Commission for
Communications Regulation

Irish Communications Market

Quarterly Market Commentary

17th June 2004

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Contents

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1 Foreword

This report updates information on the Irish Communications Sector for the period 1st January to 31st March 2004. In this report we publish the results of our SME/Corporate survey of May 2004. We also publish a survey on Internet related activity.

Mobile penetration stands at 88% with 3.5m mobile subscribers. SMS messages reached 910m during the quarter. Furthermore over 122,000 subscribers have ported their mobile number since the introduction of Mobile Number Portability in August 2003. Vodafone and O_2's market share has remained relatively stable for the past three years, with Meteor increasing its market share to 6%.

Overall revenues for the fixed, mobile and broadcasting sectors have increased 3% since the same quarter last year, while OAO (Other Authorised Operators) market share stands at 20% for the period. During the quarter Internet minutes continued to exceed those of local and national calls. The number of subscribers to digital television has reached 438,000 this period, representing 52% of all Pay TV households and 32% of all households with a television. One in four of all digital subscribers now subscribe via cable/MMDS.

ComReg commissioned the annual SME/corporate survey in May 2004, the results of which are included in section three of the report. Take-up of broadband is happening apace with 57% of all survey respondents using DSL to meet their broadband needs. Three-quarters of the sample indicated that the Irish broadband market has become more competitive in the last 12 months.

The main issue on the postal side was that ComReg published the Quality of Service Target for Single Piece Priority Mail for 2004, along with a consultation document on the nature of access that must be provided for Bulk Mail Customers.

Key regulatory developments this quarter were the publication of a number of market reviews under the new regulatory framework. These included the response to consultation and notification to the EU Commission of Wholesale voice call termination on individual mobile networks as well as the launch of a consultation on remedies for this market; the response to consultation and notification on wholesale unbundled access to metallic loops and sub loops; and consultations were launched for International Leased Lines and Wholesale Terminating and Trunk Segments of National Leased Lines and Retail Leased Lines.

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 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.

John Doherty,
Chairperson
Commission for Communications Regulation.

2 Market Overview

This section of the report provides analysis of the main trends and developments in the various sectors of the Irish communications market and is based on the information contained in the Key Data Report. For more detailed information on the sectors please refer to the Key Data Report. The data covers the quarter 1st January 2004 – 31st March 2004, except where otherwise stated.

Total revenues for fixed, mobile and broadcasting decreased 1% this quarter. This is mainly attributable to a decrease in fixed revenues. However, total revenues increased 3% since 2003. Since 25 July 2003 the general and basic licence regime has been replaced by General Authorisations under the new EU Regulatory Framework. To date 143 notifications have been received by ComReg, and an Electronic Register of Authorised Undertakings (ERAU) is available on the ComReg website.

Fixed

The OAO (Other Authorised Operator) market share remains stable at 20%. It has been in the 20-21% range for the last two years.

Internet minutes[1] slightly exceeds domestic minutes as a proportion of overall fixed retail traffic, reflecting increased internet usage by SMEs and Residential customers. Internet minutes account for 40% of all fixed retail traffic.

ISDN lines have remained the same since last quarter at 355,000. DSL take-up has increased over the last quarter by 45% (36,600 up from 25,300). FRIACO – wholesale flat rate services - were launched at the end of June 2003 and there are now approximately 63,100 FRIACO subscribers which represents an increase of 58% from 40,000 in the last quarter.

Mobile

The mobile penetration rate now stands at 88%, an increase of 1% since our last review. Meteor now accounts for 6% of this market with Vodafone and O_2 having 54% and 40% respectively. These market shares have not changed significantly over the last three years. Each mobile subscriber sent on average 88 messages each month.

Internet

The results of the Amárach residential Internet research show that 46%[2] of adults have Internet access at home[3]. PSTN remains the predominant access technology for residential users followed by ISDN. There were encouraging signs in this quarter of increased consumer usage of the Internet, almost 1 in 4 (25%, representing an increase of 6% since the previous quarter) use it daily or almost every day; while 1 in 3 use it several times a week. E-commerce has decreased by 1% this quarter, with 43% of adults with a PC having made a purchase on the Internet in the last three months. Of the 23% of home internet users that have been contacted about broadband, 18% have considered switching to broadband. The main factors encouraging users to switch to broadband are value for money (82%) and quality of service (59%).

1 Dial up / ISDN / FRIACO

2 49% was reported last quarter, this variation is within the 3% margin of error for the survey.

3 Adults ages 15 – 74 with a fixed line phone.

Cable/MMDS & Satellite

At 438,000, total digital subscribers in Ireland now represent 52% of all Pay TV households and 32% of all households with a television, up from 27% in 2003. Total cable/MMDS revenues have decreased by 2.5% since last quarter.

Tariffs

Ireland's relative position has fallen by four places in the national residential basket (due to improved tariffs in a number of countries), has improved by one position in the national business basket and has remained the same in the remaining baskets. Ireland position has improved by three places to 8th in the normalised ADSL basket and by five places to 7th in the minimum basket. The large improvement in both of the ADSL baskets is due to improved tariffs introduced by the both the incumbent and OAOs. Ireland's relative position has fallen by one place to 9th in the low user post paid basket but remains unchanged in the remaining mobile baskets.

3 SME/Corporate survey

3.1 Introduction

ComReg commissioned TNS MRBI to examine, by means of a telephone survey, the usage, attitudes and satisfaction levels of SMEs and large corporates with respect to data communications services in the Irish market. Two separate surveys were carried out in May 2004 with 53 corporate customers and 353 SMEs. The survey sample was split to allow for adaptation of the questionnaire to meet the different data needs of these two groups. All interviews were conducted with the person in the company who is responsible for management of IT/communications. This section explains in brief detail the main findings of the survey which will be published separately.
The 50 corporate respondents were drawn as a random sample from the Top 1000 companies in Ireland as published by Business and Finance magazine. The SME sample is based on the universe of companies with 1-99 employees in Ireland.

3.2 Broadband access and availability

Of the total sample, i.e. both large corporates and SMEs, 57% use DSL for broadband access while 21% use leased lines. Almost a quarter of all corporates (24%) use more than one technology to access broadband, with a greater bias towards the usage of leased lines (48%), whilst DSL is the predominant broadband access technology for SMEs.

eircom is the principal supplier of broadband technologies to both SMEs and corporates (68%)

Already having an existing relationship with a supplier is the most important factor for SMEs in choosing a broadband supplier (36%) while price is the most important factor for corporates in choosing a supplier (34%).

Two thirds of SMEs have been using broadband for up to one year, while the vast majority (94%) of large corporates have been using broadband for over one year and 62% have been using it for over three years.

A percentage of both corporates (88%) and SMEs (83%) had DSL delivered within the delivery times promised, however when asked about Service Level Agreements (SLA) from suppliers, 55% of SMEs are not aware that they can get an SLA from their supplier and only 27% have an SLA with their supplier.

3.3 Competition in the broadband sector

Just over half of all respondents have been approached by a supplier other than their existing supplier offering broadband services. This number breaks down as 48% of SMEs have been approached by an alternative broadband supplier with the equivalent figure for large corporates being 72%.

A small number of SMEs and corporates have switched supplier in the past 12 months this may be indicative, particularly in the SME market of recent purchase of broadband however 55% of those who have not switched cite the fact that they are happy with their current service level as the main reason why they have not switched.

3.4 Satisfaction with suppliers

In terms of complaints made, a higher proportion of corporates claim to have made a complaint regarding at least one aspect of the service (40-50% of corporates vs. 20-25% of SMEs). Satisfaction with suppliers' response to complaints tend however to be higher amongst corporates across all the areas surveyed (except for installation and prices where satisfaction levels are similar).

3.5 Use of broadband

Opinion is split amongst SMEs as to whether they are able or not to compare broadband services in terms of technology, whilst nearly three quarters (71%) are able to make comparisons in terms of price.

In terms of general services and facilities used on a regular basis, email and web browsing are almost universal. Other applications attracting solid usage levels are remote access (51% - 80% of corporates), secure data transfer (46%) and fast file transfer (45%).
Voice over IP is showing early signs of growth and is availed of by 9% of both segments and 22% of large corporates.

Of all respondents 44% use provide remote access for teleworkers. This is particularly prevalent in the large corporate sector (74%). The predominant mode of remote access is dial up with 41% of all respondents, the next most popular was DSL (33%).

3.6 Regionalisation

Of all respondents 20% had difficulty getting broadband, 34% of large corporates had difficulties getting broadband for their business while the corresponding figure for SMEs was 18%. Dublin was the region of most concern (34% of the overall base).

3.7 General attitudes to telecommunications

The most important telecoms requirements for both segments is reliability (55%) followed by speed of access (26%) and quality of service (17%).

Three-quarters of the sample indicated that the Irish broadband market has become more competitive in the last 12 months and 91% of SMEs consider that broadband has become more available to businesses in the same period.

When asked about competitiveness, 69% of SMEs and 62% of large corporates agree that the telecoms market is more competitive than it was 12 months ago while 45% of SMEs and 50% of large corporates agree that their broadband needs are well served. In terms of spending, 44% of SMEs agree that the overall cost of their telecoms spend has reduced in the past 12 months while only 32% of corporates agree with this statement.

4 Regulatory Developments

The following publications and developments relate to the period 17th March 2004 to 16th June 2004:

4.1 EU Framework

4.1.1 Market Analysis

As part of its series of market reviews under the new EU regulatory framework ComReg launched four consultations seeking the views of interested parties on its analysis of the markets for:

1. Wholesale National Market for International Roaming on Public Mobile Networks[4]
2. Wholesale and Retail Leased Lines (National)[5]
3. Retail Leased Lines (International)[6]
4. Remedies for Wholesale voice call termination on individual mobile networks[7]

Also published under the new EU regulatory framework was ComReg's response to consultation and notification on the market for Wholesale Access to Metallic Local Loops and Sub Loops[8] and Wholesale Voice Call Termination on individual mobile networks[9]. The former submission was subsequently accepted by the European Commission. These documents set out the relevant markets defined by ComReg appropriate to national circumstances.

Additionally ComReg has published a response to consultation on obligations imposed on the markets for Wholesale Broadcasting Transmission[10] and Wholesale Access to Metallic Local Loops and Sub Loops[11].

4.1.2 ERG consultation on accounting separation

The EU Commission in co-operation with the ERG prepared a revised draft opinion on the proposed changes to the EU Commission's recommendation on accounting separation and cost accounting. The ERG published this draft document for consultation prior to finalising its Opinion. The final version of the document may differ from the present one and will take account of the submissions received where appropriate, after which it will be submitted to the Commission as an ERG Opinion.

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4 ComReg Document No. 04/38: Market Analysis - The Wholesale National Market for International Roaming on Public Mobile Networks

5 ComReg Document No. 04/59: Market Analysis - Wholesale Terminating and Trunk Segments of Leased Lines and Retail Leased Lines (National)

6 ComReg Document No. 04/60: Market Analysis - International Leased Lines

7 ComReg Document No. 04/62b: Consultation on Remedies – Wholesale voice call termination on individual mobile networks

8 ComReg Document No. 04/40: Response to consultation and consultations on draft decision: Market analysis – wholesale unbundled access (including shared access) to metallic loops and sub-loops

9 ComReg Document No.04/62a: Response to Consultation and Notification to the European Commission – Wholesale voice call termination on individual mobile networks

10 ComReg Document No. 04/47: Significant Market Power: Wholesale Broadcasting Transmission Services - Decision Notice D6/04

11 ComReg Document No. 04/70: Decision Notice D8/04 Market Analysis Wholesale Unbundled Access. Designation of SMP and Decision on Obligations

4.2 Fixed

4.2.1 Carrier Pre-Selection (CPS)

This quarter a number of information notices were published containing details of investigations by ComReg in respect of alleged breaches by several authorised operators of their obligations under the CPS Code of Practice.[12]
The Code of Practice for CPS sets out the rules and procedures which operators wishing to offer CPS services in the Republic of Ireland must follow. It covers customer contracts, use of customer information, order-handling process, promotion of CPS, bill payment, tariff presentation, complaint and enquiry handling and the activities of the telecommunications service providers to "win back" lost customers.

4.2.2 Interconnection

This quarter a response to consultation document was published[13] setting out extracts from the responses received to a consultation document which proposed that ComReg direct *eircom* to update the Reference Interconnect Offer (RIO) in relation to interim interconnect conveyance rates for 2003/04.

A number of issues were identified in relation to which ComReg and eircom had divergent views, as a result of which ComReg published for consultation a number of draft Directions for comment by interested parties.[14]

4.2.3 Wholesale Line Rental (WLR)

During this quarter ComReg published a decision notice and direction on eircom's proposed order handling charges for Wholesale Line Rental (WLR).[15]

eircom was directed to update the Reference Interconnect Offer schedule of charges with the WLR Order Handling Charges which were submitted to ComReg in February 2004 as final rates.

An Information Notice was also published indicating that the wholesale margin for the Wholesale Line Rental (WLR) product from 1 April 2004 would be based on the retail price minus 10%.[16]

4.2.4 Local Loop Unbundling (LLU)

A consultation was published during this quarter, setting out for comment ComReg's proposals on some of the points related to the determination of the charges other operators face for use of *eircom*'s copper wire network.[17] This consultation also invited comments on some of the network design parameters that form the basis of a bottom up Long Run Incremental Cost (LRIC) model of the access network.

12 ComReg Document Nos. 04/44, 04/45, 04/46, 04/51,04/55, 04/67 and 04/68

13 ComReg Document 04/53: Response to Consultation on ComReg's review of the text of *eircom*'s Reference Interconnect Offer

14 ComReg Document 04/69: Finalisation of 2002/03 and Revision of 2003/04 Interim Interconnect Conveyance Rates

15 ComReg Document No. 04/32R: Decision Notice and Direction in relation to *eircom* handling charges for Wholesale Line Rental 03/04 onwards

16 ComReg Document No. 04/34: Wholesale Line Rental Pricing Issues, Margin

17 ComReg Document No. 04/31: Local Loop Unbundling Costing Consultation – Access Network Design Parameters and Costs of certain network access elements

4.2.5 Number Translation Code (NTC) Services

An Information Notice was published during this period, setting out the interim rates for Near End Hand Over (NEHO) of NTC calls with *eircom*. These rates will apply from the 1st May 2004 to the 30th of June 2004.[18]

An Information Notice was also published in this quarter, setting out the interim rates for NTC retention and settlement rates for certain CPS originated calls effective from 1st March 2004.[19]

4.2.6 Fixed Telephony Operators' Performance

During this period 3 further updates were published on fixed telephony operator performance for the period July to December 2003.[20]

4.3 Broadcasting

4.3.1 Digital Television

This quarter ComReg documents on technical conditions[21] for the operation of Analogue and Digital Programme Services Distribution Systems.

4.4 Radio Spectrum and Technology

4.4.1 Non-Ionising Radiation

During this period ComReg published the third of three interim reports which outlines the programme to measure Non-Ionising Radiation at 400 sites nationwide. This report covers the results of the third 100 sites measured under that programme.

4.4.2 Regional Radiocommunications Conference (RRC-'04)

During this period a report was issued on the outcome of the 2004 Regional Radiocommunications Conference held in Geneva in May 2004 at which a ComReg representative was present.

4.5 Numbering

4.5.1 Numbering Conventions V4 and New Number Applications Process – Response to Consultation

This report describes the outcome of the consultation on the National Numbering Conventions and a new number application process and details the changes that will be made as a result of the consultation.[22]

18 ComReg Document No. 0433R: Interim Rates for NTC services effective from April 1st 2004

19 ComReg Document No. 04/49: Information Notice: Application of Retention Rates in the Number Translation Code Market

20 ComReg Document No 04/61: Fixed Telephony Operator Performance July-December 2003, ComReg Document No. 04/61a Fixed Telephony Operator Performance – Detailed Business and Residential results July to December 2003 and Document No. 04/61b Fixed Telephony SMP to OAO results July to December 2003

21 ComReg Document No. 04/41 : Technical Conditions for the Operation of Analogue Programme Services Distributions Systems in Frequency Band 2500-2686 MHz and ComReg Document 04/42: Technical Conditions for the operation of Digital Television Delivery Systems between 11.7GHz and 12.5GHz

22 ComReg Document 04/37: Numbering Conventions V4 and New Number Applications Process- Response to Consultation

4.5.2 Numbering Application Procedures & Forms

This document outlines the procedure used when applying for numbering allocation, with effect from July 2003. Each of the sections within this document deals with a separate category of telephone numbering and details the procedures and eligibility requirements which apply to applications for an allocation of that type of number.[23]

4.5.3 National Numbering Conventions

The National Numbering Convention is a basic rule book which outlines how ComReg fulfils its legislated responsibilities to manage the national numbering resource effectively and efficiently. [24]

23 ComReg Document 04/36: Numbering Application Procedures and Application Forms

24 ComReg Document 04/35: National Numbering Conventions (Version 4.0) – a reference document

5 Consumer Focus

5.1 Consumer Complaints

5.1.1 Lodging your complaint/query with ComReg

If, having exhausted a Service Provider's complaint handling process, a consumer feels that their complaint has not been adequately addressed, ComReg may be able to assist. Each operator is required to have a Code of Conduct for Complaint Handling. Each operator's code may be obtained directly from the operator concerned either by telephoning the customer care line or directly from the operator's website.

ComReg can only investigate an issue if the event has occurred within the previous 9 months and if it relates to an issue where ComReg has legal powers. If so, ComReg will act as an arbitrator between the parties and request the operator to re-examine the consumer's complaint in light of any relevant regulatory obligations.

During Q1 2004 there was an overall increase of 8½% in the total number of complaints received by ComReg. However complaints increased by 34% in relation to Fixed Line Operators.

Table 5.1 below illustrates the volume of complaints received during this quarter compared to earlier periods[25].

Table 5.1 Consumer Complaints

	Q3, 2003	Q4, 2003	Q1, 2004	Change Q1 2004 v Q4 2003
Fixed Telecommunications Operators	*222*	*282*	*379*	*+34%*
Mobile Telecommunications Operators	*81*	*70**	*38*	*-45%*
Broadcasting Operators	*87*	*63**	*34*	*-46%*
Total	*390*	*415*	*451*	*+8.5%*

There has been a 34% increase in the number of Fixed Line consumer complaints received in Q1 2004 when compared with the previous quarter. The majority of complaints related to billing issues such as disputed call charges, incorrect billing (charged for services not provided or requested) and complaints regarding the non-application of promised credits or refunds to accounts.

The number of Mobile Telephony complaints has continued to decrease since the introduction of Mobile Number Portability. The majority of complaints received related to billing issues such as continuing charges for cancelled services and disputed call charges.

The number of complaints in the broadcasting area has continued to decrease since the introduction of the new regulatory framework for electronic communications in July 2003.

25 Note: Due to a compilation error in the previous report, these figures were incorrectly transposed. The above table shows the correct information.

The regulation of retail television programme distribution is outside ComReg's statutory functions. Accordingly, ComReg can no longer handle complaints directly but will pass them to the operator in question. The majority of complaints related to level of customer service experienced and included failed promised call-backs, technicians failing to call out or calling out outside appointment times and lack of correspondence.

ComReg also receives requests for information on matters concerning a wide range of Electronic Communication Network / Electronic Communication Services (ECN/ECS). The majority of queries in Q1 2004 related to broadband availability, Carrier Pre Select (CPS), *eircom*'s line rental increase and the termination of Chorus Fixed Wireless service.

Table 5.2 below illustrates the volume of queries received during this quarter compared to earlier quarters.

Table 5.2 Consumer Queries

	Q03 2003	*Q04 2003*	**Q1, 2004**	**Change Q1 2004 v Q4 2003**
Information requests	1032	1258	*1,823*	*+45%*

5.2 Consumer Guides

As part of its ongoing consumer awareness programme ComReg published a number of consumer guides during the last quarter. These guides have been prepared in response to a range of queries to ComReg by consumers.

In April ComReg published a guide on Phonecards[26]. This guide provides an overview on how phonecards work and identifies a number of factors that users should be aware of or check when purchasing cards. Also in April, ComReg published a guide on the issue of Modem Hi-jacking[27]. This guide was developed to provide internet users with tips on how they can protect themselves from programmes which change their internet settings without their knowledge or consent. ComReg has received a number of complaints regarding this issue and most complainants had incurred excessive telephone charges. The guide explains how setting may be changed by such programmes and provides advice on how to find out if a computer's settings have been changed and steps to take to address the issue.

During May, a guide to marketing calls was published[28]. This guide explains consumers' rights and how they can avoid receiving such calls, faxes or text messages.

5.3 Universal Service Obligations

In July 2003, ComReg directed *eircom* to satisfy any reasonable request to provide, at a fixed location, connections to the public telephone network and access to publicly available telephone services. *eircom* was to submit, for ComReg's approval, the criteria which it would use to assess the reasonableness of requests.

26 ComReg Consumer Guide – Prepaid Phonecards

27 ComReg Consumer Guide – Modem Hi-jacking using dialler programmes

28 ComReg Consumer Guide – Unsolicited Marketing Calls

As a result of the delay, ComReg issued a Direction[29] requiring *eircom* to submit its proposals no later than 30 June 2004. In the Direction, ComReg also set out its views concerning transparency of the order process and the need to keep users informed at all stages of the process.

5.4 Standards for Tariff Presentation

In January 2004, ComReg opened a consultation on measures which it proposed to ensure that operators provide a basic level of tariff transparency. The issue is of importance because of the emergence of new technologies, products and services leading to more sophisticated tariff packages. As a consequence, users frequently have difficulties in distinguishing between the different pricing options available and are therefore unable to exercise an informed choice in relation to the range of services provided by different operators.

In June 2004, ComReg reported on the consultation[30]. Having considered the views offered, ComReg believes that three broad principles – accuracy, comprehensiveness and accessibility – should apply when price information is being presented to consumers. These principles are contained with a Code of Practice published with the consultation report. Subject to any further amendment which may arise from a final round of consultation, the code will become binding on operators during July.

5.5 Price Information on Directory Enquiry Services

Directory Enquiry services offer a facility where the caller can be connected with the telephone number sought. ComReg research indicates that over 50% of people who avail of such a facility are not aware that the cost of doing so significantly exceeds the cost which would arise if dialled directly by the caller. While directory enquiry service providers advertise their price on their respective websites, the details are not made available to users when call completion is offered. Accordingly, ComReg has proposed specific measures to ensure that users are adequately informed of the costs. The measures are contained in a draft decision[31] which was published for public consultation on 2 June. The consultation will close on 30 June 2004 and, subject to any amendment which may arise from consideration of comments received, the decision will become binding on operators during July 2004.

29 Decision Notice on Universal Service – Future Approach towards Provision of Access Decision No D7/04, Doc No 04/48 – 27 April 2004

30 Code of Practice for Tariff Presentation, Doc No 04/57 – 2 June 2004.

31 Access to Tariff Information on Directory Enquiry Services, Doc No 04/58 – 2 June 2004

6 Postal Regulation

6.1 Regulation of Postal Services- Universal Service Obligation- Bulk

On 21 May 2004, ComReg issued a consultation paper[32] about the merits of issuing a Direction to An Post setting out the precise nature of access that must be provided for Bulk Mail Customers as current arrangements are not satisfactory. The closing date for receipt of responses to this consultation is 18 June 2004.

6.2 Quality of Service Target – Single Piece Priority Mail

On 3 February 2004, ComReg issued a consultation paper[33] which invited all interested parties, including customers and operators, to make submissions on the quality of service target. The deadline for receipt of observations was set at 26 March 2004. Unfortunately due to the disruption to An Post's postal services, submissions were received after this deadline. To ensure that all respondents had an equal opportunity to make submissions the deadline was extended to 20 April 2004[34].

On 1 June 2004, ComReg issued a response to consultation[35] in which ComReg set a Quality of Service Target of 94% for the next day delivery of single piece mail items. This rate being on a par with the European average. In accordance with Regulation 4(1)(b) of S.I. No. 616 of 2002, a formal direction was issued to An Post setting a target of 94% for D+1 and 99.5% for D+3 and requiring An Post to submit a copy of its time tabled implementation plan within 60 days showing the date at which it expects to achieve its target.

6.3 Postal Service Authorisations

From the 1 January 2004 and in accordance with Regulation 7 SI No 616 of 2002[36] a postal operator with a turnover of more than €500,000 must apply to ComReg for an authorisation. To date 15 applications have been approved and a register of such is now available on our website.

6.4 Regulated Accounts 2003

In accordance with the Accounting Direction[37] issued to An Post in September 2001, the Regulated Accounts for 2003 have been submitted to ComReg. The detailed information in the accounts is confidential to ComReg, but An Post usually publish a summary on their website: http://www.anpost.ie/corporate_homepage.asp.

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32 ComReg Document No. 04/54: Regulation of Postal Services – Universal Service Obligation – Bulk Mail Access

33 ComReg Document No. 04/08: Quality of Service Target 2004 – Single Piece Priority Mail

34 ComReg Document No. 04/39: Notification of extension to deadline for comments on ComReg 04/08 – Quality of Service Target 2004, Single Piece Priority Mail

35 ComReg Document No. 04/56: Quality of Service Target 2004 – Single Piece Priority Mail

36 SI No 616 of 2002 European Communities (Postal Services) Regulations, 2002

37 Decision Note & Report on Consultation ' Regulation of Universal Postal Services- Accounting Separation & Costing Methodology-proposed direction to An Post' D15/01 odtr01/74

7 Technology Developments

Raising awareness of new and emerging telecommunications technologies is one of the ways that ComReg can help promote innovation in the Irish telecommunications industry. This work is carried out under ComReg's Forward Looking Programme (FLP) which is advised by a panel of external experts, the 'Forward Looking Programme Steering Panel'. The FLP Steering Panel has been active since May 2003. The FLP published a Briefing Note on smart antenna technology during this quarter[38].

Smart or adaptive antenna systems utilise advanced signal processing technology to make more efficient use of radio spectrum. These antenna systems are able to steer their attention in particular directions, increasing the possibilities for an operator to reuse a given portion of spectrum to serve more customers. Smart antenna technology can be applied to both fixed and mobile wireless networks to serve more customers with higher speed services. Smart antenna technologies can be particularly useful in non-line-of-sight[39] wireless access systems where end users can install their own access devices (i.e. 'plug and play'), making this type of system more accessible. The potential advantages provided by smart antenna systems are important as operators seek to cost effectively increase broadband penetration. The briefing note includes sections on technologies, applications, regulatory implications and market development.

38 ComReg document 04/52 - http://www.comreg.ie/_fileupload/publications/ComReg0452.pdf

39 These are radio systems that can connect users without the need for a direct clear path between the user and the operator's base station. This means that more customers can be reached and that operators do not have to individually install antennas on the roof of each customer's premises.

Appendix I: Documents Issued April 04 – June 04

Fixed

Document No.	*Title*
04/70	Decision Notice D8/04 Market Analysis Wholesale Unbundled Access. Designation of SMP and Decision on Obligations
04/69	Finalisation of 2002/03 and Revision of 2003/04 Interim Interconnect Conveyance Rates
04/68	CPS Code of Practice Breach - Esat BT price comparison breach
04/67	CPS Code of Practice Breach - Ryanair Telecom website advertising breach
04/60	Market Analysis International Leased Lines
04/59	Market Analysis: Wholesale Terminating and Trunk Segments of Leased Lines and Retail Leased Lines (National)
04/55	CPS Code of Practice Breach - eircom pricing comparison breach
04/53	Response to Consultation on ComReg's review of the text of eircom's Reference Interconnect Offer
04/51	CPS Code of Practice Breach - Smart Telecom TPV breach
ERG03	European Regulators Group: Public call for input on draft ERG opinion on proposed changes to the Commission Recommendation on Accounting separation and cost accounting
04/49	Information Notice: Application of Retention Rates in the Number Translation Code Market
04/46	CPS Code Of Practice Breach, Smart Telecom Advertising Breach
04/45	CPS Code Of Practice Breach, Esat BT Advertising Breaches
04/44	CPS Code Of Practice Breach, Eircom Pricing Comparison Breach
04/40	Response to consultation and consultations on draft decision: Market analysis – wholesale unbundled access (including shared access) to metallic loops and sub-loops
04/34	Wholesale Line Rental - Pricing Issues, Margin
04/33R	Interim Rates for NTC Services effective from April 1st 2004
04/32R	Decision Notice and Direction in relation to eircom handling charges for Wholesale Line Rental 03/04 onwards
04/31	Local Loop Unbundling Costing Consultation - Access Network Design Parameters and Costs of certain access network elements

Mobile

Document No.	***Title***
04/62b	Consultation on Remedies – Wholesale voice call termination on individual mobile networks
04/62a	Response to Consultation and Notification to the European Commission – Wholesale voice call termination on individual mobile networks
04/38	Market Analysis - The Wholesale National Market for International Roaming on Public Mobile Networks

Consumer Issues

Document No.	*Title*
04/61b	Fixed Telephony Operator Performance - SMP to OAO results July to December 2003
04/61a	Fixed Telephony Operator - Detailed Business and Residential Results July to December 2003
04/61	Fixed Telephony Operator Performance -July - December 2003
CG09R	ComReg Consumer Guide - Unsolicited Marketing Calls
CG/08	COMREG CONSUMER GUIDE - Prepaid Phonecards
CG/07	COMREG CONSUMER GUIDE –Modem Hi-jacking using dialler programs
04/57	Response to Consultation on Code of Practice for Tarriff Presentation
04/48	Decision Notice on Universal Service - Future approach towards Provision of Access

Broadcasting

Document No.	*Title*
04/47	Significant Market Power: Wholesale Broadcasting Transmission Services - Decision Notice D6/04

Post

Document No.	*Title*
04/56	Quality of Service Target 2004 - Single Piece Priority Mail
04/54	Regulation of Postal Services - Universal Service Obligation- Bulk Mail Access
04/39	Notification of extension to deadline for comments on ComReg 04/08 - Quality of Service Target 2004, Single Piece Priority Mail

Radio Spectrum/Technology

Document No.	***Title***
04/66	Information Notice on Regional Radiocommunications Conference (RRC-'04)
04/65	Radio Experimenters Licence: Change of Licence Details
04/64	Radio Experimenter Licence: Mobile Repeater Operation
04/63	Experimenters Community Activities Support Call-Sign
04/52	Smart Antenna Technology - Briefing Note
04/50	Programme of Measurement of Non-Ionising Radiation emissions - Third Interim Report
04/43	Radio Experimenter Licence: Internet Linking Operation

Numbering

Document No.	***Title***
04/37	Numbering Conventions V4 and New Number Applications Process - Response to Consultation
04/36	Numbering Application Procedures and Application Forms
04/35	National Numbering Conventions (Version 4.0) - a Reference Document