no longer licensed but are still subject to a General Authorisation. During the period under review, new Regulations were introduced for MMDS¹ and Deflector² operators to bring them in line with the new framework.

Summary of Licences issued

Licence Type	No. of Licences Issued 30/6/03 -30/6/04	No. of Licences Issued 30/6/02 - 30/6/03
FWA	38	-
Radio Links	972	607
Business Radio	504	297
Community Repeaters	6	1
Test	4	4
Mobile Radio Systems	2	-
Satellite Radio	135	17
Ships Radio	661	651
Certificate of Competency (Ships)	865	1200
Aircraft Radio	157	90
Experimenters	35	37

Details of the above licence types including application forms are available from the ComReg website at www.comreg.ie

Radio Licensing

continued

Licence Exemption

A large number of radio systems are exempt from licensing in Ireland. Exemptions from licensing are normally issued when there is no requirement to manage the spectrum such as ISM bands and where the risk of harmful interference is negligible. All radio equipment that is not exempt from licensing requires a licence. A summary of the radio devices that are exempt from licensing is contained in the table below.

Summary of Radio Devices exempt from Licensing			
Radio Type	Description	Exemption Order	Other Information
Short Range Device (SRD)	Various low power devices such as inductive applications, alarms, model control, walkie talkies, wireless microphones and audio systems, radio LANS, Road Transport and traffic Telematics (RTTT), Radio Frequency Identification systems (RFID).	S.I. 405 of 2002	ERC/REC/70-03 Documents: 02/71
Citizen's Band	AM citizens' band (CB) and PR 27 radio equipment.	S.I. 436 of 1998	Standards: ETS 300 433, ETS 300 135 Documents: 00/62R
Satellite	Certain Land Mobile Earth Stations including Inmarsat, Eutelsat, Italsat, Arcanet and Thuraya Stations.	S.I. 398 of 2001	Standards: TBR 026, TBR 044, TBR 027, EN 301 681 Documents: 00/68. 00/62R Standards: TBR 28, TBR 30, TBR 43 Documents: 00/68. 00/62R
	Certain Fixed Satellite Receiving Earth Stations including VSAT and SNG receivers.	S.I. 273 of 2000	
	Mobile Earth Stations for Satellite Personal Communications Systems <1GHz (S-PCS<1GHz)	S.I. 173 of 2000	Annex 2 of ERC/DEC/(99)06 Documents: 00/62R
	Satellite Earth Stations for Satellite Personal Communications Systems <1GHz (Global Mobile Personal Communications Service, GMPCS) Exemption of Low Power Aircraft Stations	S.I. 214 of 1998 S.I. 007 of 2004	ERC/DEC/(97)03 Documents: 00/68, 00/62R
PMR 446	Short range business radios operating in the 446MHz band	S.I. 93 of 1998	Documents: 00/62R
GSM	GSM phones operating in the 900MHz band	S.I. 409 of 1997	Documents: 00/62R
DCS 1800	GSM phones operating in the 1800MHz band	S.I. 107 of 1999	Standards: TBR 31, TBR 32 Documents: 00/62R
Cordless Telephones	Analogue cordless phones operating at 31.025 - 31.325MHz (fixed part) and 31.925 - 40.225MHz (portable part)	S.I. 410 of 1997	Documents: 00/62R
	DECT cordless phones operating between 1800 -1810MHz		
	CT2-CAI digital cordless radio communications system operating in the band 864.1 - 868.1Mhz and complies with ETS 300 131		
Broadcasting	Certain wired broadcast relay stations	S.I. 200 of 1976	Documents: 00/62R
	Sound broadcasting receivers	S.I. 211 of 1972	

¹ Wireless Telegraphy (Multipoint Microwave Distribution System) Regulations S.I.No.529 of 2003

² Wireless Telegraphy (UHF Television Programme Retransmission) Regulations 2003 SI No 675 of 2003

Spectrum Management

ComReg is responsible under Section 10 of the Communications Regulation Act 2002 for the management of the Radio Frequency Spectrum and one of the objectives under Section 12 is to ensure the efficient management and use of the radio frequency spectrum. In addition under Section 35, ComReg is mandated to publish the Radio Frequency Plan which is a set of tables indicating frequency allocations in the radio spectrum at the date of publication of the plan.

The radio frequency spectrum is used to support a large number of electronic communications services and applications. Access to radio frequencies is an essential requirement for communications, particularly for aviation, shipping, defence services, public safety, broadcasting and for any private business who relies on mobile radio. As an integral part of society's infrastructure the efficient management and use of radio spectrum is crucial for a modern economy.

World Radiocommunication Conference

The international process to agree on how the radio frequency spectrum is used by all nations of the world is facilitated by the World Radiocommunication Conference which revises the Radio Regulations, the international treaty governing the use of the radio-frequency spectrum. Finalised in this reporting period, the 2003 Conference attracted 2278 participants who met 962 times in order to consider 1329 documents dealing with 51 agenda items including wireless and mobile communications, satellite broadcasting, scientific research, aircraft communications, marine communications and radiolocation services, just to name a few. Ireland's interests were represented by a small team headed by the Department of Communications, Marine and Natural Resources and including a number of ComReg staff.

Some key results of WRC 2003 include:

- Expanding the choice available for consumers. The WRC made spectrum allocations and decisions regarding various new satellite and terrestrial wireless services, including RLAN, which allows wireless communication within short-ranges, and broadband-in-flight, which provides high-speed Internet access to airline passengers.

The Conference agreed on global frequency allocations for Radio Local Area Network (RLAN) systems in frequency bands around 5 GHz which is becoming popular in Europe and which is already being used to provide broadband access in Ireland. The result successfully balances government, commercial and consumer interests.

- The conclusions of WRC-03 removed the uncertainties around spectrum allocation for Galileo, the European GPS system, and set out the regulatory framework to allow new satellite navigation systems to share the same frequency bands as existing GPS and Glonass systems. This decision will aid the move towards a European navigation satellite system providing enhanced navigational and positioning capabilities;
- Certainty on the further development of IMT-2000, the third generation (3G) mobile communications system, including protecting IMT-2000 networks from interference by other systems and regulatory procedures to facilitate use of high-altitude platform stations (HAPS) as IMT-2000 base stations;
- The resolution of a number of issues concerning the regulation of maritime distress and safety issues, important for the Irish shipping and fishing industry;
- Resolving a number of satellite network regulatory issues which will permit further sharing between terrestrial (e.g., fixed links) and satellite services that share bands. This includes outstanding issues affecting VSAT operations, one of the primary satellite network applications used in Ireland.

Broadband access within licensed GSM spectrum

In line with Government objectives to achieve widespread availability of broadband infrastructure and services throughout Ireland, ComReg concluded a consultation in August 2003 (ComReg 03/104) on extending broadband access within licensed GSM spectrum.

In light of the responses received, in particular concerning the apparent non-viability of delivering broadband wireless services without the ability to handover between cells, ComReg is concerned that such services would not be sufficiently distinguished from the already licensed public mobile services for which specific licensing arrangements apply. Nevertheless, ComReg is still keen to explore additional platforms for the delivery of fixed broadband access that would facilitate provision beyond the areas covered by existing technologies and has therefore decided to leave open the possibility to provide a FWA service using spare GSM1800 MHz spectrum as originally outlined in the ComReg consultation document.

Wireless Broadband in the 3.5 GHz band

Having decided to open up the 3.5 GHz band for Wireless Broadband in support of the Government decision to drive broadband access, ComReg introduced a new initiative aimed at introducing a local area Broadband Fixed Wireless Access licensing scheme in the 3.5 GHz frequency band (ComReg 03/97). In the initial licensing phase ending in March 2004, 37 licences were issued. This was followed by 42 licence offers on a first come first served basis by the end of this reporting period. The licences were issued for Fixed Wireless Access systems to provide telecommunications services in a specifically defined geographical service area. The impact of these services will only be known in the next reporting period.

Future strategy for use of the 2500 – 2690 MHz frequency band.

In the previous reporting period ComReg published a consultation document seeking views on proposals for the long-term strategy for use of the 2500 – 2690 MHz frequency band. Ireland is one of a small number of countries in Europe with MMDS (Microwave Multipoint Distribution Services) services deployed in this band which has been designated internationally as an expansion band for 3G services. Decisions on the detailed frequency arrangements for UMTS/IMT-2000 in the 2500 – 2690 MHz band are scheduled to be made at the European level by the end of 2004. By that stage further information should be emerging on the nature, extent and timing of 3G requirements in the 2.5 GHz expansion band. Therefore, for the time being, and mindful of the need to maintain a flexible approach in relation to the 3G expansion spectrum, it was decided to maintain the current prohibition on the provision of MMDS services in the main urban areas. When the decision by CEPT on the detailed frequency arrangements for the 2500 – 2690 MHz band is available at the end of 2004, it is intended to undertake a review of the 2.5 GHz band in 2005 (ComReg 03/105).

Interference to radiocommunications and unauthorised broadcasting

The year saw a reduction in unlicensed broadcasting as a consequence of the targeted actions taken during the previous year although complaints about this activity still continued. There was a marked improvement in cases of interference to Business Radio, but the greater quantities of consumer electronic equipment in use saw increases in problems related to the EMC and R&TTE Directives. There was also an increase in the number of cases of interference to mobile phone services. As always, investigations of interference to the Emergency Services took priority with 14 cases recorded covering interference to Aviation, Garda, Ambulance and Coast Guard.

In the period criminal convictions were obtained against ten people for offences related to unlicensed broadcasting and one person was convicted of a Business Radio offence. During the same period a forum was set up for Business Radio suppliers and installers in the radio licensing process. The Business Radio Forum now meets regularly.

In the period, the Spectrum Compliance Unit received the following complaints:

• Unlicensed broadcasting -	53
• Business radio complaints -	22
• Interference to domestic reception (TV and radio) -	8
• Complaints of interference to Safety-of-Life services -	14
• Complaints of interference to fixed telephone lines -	6
• GSM related complaints -	4
• R&TTE related complaints -	9
• Electro-Magnetic Compatibility related complaint -	1
• Fixed wireless incident -	1

Numbering

ComReg is responsible for the efficient management of the national numbering resource. ComReg must ensure that it is possible to make new numbers available speedily so that new operators may provide services to consumers.

Voice over Internet Protocol (VoIP) Services

On June 17, 2004 ComReg published its consultation document ComReg 04/72 "Numbering for VoIP services", in the process becoming among the first regulators to directly tackle VoIP issues in Europe. As the title suggests, the main focus of the document was on numbering issues, which industry sources had indicated to be their most immediate area of difficulty in opening VoIP services. Suitable numbering supports effective VoIP inter-working with the existing PSTN services. ComReg 04/72 therefore proposed important numbering initiatives that could lead to opening up existing geographic and non-geographic numbers to VoIP services, while also bringing in a totally new range that is better suited to nomadic-type¹ services. Nevertheless, the scope of the document was much wider than numbering and various contentious issues for VoIP services were opened to national discussion. These included response to 999/112 emergency calls, VoIP network integrity, quality of service, support for caller location identification, ENUM etc. Responses to the consultation were received by the end of July and there was a considerable level of interest, from Ireland and abroad. This degree of interest is encouraging, bearing in mind the long term potential for VoIP to positively stimulate competition, by providing consumers with more choice and lower prices.

As well as carrying out its own consultation, ComReg has also contributed to early initiatives of the European Commission and the IRG to provide guidance on VoIP that might help to harmonise national approaches across the Community.

Mobile Number Portability (MNP)

Mobile Number Portability was successfully launched in the Irish market by all three mobile networks on July 25, 2003. In the 12 months following its launch over 142,000 mobile numbers were ported between the mobile operators.

The MNP solution for Ireland is based on best international practice. It is designed to make porting to a new network both simple and quick, allowing customers to port their numbers within two hours. It facilitates greater consumer choice in mobile operators by allowing subscribers to move between networks without changing their number.

Premium Rate Services

The introduction of the new Premium Rate Services framework described in ComReg 03/54R allowed for more flexibility in the pricing structures and greater transparency for the consumer. The new scheme offers a new range of numbers to cater for pay-per-call products and new price bands, where there is an upper price limit for each specific access code, and within which prices can be set for individual services on a particular number. The development of the new framework continued during the period of this report, with the resolution of issues relating to inter-operator settlements. The framework was successfully launched in May 2004.

Number Changes

The final stage of the national number changes, (mainly for the North West of Ireland), which began in August 2002, was successfully concluded in November 2003. Although certain other national areas bear continuous monitoring, no further number change requirements were identified during the period of this report.

Revision of the Numbering Conventions & new applications procedures

The National Numbering Conventions is the basic rule book that describes how ComReg manages the national numbering resource effectively and efficiently, as specified in legislation. It also clearly sets out the rights and obligations of all number holders vis-à-vis allocations made to them.

The first version of the National Numbering Conventions was published in February 2000 and that was followed by annual updates, each in turn extending coverage into new areas. To continue these enhancements, a new draft was published on 3 December 2003 for public consultation and this led to publication of Version 4 as ComReg 04/35 on March 31, 2004. This was the first version published since the new regulatory framework (NRF) came into force and consequently many alterations were necessary to align with the NRF requirements. Furthermore, the NRF demands greater transparency in number allocation processes and documentation, so a new Numbering Applications document ComReg 04/36 was developed and published to meet those needs.

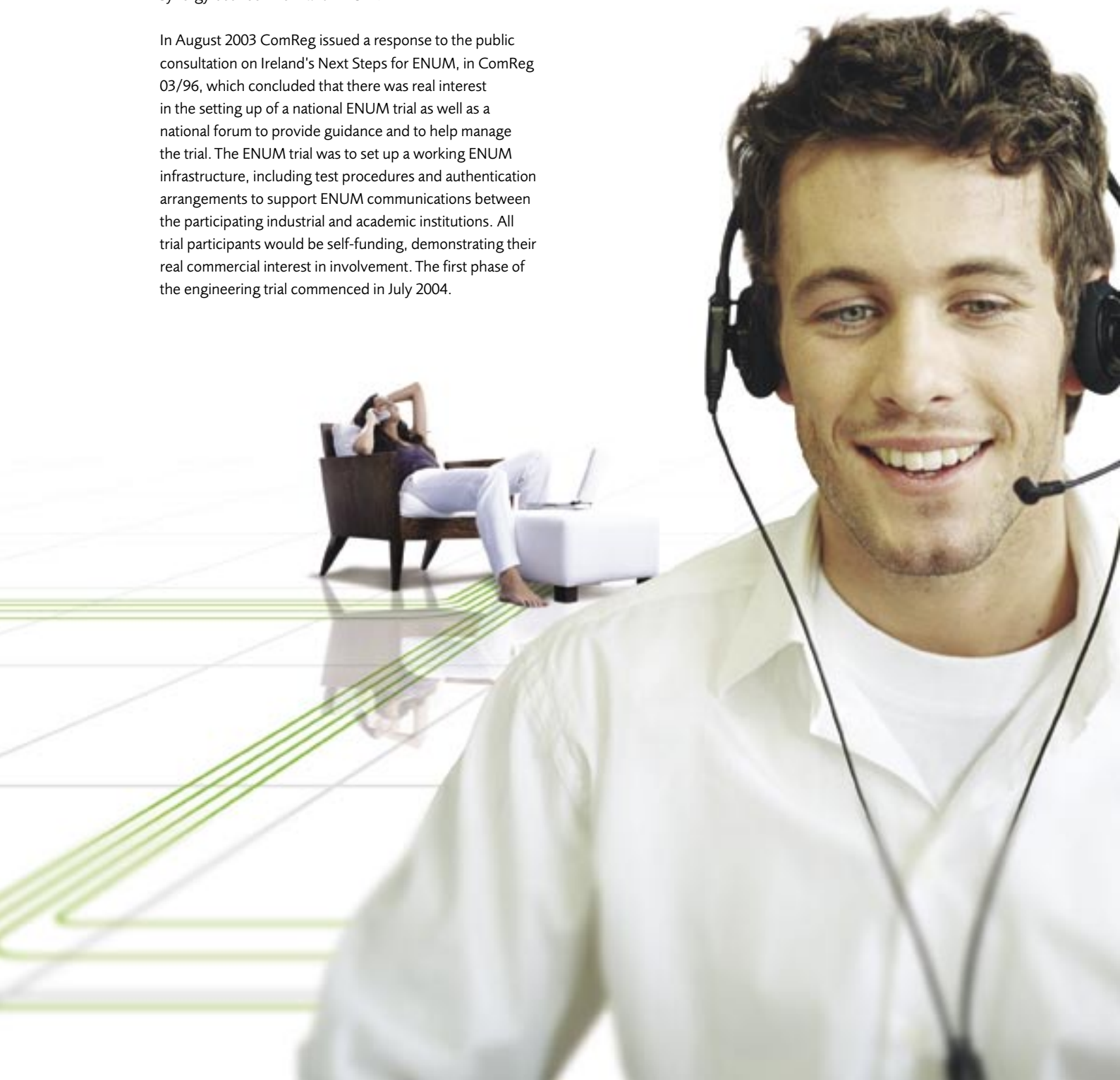
¹ Nomadic services are essentially fixed-line services that nevertheless allow users to travel with their terminals and plug-and-play without difficulty in their new temporary locations. Mobility is normally much more limited than with true mobile systems.

Electronic Numbering ENUM

ENUM is a telecoms protocol, supported by a Domain Name infrastructure, which enables a subscriber to be contacted using any communications mechanism (e.g. e-mail, fax or VoIP) so long as that person's telephone number is known. The 'killer application' is likely to be Voice over Internet Protocol (VoIP) as it potentially supports a caller in achieving Internet-based connection to the called party (i.e. rather than a higher priced PSTN/Mobile connection), whenever that party is on line. There is thus a synergy between VoIP and ENUM.

In August 2003 ComReg issued a response to the public consultation on Ireland's Next Steps for ENUM, in ComReg 03/96, which concluded that there was real interest in the setting up of a national ENUM trial as well as a national forum to provide guidance and to help manage the trial. The ENUM trial was to set up a working ENUM infrastructure, including test procedures and authentication arrangements to support ENUM communications between the participating industrial and academic institutions. All trial participants would be self-funding, demonstrating their real commercial interest in involvement. The first phase of the engineering trial commenced in July 2004.

In October 2004 ComReg published a report by the ENUM forum, ComReg 04/105a. It is expected that the trial will conclude in 2005. Discussions on the future developments of ENUM are continuing with the relevant parties.



Postal Regulation

Regulatory Framework

ComReg is the National Regulatory Authority for the Irish Postal sector. One of ComReg's key roles in this regard is to promote the development of the postal sector and in particular the availability of a universal postal service within, to and from the State at an affordable price for the benefit of all users.

In delivering its objectives, ComReg focuses on the provision of high quality customer centric postal services, guaranteeing for both letters and parcels, daily collections and deliveries, not less than five days a week, to every address in the country, while securing the freedom for the provision of competitive services through the gradual liberalisation of the postal market.

Specific functions include setting quality of service standards for An Post, monitoring actual performance against these standards, issuing directions to An Post regarding the accounting procedures to be adopted, monitoring compliance with tariff principles and specifying features of the universal service that An Post is obliged to provide. Under separate powers, An Post cannot increase prices for services without ComReg's concurrence.

During the year under review the market for outgoing cross-border mail was fully opened to competition. As a result with effect from January 1, 2004 the services "reserved" to An Post as the designated Universal Service Provider were reduced to items of domestic correspondence and incoming cross-border correspondence weighing less than 100g, providing the price was less than three times the domestic public tariff for an item of correspondence in the first weight step of the fastest standard category i.e. €1.44.

From January 2006 this limit will be further reduced to 50g with full opening of the market scheduled for January 2009:

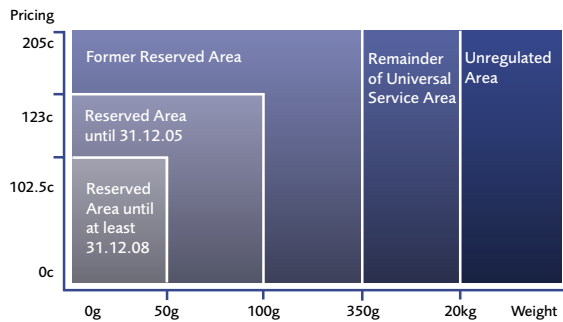


Figure 1 Interrelationship between Universal, Reserved and Unregulated Postal Services based on 2003 domestic price 48c

Unlike some other countries where it is necessary to secure a licence to provide services in direct competition with the designated universal service provider, it is possible to establish a competing service in Ireland (outside of the reserved area). With effect from January 1, 2004, postal service providers other than An Post with an annual turnover of more than €500,000, exclusive of VAT, have been required to apply for a "postal service authorisation" and to put in place simple complaint and redress procedures designed to protect consumers.

At the end of June 2004 Postal Service Authorisations had been issued to 15 providers of postal services.

In response to a public consultation on the issue of Access to An Post's network during the previous year ComReg decided to intervene only on a case by case basis should the Bulk Mail customers concerned and An Post, fail to reach an amicable agreement.

During the year further concerns were raised with ComReg regarding the ability of An Post to adequately meet the needs of the Bulk Mail Industry.

This resulted in a further intervention so that Bulk Mail Customers would have a right of access to An Post's four mail distribution centres. Mail could also be inducted at one of the twenty locations where An Post currently accepts bulk postings of metered/franked mail. Access at Delivery Office level was also proposed for mail that qualifies for the presorted, Postaim or any alternative discount services available now or in the future.

ComReg see these proposals as developing the postal market specifically for Bulk Mail users and believes there would be 'spin off' benefits for ordinary consumers as capacity is better utilised. A final decision has yet to be taken on this matter.



Postal Regulation

continued

An Post's Quality of Service

The availability of an efficient, high quality postal service on a par with the best in Europe is a key objective for a modern competitive economy such as Ireland's and in this regard the quality afforded to the single piece priority mail is a particular concern to ComReg. One of the fundamental objectives of the European Postal Directives is to secure improvements in Quality of Service and ComReg is obliged by law to set a Quality of Service target for An Post.

ComReg has appointed TNS mrbi to measure An Post's quality of service for single piece priority mail¹ (the ordinary day to day correspondence posted by individuals and businesses, big and small) and during the year ComReg published TNS mrbi's annual report for 2003 and the results of each quarter's performance. The reports showed that fewer than three out of four items of ordinary correspondence (single piece mail) were delivered the next day after posting and that some 4% were still not delivered three days later. These results are summarised below.

	National Mail (D+1)	Local Mail (D+1)	National Mail (D+3)
Target Set	94%	94%	99.5%
Q2 2003	71%	75%	N / A
Q3 2003	76%	79%	97%
Q4 2003	67%	72%	97%
Whole Year 2003	71%	75%	96%

ComReg also re-examined the quality targets that An Post is required to achieve. In order for An Post to match international best practice would have required setting a higher target than the one previously set. ComReg recognised that this would have been unrealistic, given the poor 2003 performance, and therefore again set a target which is on a par with the European average. The targets were confirmed at 94% D+1 and 99.5% D+3².

European Cross Border Results

The International Post Corporation (IPC) has also published annual results for 2003 on the quality of service of international mail within Europe. Results show an overall improvement in performance since 2002.

Postal Levy

As part of the arrangements for the introduction of Postal Service Authorisations ComReg initiated a review of the Postal Levy. Following public consultation a revised levy order was published on December 31, 2003³. A new levy order was published on 28 June 2004⁴ covering the period from July 1, 2004 to June 30, 2005. Compliance guidelines were published in February 2004.

Postcodes

The Universal Postal Union (UPU) describes the Postcode as the fundamental, essential element of an address, and a unique, universal identifier, which unambiguously identifies the addressee's locality and assists in the transmission and sorting of mail items. At present, 117 UPU member countries use Postcodes as part of their addressing systems. Ireland is the only country in the European Union without a system of postcodes and indeed one of the few in the developed world.

Interested parties were invited to submit their views and ComReg published its Postcodes Report in January 2005. The report recommends that a detailed feasibility study be undertaken in relation to the introduction of postcodes. The report proposes the establishment of a representative Working Group that would be given responsibility for the development of an implementation plan to establish a public postcode system. The Working Group would seek contributions and views from all interested parties. ComReg identified the following advantages of a postcode system:

- Rural householders would have a unique address without losing historical townland names
- Postcodes would help Irish businesses to become more efficient
- Postcodes would bring Ireland in line with best international practice
- Postcodes would improve the efficiency of the postal sector

¹ In accordance with the principles set out in the European and Irish Standard I.S. EN 13850: 2002 'Postal Services – Quality of Service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail'

² In accordance with the principles set out in the European and Irish Standard I.S. EN 13850: 2002 'Postal Services – Quality of Service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail'

³ S.I. No. 733 of 2003 covering the period from January 1, 2004 to June 30 2004.

⁴ S.I. No. 401 of 2004

Postal Regulation

continued

An Post's Prices

During the year ComReg reviewed An Post's prices for Domestic Postal services and agreed to the following increases in the price for services reserved to An Post with effect from August, 30 2003:

Format	Approved Price (up to 100g)	Original Price
Standard Letter	48c	41c to 50g 60c to 100g
Large Envelope	60c	47c to 50g 60c to 100g
Packet	96c	47c to 50g 60c to 100g

International Letter Post Tariffs

On January 5, 2004 An Post increased the price for outgoing cross-border mail services. By the end of the period under review ComReg had yet to receive the necessary information from An Post in order to allow it determine whether the new prices complied with the Tariff Principles set out in the European Communities (Postal Services) Regulations, 2002, S.I.616 of 2002.

Terminal Dues Agreements

The Terminal Dues Agreements govern the amount of money that An Post receives for delivering mail in Ireland on behalf of other international postal operators. ComReg has repeatedly expressed its concerns to An Post that it does not recover the full cost incurred in delivering incoming cross-border mail.

While ComReg is cognisant that An Post must have the freedom to conduct its negotiations as it sees best, while meeting its obligations, it is of no little concern that this matter has not yet been resolved given both its importance to An Post's finances and the adverse impact it has on postal costs for businesses and consumers alike.

International Activities

The European Union

Under the EU regulatory framework for the electronic communications sector, the European Regulators Group (ERG) provides a formal structure for liaison between national regulatory authorities (NRAs) across the European Union and the European Commission. The Group contributes to the common application of the regulatory framework and provides an advisory body for reflection, debate and advice. The ERG operates a joint work programme with the Independent Regulators Group (IRG) which consists of a wider membership. ComReg is an active participant in both forums which meet jointly.

During the year under review, the Groups met on five occasions. In April 2004, a Common Position on the approach to appropriate remedies in the new regulatory framework was adopted. This document is one of the major achievements to date of the ERG and it contributes significantly to the standardised and regular application in all Member States of the Directives governing the electronic communications sector. The Common Position covers basic principles of the application of the provisions of the regulatory framework in different markets. It provides for consistent and harmonised application in the event of market failure.

With broadband deployment as a core element of both the Lisbon Agenda of the European Union and national development strategy, a Common Position on Bitstream Access was also adopted by the group. This document defines the product, outlines regulatory provisions operational in all Member States, and makes recommendations to aid co-ordination of access.

Other significant developments include the launch of a co-ordinated effort within the mobile sector to define a wholesale international roaming market. This initiative could provide transparency for NRAs to reduce potentially excessive international roaming charges. The Group also commenced work with the European Commission on the revision of the 1998 EC Recommendation on accounting separation and cost accounting, in order to bring it in line with the requirements of current legislation.

The Postal Directive Committee

The Postal Directive Committee, established in 1998 following the introduction of the regulatory framework for the postal sector (Directive 97/67/EC), provides a forum for advice and exchange of information between national authorities and the European Commission. Together with officials from the Department of Communications, Marine and Natural Resources, ComReg actively participates in this EU Committee. The Group monitors the work undertaken by the European Committee for Standardisation (CEN) and recommends to the Commission which standards should be mandatory for member states to introduce. The meeting in November 2003 recommended that Standard "EN13850:2002: Quality of service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail" be mandatory for the measurement of quality of service. The Committee also monitors the transposition and implementation of the Postal Directives and the setting of quality of service targets by National Regulatory Authorities.

The Communications Committee

The Communications Committee (CoCom), established in 2002 following the adoption of the new framework, provides a forum for advice and exchange of information between national authorities and the European Commission. Together with officials from the Department of Communications, Marine and Natural Resources, ComReg actively participates in this EU consultation committee. The group co-ordinates input into and assessment of Commission initiatives and, during the period in question, the following were the main outputs: a comparative report detailing broadband access across the European Union; contribution to the Commission study on the provision of leased lines, looking at delivery periods, repair times, and service availability performance; discussion on a draft Recommendation on provision of broadband over power-lines; an assessment of barriers to physical roll-out of 3G infrastructure in the Member States; development and presentation of a report dealing with telecommunications and the needs of those with a disability; and follow-up to implementation of the Single European Emergency Number 112.

Radio Spectrum Policy Group

The Radio Spectrum Policy Group (RSPG) was established in 2002 following the adoption of the Radio Spectrum Decision. The role of the RSPG is to adopt formal 'Opinions' to assist and advise the European Commission on radio spectrum policy issues. During the report period the RSPG developed Opinions on the spectrum implications of the switchover to digital broadcasting and on the secondary trading of rights to use radio spectrum. It also initiated work to develop an Opinion on WAPECS, a coordinated EU spectrum policy approach to wireless access platforms for electronic communication services. The objective of Wireless Access Platforms for Electronic Communications Services (WAPECS) is to ensure that spectrum is available across a wide variety of services and applications to meet the requirements of the Lisbon agenda, and to comply with the overall policy goal of developing the EU internal market and European competitiveness. ComReg is an active participant in the RSPG and in the Radio Spectrum Committee.



International Activities

continued

Radio Spectrum Committee

The Radio Spectrum Committee (RSC) assists the European Commission in the development and adoption of technical implementing measures aimed at ensuring harmonised conditions for the availability and efficient use of radio spectrum, as well as the availability of information related to the use of radio spectrum. Issues addressed included abrogation of the ERMES Directive (on a European paging system), to facilitate new uses of the 169 MHz frequency band, and the former terrestrial flight telecommunication system (TFTS) frequency bands at 1670 MHz and 1800 MHz; development of mandates to CEPT on the introduction of Ultra Wideband (UWB) communications systems in Europe; the status of spectrum for short-range devices, and ongoing development of an appropriate EU regulatory framework to facilitate the use of the 24GHz band in the short term and 79 GHz in the longer term for automotive short range radar applications (e.g., vehicle anti-collision systems).

The European Conference of Postal and Telecommunications Administrations

The European Conference of Postal and Telecommunications Administrations (CEPT) comprises 46 member countries and is a Europe-wide forum for promotion of harmonisation and exchange of information in the fields of postal telecommunications and radiocommunications regulation. The Electronic Communications Committee (ECC) deals with telecommunications and radiocommunications issues. ComReg is active in the ECC and a number of its working groups and project teams including chairing the Working Group on Frequency Management (WGFM).

The European Committee for Postal Regulation (CERP) deals with postal issues. ComReg is active in the CERP and its working groups and project teams including chairing the Project Team on Cross-Border Mail. ComReg as a member of the Project Team on Cost Accounts played a significant role in the preparation of a CERP recommendation on the principles to be followed in establishing cost accounting systems in the postal sector.

A major event during the reporting period was European preparations under the auspices of CEPT for the first phase of the International Telecommunications Union (ITU) Regional Radio Conference (RRC-04) on digital broadcasting. RRC-04 was held in May 2004 in Geneva and was in effect a preparatory meeting for major re-planning of the broadcasting frequency bands to facilitate the introduction of digital broadcasting (sound and television). ComReg, as chair of the ECC WGFM, had responsibility for coordinating and leading European negotiations during RRC-04. The outcome of the conference was positive as all of the European and ComReg objectives were achieved in establishing a suitable framework for the next phase in 2006.

Other issues which CEPT dealt with during the period included developing decisions on the availability of frequency bands for the introduction of Wide Band Digital Land Mobile MR/PAMR in the 400 MHz and 800/900 MHz bands, and work under mandates from the European Commission to harmonise technical and, in particular, operational conditions aiming at efficient spectrum use by WLANs in the 5 GHz bands, and on harmonising the frequency usage for Short Range Devices and for Ultra Wideband applications.

Forward-Looking Activities

Forward-Looking Programme

ComReg's Forward-looking Programme monitors technological and market innovations occurring in the telecoms sector and considers how they may impact upon market development in Ireland. The programme examines the potential issues arising so that we can assess and plan how our regulatory measures should evolve in the future, with a view to facilitating innovation and helping the Irish telecoms sector develop. For example, developments taking place in the area of wireless communications such as technologies for Wireless Metropolitan Area Networks (e.g. Wi-Max) and key security aspects of emerging technologies were highlighted during the year.

Forward-Looking Programme Steering Panel

ComReg convenes a panel of senior advisors to help guide and assist the Forward-looking Programme. The panel meets in a workshop setting two to three times a year to review and help develop work carried out under the programme, to propose new topics for examination, and to draw attention to potential new issues. The workshops are chaired by Commissioner Isolde Goggin. Two meetings were held during the year. The first, which was hosted by Letterkenny Institute of Technology, took place in October 2003 and the second meeting took place in Dublin during March 2004.

Briefing Notes on Technology Developments

The Forward-looking Programme's Briefing Notes deal with emerging technologies and related innovations that could potentially have a significant impact on the future shape and direction of the telecoms sector. Although the Notes can deal with complex and technical topics, ComReg's intention is to inform readers who are broadly familiar with telecommunications, but who may not have a technology background. The principal purpose of these notes is to help ComReg develop its work programme and make well-informed decisions. Some Briefing Notes however fulfil a wider role in creating awareness, developing interest and, in some cases, stimulating innovation around new or evolving technologies.

During the year, Briefing Notes on the following topics were published:

- Developments in ICT Networking – Compendium of Briefing Notes (September 2003; ComReg 03/110):
 - Peer to Peer Networking
 - Ad-hoc and Mesh Networks
 - Wireless Metropolitan Area Networks
 - Developments in Wireless Link Technology
- Security Implications for New and Emerging Telecoms Technology (March 2004; ComReg 04/29)
- Smart Antenna Technology (May 2004; ComReg 04/52).

Communications and Publications

Public Affairs Unit

Our Public Affairs Unit issues press releases and communicates messages and statements on behalf of ComReg to the media and the public. The Unit also manages our website, deals with queries from the media, organises conferences and seminars. In addition it is responsible for the publication of the Annual Report and ComReg's Quarterly Newsletter.

ComReg also hosts a National Conference each year on a specific topic. Key national and international speakers are invited to share their expertise with our delegates. These events provide a perfect platform for sharing information, feedback and discussion among all stakeholders in the regulatory and technology sectors.

On October 1, 2003, ComReg held its National Conference in the Royal Hospital Kilmainham. Entitled "Get Connected" the purpose of the conference was to explore new methods of encouraging consumers and businesses to go on-line. The Conference was opened by the then Minister for Communications, Marine and Natural Resources, Dermot Ahern TD, and it was attended by over 150 delegates.

ComReg also held a symposium on Postcodes on November 24, 2003 in the Gresham Hotel, Dublin. The Conference was attended by over 90 delegates and it examined some of the key issues in relation to the implications of introducing a system of postcodes in Ireland.

ComReg documents published between July 2003 and June 2004

Summary of Documents published

Consultation	28
Response to Consultation	18
Decision	18
Determination	2
Briefing Note	4
Regulations	14
Information Notice	33
Market Commentary and related reports	18
Speech	3
Other	84
	<hr/>
	222

The list of documents published during the year may be found in appendix 1 of this Report and all of the documents are available on ComReg's website www.comreg.ie

Corporate Governance

It is the objective of the Commission to ensure compliance with best practice in Corporate Governance. The Code of Practice for the Governance of State Bodies was approved by the Government in October 2001. The Code sets out principles of Corporate Governance that State bodies are required to adopt.

The Code also states that where legislation applying to a State body contains provisions governing matters the subject of the Code of Practice, such matters will continue to be governed by the relevant legislation. In the case of ComReg, Section 33 of the Communications Regulation Act, 2002 provides that the Commission shall adopt with the approval of the Minister and the Minister for Finance, a code of financial management (which is based on the Code of Practice for the Governance of State Bodies) and shall arrange for its publication following such approval. Our code of financial management has been approved by the Minister for Communications, Marine and Natural Resources, and the Minister for Finance. It is published on our web-site.

To comply with best practice in this area, the Commission has established a five-person Audit Committee to oversee the financial reporting process and internal control systems of ComReg. Three members of the Audit Committee are external members, including the chair of the Committee.

ComReg complies with the Code of Practice for the Governance of State Bodies and it has affirmed compliance with relevant sections of the code either in this Annual Report or separately by way of a letter to the Minister for Communications, Marine and Natural Resources.

Financial Statements

FOR THE YEAR ENDED 30 JUNE 2004

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Report of the Chairperson

FOR THE YEAR ENDED 30 JUNE 2004

I have pleasure in submitting the annual report and audited financial statements for the Commission for Communications Regulation for the year ended 30 June 2004.

Principal Activities

The Commission for Communications Regulation was established on 1 December 2002. The functions of the Commission were specified in the Communications Regulation Act, 2002. These functions relate to the regulation and licensing of the electronic communications industry (including radio and broadcasting transmission) and the regulation of postal services. The Commission was funded wholly by income received from the electronic communications and postal industries. The establishment of the Commission had the effect of dissolving the Office of the Director of Telecommunications Regulation on 1 December 2002 and the functions of the Director were transferred to the Commission for Communications Regulation.

Financial Results

Details of the financial results of the Commission are set out in the Financial Statements and the notes supporting the Financial Statements. The results for the year show no surplus or deficit.

Auditors and Accounts

Under the Communications Regulation Act, 2002, the Commission shall keep in such form as may be approved by the Minister for Communications, Marine and Natural Resources, with the consent of the Minister for Finance, all proper and usual accounts of all moneys received or expended by it. The Commission shall submit accounts in respect of each year to the Comptroller and Auditor General. Within 42 days of the accounts being audited, the Commission is required to present to the Minister for Communications, Marine and Natural Resources, a copy of such accounts together with the audit report of the Comptroller and Auditor General.

Corporate Governance

The Commission is committed to maintaining the highest standards of corporate governance. The Code of Practice for the Governance of State Bodies published by the Department of Finance is the foundation on which our corporate governance policies are based. It is our policy to ensure that best practice in the area of procurement is followed and that all relevant tax clearance requirements are complied with.

Section 33 of the Communications Regulation Act, 2002 requires ComReg to adopt, with the approval of the Minister and the Minister for Finance, a code of financial management and shall arrange for its publication following

such approval. In addition the Commission is required to periodically review its code of financial management and revise and republish the code as appropriate. There is also a requirement on the Commission to comment in the annual report on adherence to the code.

We have submitted our code of financial management (which is based on the Code of Practice for the Governance of State Bodies published by the Department of Finance) to the Department of Communications, Marine and Natural Resources and it has been approved by the Minister and the Minister for Finance. It is the policy of the Commission to ensure compliance with our code of financial management.

Going Concern

The Commissioners, after making enquiries, believe the Commission has adequate resources to continue in operation for the foreseeable future and that it is appropriate to adopt the going concern basis in preparing the financial statements.

Prompt payment of accounts

The Commission acknowledges its responsibility for ensuring compliance, in all material respects, with the provisions of the European Communities (Late Payment in Commercial Transactions) Regulations 2002 ("the Regulations"). Procedures have been put in place to identify the dates upon which invoices fall due for payment and to ensure payments are made by such dates. Such procedures provide reasonable assurance against material non-compliance with the Regulations. The payment policy during the year under review was to comply with the requirements of the Regulations.

Health and safety of employees

The safety, health and welfare of the Commission's employees are safeguarded by the adherence to established safety standards which are in conformity with the requirements of the Safety, Health and Welfare at Work Act, 1989. The safety statement and its compliance with appropriate legislation, is reviewed on a continual basis.

Isolde Goggin

Chairperson
Commission for Communications Regulation
23 March 2005

Statement of the Commission's Responsibilities

FOR THE PERIOD ENDED 30 JUNE 2004

Section 32 of the Communications Regulation Act, 2002, requires the Commission to keep in such form as may be approved by the Minister for Communications, Marine and Natural Resources, with the consent of the Minister for Finance, all proper and usual accounts of moneys received or expended by it including an income and expenditure account and balance sheet, distinguishing between –
(a) its functions relation to electronic communications and
(b) its functions relating to postal matters.

In preparing financial statements, the Commission is required to

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- follow applicable accounting standards, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Commission for Communications Regulation will continue in operation.

The Commission is responsible for keeping proper books of account which disclose with reasonable accuracy at any time the financial position of the Commission and which enable the Commission to ensure that financial statements comply with the requirements of the Act. The Commission is also responsible for safeguarding the assets of the Commission and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Isolde Goggin

Chairperson

Commission for Communications Regulation

23 March 2005

Statement on the System of Internal Financial Control

FOR THE YEAR ENDED 30 JUNE 2004

On behalf of the Commission for Communications Regulation (ComReg) I acknowledge the responsibility for ensuring that an effective system of internal financial control is maintained and operated.

The system can only provide reasonable and not absolute assurance that assets are safeguarded, transactions authorised and properly recorded, and that material errors or irregularities are either prevented or would be detected in a timely period.

Key Control Procedures

The Commission has taken steps to ensure an appropriate control environment by

- clearly defining management responsibilities;
- establishing formal procedures for reporting significant control failures and ensuring appropriate corrective action.

The Commission has established processes to identify and evaluate business risks by

- identifying the nature, extent and financial implication of risks facing the body including the extent and categories which it regards as acceptable;
- assessing the likelihood of identified risks occurring;
- assessing the body's ability to manage and mitigate the risks that do occur;
- assessing the costs of operating particular controls relative to the benefit obtained.

The system of internal financial control is based on a framework of regular management information, administrative procedures including segregation of duties, and a system of delegation and accountability. In particular it includes:

- comprehensive budgeting system with an annual budget which is reviewed and agreed by the Commission;
- regular reviews by the Commission of periodic and annual financial reports which indicate financial performance against forecasts;
- setting targets to measure financial and other performance;
- clearly defined capital investment control guidelines;
- formal project management disciplines.

The Commission appointed Bastow Charleton to carry out a review of the system of internal financial control. The findings of this review are being actively followed up by the Commission. Since the year end procedures have been put in place to establish the internal audit function.

The Commission's monitoring and review of the effectiveness of the system of internal financial control is informed by the work of the executive managers within ComReg who have responsibility for the development and maintenance of the financial control framework, and comments made by the Comptroller and Auditor General in his management letter or other reports.

Annual Review of Controls

I confirm that a review of the effectiveness of the system of internal financial control took place in the year ended 30 June 2004.

Isolde Goggin

Chairperson

Commission for Communications Regulation

23 March 2005

Report of the Comptroller and Auditor General

FOR PRESENTATION TO THE HOUSES OF THE OIREACHTAS

I have audited the financial statements on pages 48 to 58 under the Communications Regulation Act, 2002.

Respective Responsibilities of the Members of the Commission and the Comptroller and Auditor General

The accounting responsibilities of the Members of the Commission are set out on page 45. It is my responsibility, based on my audit, to form an independent opinion on the financial statements presented to me and to report on them.

I review whether the statement on the system of internal financial control on page 46 reflects the Commission's compliance with applicable guidance on corporate governance and report any material instance where it does not do so, or if the statement is misleading or inconsistent with other information of which I am aware from my audit of the financial statements.

Basis of Audit Opinion

In the exercise of my function as Comptroller and Auditor General, I conducted my audit of the financial statements in accordance with auditing standards issued by the Auditing Practices Board and by reference to the special considerations which attach to State bodies in relation to their management and operation.

An audit includes examination, on a test basis, of evidence relevant to the amounts and disclosures in the financial statements. It also includes an assessment of the significant estimates and judgements made in the preparation of the financial statements, and of whether the accounting policies are appropriate to the Commission's circumstances, consistently applied and adequately disclosed.

I planned and performed my audit so as to obtain all the information and explanations that I considered necessary to provide me with sufficient evidence to give reasonable assurance that the financial statements are free from material misstatement whether caused by fraud or other irregularity or error. In forming my opinion, I also evaluated the overall adequacy of the presentation of information in the financial statements.

Opinion

In my opinion, proper books of account have been kept by the Commission and the financial statements, which are in agreement with them, give a true and fair view of the state of the affairs of the Commission for Communications Regulation at 30 June 2004 and of its income and expenditure and cash flow for the year then ended.

John Purcell

Comptroller and Auditor General

31 March 2005

Statement of Accounting Policies

FOR THE YEAR ENDED 30 JUNE 2004

1. ESTABLISHMENT OF THE COMMISSION

The Commission for Communications Regulation was established on 1 December 2002. The establishment of the Commission had the effect of dissolving the Office of the Director of Telecommunications Regulation (ODTR) on 1 December 2002 and the assets and liabilities of the ODTR were transferred to the Commission on that date. The functions of the Director were also transferred to the Commission for Communications Regulation on 1 December 2002.

2. ACCOUNTING CONVENTION

The financial statements for the Commission which are in the form approved by the Minister for Communications, Marine and Natural Resources with the consent of the Minister for Finance are prepared on an accruals basis except as stated below, under the historical cost convention and in accordance with generally accepted accounting practice. Financial reporting standards recommended by the recognised accountancy bodies are adopted as they become applicable. The unit of currency in which the Financial Statements are denominated is the Euro.

3. INCOME RECOGNITION

Income from Telecommunications licensing was brought to account in the year in which the licence is issued.

Income from the Electronic Communications administration levy is brought to account over the period to which it relates and any excess over the relevant administration costs, including provisions, is refunded.

Income from the Postal administration levy is brought to account over the period to which it relates and any excess over the relevant administration costs, including provisions, is refunded.

Cable, MMDS and Radio Communication licence income is brought to account over the period to which the licence relates.

4. FIXED ASSETS AND DEPRECIATION

Fixed assets are stated at cost less accumulated depreciation. Depreciation is calculated in order to write off the cost of fixed assets on a straight-line basis over their estimated useful lives at the following rates:

Technical equipment	- 3 years
Computer equipment	- 3 years
Fixtures, fittings & equipment	- 3 years
Motor Vehicle	- 3 years

5. CAPITAL RESERVE

The capital reserve represents the unamortised amount of income used to purchase fixed assets.

6. FOREIGN CURRENCIES

Transactions denominated in foreign currencies relating to revenues and costs are translated into Euro at the rates of exchange ruling on the dates on which the transactions occurred.

Monetary assets and liabilities denominated in foreign currencies are translated into Euro at the rates of exchange ruling at the Balance Sheet date.

7. PENSIONS

The Commission was staffed by directly recruited employees and a number of civil servants assigned by the Department of Communications, Marine and Natural Resources. A pension scheme was in place for full time employees of the Commission. The Commission reimbursed the Department for the wages and salary costs associated with Department staff and in addition paid a contribution towards superannuation entitlements.

The cost of providing pensions to employees are charged to the income and expenditure account on a systematic basis over the service lives of those employees in proportion to their expected pensionable payroll costs. These regular pension costs are calculated by reference to their actuarial valuations. To the extent that pension costs do not equate with cash contributions to the pension scheme, a provision or prepayment is recognised in the balance sheet.

8. TAXATION

The Commission is not liable for Corporation Tax. Income raised by the Commission is not subject to VAT. Provision is made for taxation on deposit interest received.

9. ALLOCATION OF COSTS

The Commission is required under Section 32 of the Communications Regulation Act, 2002 to distinguish between its functions relating to electronic communications and its functions relating to postal matters. Revenues and expenses directly related to each function are recorded in the accounts of that function. Shared staff costs are allocated to each function in proportion to the time spent by staff on each function. Shared overhead costs are allocated to each function in proportion to the staff numbers engaged in each function.

Income and Expenditure Account

FOR THE YEAR ENDED 30 JUNE 2004

	Notes	2004 Electronic Communications Levy €'000	2004 Other €'000	2004 Post Levy €'000	12 Months to 30 June 2004 Total €'000	7 Months to 30 June 2003 Total €'000
INCOME						
Levy		7,951		933	8,884	5,046
Licensing Fees			16,625		16,625	12,100
Other Income	1		575		575	456
GROSS INCOME						
		7,951	17,200	933	26,084	17,602
Transfer from Capital Reserve	6		102		102	261
NET INCOME						
		7,951	17,302	933	26,186	17,863
EXPENDITURE						
Staff Costs	2	4,148	3,159	480	7,787	4,348
Technical Advice		2,887	818	237	3,942	4,498
Legal Expenses		254	156	13	423	1,009
Advertising		20	20	4	44	58
Administrative Expenses		1,176	433	111	1,720	2,104
Auditors' Remuneration		8	8	1	17	7
Premises and Related Expenses		609	586	63	1,258	639
Depreciation		228	220	24	472	315
Subscriptions to International Organisations	9	600			600	360
		9,930	5,400	933	16,263	13,338
OPERATING / (DEFICIT) SURPLUS						
		(1,979)	11,902	0	9,923	4,525
Payable to Central Fund	7				(9,923)	(4,525)
SURPLUS CARRIED FORWARD						
					0	0

All recognised gains and losses have been reflected in the above income and expenditure account. The Statement of Accounting Policies, Cash Flow Statement and Notes 1 to 14 form an integral part of these Financial Statements.

Isolde Goggin

Chairperson

Commission for Communications Regulation

Balance Sheet

AS 30 JUNE 2004

	Notes	30 June 2004 €'000	30 June 2003 €'000
FIXED ASSETS			
Tangible Assets	3	461	563
CURRENT ASSETS			
Debtors	4	5,733	3,881
Cash at Bank and in hand		1,964	2,231
Short Term Investments		26,596	32,385
		34,293	38,497
CREDITORS (Amounts falling due within 1 Year)			
Creditors	5	(34,293)	(38,497)
NET CURRENT ASSETS		0	0
TOTAL ASSETS LESS CURRENT LIABILITIES		461	563
REPRESENTED BY			
Capital Reserves	6	461	563

The Statement of Accounting Policies, Cash Flow Statement and Notes 1 to 14 form an integral part of these Financial Statements

Isolde Goggin

Chairperson

Commission for Communications Regulation

Cashflow Statement

FOR THE YEAR ENDED 30 JUNE 2004

	12 Months to 30 June 2004 €'000	7 Months to 30 June 2003 €'000
Notes		
RECONCILIATION OF OPERATING SURPLUS TO NET CASH INFLOW FROM OPERATING ACTIVITIES		
Surplus (before Amount due to Central Fund)	9,923	4,525
Depreciation	472	315
Bank interest	(559)	(448)
Capital reserve transfer	(102)	(261)
(Increase) / Decrease in Debtors	(1,852)	585
Increase / (Decrease) in Creditors (excl. Central Fund)	1,428	(870)
	9,310	3,846
NET CASH INFLOW FROM OPERATING ACTIVITIES		
CASH FLOW STATEMENT		
Net cash inflow from operating activities	9,310	3,846
Return on Investments		
- bank interest	559	448
Capital expenditure		
- purchase of fixed assets	(370)	(54)
- disposal of fixed assets		
Payment to Central Fund	7 (15,555)	0
Management of Liquid Resources		
Decrease in Short Term Deposits	1,939	2,897
Decrease / (Increase) in Short Term Investments	5,789	(8,398)
	1,672	(1,261)
(DECREASE) IN CASH BALANCES		
RECONCILIATION OF NET CASH FLOW TO MOVEMENT IN NET FUNDS		
Increase / (Decrease) in cash in the period	1,672	(1,261)
(Decrease) in Short Term Deposits	(1,939)	(2,897)
(Decrease) / Increase in Short Term Investments	(5,789)	8,398
	(6,056)	4,240
Change in Net Funds	(6,056)	4,240
Opening Net Funds	34,616	30,376
	28,560	34,616
Closing Net Funds	28,560	34,616

The Statement of Accounting Policies and Notes 1 to 14 form an integral part of these Financial Statements.

Isolde Goggin

Chairperson

Commission for Communications Regulation

Notes to the Financial Statements

FOR THE YEAR ENDED 30 JUNE 2004

Notes	2004	2004	2004	12 Months to 30 June 2004	7 Months to 30 June 2003
	Electronic Communications Levy €'000	Other €'000	Post Levy €'000	Total €'000	Total €'000
1 OTHER INCOME					
Bank Interest		559		559	448
Sundry		16		16	8
		575		575	456

2. STAFF COSTS

Employee costs during the period:

Wages and Salaries	3,434	2,615	397	6,446	3,634
Social Welfare Costs	335	255	39	629	352
Pension Costs	379	289	44	712	362
	4,148	3,159	480	7,787	4,348

The average number of staff employed by the Commission during the year, analysed by category was as follows:

	53	51	5	109	109
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A number of staff work across the different activities and the staff numbers have been calculated by reference to time spent on each activity

The staff costs include salaries of the Commissioners (including arrears and employers PRSI) which were as follows:

	€'000	€'000
J.Doherty	148	73
E.Doyle	175	96
I.Goggin	148	73

3. TANGIBLE ASSETS

	Technical Equipment €'000	Computers €'000	Fixtures Fittings & Office Equipment €'000	Motor Vehicle €'000	Total €'000
Cost					
At 30 June 2003	315	1,422	579	53	2,369
Additions	50	262	58		370
Disposals					
At 30 June 2004	365	1,684	637	53	2,739
Accumulated Depreciation					
At 30 June 2003	227	1,054	499	26	1,806
Charge for period	69	327	64	12	472
Disposals					
At 30 June 2004	296	1,381	563	38	2,278
Net Book Value					
30 June 2004	69	303	74	15	461
30 June 2003	88	368	80	27	563

4. DEBTORS

	30 June 2004 €'000	30 June 2003 €'000
Due within one year:		
Cable & MMDS licence income	861	53
Electronic Communications administration levy	558	1,698
Postal administration levy	276	208
Radio Licence Income	2,988	475
Accrued Income	497	923
Prepayments & Recoverable expenses	553	524
	5,733	3,881

Debtors are stated after provision has been made for non recovery of specific debts in the sum of €481,000 (2003: €903,000). The net reduction in the provision has been offset against the administrative expenses.

Notes to the Financial Statements continued

FOR THE YEAR ENDED 30 JUNE 2004

5. CREDITORS (Amounts falling due within one year)

	30 June 2004 €'000	30 June 2003 €'000
Trade Creditors	1,396	1,767
Other Creditors	470	419
PAYE / PRSI	6	6
Value added tax	125	212
Accruals	2,855	4,102
Deferred income (see analysis below)	8,514	5,438
Payroll	836	830
Payable to Central Fund	20,091	25,723
	<hr/> 34,293	<hr/> 38,497

Analysis of Deferred Income

Radio Licence Income	8,252	5,434
FWPMA Licence / Administrative Fee Income	255	0
Other	7	4
	<hr/> 8,514	<hr/> 5,438

Where licences are renewed for a period which extends beyond the end of the financial year a proportion of that Income is deferred to meet expenditure in the following year.

6. CAPITAL RESERVES

	12 Months to 30 June 2004 €'000	7 Months to 30 June 2003 €'000
Opening Balance	563	824
Transfer to Income and Expenditure Account:		
Purchases of fixed assets	370	54
Amortisation in line with fixed asset depreciation	(472)	(315)
Net Amount of Transfer	<hr/> (102)	<hr/> (261)
	<hr/> 461	<hr/> 563

7. PAYOVER TO CENTRAL FUND

Under the Communications Regulation Act, 2002, the Minister for Communications, Marine and Natural Resources may direct the Commission to pay into the Exchequer such sum as he or she may specify being a sum that represents the amount by which the aggregate sum received by the Commission in each financial year exceeds the aggregate costs incurred in the administration of its office in that year. Such sums are treated as a distribution from the retained surplus generated from operations. No final determination has yet been made for the year to 30 June 2004. Any final determination is not expected to be greater than €9,923,000. During the year to 30 June 2004 the sum of €15,555,000 was paid to the Central Fund in respect of the year to 30 June 2002.

8. PREMISES AND ACCOMMODATION

The Commission occupies premises at Abbey Court, Irish Life Mall, Lower Abbey Street, Dublin 1. The premises are rented from the Commissioners of Public Works.

9. MEMBERSHIP OF INTERNATIONAL TELECOMMUNICATIONS ORGANISATIONS

Certain payments to International Telecommunication Organisations are met by the Department of Communications, Marine and Natural Resources out of the proceeds of the Administrative Levy. The charge to the Income and Expenditure Account includes €600,000 for that purpose

10. COMMISSIONERS AND STAFF – DISCLOSURE OF INTERESTS

The Commissioners and staff complied with the requirements of Section 25 (Disclosure of Interests) of the Communications Regulation Act, 2002. There were no transactions in the year in relation to the Commission's activities in which the Commissioners had any interest.

11. PENSIONS

The Commission operated a defined benefit pension scheme (originally established by the ODTR) which was funded by contributions from employees and the Commission which are transferred to a separate trustee administered fund.

The valuation used for FRS 17 disclosures has been based on the most recent actuarial valuation carried out at 1 January 2004 and updated to 30 June 2004 by a qualified independent actuary to take account of the requirements of FRS 17 in order to assess the scheme assets and liabilities as at 30 June 2004. In accordance with the transitional arrangements for the introduction of FRS 17 the following information is given by way of note only.

The financial assumptions used to calculate scheme liabilities under FRS 17 are

	30 June 2004	30 June 2003
Discount Rate	5.40%	5.25%
Rate of Expected Salary Increase	4.25%	4.25%
Rate of increase in Pension Payment	3.25%	3.25%
Inflation	2.25%	2.25%

Notes to the Financial Statements continued

FOR THE YEAR ENDED 30 JUNE 2004

11. PENSIONS (continued)

The assets in the pension scheme and the expected rate of return were

	Return at 30 June 2004	Expected Value at 30 June 2004 €'000	Return at 30 June 2003	Expected Value at 30 June 2003 €'000
Equities	7.75%	2,046	7.75%	1,050
Fixed Interest Bonds	4.75%	423	4.75%	306
Property	5.75%	186	5.75%	149
Cash	3.00%	160	2.25%	220
Total Value of Assets		2,815		1,725
Value of Past Service Liabilities		(3,262)		(1,868)
(Deficit) / Surplus in scheme		(447)		(143)

The deficit of €447,000 above at 30 June 2004 assumes that the funding of the prior service of those members of staff who joined ComReg from other public sector organisations would be met by those organisations. If that funding is not met by the other public sector organisations, the deficit in the scheme for the year to 30 June 2004 would have been €3,939,000.

Had FRS 17 been implemented in the primary financial statements, the following are the amounts that would have been included on the balance sheet:

	Value at 30 June 2004 €'000	Value at 30 June 2003 €'000
Net Assets		
Net Assets excluding Pension (Liability) / Asset	461	563
Pension (Liability) / Asset	(447)	(143)
Net Assets including Pension (Liability) / Asset	14	420
Reserves		
Capital Reserves excluding Pension (Liability) / Asset	461	563
Pension (Liability) / Asset	(447)	(143)
Capital Reserves including Pension (Liability) / Asset	14	420

11. PENSIONS (continued)**Analysis of the amount that would have been charged to the Income and Expenditure Account**

	12 Months to 30 June 2004 €'000	7 Months to 30 June 2003 €'000
Included in payroll costs		
Current Service Cost	388	202
Past Service Cost	-	-
Total Operating Surplus charge	388	202
Included in Finance Costs		
Expected return on Pension Scheme Assets	140	59
Interest on pension scheme liabilities	(116)	(47)
Net Finance Costs	24	12
Analysis of amount that would have been recognised in the Statement of Recognised Gains and Losses		
Actual Return less expected return on assets	(9)	(46)
Experience gains and losses on scheme liabilities	(750)	(118)
Effect of changes in actuarial assumptions	146	(94)
Actuarial Loss recognised in Statement of Total Recognised Gains and Losses	(613)	(258)
Movement in Surplus during the year		
Deficit in scheme at beginning of period	(143)	(26)
Movement in period:		
Current Service Cost	(388)	(202)
Contributions	673	331
Past Service Costs	-	-
Net Finance Costs	24	12
Actuarial Loss	(613)	(258)
Deficit in scheme at end of period	(447)	(143)
History of experience gains and losses		
Difference between expected and actual return on scheme assets	(9)	(46)
Expressed as a percentage of scheme assets	(0.3)%	(3.0)%
Experience gains and losses on scheme liabilities	(750)	(118)
Expressed as a percentage of scheme liabilities	(23.0)%	(6.0)%
Total actuarial gains and losses	(613)	(258)
Expressed as a percentage of scheme liabilities	(18.8)%	(14.0)%

Notes to the Financial Statements continued

FOR THE YEAR ENDED 30 JUNE 2004

12. CONTINGENT LIABILITIES

S.I. No 307 of 2003, the European Communities (Electronic Communications Networks & Services) Framework Regulations 2003, provides for the establishment and operation of an Electronic Communications Appeal Panel to hear and determine appeals against decisions made by ComReg.

Hutchinson 3G Limited served Notice of Appeal in respect of the market review in which all mobile operators were found to have Significant Market Power in respect of call termination on their own networks (ComReg decision D9/04, document number 04/82). A liability could potentially arise in respect of this litigation which, as at the date of these financial statements was in progress. This appeal is currently being considered by the Electronic Communications Appeal Panel. The outcome of the appeal cannot be determined with reasonable certainty and consequently it is not possible to quantify the financial implications (if any) of the appeal.

13. RELATED PARTY TRANSACTIONS

As part of the ordinary course of business, ComReg has had transactions with other government departments and other state bodies.

14. APPROVAL OF FINANCIAL STATEMENTS

These financial statements were approved by Isolde Goggin, Chairperson, Commission for Communications Regulation on 23 March 2005.

Appendix 1

LIST OF DOCUMENTS PUBLISHED BY COMREG DURING THE YEAR

03/74	Information Notice - Terminal Dues Agreements Extension to Deadline for Compliance
03/75	eircom's performance in the delivery of Leased Lines to Other Licensed Operators
03/76	Consultation Paper - Carrier Pre-Selection in Ireland 2003, ComReg's 2003 Review
03/76a	Addendum to 'Carrier Pre-Selection in Ireland 2003'
03/77	Partial Private Circuits - Publication of Prices
03/78	Future Regulation of Electronic Communications Networks and Services Consultation
03/79	Second Information Notice on The World Radiocommunications Conference - July 2003
03/80	Local Loop Unbundling: Provision of Bulk Line Data - Decision Notice D15/03
03/81	Conditions of General Authorisations
03/82R	Notification Form for a General Authorisation Version 2
03/83	Guidelines relating to General Authorisations
03/84	Wireless Telegraphy Licences - Future Applicability of Licence Conditions
03/85	Response to Consultation - Arrangements for General Authorisations
03/86	Users' Rights to Communications Services (Protecting Users in a Developing Communications Market) - Decision Notice D16/03
03/87	The Future Framework for the Regulation of Universal Service in the Irish Communications Market (Provision of Telephony Services to Users) - Decision D17/03
03/88R	Communications Act 2002 Levy Order Compliance Guidelines
03/89	Dispute Resolution Procedures - Response to Consultation & Decision Notice D18/03
03/90	Exempted Networks and Services under the Authorisation Regulations
03/91	Transition arrangements for the new Regulatory Framework for Electronic Communications
03/92	3.5 GHz Local Area Fixed Wireless Access: Response to Expressions of Interest and planned approach to licensing
03/93	ComReg's response to Dublin City Council's Public Consultation: Scheme for Regulation etc of Road Works undertaken by Network Operators in the Administrative Area of Dublin City Council, in accordance with the Communications (Regulation) Act, 2002
03/94	Monitoring eircom's compliance with Decision Notice D16/02: Off book Pricing investigation in respect of eircom's provision of voice services
03/95	An Post's Proposals to increase the price of Domestic Postal Services 2003
03/96	ENUM: Ireland's Next Steps
03/97	Guidelines to Applicants for Fixed Wireless Access Local Area - 3.5 GHz Licences
03/97a	Guidelines to Applicants for Fixed Wireless Access Local Area - 3.5 GHz Licences (Appendix 1 - Application Form in Word Format)
03/98	Response to Consultation on Future Regulation of Electronic Communications Networks and Services Administrative Charges and WT Licence Fees applicable to broadcasting networks and services
03/99	ComReg submission to Department of Communications Marine and Natural Resources Consultation on New Data Protection Regulations for Electronic Communications Networks and Services
03/100	An Post's Proposals to increase the price of Domestic Postal Services 2003
03/101	Partial Private Circuits - Review of Process Charges
03/102	Guidance on completion of Notification Form relating to a General Authorisation
03/103	Wholesale Price Cap for Interconnection Rates Next Steps following Consultation
03/104	Convergence of Mobile and Fixed technologies extending Broadband access within Licensed GSM Radio Spectrum - Responses to Consultation Document 03/63
03/105	Use and Development of Radiocommunications Services on the 2500 - 2690 MHz Bands - Response to Consultation Document 03/70
03/106	Interim Rates for NTC Services effective from 1 July 2003
03/107	An Post's Quality of Service Domestic Single Piece Mail Quarter 2, April to June 2003
03/108a	The Irish Communications Market Quarterly Review, September 2003 - Market Commentary Report
03/108b	The Irish Communications Market Quarterly Review, September 2003 - Key Data Report
03/108c	Quarterly Market Report, September 2003 - Internet Survey
03/108d	Quarterly Market Report, September 2003 - Business Postal Survey
03/108e	Quarterly Market Report, September 2003 - Residential Postal Survey
03/108f	Quarterly Market Report, September 2003 - Residential follow-up Postal Survey
03/109	Interim Rates for NTC Services effective from 1st October 2003
03/110	Developments in ICT Networking Technology - Compendium of Briefing Notes
03/111	Payphone Access Charge, Industry Implementation - Response to Consultation & Decision Notice D19/03
03/112	Green Paper on Services of General Interest: ComReg response to Consultation
03/113	Consultation Paper on the application of retention rates in the Number Translation Code market
03/114	Final Determination No. 02/03 - Summary of Investigation of FRIACO Constraints
03/115	ComReg's review of Carrier Pre Selection in Ireland 2003 - Response to Consultation & Decision Notice D20/03
03/116	Information Notice: Text of Amendment to ComReg 03/55

Appendix 1 continued

FOR THE YEAR ENDED 30 JUNE 2004

CP09	National Conference 2003 - Chairperson's Foreword
CP10a	National Conference 2003 - Senator Fergal Quinn Speech - Grocery lessons for the Internet
CP10b	National Conference 2003 - Senator Fergal Quinn - Grocery lessons for the Internet
CP11	National Conference 2003 - Professor Jim Norton - Making Life easier for Customers
CP12	National Conference 2003 - Case Study - Border Midlands Western Regional assembly
CP13	National Conference 2003 - Case Study - South West Regional Authority
CP14	National Conference 2003 - Case Study - Chambers of Commerce of Ireland
CP15	National Conference 2003 - Paul Mc Sweeney - Evaluation of Business User Demand for Telecommunications in Ireland
CP16	National Conference 2003 - Professor William Webb - Future Trends in Mobile Demand
03/117	Regulation of Postal Services - Postal Services Authorisation, Reserved Area Controls & Levy Proposed Procedures
03/118R	Review of the Mobile Phone Market - ComReg Presentation to Oireachtas Communications Committee 2nd October 2003
03/119	Partial Private Circuits: Update on Pricing and Migration
03/120	Regulatory Approach to Bundling and Temporary Discounts
03/121	Addressing the impact of Mobile Number Portability on user awareness of calls to other networks
03/122	Other RIO services: Order Handling Charges
03/123	In Situ Transfer of Leased Lines
03/124	Fees for Authorisations and Rights of Use (Response to further Consultation questions)
03/125	Information Notice: RIO Text Change Version 3.2 to 3.3
03/126	Market Analysis Wholesale Broadcasting Transmission Services
03/127a	Market Analysis - Wholesale voice call termination on individual mobile networks
03/127b	Market Analysis - Fixed and Mobile User Research
03/128	Market Analysis - The wholesale national market for international roaming on public mobile networks
03/129	Guidelines for the inclusion of a minimum set of requirements in contracts with end users
03/130	Terminal Dues Agreements - Compliance with Regulation 10(1) of S.I. 616 of 2002
03/131	Fixed Telephony Operator Performance - A comparative guide for consumers
03/131a	Fixed Telephony Operator Performance: Detailed Business and Residential Results - January to June 2003
03/131b	Fixed Telephony Operator Performance: SMP to OAO Results - January to June 2003
03/132R	Programme of Measurement of Non-Ionising Radiation emissions
03/133	'In Situ' Transfer of Leased Lines - Decision Notice D21/03
03/134	Interim RIO Rates 2003/04
03/135	An Post's Quality of Service Domestic Single Piece Mail Quarter 3, July to September 2003
03/136	ComReg's Symposium on Postcodes - Introduction by Chairperson
CP17	Principles of Postcoding - Peter Douglas Royal Mail
CP18	Operational, customer service and cost implications of the absence of a Postcode system in Ireland for multinational postal service operators - Mr. Mike Farrell DHL
CP19	Direct Mail and Postcodes - Mr. Alistair Tempest FEDMA
CP20	Meter Point Reference Numbers - Mr. Paul Mallon ESB Networks
CP21	The An Post View - Mr. Derek Kickham An Post
CP22	Postcodes, Colm Reilly PA Consulting
CP23	Post Codes as National Infrastructure - Brendan Whelan, Director ESRI, Dublin
CP24	Postcode Symposium - Presentation by Prof. Ruairi O hUiginn
03/137	Amendment of eircom's Customer Sited Interconnect Prices
03/138	Consultation Paper: Follow up in ComReg Postcode Symposium
03/139R	Regulation of Postal Services, Postal Authorisations, reserved area controls and levy procedures - Decision Notice D22/03 & Response to Consultation
03/139aR	Regulation Postal Services, Postal Authorisations - Application Form
03/139b	Regulation Postal Services, Postal Authorisations - Checklist
03/139c	Regulation Postal Services, Postal Authorisations - Declaration
03/139dR	Regulation Postal Services, Postal Authorisations - Application Guidelines
03/140R	ComReg's Review of the text of eircom's Reference Interconnect Offer
03/141	Response to Consultation Paper on the application of retention rates in the Number Translation Code market
03/142R	Updated Numbering Conventions and Number Application Process
03/142a	National Numbering Convention (Draft Document)
03/142b	Numbering Application Procedures and Application Forms (Draft)
03/142c	National Numbering Convention (Tracked Document)

03/143R	Irish Telephony Numbering Scheme Status Report December 2003
03/144a	Irish Communications Market - Quarterly Market Commentary
03/144b	Irish Communications Market - Quarterly Key Data
03/144c	Quarterly Market Report - SME Telecommunications Services Study 2003
03/144d	Quarterly Market Report - Internet Survey
03/144e	Quarterly Market Report - Television Services Survey
03/145	Consultation and Draft Direction in relation to eircom Interim Interconnect Conveyance Rates for 2003/04
03/146	Market Analysis - Wholesale unbundled access (including shared access) to metallic loops and sub-loops
03/147	Geographic Telecommunications Numbering Areas
03/148	Draft Decision: Bitstream Port Transfer
03/149	Response to Consultation addressing the impact of Mobile Number Portability on user awareness of calls to other networks
03/150	Quality of Service Standards for An Post Setting an Interim Target for 2004
03/151	RIO Text Change Version 3.5 to 3.6
03/152	Regulation Audit and Inspection - Delivering in the Public Interest - Address by Etain Doyle to 2003 IPA / CIPFA Conference, Croke Park
04/1	Standards for Tariff Presentation
CG04R	Consumer Guide to Directory Enquiry Services
04/2	Bitstream Port Transfer - Decision Notice D1/04
04/3	In situ Transfer of Leased Lines - Decision Notice D2/04
04/4	CPS Code of Practice Breach eircom pricing comparison breach
04/5	Market Analysis - Wholesale Mobile Access and Call Origination
04/6	Response to Consultation: Market Analysis - Wholesale Broadcasting Transmission Services
04/7	Communications Regulation Act 2002 (Section 30) Postal Levy Order 2003, S.I. No. 733 of 2003
04/8	Quality of Service Target 2004 Single Piece Priority Mail
04/9	Revision of Partial Private Circuit Pricing and Bulk Migration Window
CG05	Consumer Guide - Fixed Telephony, exercise of your choice
04/10	Addressing the impact of Mobile Number Portability on user awareness of calls to other networks
04/11	Experimenter Radio Licences (Club) Conditions
04/12	Response to Consultation Paper in relation to eircom Interim Interconnect Conveyance Rates 2003/04
04/13R	Interim Rates for NTC Services effective from 1st January 2004
04/14R	Programme of Measurement of Non-Ionising Radiation emissions - Second Interim Report
04/15	Consultation and Draft Direction in relation to order handling charges for Wholesale Line Rental 2003-2004
04/16	Hutchinson Mobile 3G Rights of Use
04/17	o2 Mobile 3G Rights of Use
04/18	Vodafone Mobile 3G Rights of Use
04/19	Decision Notice in relation to the application of retention rates in the Number Translation Code Market - Decision Notice D3/04
04/20	SB-WLR: Requirements for a 31st March 2004 launch date - Decision Notice D4/04
04/21	Local Loop Unbundling Costing Consultation - Direct and Indirect Operating Expenditure Econometric Modelling
04/21a	Appendix C to ComReg 04/21 - Operating Costs for the Access Network in Ireland: An Econometric Approach
ITT0401	Invitation to tender - Provision of Data Communication Services for the Commission for Communications Regulation
04/22	Consultation on Draft Ministerial Policy Directions of 08/02/2004: ComReg response
04/23	Notification of extension to deadline for comments on: Quality of Service Target 2004 Single Piece Priority Mail ComReg Document No. 04/08
04/24	Quality of Service Domestic single piece mail Performance of An Post. Annual Report - January to December 2003
04/25	Market Analysis - Wholesale Broadband Access
04/26	Application Form for Digital Television Delivery Systems at 12GHz
04/27	Digital Television Delivery Systems at 12GHz, Guidance Notes for Applicants
04/28	Technical Conditions for the operation of Digital Television Delivery Systems between 11.7GHz and 12.5GHz
04/29	Security Issues for New and Emerging Telecommunications Technologies - Briefing Note
04/30a	Irish Communications Market - Quarterly Market Commentary
04/30b	Irish Communications Market - Quarterly Key Data
04/30c	Irish Communications Market - Residential Telecommunications Survey
04/30d	Quarterly Market Report - Internet Survey
04/31	Local Loop Unbundling Costing Consultation - Access Network Design Parameters and Costs of certain access network elements
04/32R	Decision Notice and Direction in relation to eircom handling charges for Wholesale Line Rental 03/04 onwards

Appendix 1 continued

FOR THE YEAR ENDED 30 JUNE 2004

04/33R	Interim Rates for NTC Services effective from 1st April 2004
04/34	Wholesale Line Rental - Pricing Issues, Margin
CG06	ComReg Consumer Guide - Your rights when making a complaint about your telecommunications services
04/35	National Numbering Conventions (Version 4.0) - a Reference Document
04/36R	Numbering Application Procedures and Application Forms
04/37	Numbering Conventions V4 and New Number Applications Process - Response to Consultation
04/38	Market Analysis - The Wholesale National Market for International Roaming on Public Mobile Networks
04/39	Notification of extension to deadline for comments on ComReg 04/08 - Quality of Service Target 2004, Single Piece Priority Mail
04/40	Response to consultationA and sub-loops
04/41	Technical Conditions for the operation of Analogue Programme Services Distribution Systems in Frequency Band 2500-2686 MHz
04/42	Technical Conditions for the operation of Digital Programme Services Distribution Systems
04/43	Radio Experimenter Licence: Internet Linking Operation
04/44	CPS Code of Practice Breach eircom pricing comparison breach
04/45	CPS Code of Practice Breach Esat BT advertising breaches
04/46	CPS Code of Practice Breach Smart Telecom advertising breach
04/47	Significant Market Power: Wholesale Broadcasting Transmission Services - Decision Notice D6/04
04/48	Decision Notice on Universal Service - Future approach towards Provision of Access
CG07R	ComReg Consumer Guide - Modem Hijacking using dialler programs
CG08	ComReg Consumer Guide - Prepaid Phonecards
04/49	Information Notice: Application of Retention Rates in the Number Translation Code Market
04/50R	Programme of Measurement of Non-Ionising Radiation emissions - Third Interim Report
ERG03	European Regulators Group: Public call for input on draft ERG opinion on proposed changes to the Commission Recommendation on Accounting separation and cost accounting
04/51	CPS Code of Practice Breach Smart Telecom TPV breach
04/52	Smart Antenna Technology - Briefing Note
04/53	Response to Consultation on ComReg's review of the text of eircom's Reference Interconnect Offer
04/54	Regulation of Postal Services - Universal Service Obligation - Bulk Mail Access
CG09R	ComReg Consumer Guide - Unsolicited Marketing Calls
04/55	CPS Code of Practice Breach eircom pricing comparison breach
04/56	Quality of Service Target 2004, Single Piece Priority Mail
04/57	Response to Consultation on Code of Practice for Tariff Presentation
04/58	Consultation Paper - Access to Tariff Information on Directory Enquiry Services
04/59	Market Analysis: Wholesale Terminating and Trunk Segments of Leased Lines and Retail Leased Lines (National)
04/60	Market Analysis International Leased Lines
04/61	Fixed Telephony Operator Performance - July - December 2003 - a comparative guide for consumers
04/61a	Fixed Telephony Operator Performance Detailed Business and Residential Results - July to December 2003
04/61b	Fixed Telephony Operator Performance - SMP to OAO Results- July to December 2003
04/62a	Response to Consultation and Notification to European Commission - Wholesale voice call termination on individual mobile networks
04/62b	Consultation on Remedies - Wholesale voice call termination on individual mobile networks
04/63	Experimenters Community Activities Support Call-Sign
04/64	Radio Experimenter Licence: Mobile Repeater Operation
04/65	Radio Experimenter Licence: Change of Licence Details
04/66	Information Notice on Regional Radiocommunications Conference (RRC-'04)
04/67	CPS Code of Practice Breach - Ryanair Telecom website advertising breach
04/68	CPS Code of Practice Breach Esat BT price comparison breach
04/69	Finalisation of 2002-03 and Revision of 2003/04 Interim Interconnect Conveyance Rates
04/70	Decision Notice D8/04 Market Analysis Wholesale Unbundled Access. Designation of SMP and Decision on Obligations
04/71a	Irish Communications Market - Quarterly Market Commentary
04/71b	Irish Communications Market - Quarterly Key Data
04/72	Consultation Document - Numbering for VOIP Services
04/73	Notification of extension to deadline for comments on: Regulation of Postal Services - Universal Service Obligation - Bulk Mail Access ComReg Document No. 04/54
04/74	Consultation Paper - Use of Mobile Telephony Interceptors in Ireland
04/75	Interim Rates for NTC Services effective from 1st July 2004