



Office of the Director of  
**Telecommunications  
Regulation**

## QUARTERLY REVIEW

# The Irish Communications Market Quarterly Review

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**Oifig an Stiúirthóra Rialála Teileachumarsáide**

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## **1 FOREWORD BY THE DIRECTOR**

This report updates information on the Irish Communications Sector for the period October to December 2001. Despite difficulties in the sector an overall growth of 3% was recorded in the quarter, mobile penetration grew by 4%, and Ireland has improved in the review of telecommunications tariffs, most notably in the international leased lines basket.

Key regulatory developments in the quarter included the launching of the 3G competition in December 2001, the commencement of work on implementing EU Directives, and a consultation reviewing the current price cap.

We carried out our second consumer survey, conducted by Irish Marketing Surveys, in February 2002. The results of this survey are referred to throughout the report. The full survey will be available shortly on our website.

I would like to thank all those operators and organisations who have contributed information and comments for this review and I appreciate their efforts in facilitating the publication of this document. I continue to encourage all operators to complete the questionnaire sent to them on a quarterly basis to ensure as complete a picture as possible of the Irish market can be presented.

## 2 MARKET DEVELOPMENTS

The data in the review is based on returns from licensees for the period 1st October 2001 to 31st December 2001. The report is based on submissions from 41 licensees (detailed in Appendix 1) which represent approximately 99% of total market activity.



### 2.1 OVERVIEW

Key market indicators include:

- Total revenues for fixed, mobile and broadcasting markets at the end of December 2001 stands at an estimated €3.26 billion per annum on an annualised basis, an increase of approximately 3% since the last quarter. This figure has increased by approximately 14% since December 2000.
- The telecoms sector is now estimated to account for approximately 3.17% of Irish GDP (2000)<sup>1</sup> an increase of 0.07% since the last quarter.
- The new entrants' share of the fixed line market is approximately 21%. The market share held by new entrants has varied a little around the 20% mark in the last twelve months. It now stands at 2% more than in December 2000.
- In the period up to the end of December 2001 2 additional basic licences were awarded, bringing the total number of Basic licences to 41.
- To date 45 General and 41 Basic licences have been issued in the Irish market. Of the number of licences issued, 23 General (Dec 2000; 25) and 20 Basic licences (Dec 2000; 21) are issued to companies who are operational in the Irish market.
- The Irish mobile penetration rate is now 79%, an increase of 12% since this period last year. This figure is 4% higher as compared to the figure given in the last quarter.
- There are approximately 613,000 cable/MMDS subscribers to *basic television services* in Ireland. Approximately 1 million households are passed for analogue service and approximately 600,000 for digital service. Approximately 5% of the total cable & MMDS subscribers had upgraded to digital.

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<sup>1</sup> Figure was calculated using GDP at market price (2000) – ESRI Quarterly Economic Commentary, Dec 2001

- The total number of employees in the telecoms sector is approximately 16,700. The fixed, mobile and cable markets account for approximately 78%, 16% and 6% of the total figure respectively. There has been a decline of approximately 2% since last quarter.

## 2.2 DATA COMMUNICATIONS

### 2.2.1 Leased Lines

On the basis of the December 2001 quarter statistics, the total number of leased line circuits remained relatively constant at approximately 39,000.

The rolling three month average delivery time for leased line circuits ordered by OLOs for October 2001 was between 36 and 43 days. As illustrated in table 2.1 below, this figure has reduced to between 26 and 15 days. By November/December 2001, new orders were being dealt with more quickly than the timings indicated below, but the overall figures include the clearance of backlogs and long term project managed orders.

**Table 2.1: Rolling Three Month Average Delivery Time for Leased Line Circuits Ordered by OLOs (Working Days)**

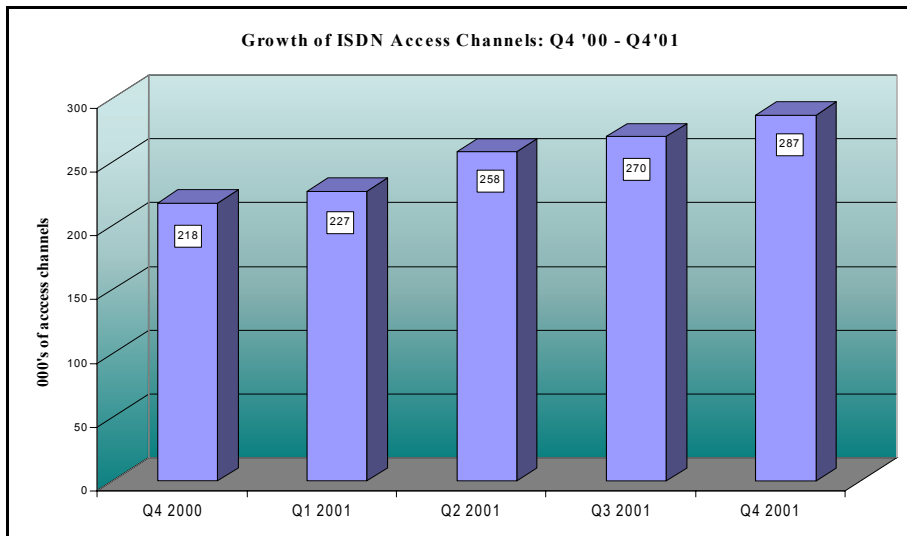
	<i>Nov 2001</i>	<i>Dec 2001</i>	<i>Jan 2002</i>
<i>All Leased Lines</i>	<i>35</i>	<i>31</i>	<i>23</i>
<i>Of Which:</i>			
<i>Sub 2Mbit Lines</i>	<i>33</i>	<i>32</i>	<i>26</i>
<i>2Mbit Lines</i>	<i>39</i>	<i>31</i>	<i>15</i>

### 2.2.2 ISDN Access Channels

The number of ISDN access channels<sup>2</sup> has increased from approximately 270,000 at the end of September 2001 to approximately 287,000 access channels at the end of December 2001, which represents an increase of approximately 7%. The number of ISDN access channels has increased by approximately 32% since December 2000. The proportion of ISDN as a percentage of total access paths is now 6%.

<sup>2</sup> The figure for total ISDN access channels includes basic rate, fractional rate, and primary rate ISDN and is expressed in basic rate equivalents.

**Figure 2.1 ISDN Access Channels**



Source: Quarterly Review Questionnaire

### 2.2.3 Broadband Access

During the quarter a report on the development of broadband access in OECD countries was published. The broadband penetration in each country was calculated on the basis of DSL and cable modems per 100 inhabitants offering bandwidths over 512k at the end of 2000. Based on these calculations, Ireland was ranked 27<sup>th</sup> out of 30 countries at the end of June 2001. At the end of 2000, commercial DSL services were available in 22/30 countries and cable modem services were available in 21/30 countries.

According to the report, one of the key ingredients in raising broadband penetration is competition between different network operations and competition between technologies.

Korea and Sweden are among the highest ranked countries at the end of June 2001 in terms of their overall broadband penetration. According to the report their success is attributable to the high levels of competition between different infrastructure providers. There are multiple companies competing with their own broadband infrastructure which has helped raise penetration rates. In Korea and Sweden, as in many other countries, a combination of public and private funding support over many years for infrastructure spending has encouraged broadband penetration.

The Minister for Public Enterprise announced a major drive to ring high speed Internet access to 67 towns around the country. Two phases of a regional broadband programme will see €160 million invested in each of the 26 counties. Phase one of the broadband programme will see 19 towns, many in the Border, Midlands and West (BMW) region targeted immediately. Metropolitan area fibre optic networks will be built in these towns to link up with the existing

backbone network in the country. The town links will facilitate consumers, educational establishments, industry and business and provide “always on” low cost and high speed Internet access which will drive the Government’s e-commerce agenda.

#### **2.2.4 Fixed Wireless Access**

During the quarter a consultation paper<sup>3</sup> on expanding opportunities for the development of broadband services using fixed wireless access type technologies was issued. The proposals include the development of a new licensing regime for local area FWA systems in the 10.5 GHz band and the extension of the power limits in the 5.8 GHz radio licence-exempt band. In addition the consultation paper proposes measures relating to existing FWA licences, in particular the rationalisation of existing broadband FWA spectrum in the 26 GHz band.

In addition, the ODTR has also recently proposed to CEPT that consideration be given to raising the EIRP limit in the 5.8 GHz band to facilitate MAN<sup>4</sup> type operations and the proposal has been well received.

*All figures and statements expressed in this review seek to reflect developments in the Irish market since the ODTR’s last quarterly report. While every effort has been made to include the most up to date figures and estimates, we have, in some instances, referred to earlier data.*

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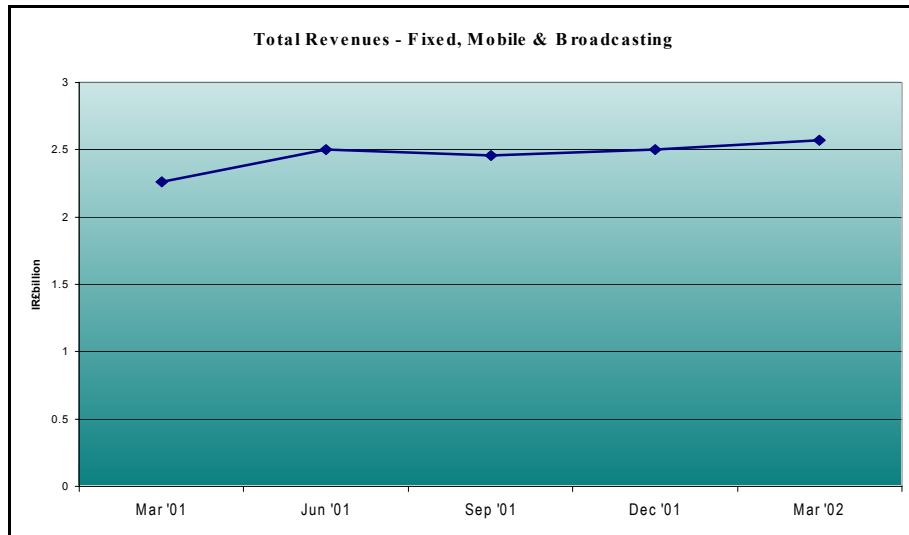
<sup>3</sup> ODTR Document No. 02/19 – Expanding Opportunities in the Radiocommunications Market: Fixed Wireless Access (FWA) – Consultation Paper

<sup>4</sup> Metropolitan Area Networks

### 3 FIXED LINE MARKET

Total revenues for fixed, mobile and broadcasting markets now stand at an estimated €3.26 billion per annum on an annualised basis. This figure has increased by approximately 14% since December 2000. It can be seen from figure 3.1 below that the majority of this growth was early in the year with revenues stabilising over the last couple of quarters.

**Figure 3.1 Total Revenues - Fixed, Mobile & Broadcasting**



Source: ODTR Estimates

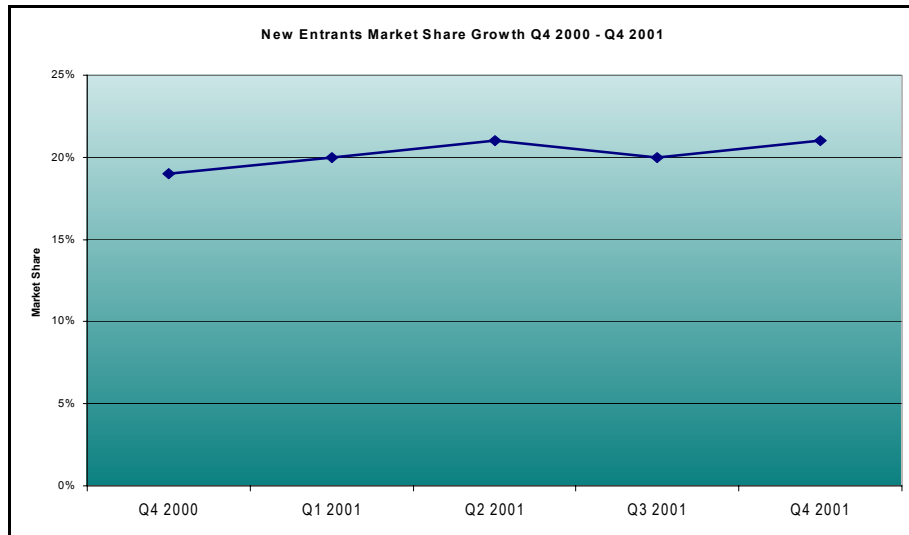
Total fixed line revenue<sup>5</sup> for the quarter to the end of December 2001 stands at approximately €519 million, which accounts for approximately 64% of total telecommunications revenue.

The market share of OLOs now stands at approximately 21%.

<sup>5</sup> This figure includes revenue from retail traffic (local, national, international, mobiles, internet, payphone & other) Internet services, leased lines, switched data services and other services such as directory publication & maintenance of customer equipment. Data based on operator returns.



**Figure 3.2: OLO Market Share**



Source: ODTR Quarterly Review Questionnaire

### 3.1 CARRIER PRE SELECTION

The number of CPS<sup>6</sup> subscribers has decreased by 9% since our last quarterly report. As at the end of December 2001, there were approximately 145,000 subscribers, including both residential and business customers. This decrease may be reflective of winback campaigns in the market. CPS is a key competitive indicator. The ODTR is concerned with the decline in this figure, and we are continuing to monitor CPS practices.

According to the ODTR consumer survey carried out in February 2002, 32% of respondents are aware of CPS. This figure has declined from 37% in last year's survey. This may be attributable to a lower level of advertising/marketing as compared with 2000. In comparison 56% of fixed phone customers in the UK were aware of indirect access suppliers<sup>7</sup>. In the residential market there is a lower awareness of CPS compared to the SME market where 78% are aware of the service (ODTR/IMS SME survey November 2001).

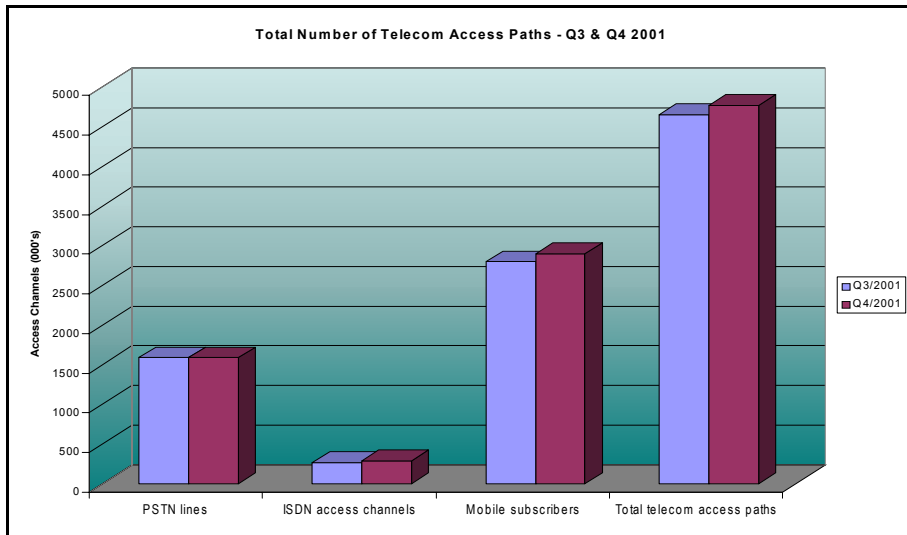
<sup>6</sup> Carrier Pre Selection is a service that enables a subscriber to the fixed network to select a different carrier from the local loop operator for the routing of all or some of its outgoing calls.

<sup>7</sup> Source: Oftel's survey – Residential consumer use of fixed services for November 2001.

### 3.2 TELECOM ACCESS PATHS

The total number of telecom access paths at the end of the quarter was 4.777 million. This figure has increased by approximately 13% since December 2000. The increase is mainly attributable to the increase in mobile subscribers.

**Figure 3.3: Telecom Access Paths**



Source: ODTR Quarterly Review Questionnaire

#### 3.2.1 PSTN Lines

The total number of PSTN lines has remained relatively constant. The total was just over 1.59million lines at the end of December 2001. This figure is split between residential and business lines, with 1.09 million and 0.5 million lines respectively.

#### 3.2.2 ISDN Access Channels

As at the end of December 2001, there were approximately 287,000 ISDN access channels. (See Figure 2.1 in Data Communications)

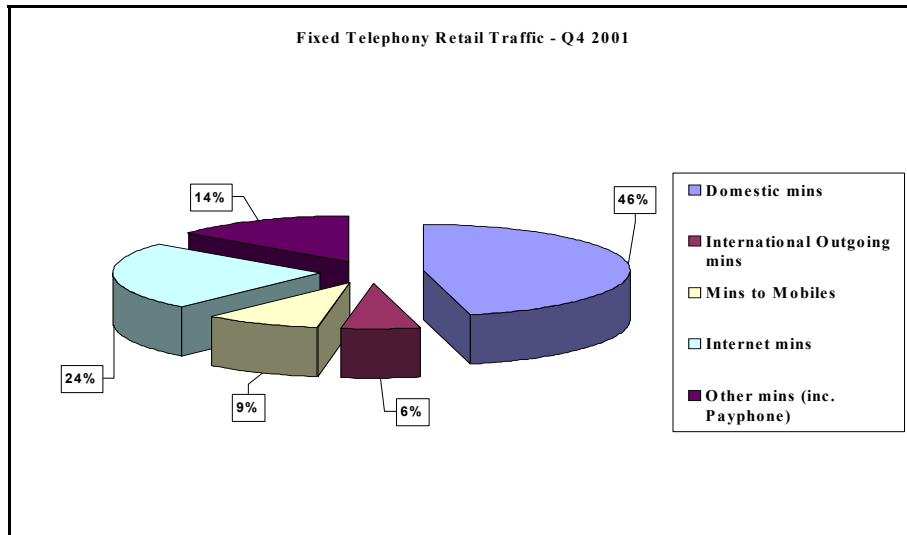
#### 3.2.3 Mobile Subscribers

The number of mobile subscribers has increased to 2.9 million, at the end of December 2001. Mobile lines account for nearly 60% of the total access paths.

### 3.3 RETAIL TRAFFIC

Fixed Telephony Retail traffic measured in minutes has increased by approximately 2% since last quarter. Domestic, international, mobile and internet minutes experienced growth during the quarter, while other minutes have remained static.

**Figure 3.4 Retail Traffic**



Source: ODTR Quarterly Review Questionnaire

As a proportion of total retail traffic, domestic minutes remains the highest followed by Internet traffic. This remains stable with last quarter and twelve months ago.

### 3.4 CONSUMER SURVEY

The ODTR commissioned Irish Marketing Surveys (IMS) to conduct a survey of residential telecommunications users to solicit their views on various telecommunication service issues. The interviews were conducted in February 2002 and the findings of the survey are from a representative sample of 500 respondents with a confidence interval of 95% (i.e. findings may range 5% either side of those noted).

In order to maintain continuity, similar questions were asked this year as in our earlier survey of January 2001. In light of the relatively smaller, more limited reductions in prices in 2001 as compared with 2000, and the withdrawal of a significant player from the consumer market, it is not surprising that there was a reduction in the proportion of respondents agreeing or strongly agreeing with the general statements. However as shown below there has been a small increase in perceptions of value for money. Table 3.1 below compares the attitudes of respondents to statements posed in our 2002 and 2001 surveys. In all cases the respondents either agreed strongly or very strongly with the statements.

**Table 3.1**

<i>Statement</i>	<i>2001</i>	<i>2002</i>
<i>I believe that there are savings to be made from changing my home telephone supplier</i>	45%	34%
<i>The overall costs of my home telephone has reduced in the last 12 months</i>	53%	42%
<i>I am more satisfied with my home telecommunications supplier than 12 months ago</i>	51%	50%
<i>I believe the home telecommunications market is more competitive than 12 months ago</i>	83%	66%

**Figure 3.5 Value for Money Rating**

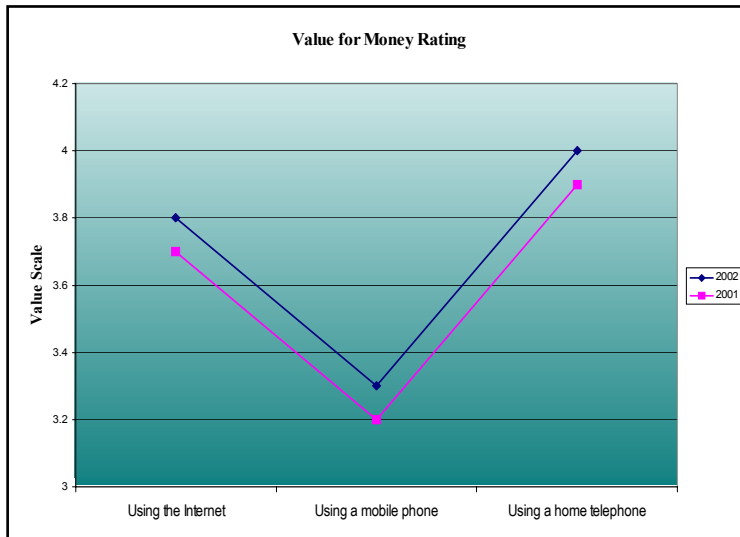
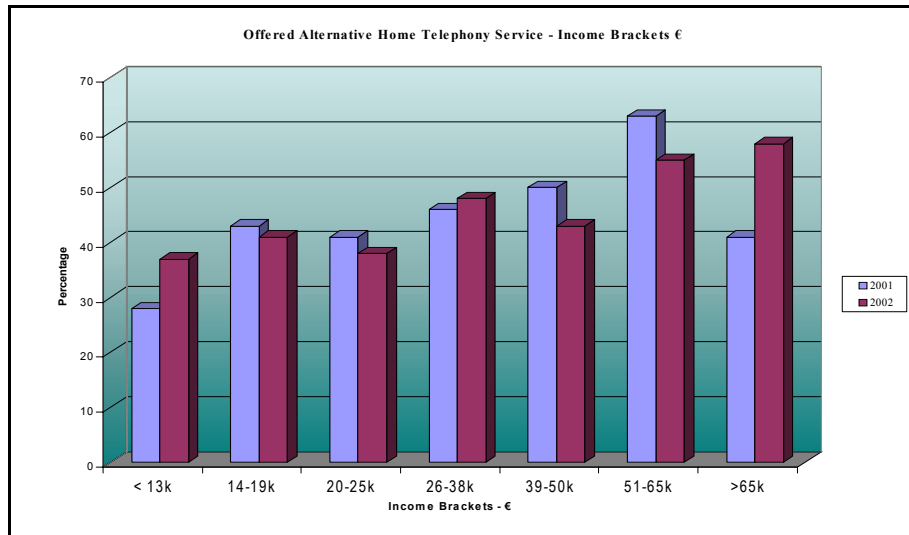


Figure 3.5 illustrates the value for money rating for various telecommunications services. The respondents rated the services on a scale from one to five where one is the poorest value for money and five is excellent value for money. The three services received a higher score than 12 months ago.

Overall 2 in 5 adults (43%) have been approached by companies other than *eircom* offering an alternative home telecommunications service. This has remained the same since last year's survey. As illustrated in figure 3.6 overleaf the results of this survey indicate a narrower income divide behind this statistic. 37% of those earning less than €13,000 had been offered an alternative telephony provider (an increase of 9% from last year) whereas 55% of those earning €51,000 - €65,000 had been offered an alternative operator.

**Figure 3.6: Offered alternative home telephone service**



The survey also asked respondents who their main telecommunications supplier was. 8% of adults use a supplier other than *eircom*, for their home telephone service, a drop of 6 percentage points since the last survey in 2001. The decline in those using a supplier other than *eircom* may be indicative of decreased activity in the residential sector in the past twelve months.

The consumer survey also indicated that 13% of those currently using *eircom* had switched back from another supplier. The main reason given for switching back to *eircom* was ‘cheaper calls overall’ (36%), approximately 4% of the total sample size.

Table 3.3 lists the main operators offering services in the residential market.

**Table 3.3: Fixed Services offered in the residential markets**

<i>Operator</i>	<i>International</i>	<i>Long Distance</i>	<i>Local</i>
<i>Chorus</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>eircom</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>Esat Telecom</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>Hibercall</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>ntl</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>Rillbank Ltd t/a Direct Dial Telecom</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>SM Communications</i>	<i>Y</i>	<i>Y</i>	<i>N</i>
<i>Smart Telecom</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>Swiftcall</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>
<i>Switchcom</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>

### **3.5 REGULATORY DEVELOPMENTS**

#### **3.5.1 Price Cap on Telecommunications Services**

The ODTR is reviewing the current price cap that has applied to a range of services, mainly retail voice and line rental service, provided by *eircom* since January 1<sup>st</sup> 2000. A key purpose of price capping is to protect consumers from the high prices that might result in the absence of competitive constraints. It also encourages greater efficiency in the provision of services by the operator concerned.

The first of three consultation papers which will take place this year was issued recently<sup>8</sup>.

The intention is to make necessary changes, if any, to the price cap by 1<sup>st</sup> January 2003. The full range of fixed and mobile retail and wholesale telephony services are listed in the paper and the ODTR is seeking views as to which of these should be subject to price capping.

The Director may introduce a price cap in respect of a telecommunication service, where the Director considers that there is no competition in the market for that service or that the provider of those services holds a dominant position.

<sup>8</sup> ODTR Document No.02/21 Consultation Paper – Review of the Price Cap on Certain Telecommunications Services.

### **3.5.2 Review of new EU Directives**

The new regulatory framework for communication networks and services, recently adopted by the EU, will make some significant changes to the way the electronic communications markets are regulated. The four directives adopted so far by the EU are:

- The Framework Directive which essentially sets out the key procedures for managing the regulatory programme.
- The Access Directive which mainly consolidates the current position on access and interconnect.
- The Universal Service Directive which sets out the range of services that may be designated as USO and also includes provision on users' rights.
- The Authorisation Directive which changes the existing licensing procedures.

#### **Authorisation Directive:**

A consultation paper<sup>9</sup> was issued on replacing licences which are currently issued for a variety of services with a standardised general authorisation in accordance with the Framework Directive.

At present the ODTR issues licences for telecom services (fixed, mobile and fixed wireless) broadcasting transmission, television distribution (cable, MMDS, deflectors) and a variety of services which use radio frequencies. Under the provisions of the new EU Directives, all services, including some services and networks which are not currently subject to licensing in Ireland such as satellite television, would be subject to the same rules from June 2003. Where the use of radio frequency is involved, it will still be necessary for the ODTR to grant rights on an individual basis and spectrum will continue to be allocated for specific purposes, e.g. mobile or private radio. However the conditions would also be standardised as far as possible.

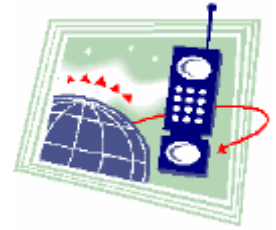
The move from licences to authorisations will require a change in the governing legislation. The Department of Public Enterprise has indicated that it bring forward amending regulations to give effect to the terms of the EU Directives.

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<sup>9</sup> ODTR Document No. 02/22 Consultation Paper – Future Regulation of Electronic Communications Networks & Services – Future Authorisation.

## 4 MOBILE COMMUNICATIONS

The Irish mobile penetration rate has increased to 79% reflecting the growth in mobile phone sales over the Christmas period. This is 4% higher than the figure reported in our last quarterly review, and 12% higher than the same period last year.



**Figure 4.1 Irish Mobile Penetration Rate: Q1 '00 - Q4 '01**

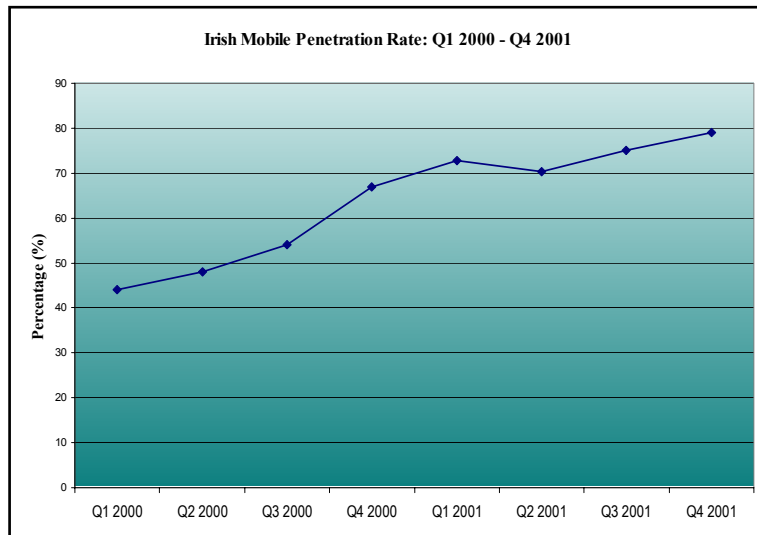


Figure 4.1 illustrates the Irish mobile penetration rate since Q1 2000. The penetration rate has risen by 12% from Q4 2000 to Q4 2001.

Source: ODTR Estimates and FT Mobile Communications

With approximately 2.9 million mobile subscribers, the three mobile operators in the Irish market - Vodafone<sup>10</sup>, Digifone, and Meteor - now have 58%, 39% and 3% market share respectively<sup>11</sup>.

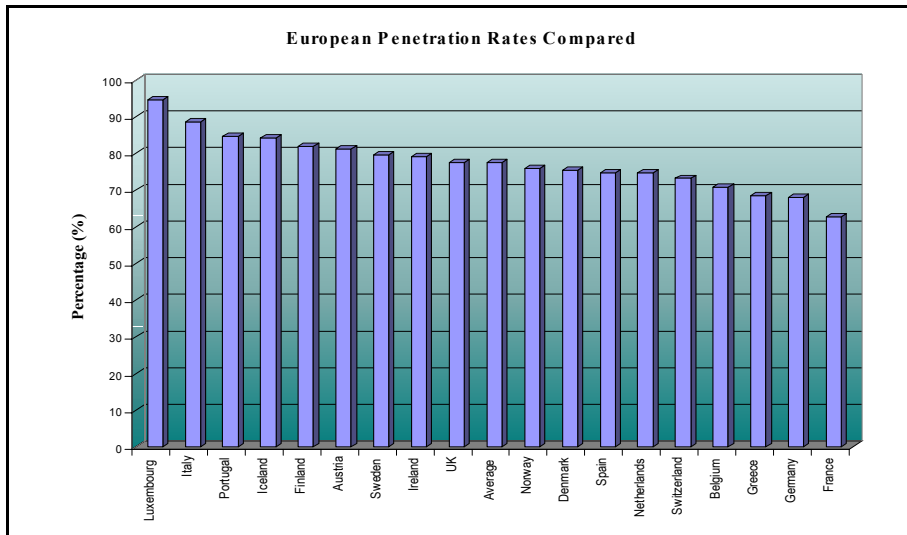
Figure 4.2 illustrates the various European mobile penetration rates. Ireland has the 8<sup>th</sup> highest penetration rate in Europe, lying 2 places ahead of the European average, and one place ahead of the UK. At 95%, Luxembourg continues to have the highest mobile penetration rate in Europe.

<sup>10</sup> Eircell Vodafone rebranded to Vodafone on 22nd February 2002

<sup>11</sup> Source: ODTR Quarterly Review Questionnaire



**Figure 4.2 European Penetration Rates**



Source: FT Mobile Communications

#### 4.1 CONSUMER SURVEY

According to the ODTR consumer survey 72% of respondents indicate that they make regular use of a mobile phone, no change from last year's survey. 52% of households have three or more mobile phones compared to 42% 12 months ago. The Irish consumer mobile phone market is pre-dominantly pre-paid with 65% of respondents using pre-paid phones; 77% use pre-paid phones in the UK<sup>12</sup>. Reviewing occupational groups, it is clear that mobile penetration amongst students is the highest with 91% making regular use of a mobile phone, compared to 88% of full time employees. Mobile penetration is also higher among high income households and those who have Internet access at home.

Irish mobile phone users tend to remain with their existing operator with 90% of respondents indicating that they have not switched operator in the last year, down 1% from our previous survey. Mobile number portability, planned for later this year, will provide for easier transfer to other operators.

<sup>12</sup> Source Oftel's survey into residential consumer use of mobile services for November 2001.

**Figure 4.3 Mobile usage split by age group**

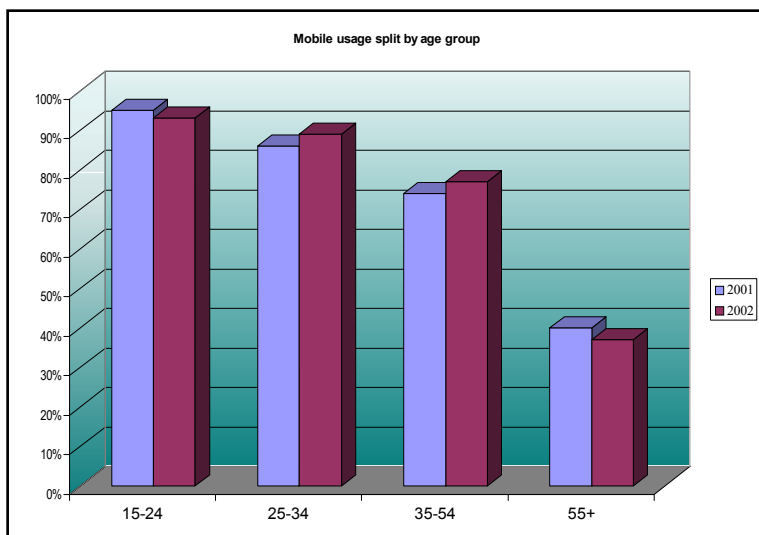


Figure 4.3 illustrates mobile usage amongst different age groups. There has been little change in the 15-24 year age category which remains over 90%. However there has been growth in the 25-34 and 35-54 age categories in which 89% and 77% respectively use mobiles.

## 4.2 DATA SERVICES

### 4.2.1 SMS

The number of SMS messages sent continues to grow strongly. During the year 2001 approximately 1.5 billion SMS messages were sent in Ireland. On average, mobile users send 52 SMS per month

**Figure 4.4 Number of SMS sent Q1 2000 - Q4 2001**

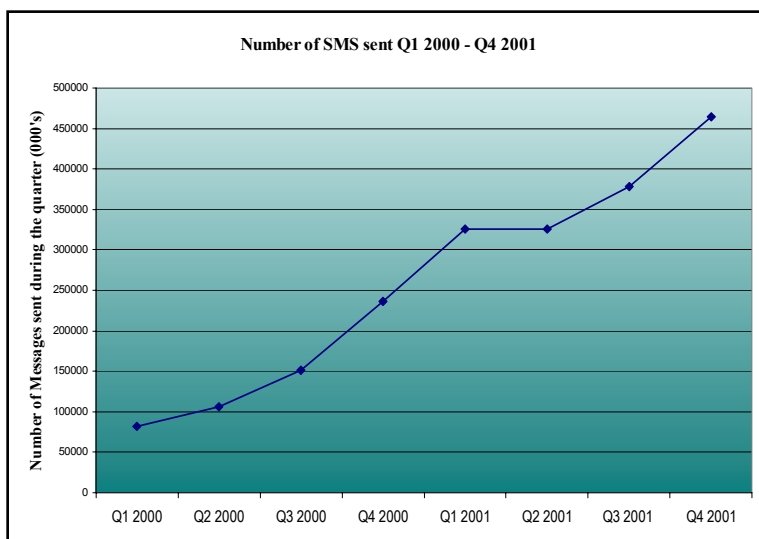


Figure 4.4 illustrates the number of SMS messages since Q1 2000. There has been a 97% increase in the number of SMS sent from Q4 2000 to Q4 2001.

Source: ODTR Quarterly Review Questionnaire

### 4.2.2 General Packet Radio Service (GPRS)

GPRS is recognised as a key step in the use of mobile phones for data communication. Sometimes referred to as 2.5G, GPRS provides enhanced data speeds of up to 40k/bits. The main advantages of GPRS is that it provides users with an ‘always on’ Internet connection,

and will deliver data services to consumers at speeds up to four times faster than currently available by WAP. Vodafone and Digifone launched their GPRS services in January 2002.

### **4.3 REGULATORY DEVELOPMENTS**

#### **4.3.1 3G**

During the quarter the ODTR launched the competition for the selection of third generation (3G) mobile phone licenses. 3G represents a major evolution in mobile technology, allowing for the transfer of data up to 40 times faster than existing mobile phones. Four 20 year licenses will be awarded. The closing date for the receipt of applications is 27<sup>th</sup> March 2002, and it is expected that the highest ranked bidders will be announced by the end of June 2002.

#### **4.3.2 Value added text messaging (SMS) services**

The ODTR has opened up a range 5-digit codes which will enhance the services that mobile operators can offer to their customers. Value added text messaging provides an SMS content service to the consumer, often incurring a premium charge related to the content. An example of some of the new services could include event driven content e.g. real-time football results, travel information, and business and commerce applications. Value added text messaging will provide an opportunity for companies to generate new forms of mobile content or application provision in Ireland, offering a rich content and application environment for customers, while improving customer choice.

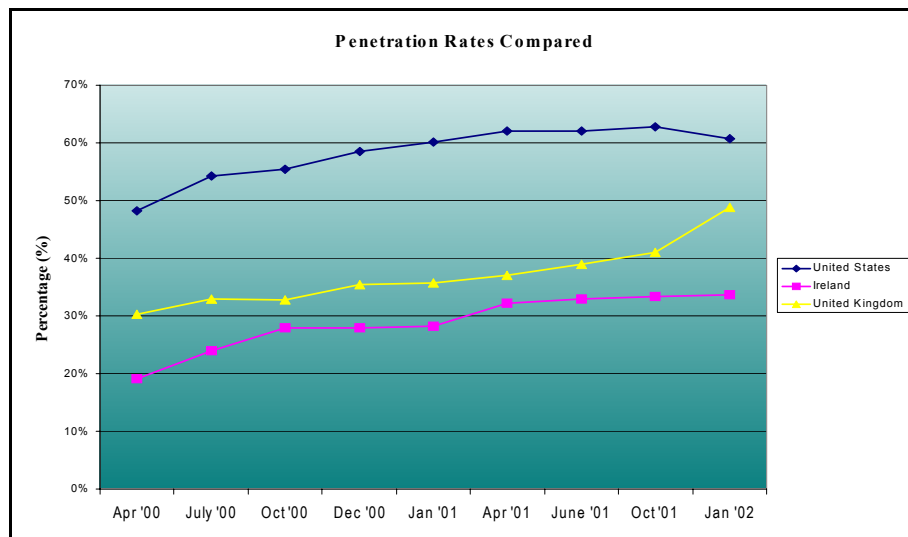
## 5 INTERNET

The overall position at the end of January 2002 is that residential household penetration continues to increase slowly, but those who have Internet access at home are making substantially more use of it than previously.



At the end of January 2002 residential Internet penetration in Ireland was estimated at 34%<sup>13</sup>, an increase of 1% since October 2001. It can be seen from figure 5.1 that the growth in Internet penetration in Ireland has remained relatively stable; however, the penetration rate in the UK has risen by 8% while the USA has fallen by 2% since October 2001.

**Figure 5.1 Internet Penetration Rates Compared**



Source: Nielsen NetRatings

Although the penetration rate has stabilised there is evidence from our last two quarterly reviews that people who have access to the Internet at home are using it more. According to Nielsen's Internet figures (see table 5.1 overleaf), the active Internet Universe in Ireland has increased by 16% since our last review<sup>14</sup>. The active Internet universe refers to the number of people who have access to the Internet at home and have used it during the month.

<sup>13</sup> The ODTR have been using Nielsen NetRatings – Current Internet Universe (i.e. penetration): All individuals 2+ who have accessed the Internet from home. Other methods of calculation, including penetration rates based on households and adults 16+ accessing the Internet give different penetration numbers and many improve Ireland's penetration rate

<sup>14</sup> All individuals 2+ who accessed the Internet from home i.e. usage

The average home user spent just over 4 hours online in January 2002, remaining consistent with previous reviews.

**Table 5.1: Average Internet Usage for Ireland, the UK, and the US, January 2002.**

	<i>United States</i>	<i>Ireland</i>	<i>United Kingdom</i>
<i>Number of Sessions per Month</i>	21	9	14
<i>Number of Unique Sites Visited</i>	47	30	42
<i>Time Spent per Site</i>	n/a	12:39	20:18
<i>Time Spent per Month</i>	11:27:08	4:05:07	6:45:36
<i>Time Spent During Surfing Session</i>	32:56	28:01	29:35
<i>Duration of a Page viewed</i>	00:55	00:45	00:47
<i>Active Internet Universe</i>	104,793,226	639,313	17,011,856
<i>Current Internet Universe Estimate</i>	164,139,614	1,259,835	28,995,205

Source: Nielsen NetRatings, January 2002

## 5.1 CONSUMER SURVEY

According to the ODTR Consumer survey, 44% of respondents have access to the Internet at home, an increase of 7% since our last consumer survey. In the UK 45% indicated that they had access to the Internet at home<sup>15</sup>. There is also evidence of growth in e-commerce with 39% having bought online in Ireland, an increase of 3% since our last survey. The main reason given for those who haven't purchased on line is 'not interested' - 28% of respondents, an increase of 2% since our last survey. Similarly, as outlined in table 5.2 below, the main reason given by those who do not have Internet access at home is 'not interested.'

**Table 5.2: Reasons given by those who do not have Internet access at home**

<i>Statement</i>	<i>2001</i>	<i>2002</i>
<i>Not interested</i>	38%	39%
<i>No PC at home</i>	23%	26%
<i>Too expensive</i>	15%	8%

Internet access at home is higher than average amongst males (50%), and 15 to 24 year olds (59%). Those living in Dublin and in urban areas are also more likely to have access at home (56% and 53% respectively) as are households with an income greater than €20,000. The situation is similar to our previous survey except that all categories experienced growth e.g. in our previous survey 37% of males, and 47% of 15-24 year olds had Internet access at home.

<sup>15</sup> Source: OfTel's survey into residential consumer use of internet services for November 2001.

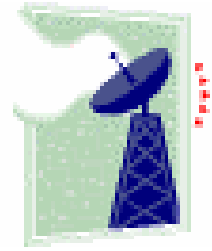
## **5.2 REGULATORY DEVELOPMENTS**

### **5.2.1 *The Internet in Ireland - Response to consultation***

During the quarter, the ODTR issued a response to its 2001 consultation on the Internet. The main conclusions reached in the paper was that a more competitive supply industry has an important role to play in stimulating demand for the internet, as has the development of relevant technologies.

## 6 CABLE & MMDS & SATELLITE

At the end of December 2001, the ODTR estimates that there were approx. 613,000 cable & MMDS subscribers in total to *basic television services* in Ireland. This figure has increased slightly since last quarter from 610,000. At the end of December 2001, approximately 5% of the total cable & MMDS subscribers had upgraded to digital. Approximately 1 million households were passed and approximately 60% of these were passed for digital services.

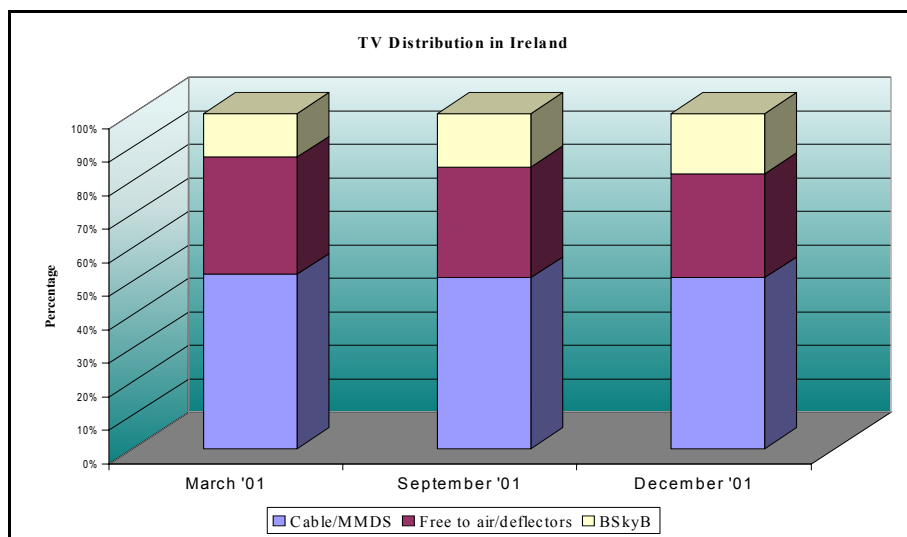


Total cable & MMDS revenues have decreased by approximately 1.5% since last quarter. Employees in the sector at the end of December 2001 were 1,000, a decrease of approximately 2% since December 2000.

Telephony subscribers purchasing from cable & MMDS companies fell by approximately 1% and Internet subscribers have increased by 2% since last quarter.

At the end of December 2001, it is reported that there were over 220,000 subscribers<sup>16</sup> to BSkyB. This figure has increased by approximately 14% since September 2001. Figure 6.1 illustrates the TV distribution in Ireland between free to air / defectors, cable / MMDS and BSkyB.

**Figure 6.1 - TV Distribution in Ireland**



Source: Operator returns and Electric News

<sup>16</sup> Source: Electric News.net – 8<sup>th</sup> February 2002.

### ***6.1 REGULATORY DEVELOPMENTS***

In line with the arrangements agreed in respect of the price increases etc. last year for cable & MMDS operators, the Director drafted new regulations to end in-platform exclusivity and submitted them to the Minister for Public Enterprise.

In December, the ODTR indicated its intention to seek expressions of interest in providing digital television services on a regional or local basis from prospective licensees at 12GHz and potential operators of single multiplex services in the UHF band. The ODTR will offer licences for services in the UHF band only be offered if they do not constrain the spectrum needed for the development of National DTT.



## 7 CONSUMER FOCUS

### 7.1 CODES OF PRACTICE

Following the adoption by the ODTR of standardised minimum criteria in August 2001, in December, operators introduced their new codes of practice.

The standard criteria outline a comprehensive yet flexible process for dealing with customer complaints by providing practical guidelines for their handling and informing customers as to the level of service they can expect from their operator. The code also provides the consumer with transparency as to how licensees treat a complaint and outlines the steps that will be taken while the complaint is being processed. This is a minimum set of criteria and operators are free to adopt standards in excess of this.

The Decision Notice which explains the new criteria is entitled 01/67 "Codes of Conduct for the Handling of Consumer Complaints by Telecommunications Operators" and is available on the ODTR website [www.odtr.ie](http://www.odtr.ie). According to the ODTR/IMS survey, 58% of respondents are not aware that operators have a code of conduct

### 7.2 SERVICE LEVEL AGREEMENTS (SLA)

On the 30<sup>th</sup> November 2001 the ODTR sought views from interested parties with respect to Service Level Agreements provided to other licensed operators by *eircom*. Service Level Agreements (SLAs) set out the minimum quality of service standards which *eircom* must meet when providing services to other operators.

*eircom*'s current monthly service delivery performance has improved substantially in recent months, with delivery timeframes have fallen from approximately 54 days in February 2001 to between 16 and 20 days today.<sup>17</sup>

The consultation paper entitled "Service Levels Provided to Licensed Operators by Operators with Significant Market Power" - 01/92, closed in mid January and is available on the ODTR website [www.odtr.ie](http://www.odtr.ie). A response to the consultation will issue during March 2002.

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<sup>17</sup> The figures stated here are not directly comparable with those stated earlier in section 2.2.1 which are for a rolling three month average.

### **7.3 MEASURING LICENSED OPERATOR PERFORMANCE (MLOP)**

On March 7th, the ODTR published initial data from the Measuring Licensed Operator Performance (MLOP) programme. The MLOP programme is part of ongoing measures introduced by the ODTR to address service quality and delivery issues. This publication is intended as the first in a series of quarterly reports on performance.

The principal benefit of the programme is that information is made available to consumers that can assist them when making informed choices concerning their fixed line operator. In the longer term it should stimulate greater competition in service quality among the operators, thereby leading to further improvements in performance.

### **7.4 CONSUMER SURVEY**

The new ODTR/IMS survey included additional questions on the awareness of consumers of facilities for controlling their bills. Although large premium rate bills can be a significant problem for some subscribers, only 7% of respondents use the option of barring certain calls from their phone in order to control expenditure while 53% are aware that this facility is available. The survey also indicated that 24% of respondents would be interested in the introduction of a pre-pay system to control expenditure. 55% are aware that they can get a basic level of itemised billing from *eircom* for free.

## 8 TECHNOLOGY DEVELOPMENTS

A key aspect of the ODTR role is to raise awareness of new telecommunications technologies in the ICT sector. To this end, a Briefing Note on wireless local area networks<sup>18</sup>, (WLANs) was published during the quarter. A consultation paper on fixed wireless access<sup>19</sup>, part of which considers the use of the 5.8GHz band for WLANs, was also published in the quarter.



The main application of WLANs is in the provision of broadband data transfer within buildings, including offices, hotels, shops and homes. For example, WLANs enable laptop computers to be connected to communications networks, without being constrained by cables and fixed access points. It is envisaged that new high speed applications (e.g. for people who need to work while travelling) will develop that harness the broadband access afforded by WLAN technology.

WLAN technology is also used externally, extending the reach of local area networks. This application is useful for interconnecting LANs in different buildings (e.g. on a university campus) and as a way of possibly providing broadband Internet access to residential users. In issuing this paper, our intention is to encourage potential users to examine whether WLAN technology may meet their needs, and to raise awareness of new technologies and services in Ireland.

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<sup>18</sup> Source: ODTR Document No. 02/16

<sup>19</sup> Source: ODTR Document No. 02/19

## 9 POSTAL REGULATION



During the quarter the ODTR asked for comments on an interim price increase application submitted by An Post. An Post propose that the basic price to deliver a letter anywhere in Ireland or Britain will rise by 3c to 41c. The new price would cover all POP (Post Office Preferred) letters up to 50g as compared with 25g at present, the effect of which would mean that the stamp would be reduced for about 10% of all letters.

An Post want to implement these price changes on 1<sup>st</sup> April 2002. Full details of An Post's proposal (including a breakdown of price increases) are outlined in a Consultation Paper ODTR 02/15 - Application by An Post to increase the price of reserved Postal Services. The document is available on the ODTR website [www.odtr.ie](http://www.odtr.ie). The purpose of this paper is to give An Post's customers an opportunity to make representations about the proposals and in particular to set out for the Director how the proposals will affect them. It also sets out the criteria against which the Director will make her decision. The consultation period closed on 27<sup>th</sup> February 2002.

## 10 REVIEW OF TELECOMMUNICATIONS TARIFFS

This section compares movements in incumbents' tariffs for a range of telecommunication services since the ODTR's last review in December 2001. It should be noted that competing operators sometimes offer cheaper tariffs and this would also be true in the other countries surveyed. The tariff comparisons, generated from the pricing of a number of baskets of telecom services, rank Ireland's position against a group of key countries in relation to telecom tariffs<sup>20</sup>. The tariff comparison also reflects only one tariff option per incumbent operator and by definition is not indicative of tariff levels available in other tariff options, which may be offered by operators.

The baskets, which are constructed by Teligen using an OECD approved methodology, provide a "snapshot" of Ireland's position vis-à-vis other countries at a particular point in time. The baskets of services examined in this review include:

- National PSTN
- International PSTN
- National Leased Lines
- International Leased Lines
- Personal Mobile Basket
- Business Mobile Basket
- Personal Pre-paid Mobile Basket

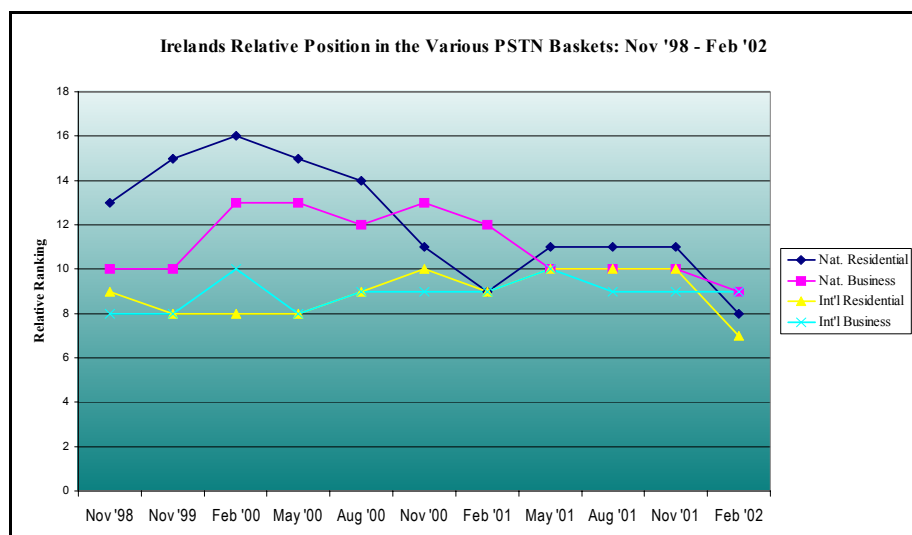
### *10.1 OVERVIEW*

Ireland's position in all of the PSTN baskets has improved during the quarter.

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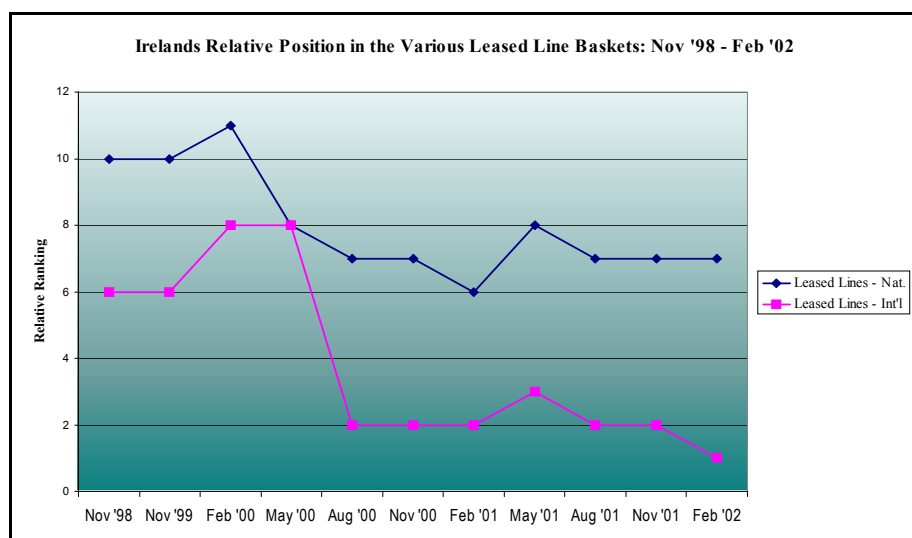
<sup>20</sup> For the purpose of our analysis only the EU 15, Iceland, Norway and Switzerland are examined.

**Figure 10.1: Ireland's Relative Position for Various PSTN baskets: Nov '98 - Feb '02**



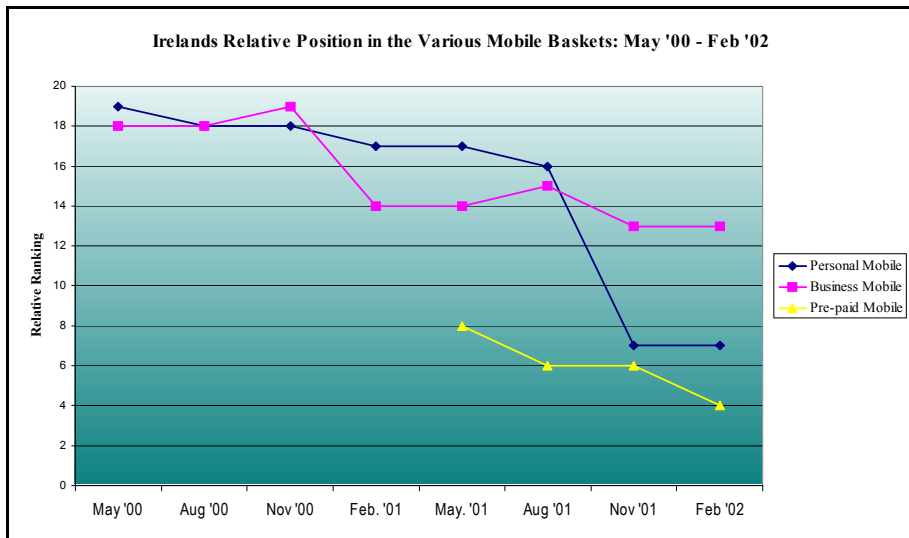
During the quarter Ireland's position in the international leased line basket improved by one place to 1<sup>st</sup> position. Ireland remained in 7<sup>th</sup> position in the national leased line basket.

**Figure 10.2 Ireland's Relative Position in the Leased Line Baskets: Nov '98 - Feb '02**



Ireland's position in the pre-paid mobile basket improved by 2 places. The post-paid baskets remained static since our last review.

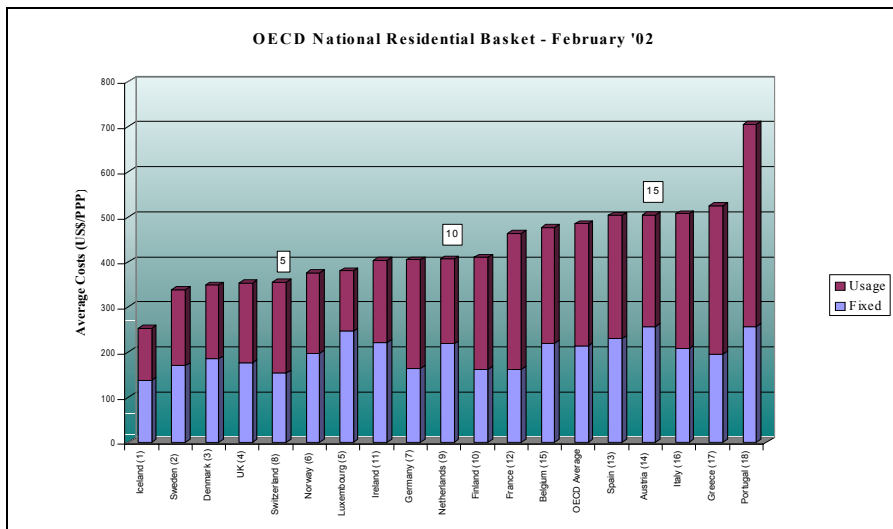
**Figure 10.3: Ireland’s Relative Position for various Mobile Baskets: May ’00 - Feb ’02**



**10.2 NATIONAL RESIDENTIAL BASKET**

The “National Residential Basket” examines the average cost of national (including local) calls for the residential sector. Ireland’s position in this basket has improved by 3 places since our last review. In 8<sup>th</sup> place, Ireland lies 6 places ahead of the OECD average.

**Figure 10.4: OECD National Residential Basket - February 2002**



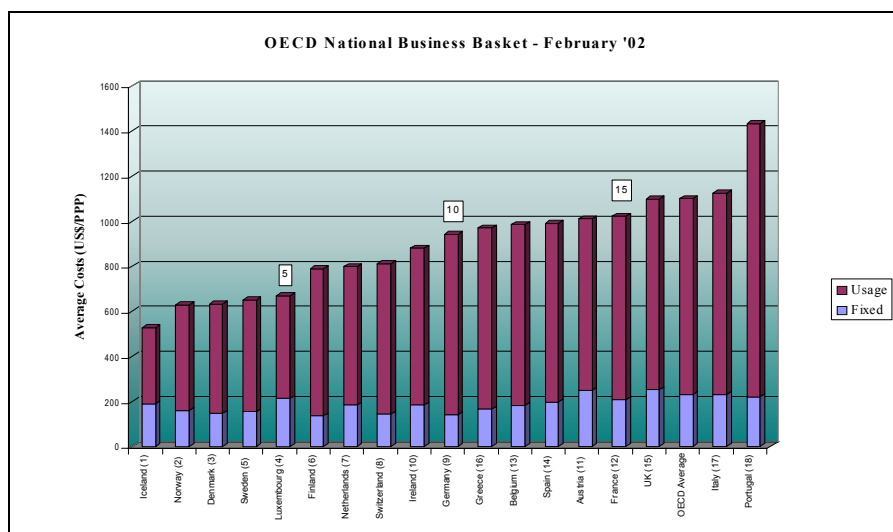
NB: The numbers in brackets represent the countries respective rankings as at December 2001.

**10.3 NATIONAL BUSINESS BASKET**

The “National Business Basket” examines the average cost of national (incl. local) calls for the business sector. This basket is comprised of a much larger number of calls compared to the residential basket, with a greater proportion at peak times although they are generally of shorter duration. In 9<sup>th</sup> place, Ireland has improved by one position since our last review in

December. Over the year Ireland's position has remained the same; however, it now lies 8 places ahead of the OECD average compared to 3 places ahead 12 months ago.

**Figure 10.5: OECD National Business Basket - February 2002**

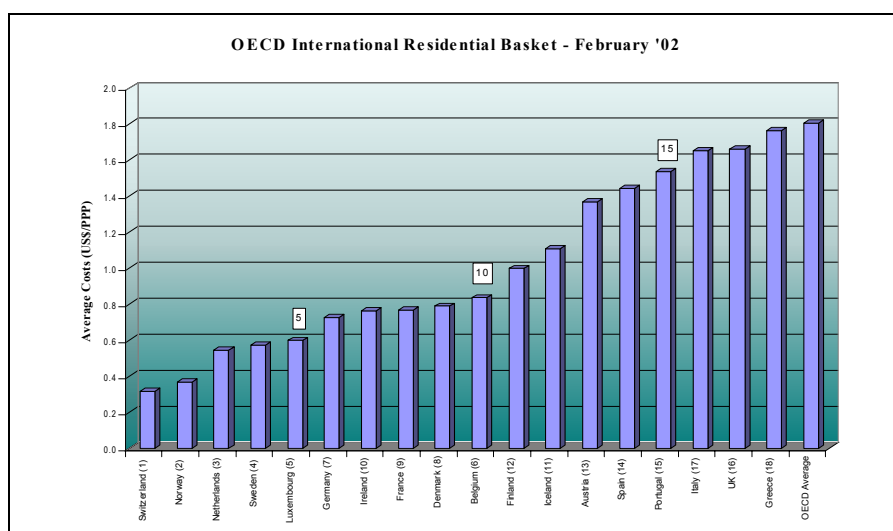


NB: The numbers in brackets represent the countries respective rankings as at December 2001.

### 10.4 INTERNATIONAL RESIDENTIAL BASKET

The “International Residential Basket” sets out the average cost of international calls for residential users. In 7<sup>th</sup> place Ireland's position has improved by 3 places during the quarter; the highest position in this basket since liberalisation.

**Figure 10.6 OECD International Residential Basket - February 2002**



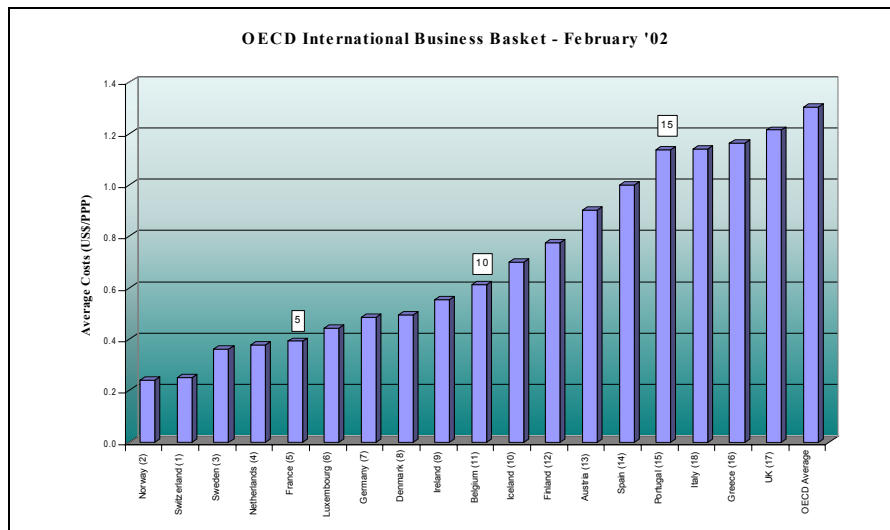
NB: The numbers in brackets represent the countries respective rankings as at December 2001



### 10.5 INTERNATIONAL BUSINESS BASKET

Figure 10.7 illustrates the average cost of international calls for business users. Like the national baskets, the international baskets have different weights for the business and the residential sectors. The business basket apportions 75% of the calls to peak rates, while the residential basket apportions 25% to peak rates. Figure 10.7 illustrates Ireland's position in this basket. In 9<sup>th</sup> place, an improvement of one position since our last review, Ireland lies 9 and 10 positions ahead of the UK and the OECD average respectively.

**Figure 10.7: OECD International Business Basket - February 2002**



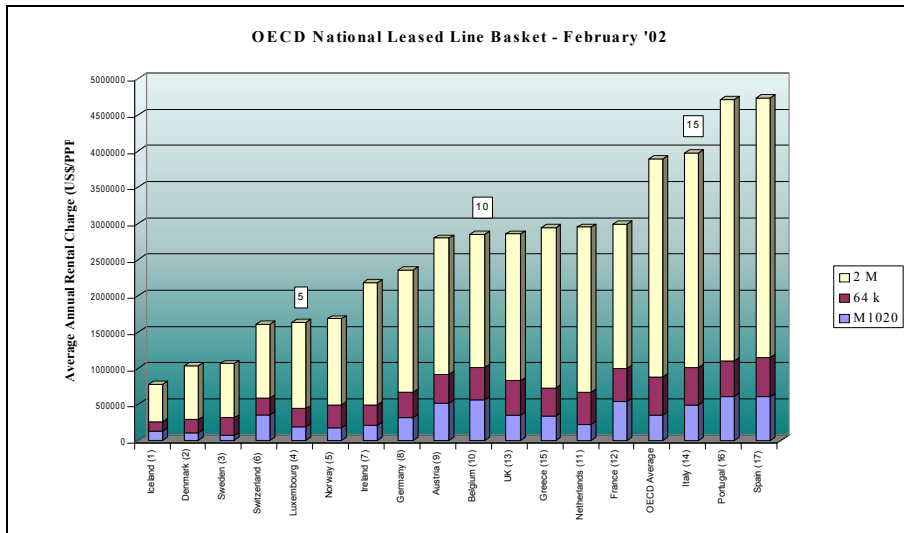
NB: The numbers in brackets represent the countries respective rankings as at December 2001

### 10.6 NATIONAL LEASED LINES

Figure 10.8 illustrates Ireland's position in the national leased line basket. Ireland has remained in 7<sup>th</sup> position for our last three reviews, and now lies 8 positions ahead of the OECD average<sup>21</sup>.

<sup>21</sup> The "National Leased Line Basket" is based on 100 circuits distributed over 6 distances from 2 to 500 km. Results exclude Vat.

**Figure 10.8 OECD National Leased Line Basket - February 2002**

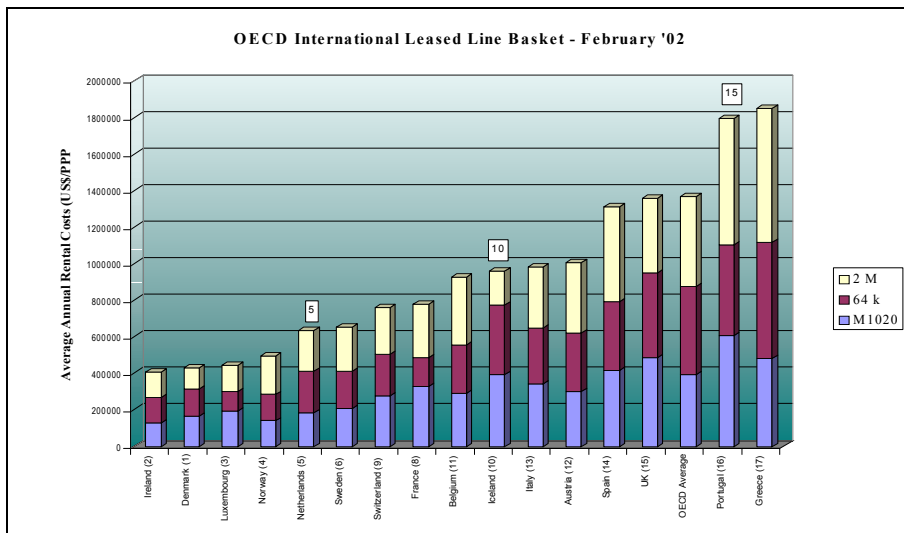


NB: The numbers in brackets represent the countries respective rankings as at December 2001

**10.7 INTERNATIONAL LEASED LINES**

Ireland’s position in the International leased line basket is illustrated in figure 10.9<sup>22</sup>. In 1<sup>st</sup> position Ireland lies 13 and 14 positions ahead of the UK and the OECD respectively.

**Figure 10.9 OECD International Leased Line Basket - February 2002**



NB: The numbers in brackets represent the countries respective rankings as at December 2001

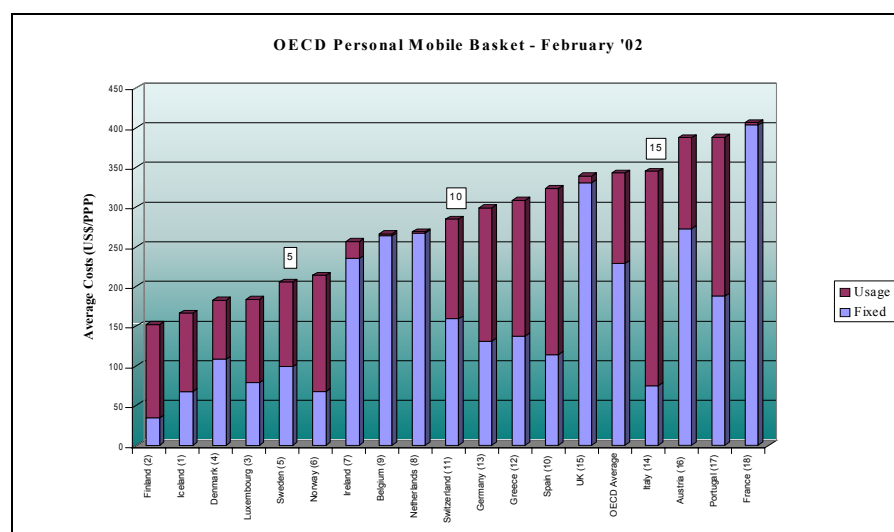
**10.8 PERSONAL MOBILE BASKET - POST-PAID**

This basket covers GSM tariffs<sup>23</sup> and reflects post-paid tariffs available from the incumbent mobile operator. The “Personal Mobile Basket” sets out the average of personal mobile

<sup>22</sup> The prices for these circuits are devised from the weighted average of half-circuits to all other OECD countries, using the traffic volume weighting method proposed by Teligen.

tariffs. Ireland remains in 7<sup>th</sup> position in this basket, 7 and 8 places ahead of the UK and the OECD average respectively.

**Figure 10.10: OECD Personal Mobile Basket - February 2002**



NB: The numbers in brackets represent the countries respective rankings as at December 2001

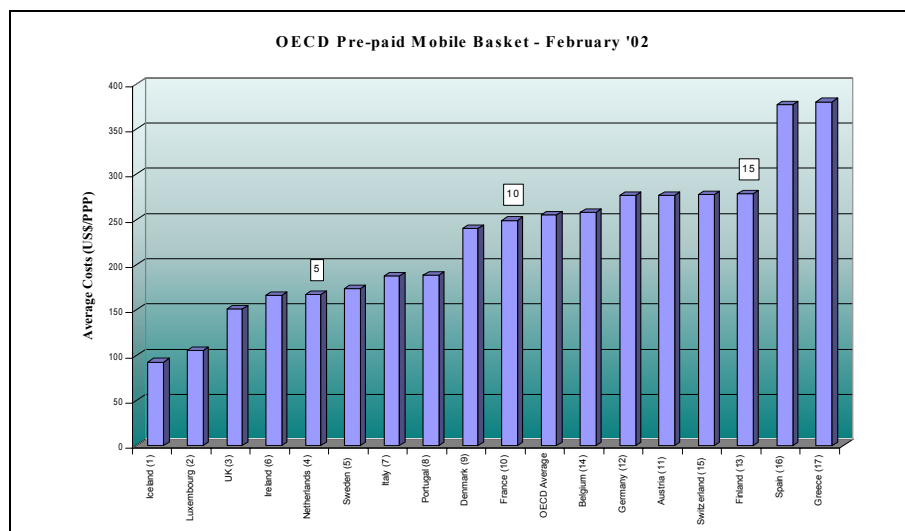
### 10.9 PERSONAL PRE-PAID BASKET

This basket covers GSM or DCS tariffs<sup>24</sup>. Both reflect pre-paid tariffs available from the incumbent mobile operators. In 4<sup>th</sup> position Ireland lies one position behind the UK and 7 positions ahead of the OECD average.

<sup>23</sup> The OECD Personal Mobile basket has national calls fixed at 200 distributed between local and national (not distance related) and including 10% of calls to other mobiles in the same network. Call duration will be 3 minutes for all types of calls. The charge for each call reflects the actual charge for the duration in question, as defined by the tariff. Call set-up and minimum charges are included. Detailed lists of caveats are set out in our quarterly review for March 2001.

<sup>24</sup> The OECD Personal Pre-paid baskets have a peak / off-peak relationship of 25% / 75%, the same as the standard personal mobile basket and as the OECD stipulates. There are no handset charges or other initial fees included, and the cheapest option available is always used. As is the case with all the baskets US\$/PPP is used.

**Figure 10.11: OECD Personal Pre-paid Basket - February 2002**

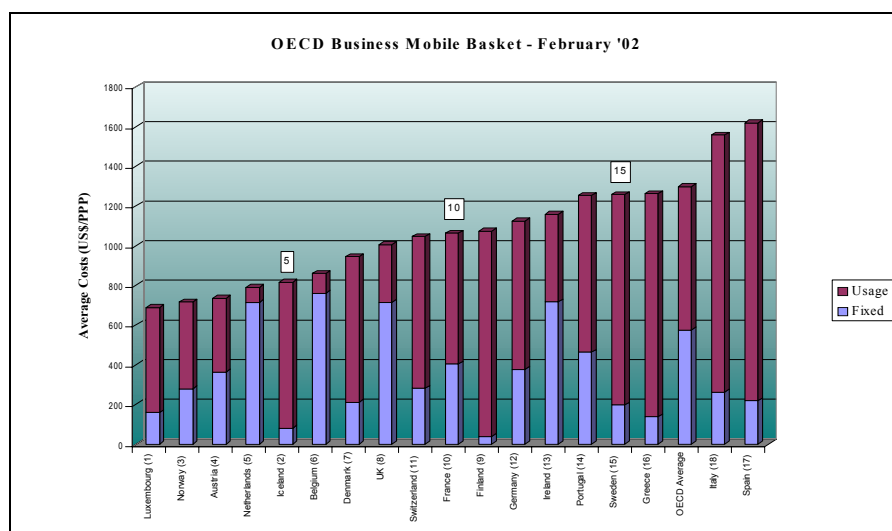


NB: The numbers in brackets represent the countries respective rankings as at December 2001

### 10.10 BUSINESS MOBILE BASKET

This Basket covers GSM tariffs and reflects post-paid tariffs available from the incumbent mobile operator<sup>25</sup>. The “Business Mobile Basket” sets out the average cost of Business mobile tariffs. As illustrated in Figure 10.12 Ireland’s position has not changed since our last review, remaining in 13<sup>th</sup> place.

**Figure 10.12: OECD Business Mobile Basket - February 2002**



NB: The numbers in brackets represent the countries respective rankings as at December 2001.

<sup>25</sup> The number of national calls in the OECD Business Mobile basket is fixed at 1200. The national calls are just distributed between local and national (not distance related), and include 10% of calls to other mobiles in the same network. The international proportion of the basket follows the basic structure of the international PSTN basket, for business & residential usage. The only difference is that calls have duration of 3 mins.

## 11 APPENDIX 1 - LIST OF LICENSEES

GENERAL LICENSEES	Operational	Voice Services	Infrastructural Network	Reseller	Other VAS	Responded To QR
AUCS Communications Services (Ireland) Ltd. - formerly known as AT&T Unisource	Y	N	Y	N	VPNs, International Call Centre Solutions.	N
Aurora Telecom Ltd	Y	N	N	N	N	Y
Budget Telecommunications Ltd	Y	Y	Y	Y	Indirect Access (National/International/Mobile) Services. Number Translations Services.	Y
Cable & Wireless Services Ltd	Y	Y	Y	N	Customer Premises Equipment Frame Relay & ATM Freephone, Direct & Indirect Voice	Y
Cablelink (Acquired by ntl:)	Y	Y	Y	N	Cable TV services	Y
Carrier 1 AG	N	N	N	N	N	N
Chorus (trades as Irish Multichannel)	Y	Y	Y	N	Cable TV & Telephony services	Y
Signal Global Telecommunications Ireland Ltd	N	N	N	N	N	N
Colt Telecom	Y	N	N	N	N	Y
Concert Global Networks Ltd.	N	N	N	N	N	Y
<i>eircom</i>	Y	Y	Y	N	Global voice, data and internet services provider.	Y
Eircell	Y	Y	Y	N	Mobile Operator	Y
Esat Telecommunications Ltd	Y	Y	Y	N	Global voice, data and internet services provider	Y
Esat Digifone	Y	Y	Y	N	Mobile Operator	Y
Esat Net	Y	N	Y	N	Internet Service Provider	Y
Formus	N	N	N	N	N	N
Global Crossing Ireland Ltd.	Y	Y	N	N	ATM; Frame Relay; IP VPN; IPLs	Y
GTS Business Services (Ireland) Ltd	Y	Y	Y	Y	Carrier and access services; Internet services; callcards	Y

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GENERAL LICENSEES	Operational	Voice Services	Infrastructural Network	Reseller	Other VAS	Responded To QR
IDT Europe BV Lts Liability Cooler	N	N	N	N	N	Y
Interoute Ireland Ltd	N	N	N	N	Residential & Business CPS Carrier Access. Prepaid Accounts and cards.	N
ITG Group (IRL) Ltd.	Y	N	Y	N	EPOS Equipment Payphones CPS on Voice Land-Line Traffic	Y
IXC Communications Services Europe Ltd.	N	N	N	N	N	N
LCN-Ireland, L.L.C.	N	N	N	N	N	N
LDMI Telecommunications of Ireland (previously known as Vianvi Ltd)	N	N	N	N	N	Y
Mastercall International Ltd	N	N	N	N	N	N
WorldCom	Y	Y	Y	N	Int'l frame relay, int'l freefone service into Ireland, Nat. & Int'l VPNs.	Y
Meridian Communications Ltd. (formerly known as ACCESS Telecom)	N	N	N	N	Resale of mobile telephony services	N
NTL (UK) Group, Inc.	Y	N	Y	N	Leased Lines & Broadcasting Transmission Services	Y
Ocean Communications Ltd	Y	Y	Y	N	Complete voice, data and internet Service provider.	Y
PrimeTEC UK Ltd	N	N	N	N	N	N
Primus Telecommunications Ltd	N	N	N	N	N	N
RSL Communications (Ireland) Ltd	N	N	N	N	N	N
Sigma	N	N	N	N	N	N
S.M. Communications (T/A Worldlink)	Y	Y	N	Y	Prepaid Services	Y
Smart Telecom	Y	N	N	N	N	Y
Startec Global Communications UK Ltd.	N	N	N	N	N	N
Stentor Communications Ltd	Y	Y	Y	Y	Call centre and VPN solutions Callcards	Y
Swiftcall Centre	Y	Y	N	Y	Indirect Access & CPS Telephony Internet & Callcard Services Call Centre Services	Y

<b>GENERAL LICENSEES</b>	<b>Operational</b>	<b>Voice Services</b>	<b>Infrastructural Network</b>	<b>Reseller</b>	<b>Other VAS</b>	<b>Responded To QR</b>
Tele2 Telecommunications Services Ltd.	N	N	N	N	N	Y
Teleglobe Ireland Ltd	N	N	N	N	N	N
Transaction Network Services Limited	Y	N	N	N	Dial-up access for point of sales.	Y
VarTec Telecom (UK) Ltd.	N	N	N	N	N	Y
Viatel (I) Ltd.	N	N	N	N	N	N
WTI Ireland Ltd.	N	N	N	N	N	N
Yac.com Ltd.	N	N	N	N	N	Y

BASIC LICENSEES	Operational	Voice Services	Infrastructural Network	Reseller	Other VAS	Responded To QR
Alord Holdings Ltd (T/a Switchcom)	Y	Y	N	Y	Pre-paid/Post paid residential service.	Y
AT&T Global Network Services Ireland Ltd.	Y	N	Y	N	Dial up and leased line services	Y
Broad Band Communications Ltd.	N	N	N	N	N	Y
Brighter Networks Ltd.	N	N	N	N	N	N
Cargo Community Systems Ltd.	Y	N	Y	N	e-commerce solutions	Y
Casey CableVision Ltd.	Y	N	Y	N	Cable TV Limited internet services	N
Conduit Enterprises Ltd	Y	N	Y	N	Nat. & Int'l directory enquiry services	Y
Crossan Cable	N	N	N	N	N	N
EGN B.V.	Y	N	Y	N	relay services for multinationals	Y
ESB Telecoms Ltd.	N	N	N	N	N	N
Flag Telecom	N	N	N	N	N	N
Genesis Internet Service Provider Ltd.	N	N	N	N	N	N
Genuity International Inc. (formerly known as GTE Internetworking International Corporation)	N	N	N	N	N	N
Global Crossing Ireland Ltd. (licence surrendered to the ODTR as of 07/08/01)	N	N	N	N	N	N
Global One Communications Ltd.	Y	N	Y	N	ATM Switching	N
GTS Network (Ireland) Limited	N	N	N	N	N	N
Hibercall Ltd.	Y	Y	N	Y	Prepaid & Postpaid Services, Callcards	Y
Hyper Lan Ltd	N	N	N	N	N	N
IDirect	N	N	N	N	N	N
Indigo	Y	N	Y	N	Internet Service Provider	Y
IXNET UK Ltd.	Y	N	Y	N	Limited service to banks.	N



BASIC LICENSEES	Operational	Voice Services	Infrastructural Network	Reseller	Other VAS	Responded To QR
Kokomo	N	N	N	N	N	N
KPNQwest Carrier Services B.V	Y	Y	N	N	IP VPN ATM Direct Internet Access	Y
Lake Communications System	Y	N	Y	N	ISDN, business solutions	N
MediaNet Ireland Ltd	Y	N	Y	N	Internet business solutions	N
Metromedia Fibre Network Ireland Ltd	N	N	N	N	N	N
Next Telecom	N	N	N	N	N	N
QoS Networks Limited	N	N	N	N	N	N
Radianz Connect Services (previously known as Reuters Connect Services)	Y	N	Y	N	Private wire services.	N
Rillbank Limited	Y	N	N	N	N	Y
Savvis Europe B.V.	Y	N	N	N	N	N
Sonic Telecom	N	N	N	N	N	Y
Société Internationale de Télécommunications Aéronautiques	Y	N	Y	N	Managed data network access services for the airline industry	N
Sprintlink	N	N	N	N	N	N
TCS (Ireland) Ltd.	Y	Y	N	N	Voice Telephony services via the Internet.	N
Tele Media International Ltd.	N	N	N	N	N	N
Timas Ltd (T/A Galileo Ireland)	Y	N	Y	N	Frame relay service for travel agents	Y
Torc Telecom	N	N	N	N	N	N
Universal Access Ireland Ltd	N	N	N	N	N	N
Valuetel Ltd.	Y	Y	N	Y	Re-selling long distance domestic & international services; callcards	Y
Waterland Technologies	N	N	N	N	N	N
Web-Sat Ltd.	N	N	Y	N	Internet access via satellite; SMG news services.	Y

## 12 APPENDIX 2 - DOCUMENTS ISSUED, DECEMBER 2001- FEBRUARY 2002

DOCUMENT NO.	NAME
<b>FIXED</b>	
01/94	National Numbering Conventions – (Version 2.0) – Reference Document
01/95	Numbering Conventions Revision – Update to Version 2.0 – Decision Notice D18/01
01/98	<i>eircom</i> 's Reference Interconnection Offer – Miscellaneous issues – Consultation Paper
<b>MOBILE</b>	
01/96	Four Licences to Provide 3G Services in Ireland – Information Notice
01/99	Competition for 3G Services in Ireland: Tender Documents for One "A" Licence to provide 3G Services in Ireland
01/100	Competition for 3G Services in Ireland: Tender Document for Three "B" Licences to provide 3G Services in Ireland
02/14	A Framework for Value-added Text Messaging (SMS) Services – Response to Consultation
<b>INTERNET</b>	
02/20	The Internet in Ireland Communication Transmission and Delivery Issues – Response to Consultation
<b>POST</b>	
02/15	Application by An Post to increase the price of reserved Postal Service – Consultation Paper
<b>RADIO SPECTRUM/ TECHNOLOGY</b>	
02/16	Wireless Local Area Networks – Briefing Note
02/19	Expanding Opportunities in the Radiocommunications Market: Fixed Wireless Access (FWA) – Consultation Paper
<b>BROADCASTING</b>	
01/97	Licensing for Regional or Locally Based Digital Television Delivery – Response to Consultation
02/18	Notification of Proposed Amendment to Wireless Telegraphy (Programme Services Distribution) regulations 1999 – Information Notice

<b>DOCUMENT NO.</b>	<b>NAME</b>
<b>LLU</b>	
02/24	LLU – Copper Loop Frequency Management Plan – Decision Notice
<b>REGULATION</b>	
02/22	Future Regulation of Electronic Communications Networks and Services – Future Authorisations – Consultation Paper
<b>GENERAL</b>	
02/17	Address by Etain Doyle Director of Telecommunications Regulation to First Tuesday in Jury's Hotel Dublin on February 2 <sup>nd</sup> 2002, The Telecommunications Industry in Ireland
02/21	Review of the Price Cap on Certain Telecommunications Services – Consultation Paper
02/23	Measuring Licensed Operator Performance Programme. Issue 1: July to September 2001
<b>LICENCE APPLICATIONS</b>	
02/01	Aircraft Radio Licence – Application Form
02/02	Temporary Business Radio Licence – Application Form
02/03	Community Repeater Licence – Application Form & Guidance Notes
02/04	Radio Experimenter Licence – Application Form
02/05	Radio Experimenter Licence – Guidance Notes
02/06	Radio Experimenter Licence: 6m Band (50-52 MHz) And/Or 4m Band (70.125 – 70.450 MHz) Operation – Application Form
02/07	Radio Experimenter Licence: Secondary Bands*/Additional Modes (FSTV, SSTV, RTTY), Operation – Application Form
02/08	Radio Experimenter Licence: Maritime Mobile Operation – Application Form
02/09	Radio Experimenter Licence: Repeater Operation – Application Form
02/10	Radio Experimenter Licence: Visitor Permit – Application Form
02/11	Point to Point Radio Link Licence Below 1 GHz – Application Form & Guidance Notes
02/12	Paging Permit (On-Site) – Application Form
02/13	Maritime Mobile Radio Station Licence – Application Form & Guidance Notes