Commission for
Communications Regulation

Irish Communications Market

Quarterly Key Data

September 2003

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Contents

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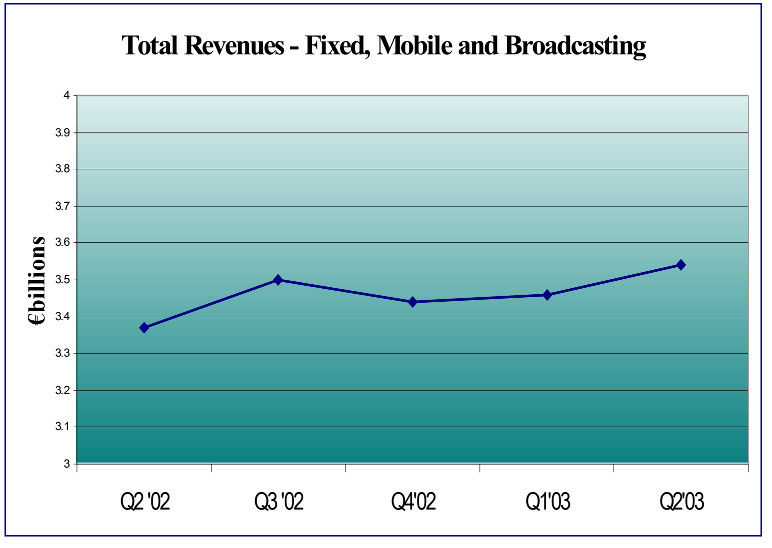
1 Overall Market Data

The data in this review is based on returns from licensees for the period 1st April 2003 to 30th June 2003. The report is based on submissions from 38 operators (detailed in the Appendix) which represent approximately 99% of total market activity[1].

1.1 Overall Telecommunications Revenues

Figure 1.1.1 Total Revenues – Fixed, Mobile & Broadcasting



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

- Total revenues for fixed, mobile & broadcasting markets now stands at an estimated €3.54 billion per annum on an annualised basis.
  - Increase of approximately 2% since last quarter.
  - Increase of approximately 5% since last year.

1.2 Telecoms Sector as a % of GDP

- Telecoms sector is estimated to account for approximately 2.77% of Irish GDP (2002)[2].
  - Increase of 0.07% since last quarter

[2] Figure was calculated using GDP at market price (2002) – ESRI Quarterly Economic Commentary, Summer 2003.

1.3 Number of licenses

- On 24 July 2003 39 General[3] and [4]36 Basic licences[5] were in issue in the Irish market[6].
- There were 24 operators[7] providing services under General licences (September 2002; 20) and 17 under Basic licences[8] (September 2002; 18)[9].
- From 25 July 2003 under Regulation 22 of the Authorisation Regulations all holders of general, basic and mobile licences are automatically authorised to provide electronic communications networks and/or services. All pre-existing licence holders are required to notify ComReg by 5 September 2003. The authorisation process is that of self notification and a list of notifications received to date is available on ComReg's website www.comreg.ie, this list does not imply any judgement on the part of ComReg as to whether or not the activities referred to come within the new EU Electronic Communications Framework.

[3] The following general licences were revoked during the quarter: Alphyra Ltd., IDT Europe BV, Interoute Ireland Ltd., IXC Communications Ltd., LCN Ireland, Mastercall Ltd., Primetec Ltd., Primus Ltd and Startec Global.

[4] Basic licences were awarded to Network-i-Ltd. and Swisscom Eurospot UK Ltd. during the quarter.

[5] The following basic licences were revoked during the quarter: Axis Communications Ltd., Genesis ISP, Indigo Services Ltd., Ixnet UK Ltd., Kokomo Ltd. KPNQwest, Savvis Europe BV, SITA, Sonic Telecom, Tarwin Trading Ltd., Telemedia International Ltd., and Waterland Technologies Ltd.

[7] Talkshop Ltd. commenced operations this quarter.

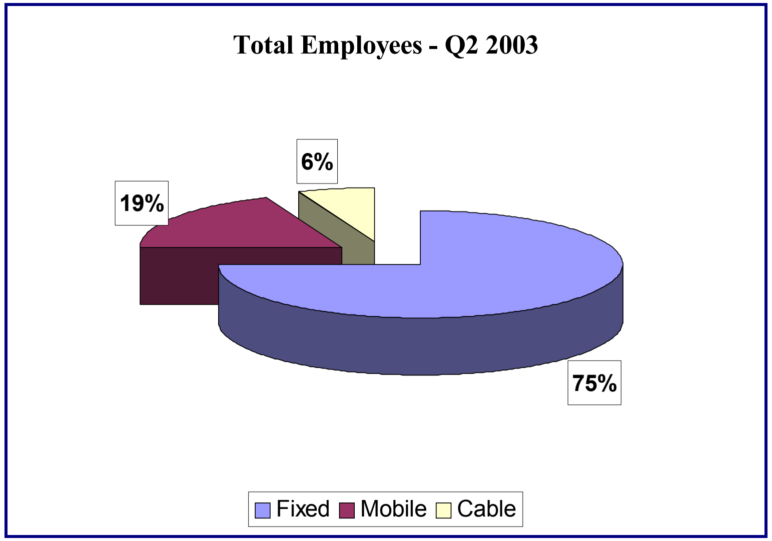
[8] Amocom Technologies Ltd. commenced operations this quarter.

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

1.4 Employees

- The number employed in the telecommunications sector is approximately 14,560.
    - Decrease of 1% since last quarter.
    - Decrease of 9% since last year.
- The fixed, mobile & broadcasting markets account for approximately 75%, 19% and 6% of the total figure respectively. The proportions were the same last quarter.

Figure 1.1.2 Total Employees



2 Data By Sector

2.1 **Fixed Line**

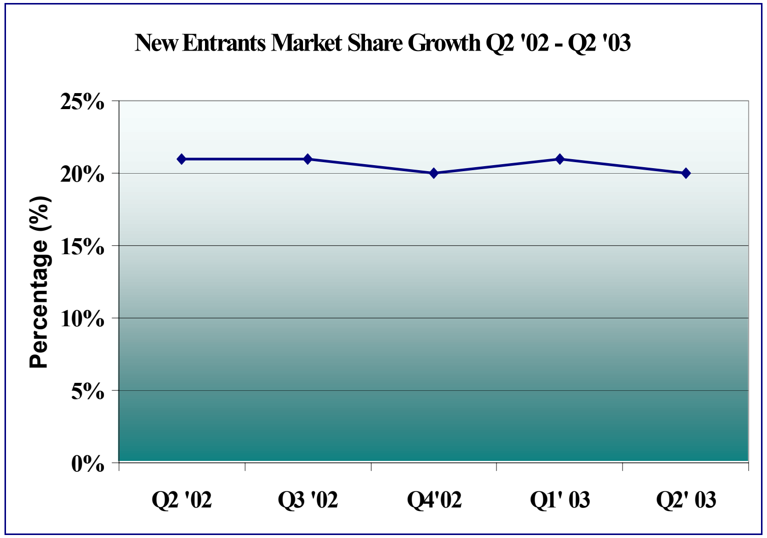
2.1.1 Fixed Line Revenue

- Total fixed line revenue[10] is approximately €502 million.
    - Decrease of approximately 3% since last quarter.
    - Annualised fixed line revenue figure accounts for 57% of total telecoms revenue as compared with 62% last year.

2.1.2 Other Authorised Operators (OAO) Market Share

- OAO market share is approximately 20%.
    - Decrease of 1% since last quarter.
    - The market share has been in the 20-21% range for the last two years.

Figure 2.1.1 OAO Market Share

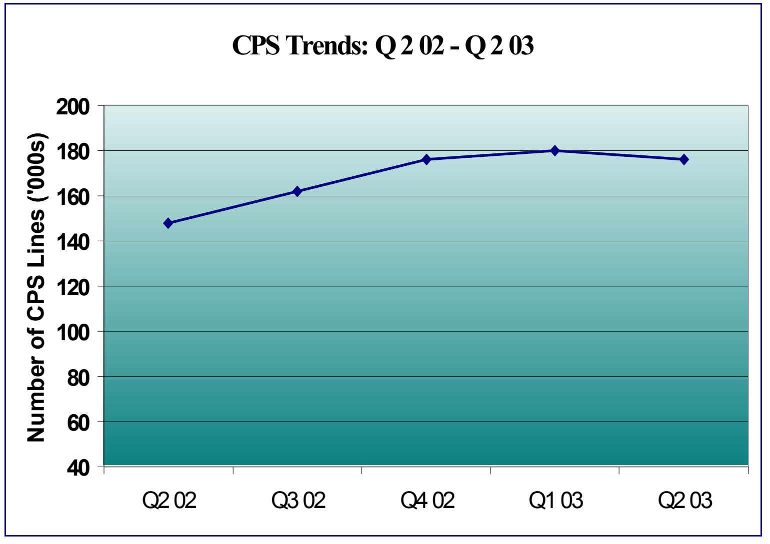


Source: ComReg Quarterly Review Questionnaire

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

2.1.3 Carrier Pre Selection

Figure 2.1.2 Carrier Pre Selection



- The CPS figure is reported by *eircom* and has decreased by approx 2% since last quarter. ComReg issued a consultation document reviewing the CPS framework; the response will be published shortly.

- Of the total number of CPS lines[11], 98%, 1% and 1% are apportioned to all calls, national & international calls, and international calls only respectively.

2.1.4 Telecom Access Paths

- There are approximately 5. 16 million telecom access paths[12].
  - 3% increase since last quarter.
  - Increase of approximately 5% since last year.

2.1.5 PSTN Lines

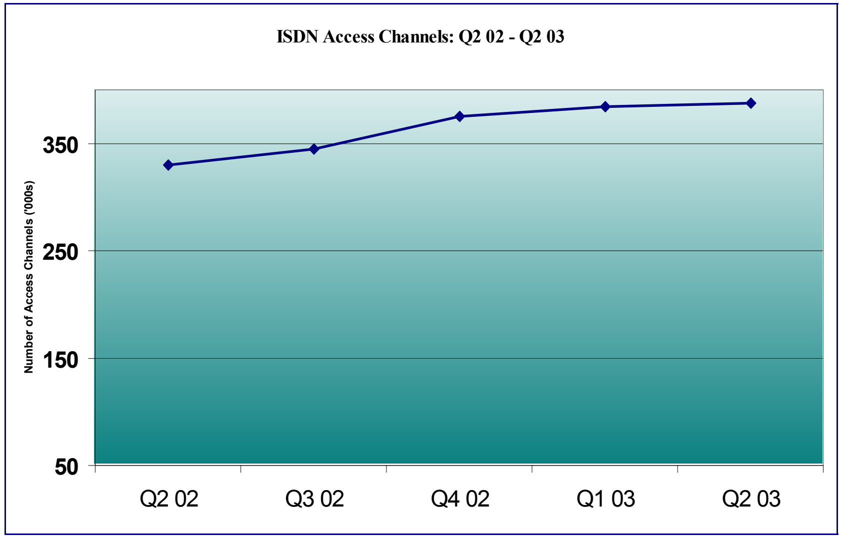
- Total of 1.6 million lines.
  - Remains constant since last quarter.
  - Accounts for 31% of total access paths as compared with 33% last year.

[11] Both business and residential

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

2.1.6 ISDN Access Channels

Figure 2.1.3 ISDN Access Channels



- Approximately 388,000 ISDN access channels.
  - Increase of 18% since last year.
  - Increase of 1% since last quarter.
  - Accounts for 7% of total access paths
  - The proportion of primary, fractional & basic rate ISDN is 44%, 6% and 50% respectively of the total number of ISDN access channels.

2.1.7 Mobile Subscribers

- 3.17 million mobile subscribers.
- Mobile subscribers account for approximately 61% of total access paths.

2.1.8 DSL

- Approximately 7,350[13] DSL lines have been installed, increased from 3,850 last quarter.

2.1.9 Cable Modems

- Approximately 3,000 cable modems supplied by Ntl, Chorus and Casey CableVision (Dungarvan).
  - This figure remains unchanged since last quarter.

2.1.10 FRIACO

There are approximately 6,500 FRIACO subscribers.

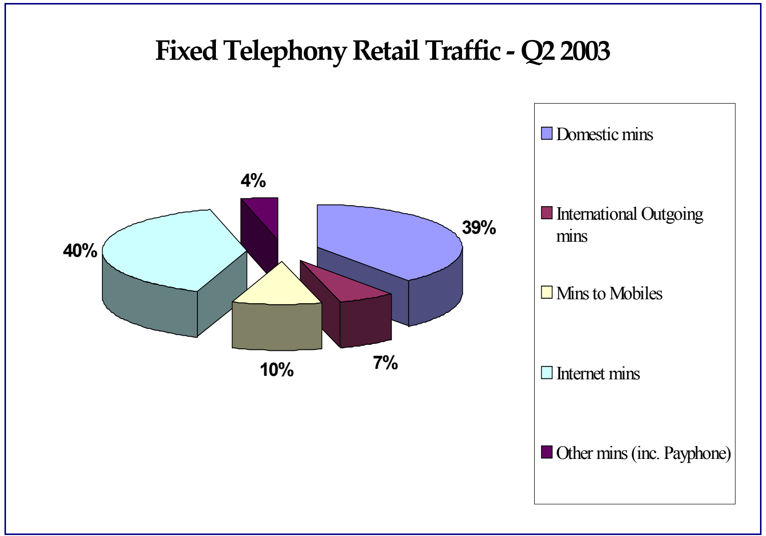
[13] This figure includes the incumbent and OAO lines and is based on the number of lines installed.

2.1.11 Fixed Wireless Access

- There are approximately 5,400 business and residential FWA subs, this includes exempt wireless based activity in the market with approx 500 subscribers using other technologies such as WLANs. There are a number of public "hotspots" emerging while a number of operators have indicated that they intend to provide these services going forward.

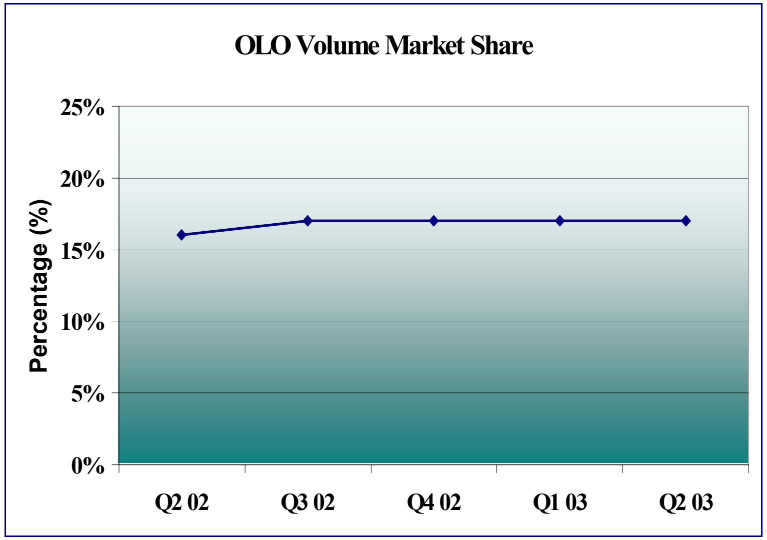
2.1.12 Fixed Retail Traffic (Minutes)

Figure 2.1.4 Fixed Retail Traffic



- Retail traffic has remained relatively static since last quarter.
  - Total minutes increased by 1% in the same quarter last year.
  - Domestic minutes account for 39% of overall minutes, Internet 40%, Mobile 10%, International 7% and Other 4%. As compared with last year domestic minutes accounted for 43% of overall minutes, Internet 37%, Mobile 10%, International 6% and Other 4%.
- Over the last year internet minutes, as a proportion of overall minutes, have caught up with domestic and it now appears that internet minutes are the highest proportion of total retail traffic.
- OAO market share based on volumes[14] is 17%

Figure 2.1.5 OAO Volume Market Share (Minutes)



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

2.1.13 Leased Lines

- There are approximately 21,000 retail leased line circuits.
- There are approximately 9,000 wholesale leased line circuits.

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

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

	May '03	June '03	July '03
All Leased Lines	*16*	*17*	*18*
Of Which:			
Sub 2Mbit Lines	*17*	*18*	*18*
2Mbit Lines	*9*	*10*	*14*

- The rolling three month average delivery time for 95% leased line circuits ordered by OAOs for April 2002 was between 13 and 18 days[15].
- Since April this figure has remained the same for Sub 2Mbit Lines, has increased from 13 to 14 days for 2 Mbit Lines, with a slight rise[16] in the average delivery time for all Leased Lines from 17 to 18 days[17].

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

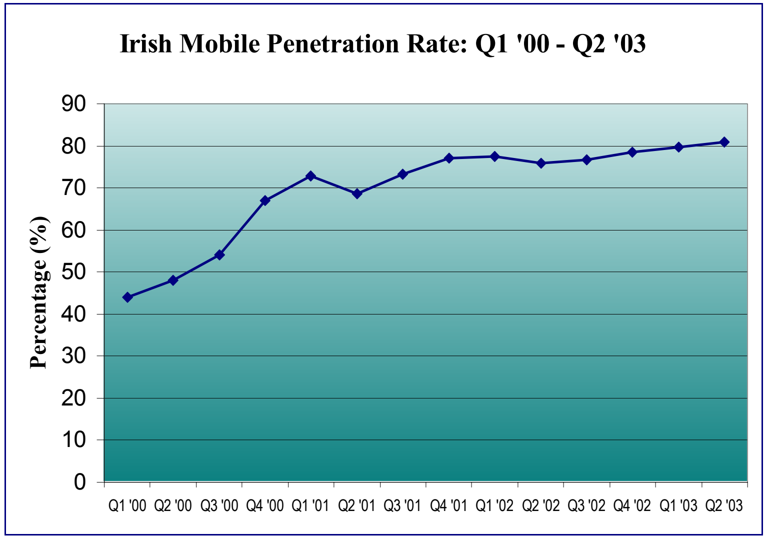
[16] There were an unusually small number of orders for 2Mbit leased lines for April leading to a fall in average delivery time for this month and in due course a slight rise in the three month average delivery time for July.

[17] 1) Delivery lead-time is shown for 95% of orders delivered in the period 2) Sub 2mb deliveries include digital circuits with transmission speeds of less than 2mb. 3) The statistics provided relate to orders from other licensed operators only. 4) Other interconnect circuits are not included in the statistics.

2.2 Mobile

2.2.1 Irish Mobile Penetration Rate

Figure 2.2.1 Irish Mobile Penetration Rate

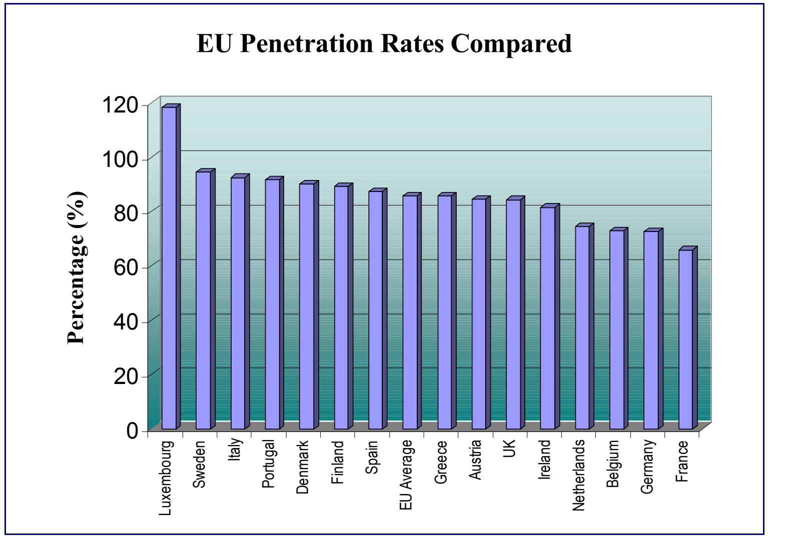


Source: Baskerville and ComReg Estimates

- Irish mobile penetration rate now stands at 81%.
    - Increase of 1% since last quarter.
    - Increase of 5% in the last 12 months.

2.2.2 EU Penetration Rates

Figure 2.2.2 EU Penetration Rates



Source: Baskerville

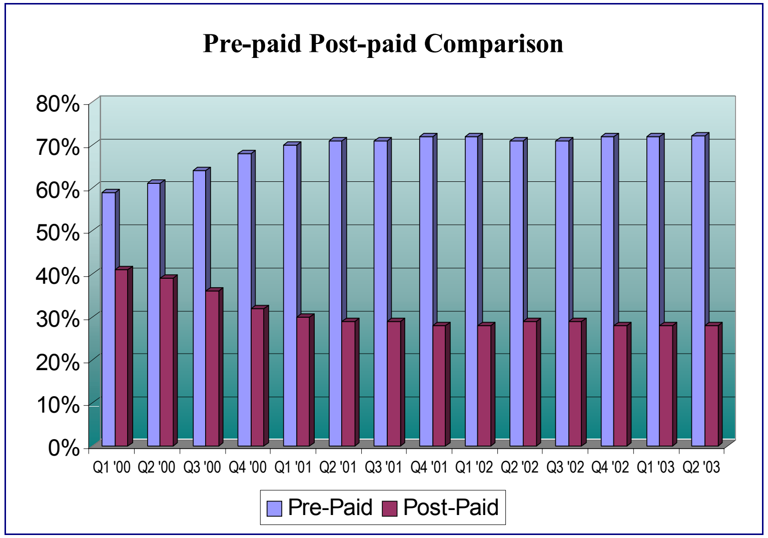
- At this point most EU countries penetration rate is above 80%.

2.2.3 Subscribers

- Approximately 3.17 million mobile subscribers at the end of June 2003.
    - Increasing from approximately 2.97 million at the end of June 2002.

2.2.4 Pre-Paid / Post Paid Comparison

Figure 2.2.3 Pre-Paid / Post Paid Comparison

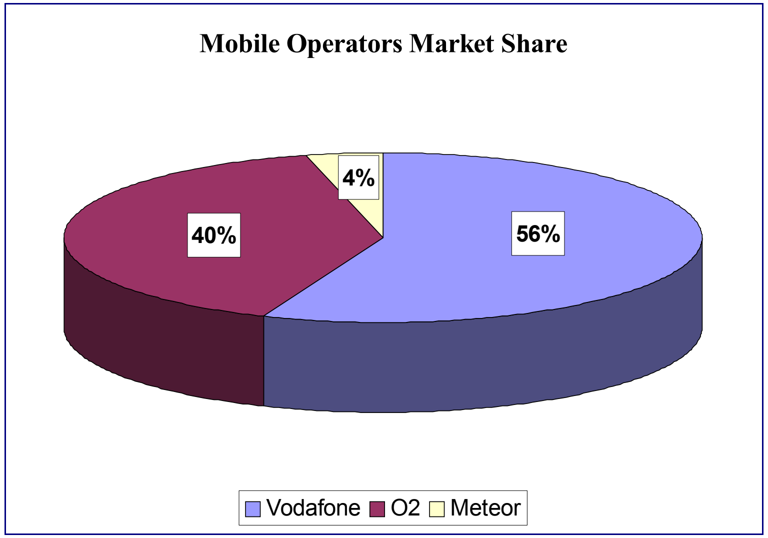


Source: ComReg Quarterly Review Questionnaires

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

2.2.5 Market Shares

Figure 2.2.4 Mobile Operators Market Share[18]



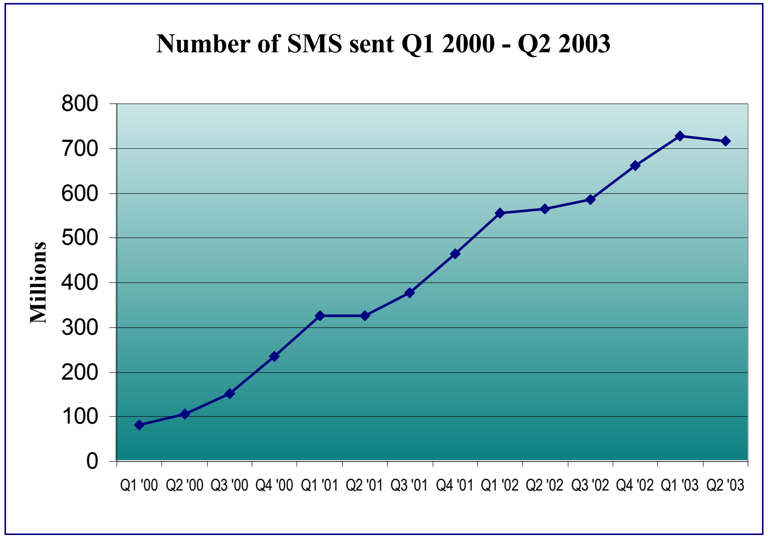
Source: ComReg Quarterly Review Questionnaire

- Vodafone - 56%, 0_2 – 40%, Meteor – 4%.
- No change since our last review, all operators increased their subscriber base this quarter.

[18] Market share based on the number of subscribers

2.2.6 SMS

Figure 2.2.5 Number of SMS Messages sent

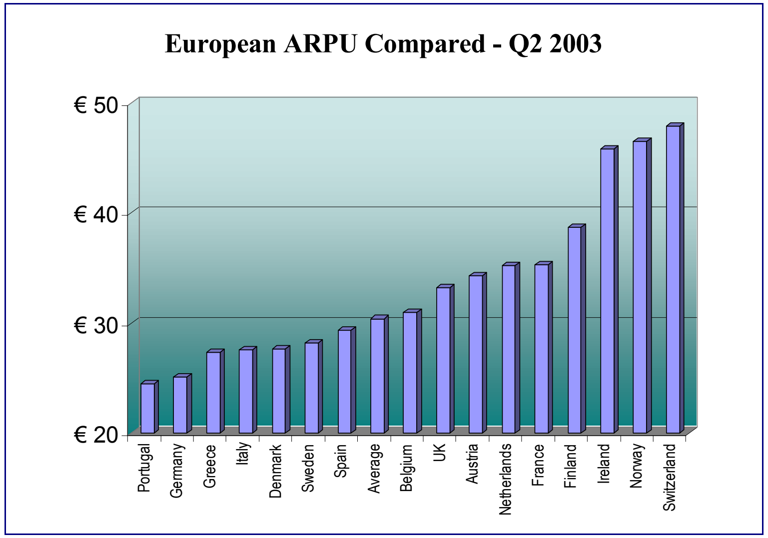


Source: ComReg Quarterly Review Questionnaire

- Approximately 716 million messages sent during the quarter.
  - 75 SMS messages sent on average per month, decrease of 2% on the previous quarter.
  - 27% increase in the number of messages sent in 12 months.

2.2.7 ARPU

Figure 2.2.6 European ARPU Compared



Source: The Yankee Group

- Irish Mobile Operator's ARPU is estimated at €46 per month, an increase of €1 since the last quarter, while the EU average is €30[19].

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

- Irish Mobile Operators' ARPU is the 3rd highest of the European countries; an improvement from the highest position last quarter[20].

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[20] It should be noted that the change in Ireland's position is partly a result of the strengthening of the Euro against the Norwegian Kroner and the Swiss Franc

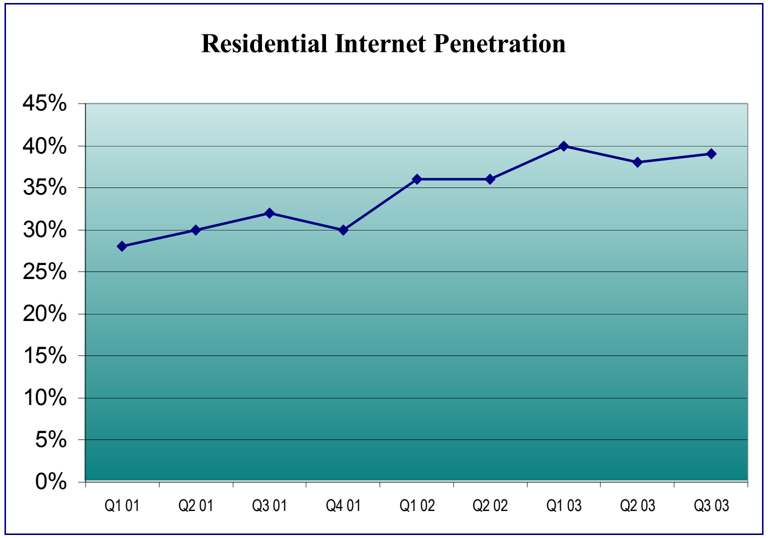
2.3 Internet

The results of the *Amárach* Internet research, commissioned by ComReg, are referred to throughout this section. Internet research is among a nationally representative sample of 1,105 adults aged 15 – 74[21]. Of those surveyed 81% have a fixed line at home. The results of *Amárach's* research will refer to those with a fixed line unless otherwise stated. The survey was carried out during July/August 2003.

Residential Internet penetration stands at 39%. It should be noted however that by including those who do not have a fixed line the Internet penetration figure would be 32% of households in Ireland.

2.3.1 Ireland's Internet Penetration Rate

Figure 2.3.1 Ireland's Internet Penetration Rate



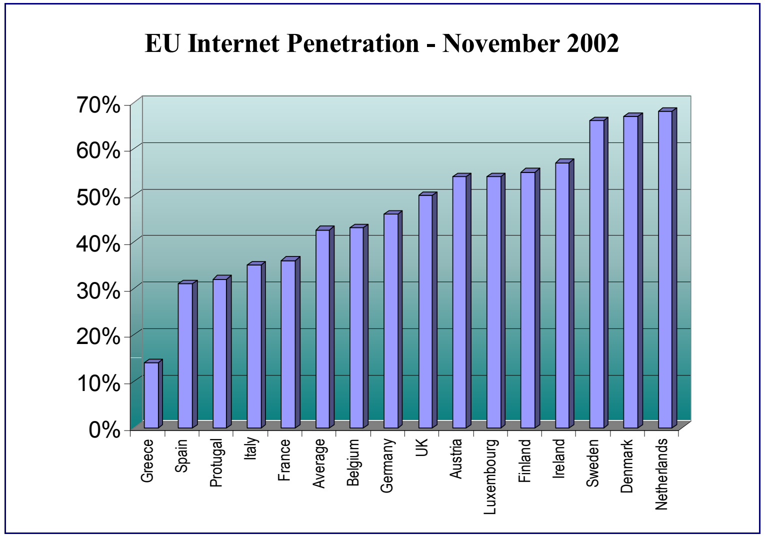
- Residential Internet penetration is estimated at 39%.

[21] *Amárach* carried out face to face research of 1,105 adults aged 15 – 74 years during July / August 2003. The Internet penetration figure is nationally representative of the adult population with a fixed line, with a margin of error of +/- 3.4%.

2.3.2 EU Internet Penetration

According to the results of the European Commission's Flash Eurobarometer[22] report, Ireland was 4th in terms of Internet penetration in the EU at November 2002.

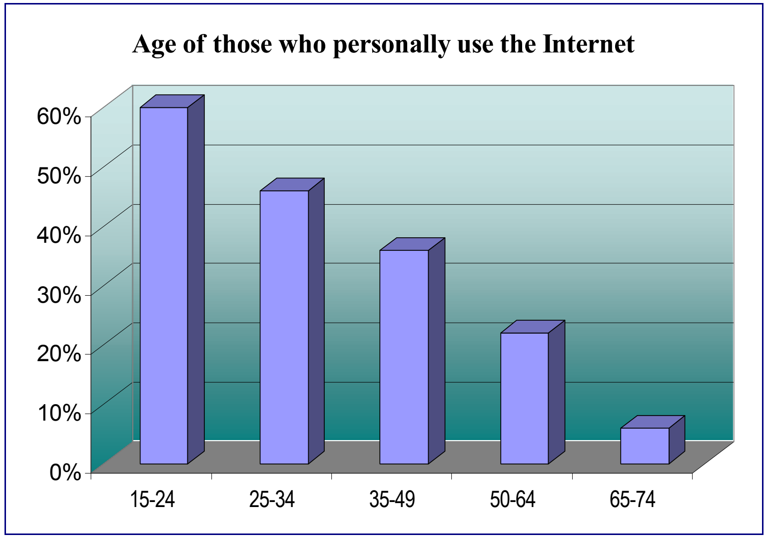
Figure 2.3.2 EU Internet Penetration



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

2.3.3 Average Internet Usage

Figure 2.3.3 Age of those who personally use the Internet



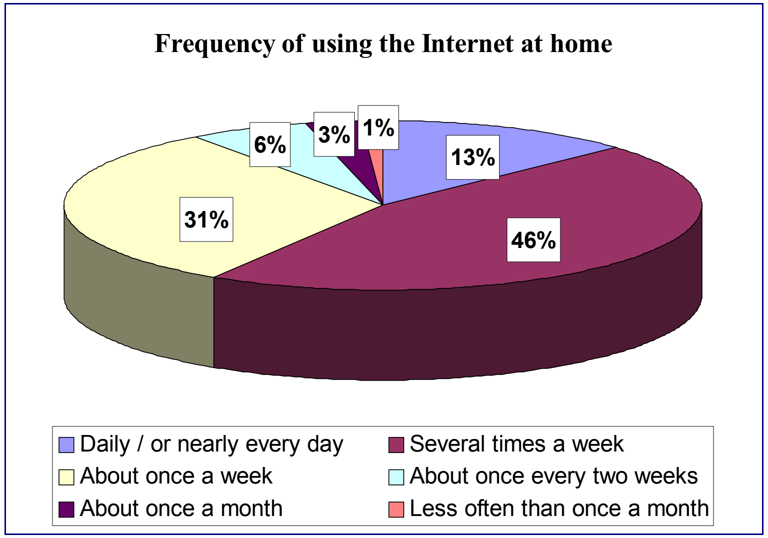
- Usage is highest amongst 15 – 24 year olds (60%), 25 -34 year olds (46%) and 35 – 49 year olds (36%).

2.3.4 Methods of access to the Internet at home

- PSTN is the predominant form of home Internet access (78%) followed by ISDN (10%)

2.3.5 Frequency of using the Internet at home

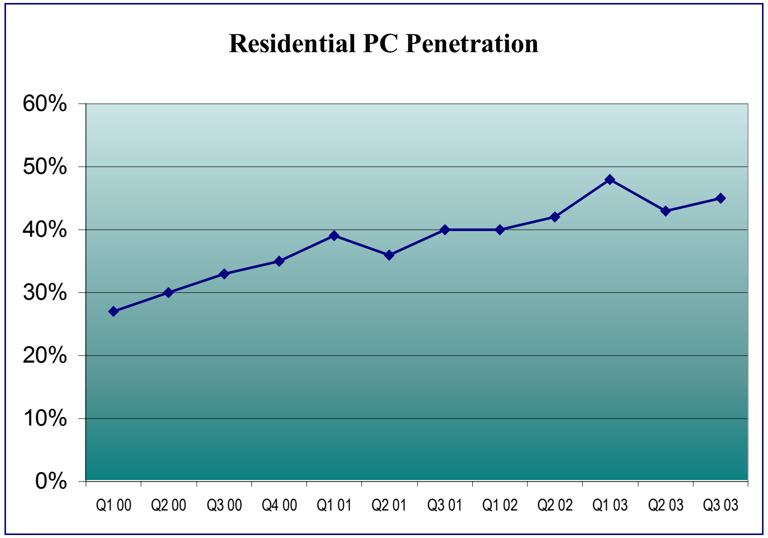
Figure 2.3.4 Frequency of using the Internet at home



- Of those who personally use the internet at home, 13% use it daily or almost every day; while 46% use it several times a week.
- On average those who personally use the Internet at home estimate that they spend 4 hours on line in a typical week, a decrease of 2 hours since our last survey[23].

2.3.6 Residential PC Penetration

Figure 2.3.5 Residential PC Penetration



- 45% indicate that they have a home PC, an increase of 5% in 2 years

[23] It should be noted that estimates of time spent on-line are based on respondent's perceptions. Survey carried out during July/August 2003

2.3.7 E-Commerce

- 41% have used the Internet to purchase a product or service in the last three months.
- The most common products or services purchased on the Internet in the last three months were airline tickets (65%), concert tickets (38%) and books (13%).
- 5% indicated that they have used their mobile phone text or internet function to purchase a product or service.

2.3.8 Internet Minutes

- Internet minutes account for 40% of all fixed retail traffic.
- An increase of 1% since our last review.

2.4 Cable/MMDS & Satellite

2.4.1 Cable/MMDS Subscribers

- Approximately 562,000 cable/MMDS subscribers to basic television services in Ireland.
  - Decrease of approximately 2% since last quarter.

2.4.2 Digital Subscribers

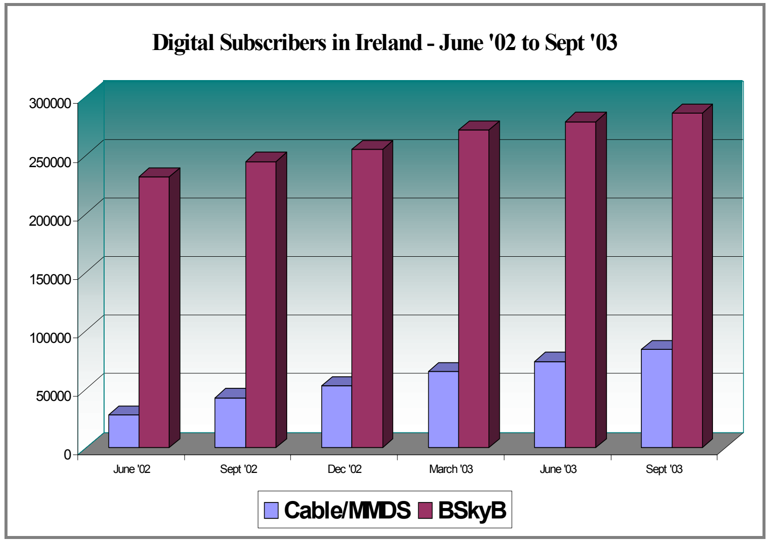
- Approximately 15% of cable/MMDS subscribers have upgraded to digital compared to 7% in September 2002.
  - An increase of 2% since last quarter.
- 286,000 subscribers to BSkyB[24]
  - Increase of 3% since last quarter.
  - This figure has increased by 41,000 since September 2002.
- Approximately 370,000 cable/MMDS and satellite digital subscribers
  - This figure has increased by 82,000 since September 2002.
  - Represents approximately 28% of all households with a television[25].

2.4.3 Households Passed

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

2.4.4 TV Distribution in Ireland

Figure 2.4.1 Digital TV Distribution in Ireland



2.4.5 Cable/MMDS Revenues

- Total cable/MMDS revenues have remained unchanged since last quarter.

[24] BSkyB results for year end 30 June 2003 (12th August 2003)

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

3 Tariff Data

This section compares movements in incumbents' tariffs for a range of telecommunication services. The tariff comparisons, generated from the pricing of a number of baskets of telecom services, rank Ireland's position against all other Member States in relation to telecom tariffs[26]. It should be noted that competing operators sometimes offer cheaper tariffs and this would also be true in the other countries surveyed. The tariff comparison also reflects only one tariff option per incumbent operator and by definition is not indicative of tariff levels available in other tariff options, which may be offered by operators.

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

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

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

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

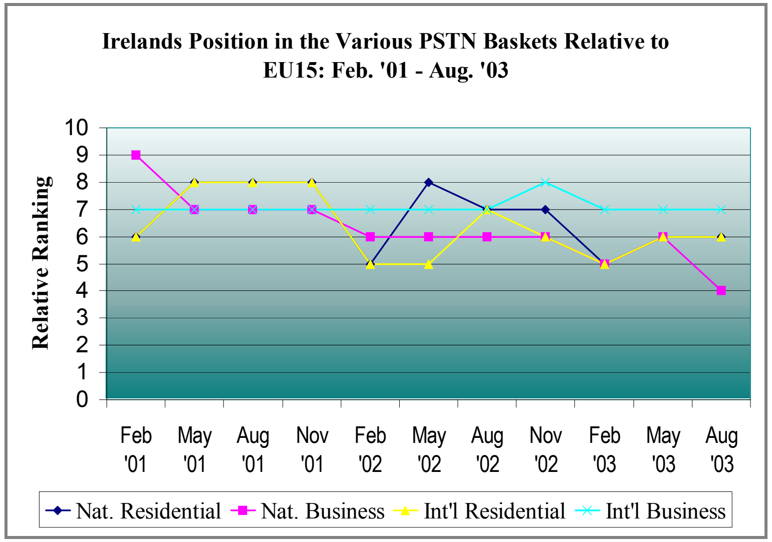
[26] While still using baskets constructed by Teligen using an OECD approved methodology, only comparisons between the 15 Member States are examined.

3.1 Overview

3.1.1 PSTN

- Figure 3.1.1 shows the movement in Ireland's position relative to the EU in all PSTN baskets since February 2001. Ireland's relative position has remained unchanged in all PSTN baskets except for the national business basket where it has improved by one place.

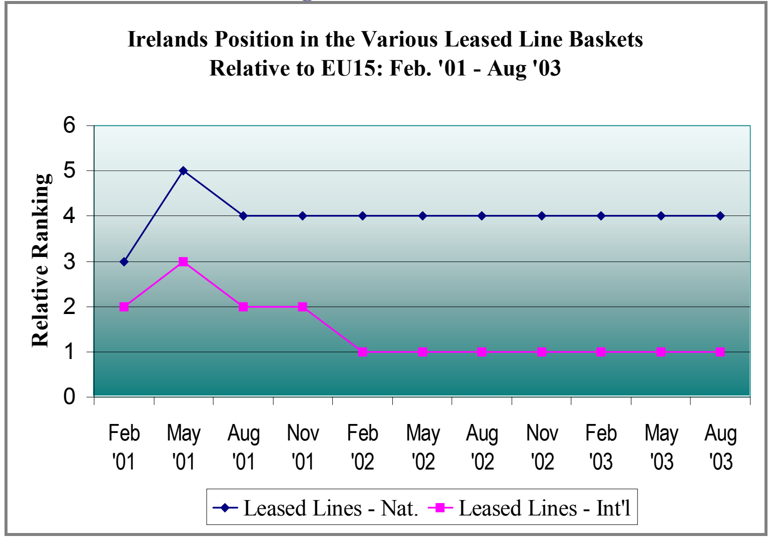
Figure 3.1.1: Ireland's Relative Position for Various PSTN baskets: Feb. '01 – Aug '03



3.1.2 Leased Line

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

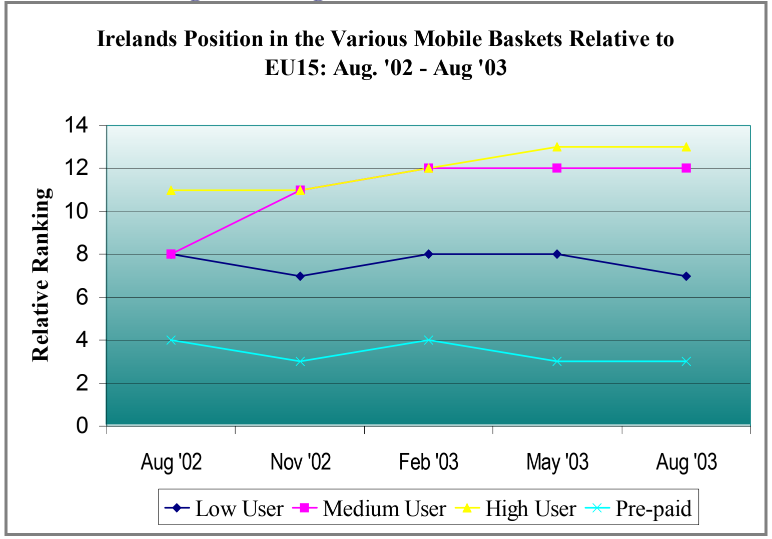
Figure 3.1.2 Irelands Relative Position in the Leased Line Baskets: Feb. '01 – Aug '03



3.1.3 Mobile

- Figure 3.1.3 shows the movement in Ireland's position relative to the EU in all mobile baskets since August 2002[27]. Ireland's relative position has remained unchanged in all mobile baskets except for the low user post paid basket where it has gone up one place to 7th.

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



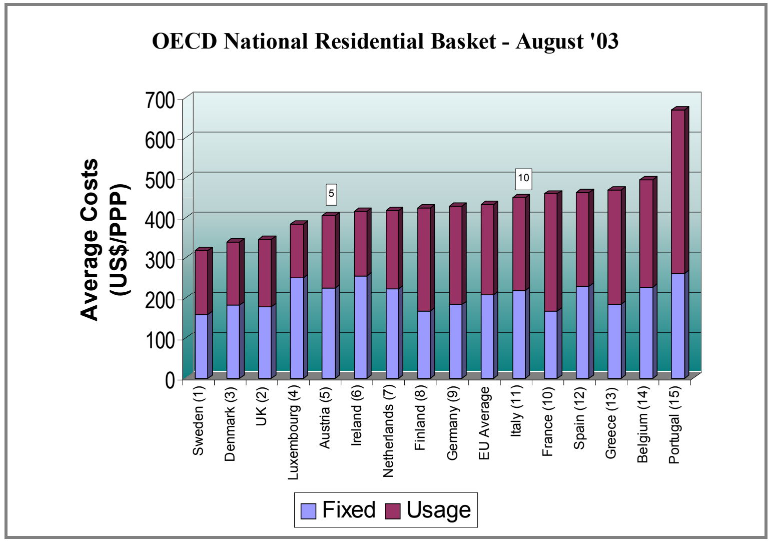
[27] This graph reflects the implementation of the revised OECD methodology agreed for mobile baskets in October 2001 and is based on the operator with the lowest available tariff in each country

3.2 PSTN Baskets

3.2.1 National Residential Basket

- Ireland position remains unchanged since last quarter, in 6th place and four positions ahead of than the EU average.

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

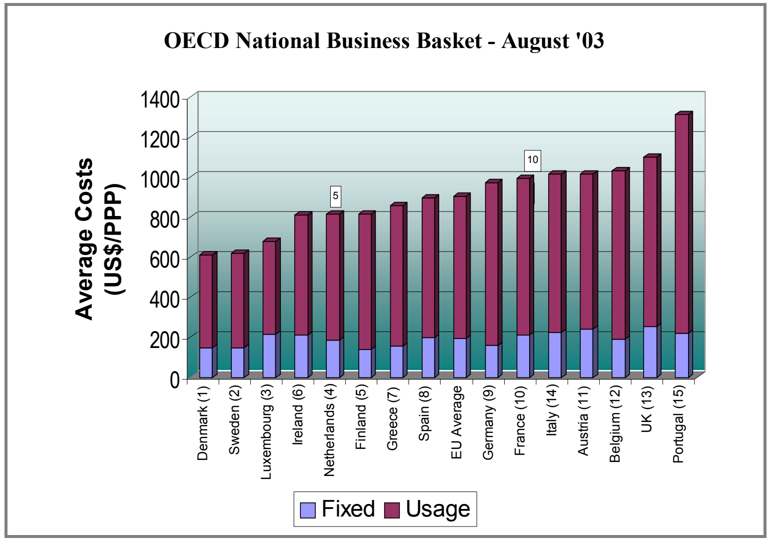


NB: The numbers in brackets represent each Member States respective rankings as at May 2003.

3.2.2 National Business Basket

- Ireland position has improved by two places from 6th to 4th and is now five positions ahead of the EU average.

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

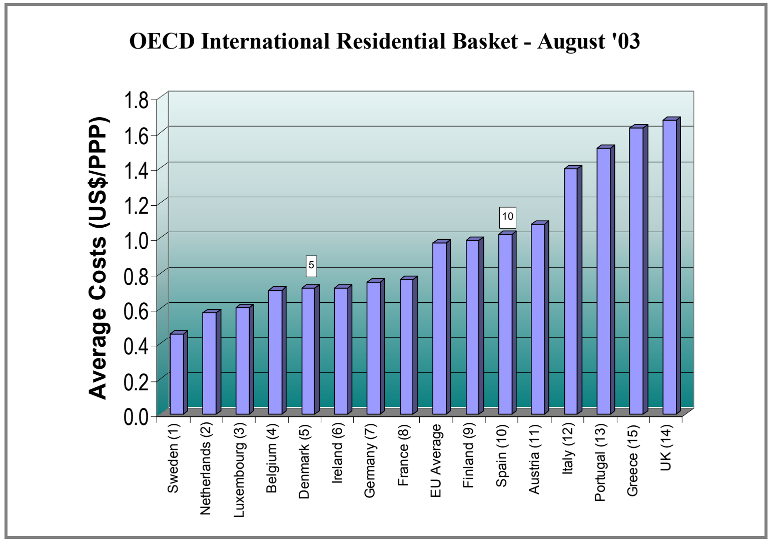


NB: The numbers in brackets represent each Member States respective rankings as at May 2003

3.2.3 International Residential Basket

- Ireland remains in 6th position since last quarter and three positions ahead of the EU average.

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

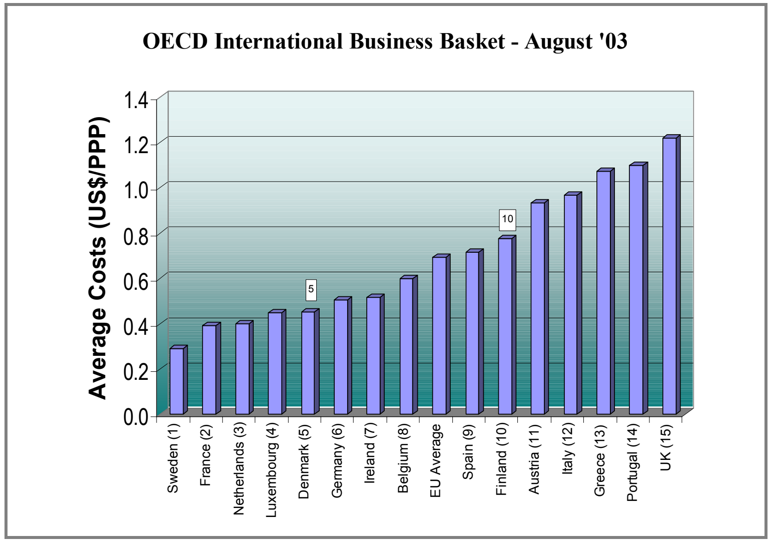


NB: The numbers in brackets represent each Member States respective rankings as at May 2003

3.2.4 International Business Basket

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

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



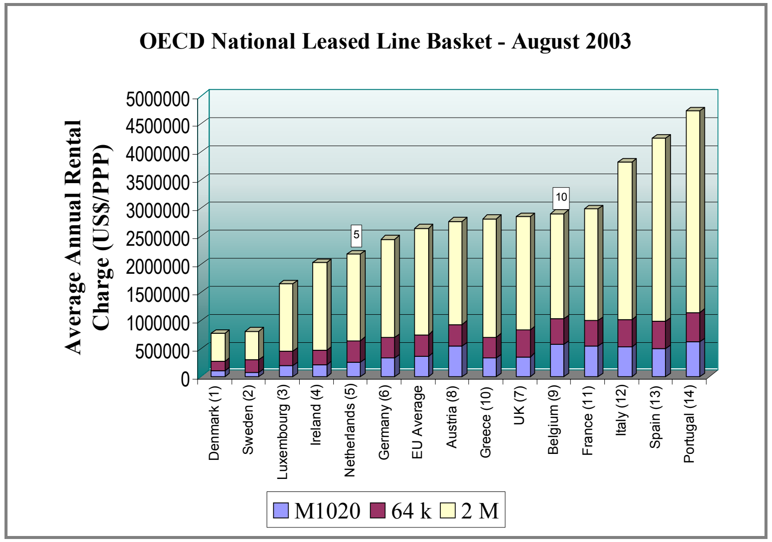
NB: The numbers in brackets represent each Member States respective rankings as at May 2003

3.3 Leased Line Baskets

3.3.1 National Leased Lines

- Ireland remains in 4th place and is three positions ahead of the EU average[28].

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

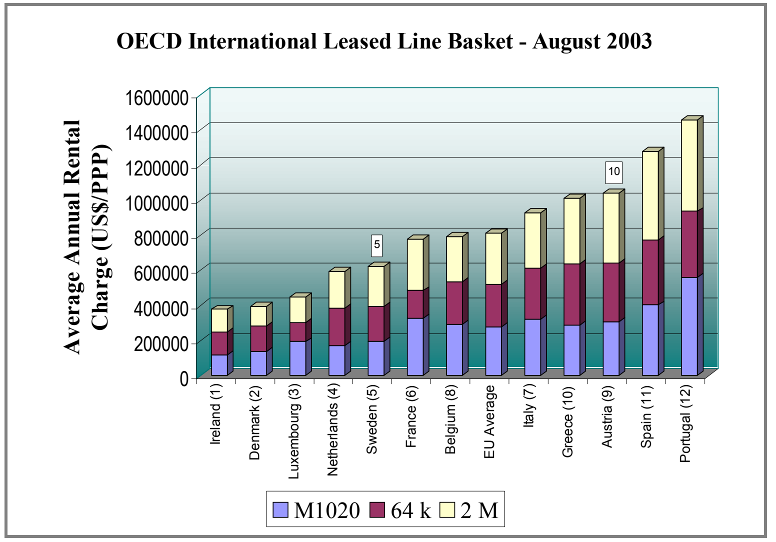


NB: Data for Finland is unavailable. The numbers in brackets represent each Member States respective rankings as at May 2003

3.3.2 International Leased Lines

- Ireland remains in 1st position[29].

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



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

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

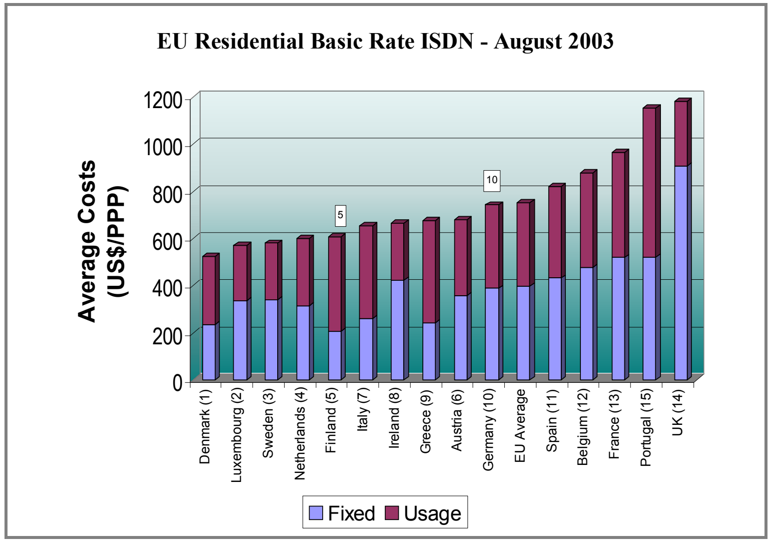
[29] The prices for these circuits are devised from the weighted average of half-circuits to all other OECD countries, using the traffic volume weighting method proposed by Teligen.

3.4 ISDN Baskets[30]

3.4.1 Residential Basic Rate ISDN Basket[31]

- Ireland has improved by one place to 7th and is now four places ahead of the EU average in the residential ISDN basket.

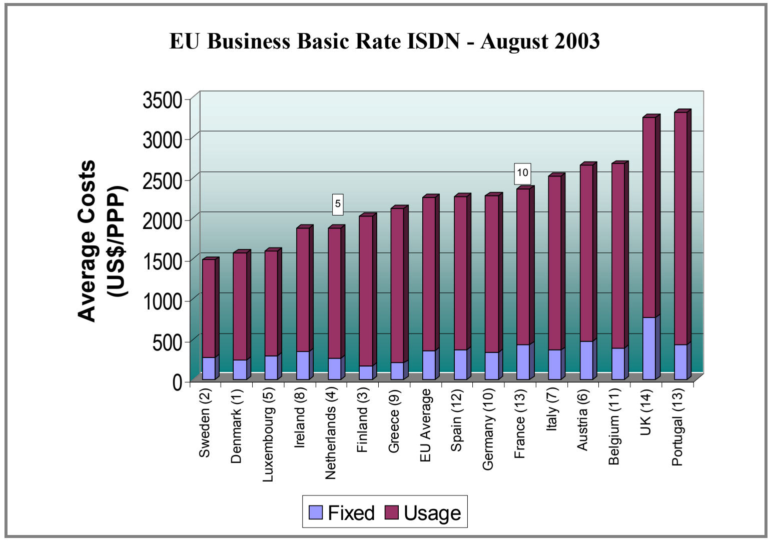
Figure 3.4.1 Residential Basic Rate ISDN Basket – August '03



3.4.2 Business Basic Rate ISDN Basket[32]

- Ireland has improved by four places to 4th and is now four places ahead of the EU average in the business basic rate ISDN basket. This increase is largely due to an improvement in methodology agreed with Teligen[33].

Figure 3.4.2 Business Basic Rate ISDN Basket – August '03



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

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

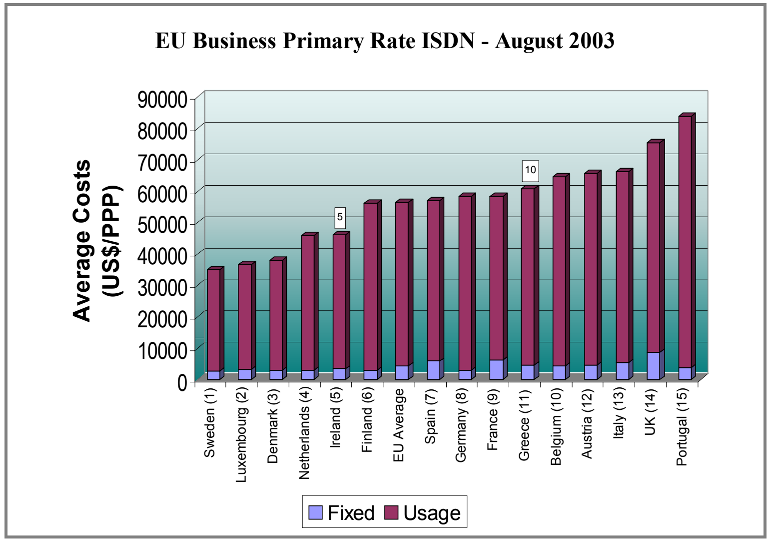
[32] Same usage profile as OECD business PSTN basket with an additional internet usage included for off-peak times.

[33] Going forward, the installation charge for basic rate access (BRA) ISDN should be replaced with the charge to upgrade a standard PSTN connection to a BRA-ISDN connection. Several operators provide this alternative, and using these figures in the comparison should give a truer indication of the cost of the service as a customer will more than likely have an existing telephony connection.

3.4.3 Business Primary Rate ISDN Basket[34]

- Ireland remains in 5th place and two places ahead of the EU average in the business primary rate ISDN basket.

Figure 3.4.3 Business Primary Rate ISDN Basket – August '03



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

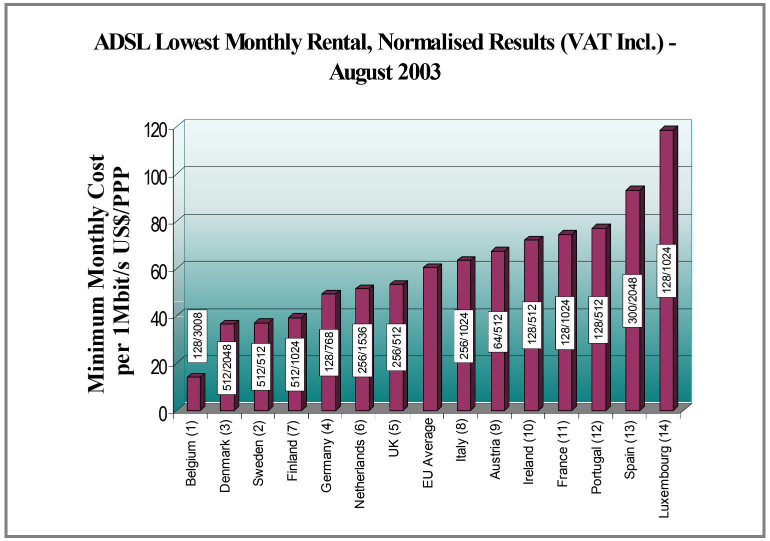
3.5 ADSL Baskets

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

3.5.1 Lowest Monthly Rental ADSL Basket (Normalised)[35]

- Ireland remains in 10th place in this basket, three places ahead of the EU average.

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



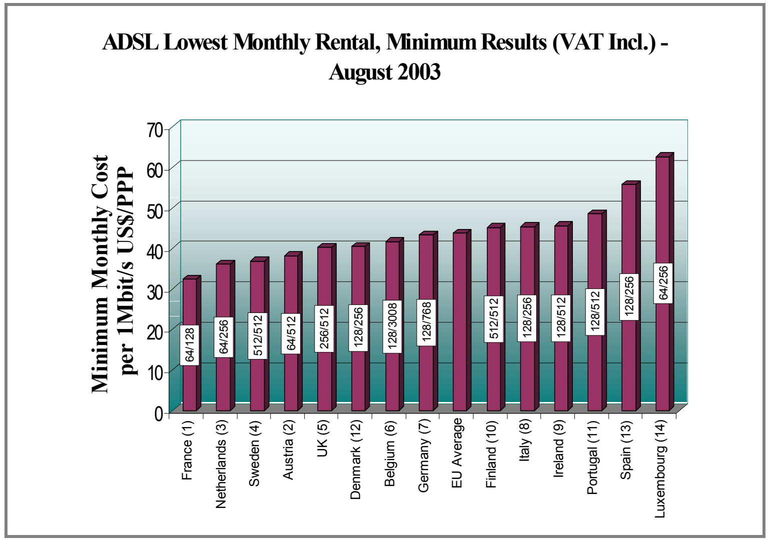
N.B. Greece has been excluded this quarter because the service has only recently been introduced

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

3.5.2 Lowest Monthly Rental ADSL Basket (Minimum)[36]

- Ireland lies in 11th position in this basket, down two places since last quarter. This drop is due in part to a new cheaper call package introduced in Denmark.

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



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

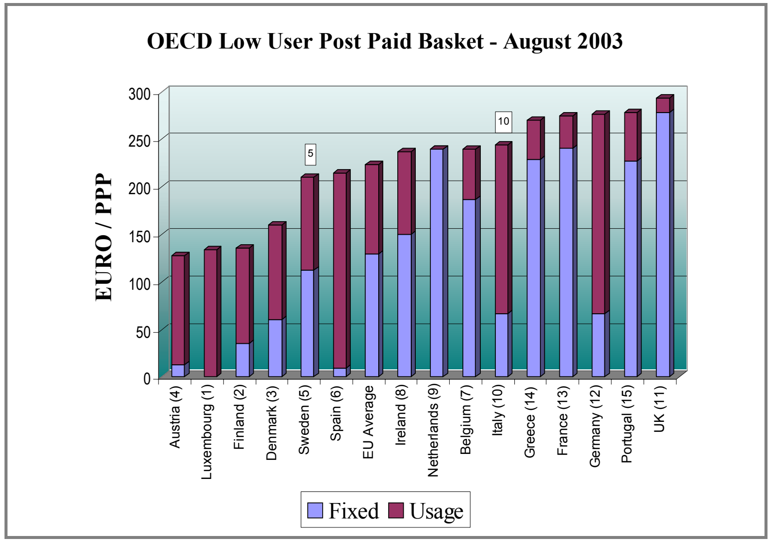
[36] The minimum results show the lowest monthly rental charge offered in each country. This method may favour countries offering lower speeds. Figures in boxes represent the upload / download speed (kb/s) of the service offered

3.6 **Mobile Baskets**

3.6.1 Low User Post Paid Mobile Basket

- Ireland has moved up one place to 7th and is now one place ahead of the EU average and eight places ahead of the UK.

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

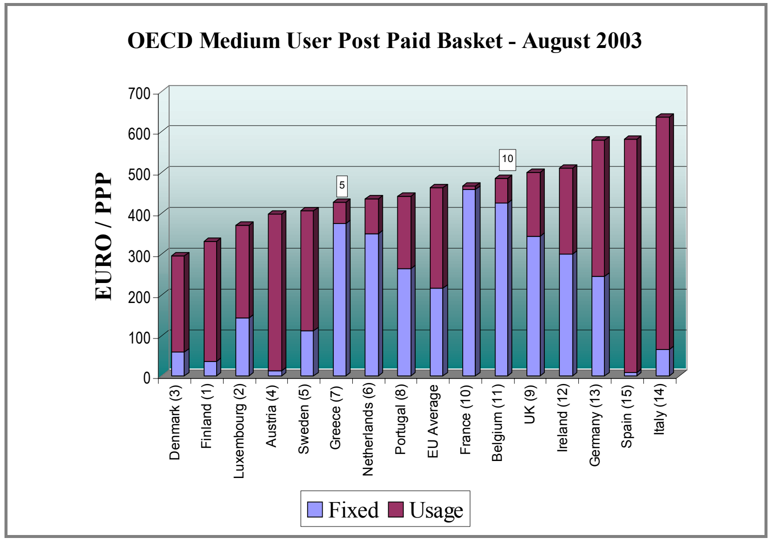


NB: The numbers in brackets represent the countries respective rankings as at May 2003

3.6.2 Medium User Post Paid Mobile Basket

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

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

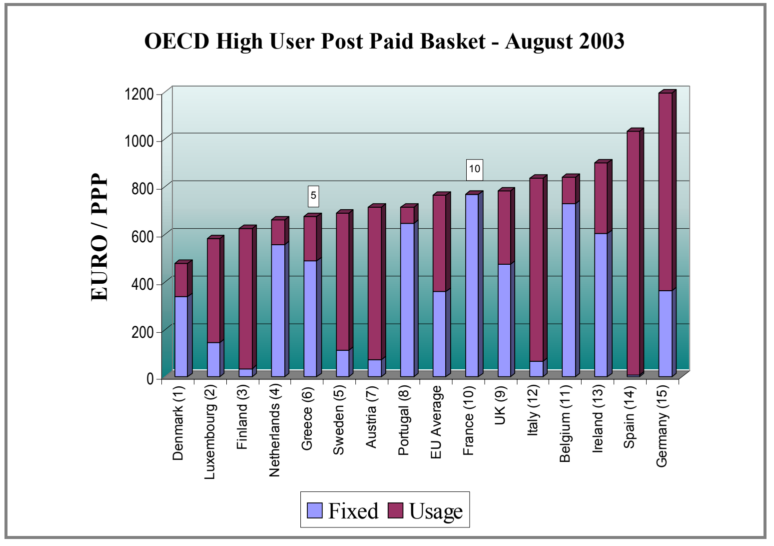


NB: The numbers in brackets represent the countries respective rankings as at May 2003

3.6.3 High User Post Paid Mobile Basket

- Ireland remains in 13th position in the high user post paid mobile basket, three places ahead of the UK and five places ahead of the EU average.

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

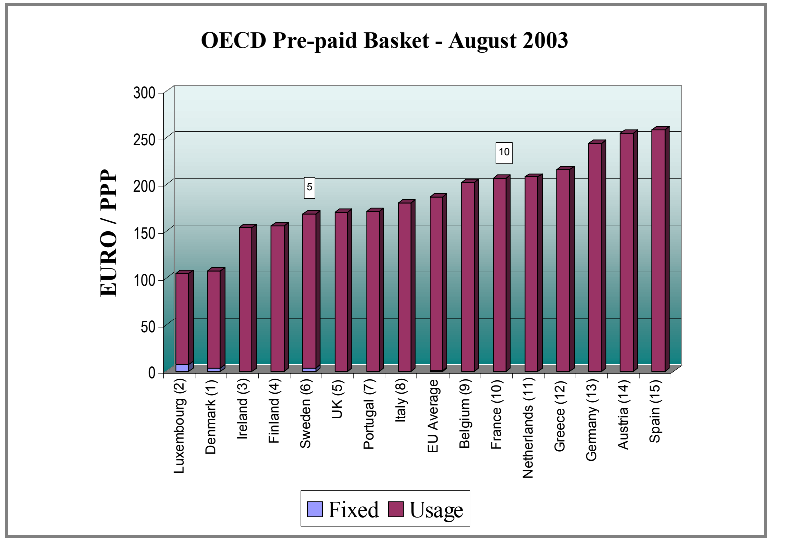


NB: The numbers in brackets represent the countries respective rankings as at May 2003

3.6.4 Pre Paid Mobile Basket[37]

- Ireland's position remains unchanged in the pre-paid mobile basket.

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



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

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

Appendix - Licensees

GENERAL LICENSEES Valid on 24 July 2003

FIXED OPERATORS[38]

Licensee	*Operational*	*Responded to QR*
Access Telecom (Ireland) Ltd.	YES	NO
Access Telecom Ltd.	YES	NO
Aurora Telecom	YES	YES
BT Global Networks Ltd.	NO	YES
Budget Telecommunications Ltd.	YES	YES
Cable & Wireless Services (Ireland) Ltd.	YES	YES
Colt Telecom Ireland Ltd.	YES	YES
Conduit Enterprises Ltd.	YES	YES
CVC Acquisition Company (Ireland) Ltd.	NO	YES
Dome Telecom Ltd.	YES	NO
eircom Ltd.	YES	YES
Energis Holding Ltd.	YES	YES
Esat Inland Ltd.	YES	YES
Esat Net Ltd.	YES	YES
Esat Telecommunications Ltd.	YES	YES
Global Crossing Ltd.	YES	NO
Infonet Broadband Services Corporation	YES	YES
LDMI Telecommunications Ireland Ltd.	NO	NO
Ocean Communications (Ireland) Ltd.	YES	YES
Opera Telecom (Ireland) Ltd.	NO	YES
Sigma Telecom Ltd.	NO	YES
SM Communications Ltd.	YES	YES
Smart Telecom Ltd.	YES	YES

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

Swiftcall Centre Ltd.	YES	YES
Talkshop Ltd.	YES	YES
TCSI Ltd.	NO	NO
Tele2 Telecommunications Services Ltd.	NO	NO
Teleglobe Ireland Ltd.	NO	NO
Transaction Network Services Ltd.	YES	YES
Vartec Telecom (UK) Ltd.	YES	YES
Viatel (I) Ltd.	NO	NO
WorldCom Telecommunications Ireland	YES	YES
Yac Ltd.	NO	YES

MOBILE OPERATORS

Licensee	***Operational***	***Responded to QR***
Meteor Mobile Communications	YES	YES
Hutchison Whampoa	NO	NO
O2 Communications Ireland Ltd.	YES	YES
Vodafone Ireland Ltd.	YES	YES

CABLE OPERATORS[39]

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

[39] Cable operators who hold a general telecommunications licence

BASIC LICENCES Valid on 24 July 2003

FIXED OPERATORS[40]

Licensee	*Operational*	*Responded to QR*
Airspeed Communications Ltd.	NO	YES
Amocom Technologies Ltd.	YES	YES
Aramiska BV	NO	NO
AT&T Global Network Services Ireland Ltd.	YES	NO
Berney Crossan & Sons Ltd.	YES	NO
Broadband Communications Ltd.	NO	YES
Broadband Partners (Ireland) Ltd.	NO	NO
Broighter Networks Ltd.	NO	YES
Callidus Telecom Europe Ltd.	NO	NO
Cargo Community Systems Ltd.	YES	YES
Cinergi Telecom Ltd.	YES	YES
Digiweb Ltd.	NO	NO
EGN BV	YES	YES
Equant Network Systems Ltd.	YES	YES
ESB Telecoms Ltd.	NO	YES
European Access Providers Ltd.	YES	NO
Flag Telecom (Ireland) Ltd.	NO	NO
Global Voice Networks Ltd.	NO	NO
Greenbeam Networks Ltd.	NO	NO
Irish Broadband Internet Services Ltd.	YES	YES
Irish Wisp Consultants Ltd.	NO	NO
Last Mile Ltd.	NO	NO
Level 3 Communications Ltd.	YES	NO
Megabeam Networks Ltd.	NO	NO
Network (i) Ltd.	NO	NO

[40] Fixed operators who hold a basic telecommunications licence

Onecall Ltd.	NO	NO
Radianz Connect Services	NO	NO
Rillbank Ltd.	YES	YES
Skynet Telecom Ltd.	NO	NO
Solutions by Netsource Ltd.	YES	YES
Sprintlink Ireland Ltd.	YES	YES
Swisscom Eurospot UK Ltd.	NO	NO
Timas Ltd.	YES	YES
Web-Sat Ltd.	NO	YES

CABLE OPERATORS[41]

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

[41] Cable operators who hold a basic telecommunications licence