



Commission for  
**Communications Regulation**

## **Irish Communications Market**

### **Quarterly Key Data Report**

**Data as of Q2 2013**

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### **Corrigendum to Q1 2013 and Q4 2012 Reports**

- Total Mobile Subscriptions for Q1 2013 has been amended from 5,432,182 to 5,454,799 following operator revision. Other statistics related to the number of subscriptions (subscriptions market shares, monthly traffic per subscriber etc.) have also been slightly amended.
- Total mobile revenues from Q1 2011 to Q4 2012 inclusive have been revised upwards following an operator revision arising from a change in the treatment of handset revenues. Total quarterly mobile revenues have been revised upwards each quarter, ranging from a minimum of €8,736.174 to a maximum of €14,280,022. These changes also affect revenue market shares which have also been revised.
- Total Fixed Subscriptions from Q4 2010 to Q1 2013 inclusive have been revised downwards due to a classification error by a mobile operator that led to the inclusion of mobile broadband subscriptions in fixed subscriptions values. The percentage split of fixed subscriptions in figure 2.2.4.1 has also been affected by this change.

#### **Legal Disclaimer**

The information and statistics contained within this document are derived from a variety of sources, but are mostly reliant on data obtained from authorised operators.

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## Summary

There was a decline in total industry revenues (although mobile industry revenues were on the rise) and a slight decrease in broadband subscriptions in Q2 2013 compared to Q1 2013. Overall industry revenues decreased by 1.8%. Total revenues in the twelve months to June 2013 at €3.70 billion were down from over €3.82 billion over the 12 months previous. Total broadband subscriptions were 1,665,231 this quarter which was a decrease of 0.2% from Q1 2013 but an increase of 0.7% compared to Q2 2012. Overall voice traffic volumes were on the rise this quarter, up by 0.9% this quarter. Presented below is a tabular summary of this quarterly report.

Irish Quarterly Communications Market Data Q2 2013				
	Q2'13	Q1'13	Quarterly Change	Annual change
Total Market Revenues	€896,073.581	€912,752,742	-1.8%	-4.6%
Fixed Line Revenues	€461,781.307	€485,546,501	-4.9%	-7.4%
Mobile Revenues	€391,727.652	€383,157,067	+2.2%	-1.2%
Broadcasting Revenues <sup>1</sup>	€42,564.622	€44,049,174	-3.4%	-3.2%
Total Voice Traffic (Minutes)	4,082,365,447	4,046,486,709	+0.9%	-4.1%
Fixed Voice Traffic (Minutes)	1,356,992,107	1,410,922,677	-3.8%	-9.2%
Mobile Voice Traffic (Minutes)	2,725,373,340	2,635,564,032	+3.4%	-1.4%
Total Internet Subscriptions	1,674,841	1,679,004	-0.2%	+0.3%
Narrowband Internet Subscriptions	9,610	10,419	-7.8%	-41.0%
Total Broadband Subscriptions	1,665,231	1,668,585	-0.2%	+0.7%
Fixed Broadband Subscriptions	1,141,192	1,126,121	+1.3%	+5.3%
Mobile Broadband Subscriptions (HSDPA)	524,039	542,464	-3.4%	-8.1%
Fixed Subscriptions <sup>2</sup>	1,945,404	1,937,406	+0.4%	-1.1%
Fixed Voice Subscriptions	1,494,011	1,475,457	+1.3%	+3.9%
Total Mobile Subscriptions (inc. HSDPA and M2M)	5,438,144	5,454,799	-0.3%	-0.9%

<sup>1</sup> ComReg only captures Cable/MMDS/IPTV revenues from a number of TV providers for Quarterly publication in the Report under broadcasting revenues. The collection and publication of licence fee and/or television (advertising, satellite TV) revenues) does not fall within ComReg's remit and therefore is not included in the broadcasting revenue figure.

<sup>2</sup> Fixed subscriptions to voice, fixed internet and TV services (both single play and bundled subscriptions).

Machine to Machine Subscriptions	340,248	NA	-	-
Mobile Subscriptions <sup>3</sup> (exc. HSDPA and M2M)	4,573,857	NA	-	-

- Overall electronic communications network and service revenues at the end of June 2013 were €896.1 million for the quarter. Industry revenues decreased by 1.8% this quarter, and declined by 4.6% compared to Q2 2012. This decline was driven primarily by decreases in broadcasting and fixed line revenues in the quarter.
- The mobile market represents approximately 73.7% of all voice and internet subscriptions (fixed and mobile), with fixed market subscriptions (voice and internet) representing the remaining 26.3%.
- At the end of the June 2013 there were 1,494,011 fixed voice subscriptions in Ireland, an increase of 1.3% since last quarter and an increase of 3.9% since Q2 2012.
- Total voice traffic minutes increased by 0.9% this quarter. Mobile minutes form the majority of voice minutes at 66.8%, with fixed minutes representing the remaining 33.2%. Mobile voice minutes increased by 3.4% this quarter while fixed voice minutes fell by 3.8% this quarter.
- This quarter, total internet subscriptions decreased by 0.2% to 1,674,841.
- Narrowband internet subscriptions continued to fall (-7.8% in this quarter), declining by 41.0% since Q2 2012. There are now a total of just 9,610 narrowband subscriptions in Ireland as consumers continue to migrate away from slower dial-up technologies, towards higher speed fixed and mobile broadband subscriptions.
- Broadband subscriptions (fixed and mobile) decreased by 0.2% this quarter, but were up by 0.7% compared to Q2 2012. Cable (+5,571) and DSL<sup>4</sup> (+10,232) subscriptions increased this quarter while satellite/fibre (-352) FWA (-380) and dedicated mobile broadband subscriptions (-18,425) fell this quarter.

<sup>3</sup> As of Q2 2013 Machine to Machine (M2M) subscriptions are excluded from mobile voice subscriptions. Therefore, changes in subscriptions are not directly comparable to previous periods. See section 4.6 for a more detailed description of M2M.

<sup>4</sup> Including VDSL lines.



- The estimated fixed broadband household penetration rate<sup>5</sup> rate was 57.8% in Q2 2013. The fixed broadband per capita penetration rate was 24.8%. The broadband per capita penetration rate (including mobile broadband) was 36.2%.
- Average fixed broadband speeds continue to increase. In Q2 2013 approximately 37.5% of all fixed broadband subscriptions were equal to or greater than 10Mbps up from 30.1% in Q2 2012. 29.9% of all fixed broadband subscriptions were equal or greater than 30Mbps up from 19.6% in Q2 2012.
- At the end of June 2013 there were 5,438,144 mobile subscriptions (including HSDPA and M2M) in Ireland, a decrease of 0.3% since last quarter. The mobile penetration rate was 118.3% including mobile broadband and Machine to Machine subscriptions and 99.5% excluding mobile broadband and Machine to Machine subscriptions.
- The number of smartphone/tablet users<sup>6</sup> increased to 2,449,999 this quarter, up by 1.2% from Q1 2013 and up by 11.2% compared to Q2 2012.
- The amount of mobile numbers ported in Q2 2013 was 104,037 down from a peak of 123,646 in Q2 2011. On average there were 104,003 numbers ported per quarter over the last 12 months.
- In Q2 2013 mobile ARPU was €27 per month, down from €29 per month in Q2 2012. Declining ARPU is likely to be a reflection of a number of factors such as those attributable to worsened economic conditions in Ireland (e.g. reduced consumer spending), lower priced mobile plans, increased sales of bundled products (combining mobile with fixed calls and sometimes broadband) and reductions in mobile roaming and termination rates, among others.

Notes to data:

- Both Meteor and emobile brands are reported under the umbrella of eircom Group Mobile.
- 48, which is a brand of Telefónica, is included under O2.
- Sky Ireland have declined to provide information on subscriptions to TV services and TV revenues. Thus, this information is not included in the report. Sky Ireland's distribution of subscriptions by type (single play, double

<sup>5</sup> This estimate excludes business subscriptions and mobile broadband subscriptions.

<sup>6</sup> Based on active 3G SIMS excluding dedicated mobile broadband SIMs.

play or triple play) is estimated using percentage distribution of Sky Ireland's subscriptions obtained from the market survey data conducted by RED C Research & Marketing Ltd. For more details on survey method, see the Appendix on page 74.

- Aggregated SB-WLR Performance Statistics, as supplied by Eircom, are published in accordance with ComReg Decision Notice (07/61) Section 6.6 (vii) in the appendix.
- As since Q2 2013, an Irish population estimate<sup>7</sup> from the Central Statistics Office (CSO) of 4,598,600 (April 2012 population numbers) is used for Q2 2013. This compares to 4,585,400 which was used in Q1 2013. As since Q2 2013, an estimated household number of 1,687,000 from the CSO is used for Q2 2013. A household number of 1,687,500 was used in Q1 2013.
- A number of external sources are used for international comparisons. These include the Central Statistics Office, Analysys Mason, and Teligen.
- In most cases data has been rounded to one decimal place in this report.
- Not all charts in this report may sum exactly to 100% due to rounding.
- While quarter on quarter comparisons are made in the report, definitive conclusions with regard to trends cannot be drawn and year on year comparisons are used to improve the reliability of the analysis.
- Further explanations and descriptions of data supplied in this report can be found in the accompanying explanatory memorandum 13/87a.
- Extracts of data used in this report can be downloaded at [www.comstat.ie](http://www.comstat.ie)
- Data previously published may have been amended since publication. Any such amendments are noted in the corrigendum on page 5.

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<sup>7</sup> Estimates based on Quarterly National Household Survey (QNHS).

## 1. Overall Market Data

Data presented in this report is based on questionnaires completed by authorised operators for the period from 1 April to 30 June 2013. The report is based on submissions from 57 active operators.

### 1.1 Number of Authorisations

**Figure 1.1.1 - Total Number of Authorisations**

Total Authorisations	June 2013
No. of fixed and wireless authorisations	367
No. of mobile telephony authorisations	10
No. of broadcasting authorisations (incl. Cable TV, MMDS, Deflectors)	63
Total Number	440

Before providing networks or services to third parties, operators are required to submit a notification to ComReg which is added to a central register of authorised operators. At the date of publication there were 440<sup>8</sup> authorised undertakings in Ireland.

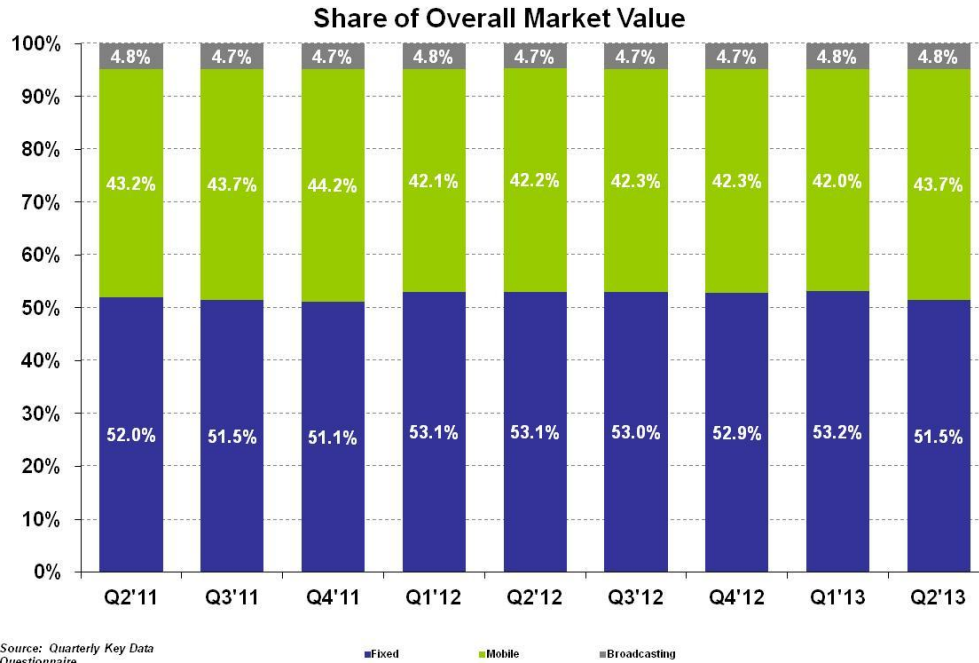
It should be noted that the list above refers to the number of general authorisations granted by ComReg under the European Framework for Authorisations, and does not necessarily reflect the total number of commercially active organisations or entities currently operating in the market. The total includes a number of undertakings who are authorised to use licence-exempt spectrum for the provision of services.

<sup>8</sup> The decrease in the number of general authorisations reflects the audit on the number of active general authorisations and the expiry of the Deflector Licensing Scheme in December 2012.

### 1.2 Overall Electronic Communications Revenues<sup>9</sup>

Figure 1.2.1 shows the proportion of industry revenue attributable to the provision of fixed line, mobile and cable broadcasting services.

**Figure 1.2.1 – Fixed, Mobile & Broadcasting as a % of Total Revenues**



According to Central Statistics Office data, Ireland’s Gross National Product for Q1 2013 was approximately €34 billion. Based on the Q1 2013 revenue data reported to ComReg by operators in the Irish communications sector, these revenues were approximately 2.7% of GNP in that quarter.

Overall electronic communications network and service revenues for Q2 2013 were €896.1 million. This was a 1.8% decrease on the previous quarter. Comparing Q2 2012 to Q2 2013, industry revenues have decreased by 4.6%. Over the twelve months to June 2013, total revenues were just below €3.7 billion.

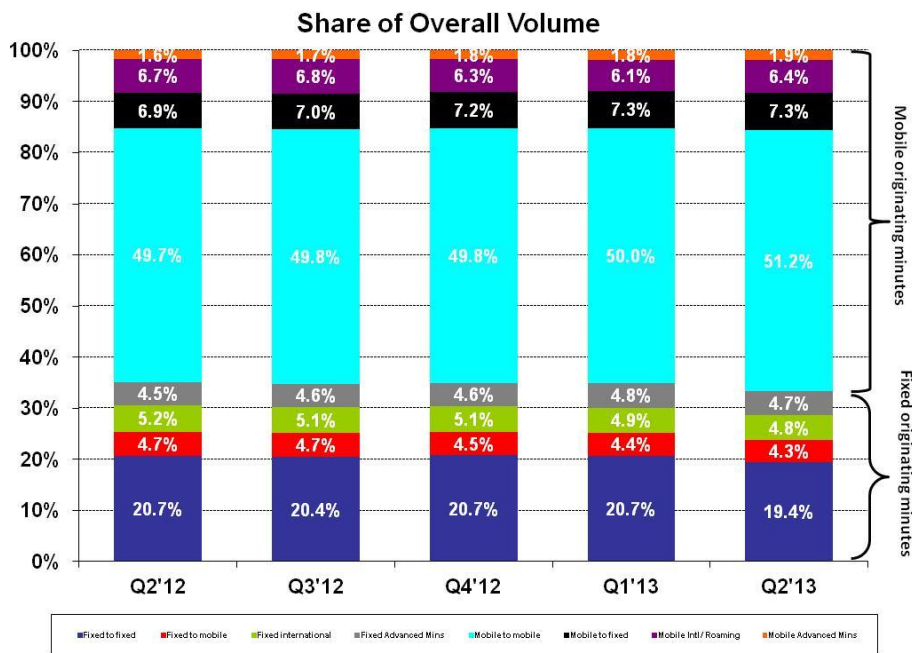
This quarter, mobile revenues increased by 2.2% but declined by 1.2% when compared to Q2 2012. Fixed revenues decreased by 4.9% this quarter and decreased by 7.4% when compared to Q2 2012. (Cable/MMDS/IPTV) broadcasting revenues decreased by 3.4% and declined by 3.2% compared to Q2 2012. The broadcasting network revenues in this report only captures Cable/MMDS/IPTV revenues and thus, exclude Sky Ireland’s satellite revenues and all content related revenues.<sup>10</sup>

<sup>9</sup> Further detail on terms and definitions - ComReg Doc. 13/87a Explanatory Memorandum.

<sup>10</sup> ComReg captures Cable/MMDS/IPTV revenues from a number of TV providers for publication in the Quarterly Report under broadcasting revenues. The collection and publication of licence fee and/or television advertising revenues does not fall within ComReg’s remit and therefore is not included in the broadcasting revenue figure.

### 1.3 Overall Call Volumes

**Figure 1.3.1 - Share of Total Voice Call Volumes (Minutes)<sup>11</sup>**



Source: Quarterly Key Data Questionnaire

Figure 1.3.1 profiles volumes of originating voice calls by call type on both fixed and mobile networks on a quarterly basis. Q2 2013 showed an increase in total voice minutes. Voice minutes for Q2 2013 totalled 4.08 billion minutes and there were 16.4 billion minutes in the twelve months to the end of June 2013. Total voice minutes increased by 0.9% from the previous quarter but have fallen by 4.1% since Q2 2012.

It should be noted that in this quarterly report the split of managed VoB minutes by category (i.e. domestic, international, mobile, other) has been placed into those respective categories of calls originating from fixed networks in figure 1.3.1.

Mobile originating voice minutes (down 1.4% on Q2 2012) accounted for 66.8% of all voice minutes in Q2 2013 (compared to 64.9% in Q2 2012) while traffic originating on a fixed line network (down 9.2% on Q2 2012) accounted for the remaining 33.2% of all voice minutes (compared to 35.1% in Q2 2012). Figure 1.3.2 shows the total voice traffic in Ireland at the end of Q2 2013.

<sup>11</sup> Fixed advanced minutes include premium rate services minutes, freephone minutes, payphone minutes, operator services minutes, national and international virtual private network minutes. Mobile advanced minutes include premium rate services minutes and other mobile minutes such as voicemail, DQ, call completion minutes etc.

**Figure 1.3.2 – Total Voice Traffic**

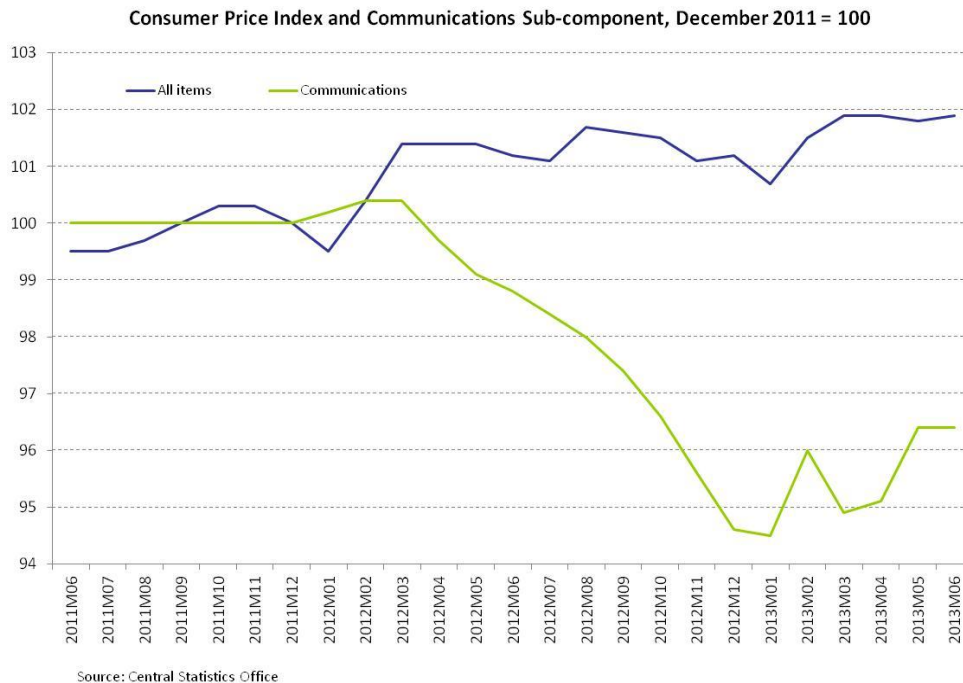
	<b>Q2'13 Mins</b>	<b>Q1'13 – Q2'13 Growth</b>	<b>Q2'12 – Q2'13 Growth</b>
<b>Fixed voice minutes</b>	<b>1,356,992,107</b>	<b>-3.8%</b>	<b>-9.2%</b>
<b>Mobile voice minutes</b>	<b>2,725,373,340</b>	<b>+3.4%</b>	<b>-1.4%</b>
<b>Total voice minutes</b>	<b>4,082,365,447</b>	<b>+0.9%</b>	<b>-4.1%</b>

**1.4 Communications and the Consumer Price Index**

Figure 1.4.1 shows the monthly change in the Consumer Price Index (CPI) and the communications sub-component from June 2011 to June 2013. The CSO has now revised its weighting for the communications basket to 3.133% of the total CPI down from 3.487% previously.<sup>12</sup>

Using December 2011 as the base period, communications prices have been fluctuating over the last 9 months with both increases and decreases observed during this period. Communication prices have declined by 3.6 base points since June 2011, compared to an increase in the overall CPI by 2.4 base points in the same period.

**Figure 1.4.1 – Consumer Price Index and Communications Sub-Component**



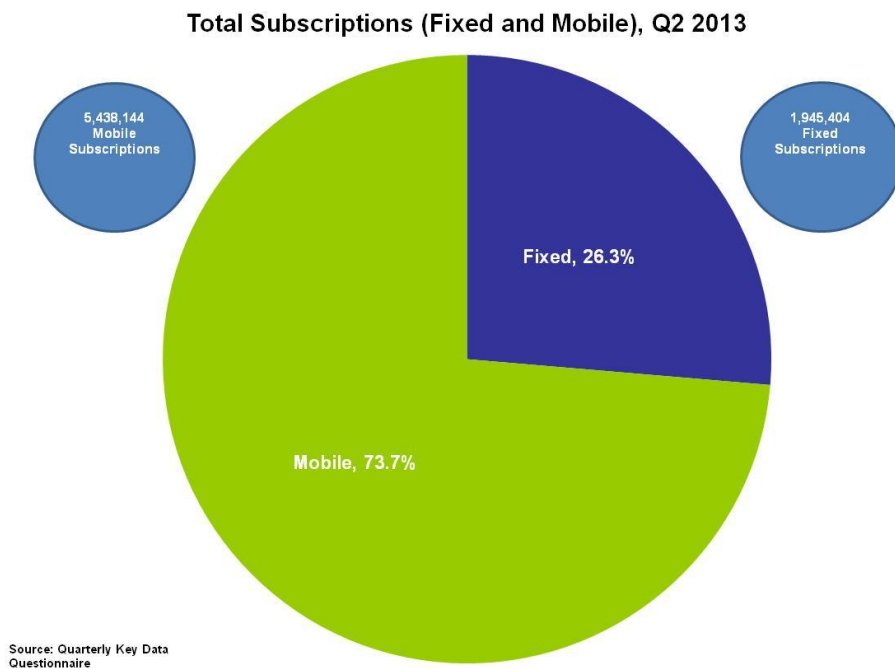
<sup>12</sup> [http://www.cso.ie/en/media/csoie/releasespublications/documents/prices/2013/prices/consumerpriceindex/cpi\\_jan\\_2013.pdf](http://www.cso.ie/en/media/csoie/releasespublications/documents/prices/2013/prices/consumerpriceindex/cpi_jan_2013.pdf)

### 1.5 Fixed and Mobile Market Retail Voice, Internet and TV Subscriptions

Figure 1.5.1 shows the total number of mobile voice and data subscriptions (also reported in section 4.1) and the estimated number of fixed subscriptions to voice, internet and TV services (both single play and bundled subscriptions) in Ireland as of Q2 2013.

Customers purchasing either a single fixed service or more than one service (as part of a bundle) are included in the fixed subscriptions category. The mobile market represents approximately 73.7% of all subscriptions with fixed line subscriptions representing the remaining 26.3%. It should be noted that it is possible that a customer may have more than one subscription, particularly where a mobile customer has more than one SIM card or in the case of a business customer with multiple subscriptions across several offices.

**Figure 1.5.1 – Total Subscriptions (Fixed and Mobile), Q2 2013**



## 2. Fixed Market Data

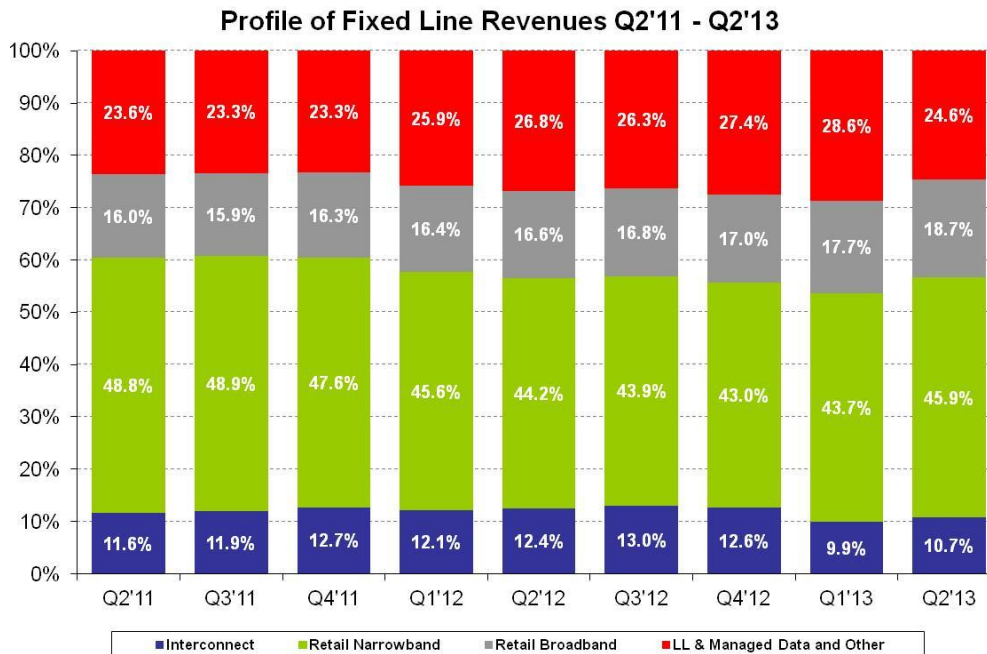
### 2.1 Total Fixed Line Revenues

Figure 2.1.1 shows the profile of fixed line wholesale and retail revenues in Ireland over the last two years. Total fixed line revenues for Q2 2013 were over €461 million. This was a decrease (-4.9%) on Q1 2013 revenues and a 7.4% decrease on Q2 2012 revenues.

Retail narrowband revenues (-3.7%), interconnect revenues (-20.0%) as well as leased lines, managed and other data services revenues (-15.0%) have fallen since Q2 2012, but retail broadband revenues have increased by 4.2%.

Comparing Q2 2012 to Q2 2013, the proportion of fixed line revenues attributable to leased lines, managed data and other advanced data services decreased by 2.2 percentage points, interconnect revenues declined by 1.7 percentage points and retail broadband revenues' market share increased by 2.1 percentage points. The proportion of retail narrowband revenues has risen by 1.7 percentage points, to 45.9% of overall fixed line revenues.

**Figure 2.1.1 – Profile of Fixed Line Revenues**



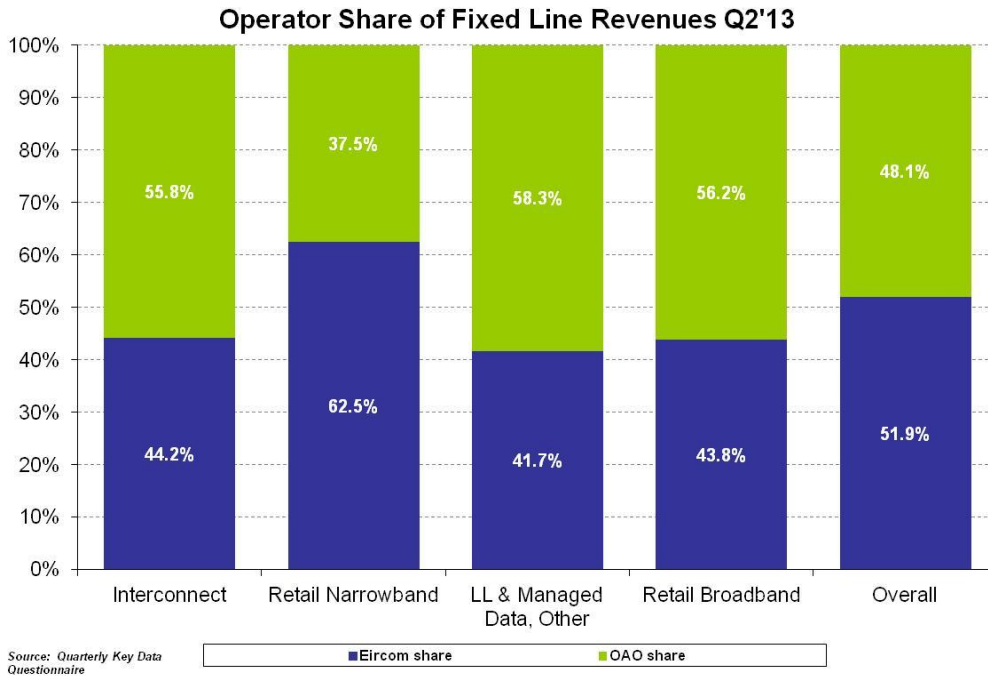
Source: Quarterly Key Data Questionnaire



### 2.1.1 Authorised Operators’ Share of Overall Fixed Line Revenues

Figure 2.1.1.1, below, shows the market shares of the incumbent and other authorised operators (OAOs) in each of the fixed line service categories mentioned in figure 2.1.1. Market shares are grouped within a number of revenue categories to link related services and are based on both retail and wholesale revenues; this classification does not reflect the specific markets identified in ComReg’s Market Analysis process.

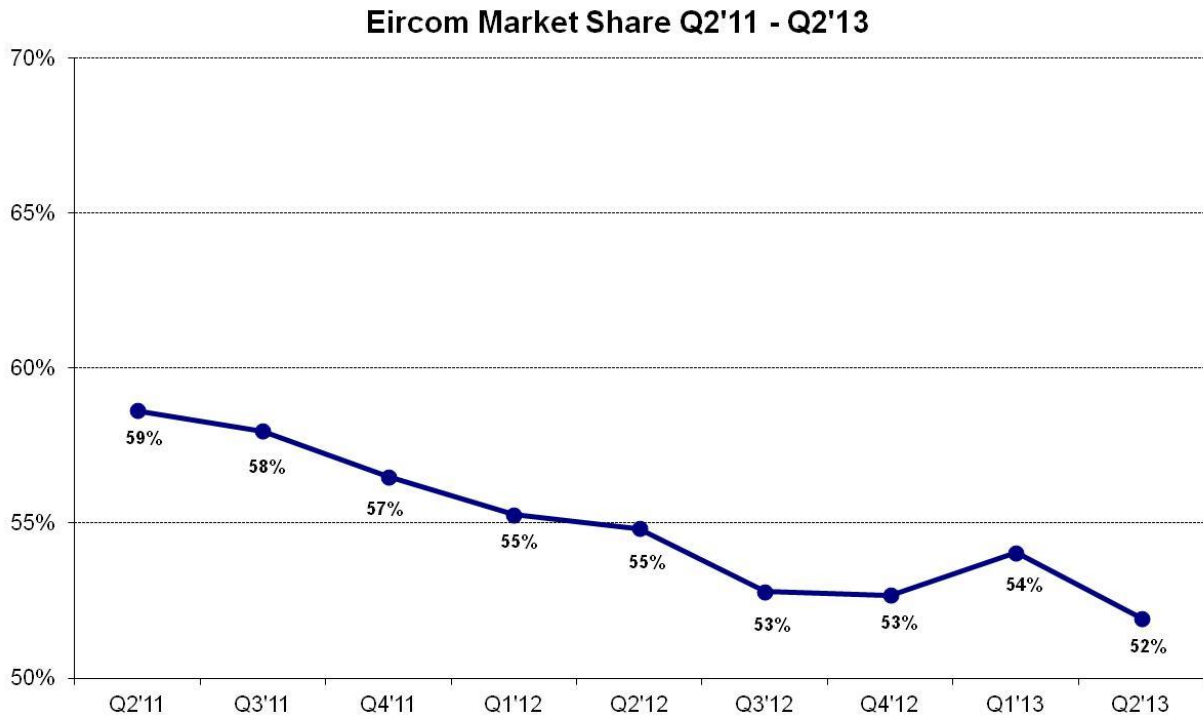
**Figure 2.1.1.1 – Operator Share of Fixed Line Revenues<sup>13</sup>**



<sup>13</sup> Eircom’s retail broadband share includes DSL, Fibre and Satellite revenues.

Figure 2.1.1.2 below shows the revenue shares of the fixed market (interconnect, retail narrowband, retail broadband and leased line, managed and other data revenues). Eircom’s overall share of fixed line market revenue was 51.9% in Q2 2013.

**Figure 2.1.1.2 – Eircom’s Share of Fixed Line Revenues**



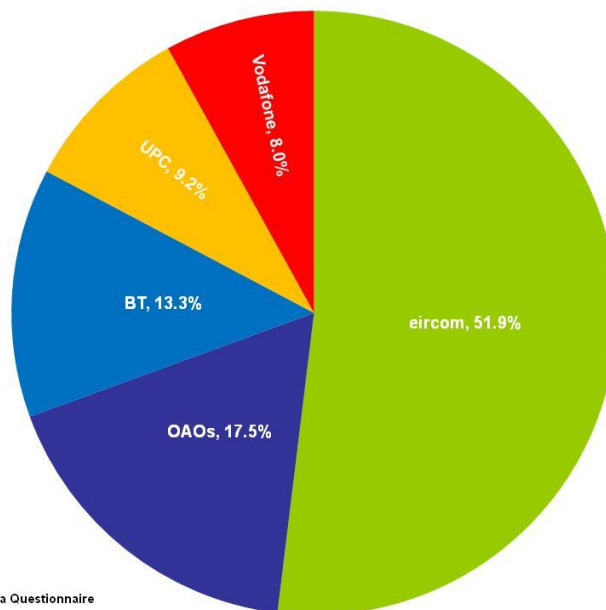
Source: Quarterly Key Data Questionnaire

Figure 2.1.1.3 below outlines the revenue shares of the fixed market (comprising interconnect, retail narrowband, retail broadband and leased line, managed and other data revenues) held by the incumbent fixed line operator (eircom), OAOs with a minimum 2% market share, and all other OAOs. When making comparisons, it is important to note that the market shares presented below are based on shares across all fixed wholesale and retail revenue streams and some operators may not offer products and services across all segments of the market.

In Q2 2013, Eircom had the highest revenue share in the market with 51.9% market share. ComReg estimates that the next three largest operators (BT, UPC and Vodafone (fixed only)) contribute a further 30.6% of industry revenue. This data includes both wholesale and retail revenues in the fixed market and, as such, should not be interpreted as a definitive statement of retail revenue market shares.

**Figure 2.1.1.3 – Fixed Revenue Market Shares**

**Fixed Revenue Market Shares, Q2 2013**



Source: Quarterly Key Data Questionnaire

## 2.2 Fixed Line Access Paths

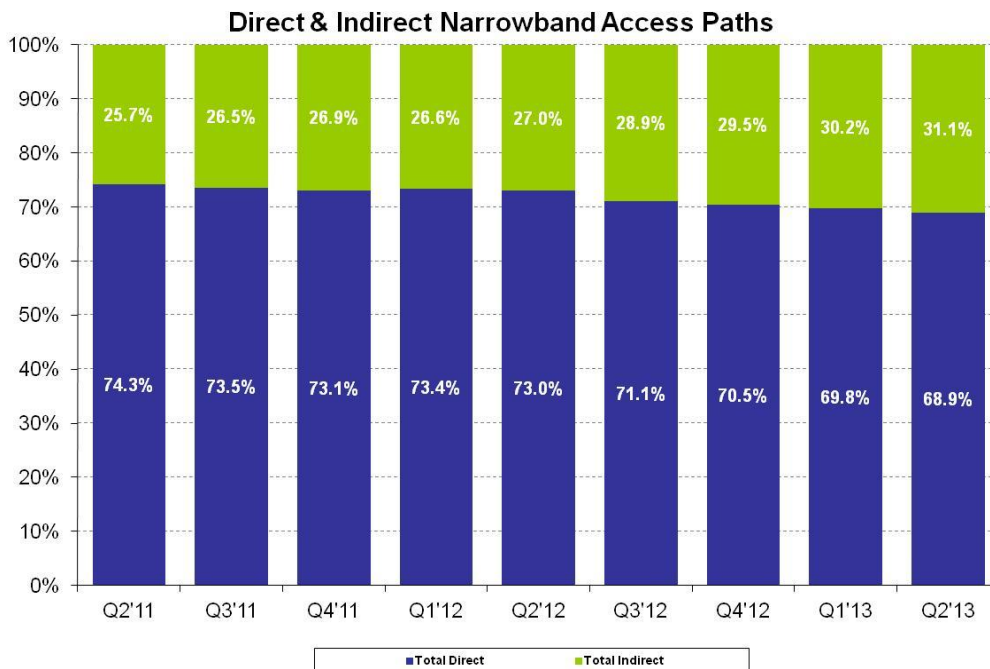
### 2.2.1 Access Paths

Figure 2.2.1.1 presents the total number of narrowband copper fixed access paths (PSTN and ISDN) broken out by direct and indirect access<sup>14</sup>. These paths are usually used for voice services and internet access. There were just below 1.64 million direct and indirect PSTN and ISDN access paths in the Irish market in Q2 2013.

This represents a decrease of 0.03% on last quarter and a decline of 8.2% since Q2 2012. The general reduction in demand for fixed lines could be due to a number of reasons such as an increase in the number of business failures and exits, competition from other platforms (such as cable) and fixed line disconnections due to emigration or cancellation of lines used for dial up internet access.

In Q2 2013, indirect access accounted for 31.1% of all access paths in the fixed line market.<sup>15</sup> While this chart shows the number of narrowband only access paths in Ireland, voice and data can also be supplied by other means such as broadband. Details on the broadband market in Ireland can be found in chapter 3 of this report.

**Figure 2.2.1.1 – Direct & Indirect Narrowband Fixed Access Paths**



Source: Quarterly Key Data Questionnaire

<sup>14</sup> Indirect access paths relate to telephone lines provided to customers by means of Carrier Pre-select (CPS), Wholesale Line Rental (WLR) or Switchless Voice (SV). CPS allows the user to receive all or a portion of calls from one provider and line rental from another provider (usually Eircom). SB-WLR (also known as Single Billing-WLR) allows the user to receive every aspect of telephone service, including all calls and line rental from one single supplier. SV also known as White Label Access-Voice Access (WLA-(Voice)) is a switchless voice service which allows an operator to purchase end-to-end call services without the need to have its own interconnection infrastructure.

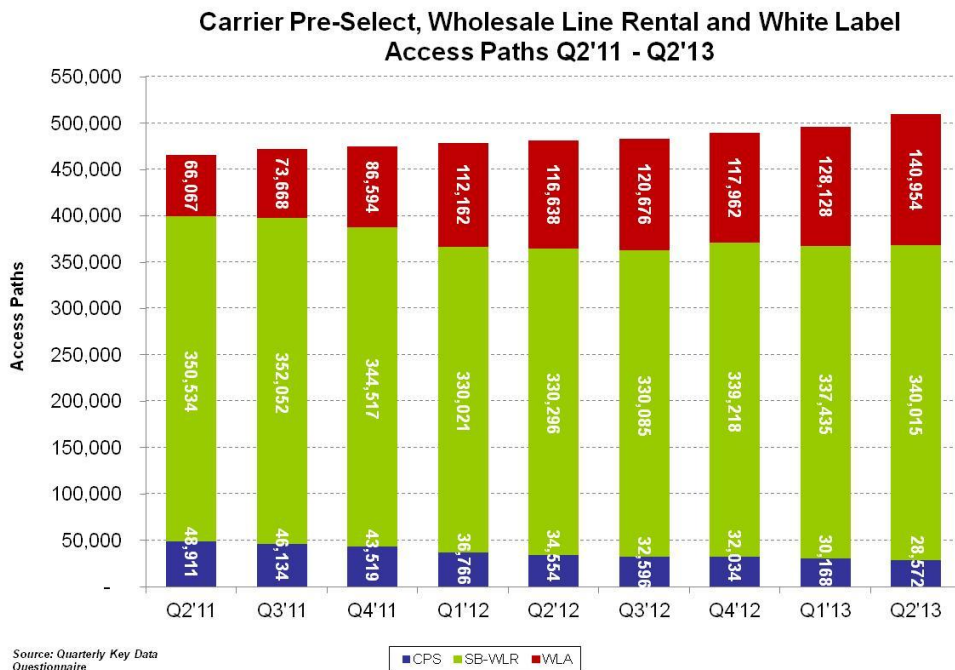
<sup>15</sup> Access paths are not synonymous with access lines as for example in the case of ISDN paths, there may be more than 1 path provided via a single ISDN line.

### 2.2.2 Indirect Access Paths

Figure 2.2.2.1 illustrates the overall number of indirect PSTN and ISDN paths provided by means of either Carrier Pre-Selection (CPS) only, Single Billing Wholesale Line Rental (SB-WLR) and White Label Voice Access (WLA). In Q2 2013, there were 509,541 indirect access paths in Ireland. The number of indirect access paths increased by 2.8% this quarter and rose by 5.8% in the year to Q2 2013 due to an increase in SB-WLR and WLA paths, as CPS access paths continue to decline.

The data indicates that OAOs continue to migrate their customer base to single-bill services, i.e. SB-WLR rather than CPS (i.e. calls only) while the number of White Label Access paths is also growing. SB-WLR managed by OAOs now accounts for 66.7% of indirect access paths compared to 75.3% in Q2 2011. WLA paths account for 27.7% of total indirect access paths compared to 14.2% in Q2 2011. The share of CPS only indirect access paths has declined by 4.9 percentage points in the last two years and now accounts for 5.6% of overall indirect access paths.

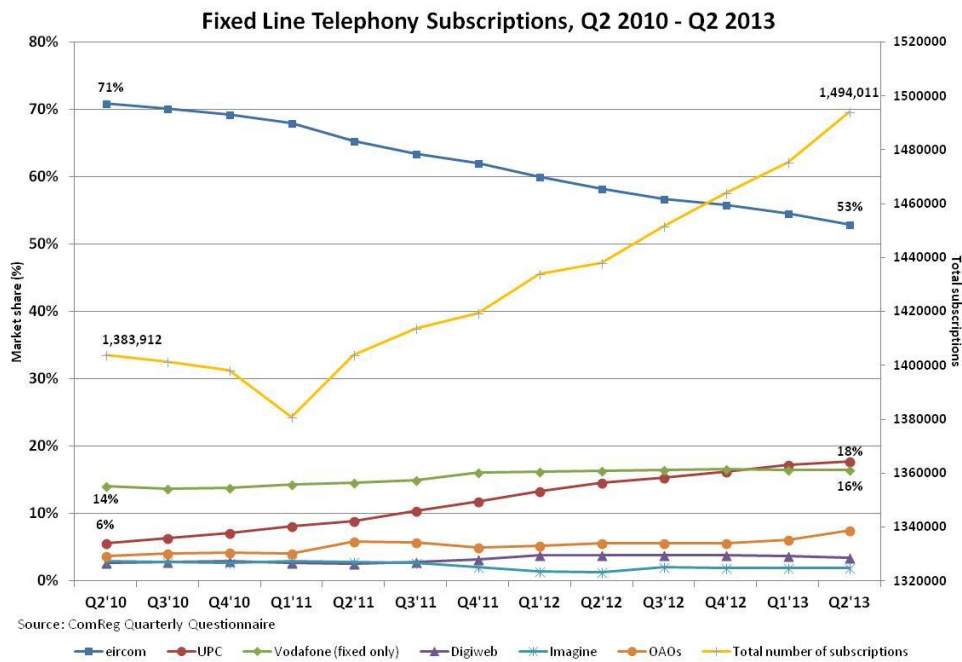
**Figure 2.2.2.1 – Narrowband Indirect Access Paths**



### 2.2.3 Fixed Voice Subscriptions

Figure 2.2.3 shows the estimated number of retail customers/subscriptions to fixed voice services (either standalone or as part of a bundle) and operators’ market shares based on these subscriptions. At the end of Q2 2013 there was 1,494,011 fixed voice subscriptions (an increase of 1.3% on Q1 2013 and an increase of 3.9% on Q2 2012). Fixed voice subscriptions are increasing quarter on quarter since Q1 2011. As of Q2 2013 Eircom had 53% of all fixed voice subscriptions followed by UPC (18%) and Vodafone (16%).

**Figure 2.2.3.1 – Fixed Voice subscriptions, Q2 2010 – Q2 2013**



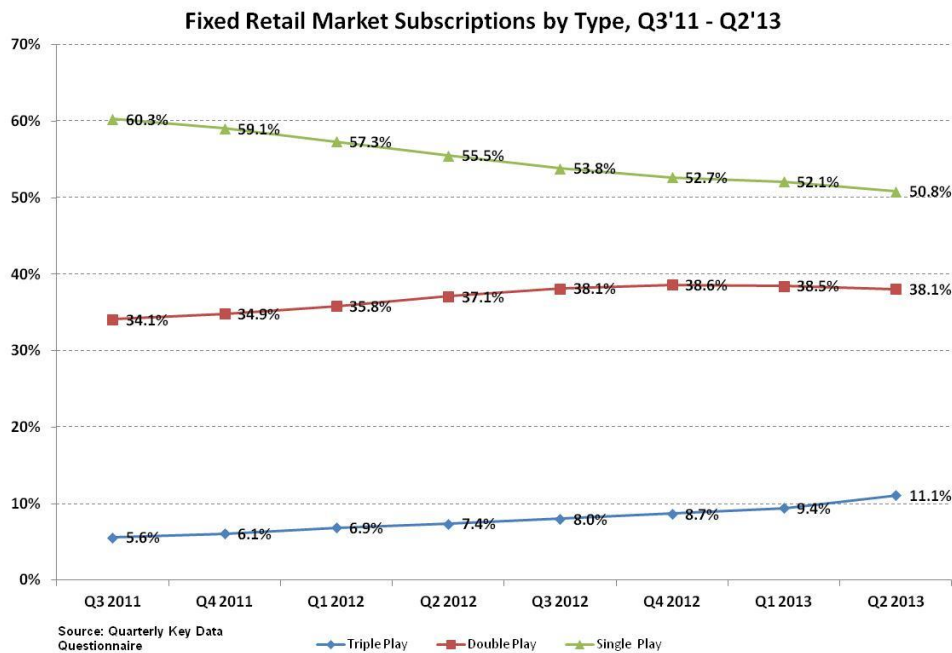
### 2.2.4 Fixed Market Retail Subscriptions by Type

Figures 2.2.4 shows the estimated proportion of retail customers/subscriptions to fixed line services (mobile networks are excluded) broken out by those with a single service and those taking a bundle of two or more services as of Q2 2013 (subscriptions mean a customer with at least one contract with an electronic communications service provider).<sup>16</sup> Single play subscriptions include fixed line services only which means that standalone mobile voice, standalone mobile broadband and standalone satellite TV subscriptions are excluded from this figure.

<sup>16</sup> Double play subscriptions can refer to either fixed telephony and internet or television or mobile telephony; television and the internet; mobile telephony and internet or television subscriptions. Triple play subscriptions can refer to fixed telephony and internet and television; fixed telephony and mobile telephony and internet; fixed telephony and mobile telephony and television; or, mobile telephony and internet and television subscriptions.

It is estimated that there were 1,945,404 fixed market retail subscriptions in Q2 2013 across both business and residential customers (a business customer may have multiple subscriptions). There was a continued decline in the share of single play subscriptions and a decline in double play subscriptions as triple play’s share of subscriptions continued to increase. 50.8% of these subscriptions were single play compared to 55.5% in Q2 2012, 38.1% double play (a bundle of two services) compared to 37.1% in Q2 2012 and 11.1% triple play (a bundle of 3 services) compared to 7.4% in Q2 2012.

**Figure 2.2.4.1 – Fixed Market Retail Subscriptions by Type, Q3 2011 – Q2 2013<sup>17</sup>**



### 2.3 Fixed Voice Call Volumes

Fixed voice traffic in Q2 2013 was over 1.35 billion minutes, which was a 3.8% decrease on Q1 2013 and a fall of 9.2% since Q2 2012. Fixed voice traffic has fallen consecutively quarter on quarter since Q1 2011.

Managed voice over broadband (VoB) minutes account for approximately 11.4% of total fixed voice minutes up from 10.3% in Q2 2012. This reflects a continued increase in managed VoB subscriptions. There were more than 311,000 managed VoB subscriptions in Ireland in Q2 2013 and over 154 million managed VoB minutes, up from approximately 255,000 managed VoB subscriptions and 153 million managed VoB minutes in Q2 2012.

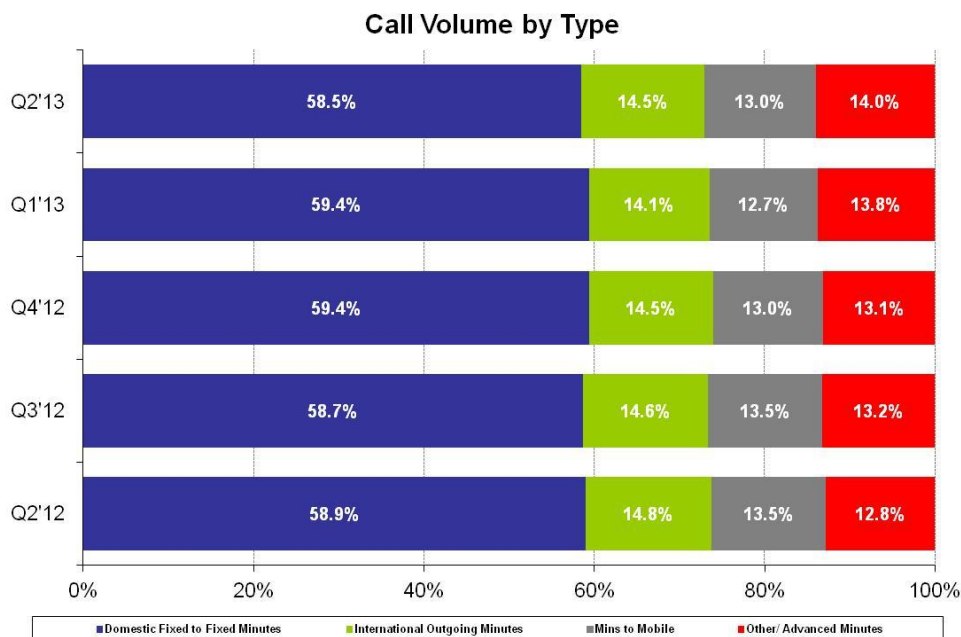
<sup>17</sup>Sky Ireland have declined to provide information on TV subscriptions. Sky Ireland’s distribution of subscriptions by type (single play, double play or triple play) is estimated using percentage distribution of Sky Ireland’s subscriptions obtained from the market survey data conducted by RED C Research & Marketing Ltd. For more details on survey method, see the Appendix on page 74.

The numbers quoted in this report represent managed VoB data only (for example by Eircom, UPC and other providers such as Blueface) and do not include unmanaged or over the top VoB services by providers such as Skype.

It should be noted that in this quarterly report the split of managed VoB minutes by category (i.e. domestic, international, mobile, other) has been placed into those respective fixed minutes categories in figures 2.3.1, 2.3.2 and 2.3.3.

Figure 2.3.1 shows that domestic fixed to fixed minutes accounted for 58.5% of all fixed voice traffic in Q2 2013. International outgoing minutes had a 14.5% market share of all fixed voice traffic. The market share of fixed to mobile minutes was 13.0% while other/advanced minutes (which include premium rate minutes) represented 14.0% of all fixed voice traffic.

**Figure 2.3.1 – Fixed Voice Call Volume (Minutes)<sup>18</sup>**



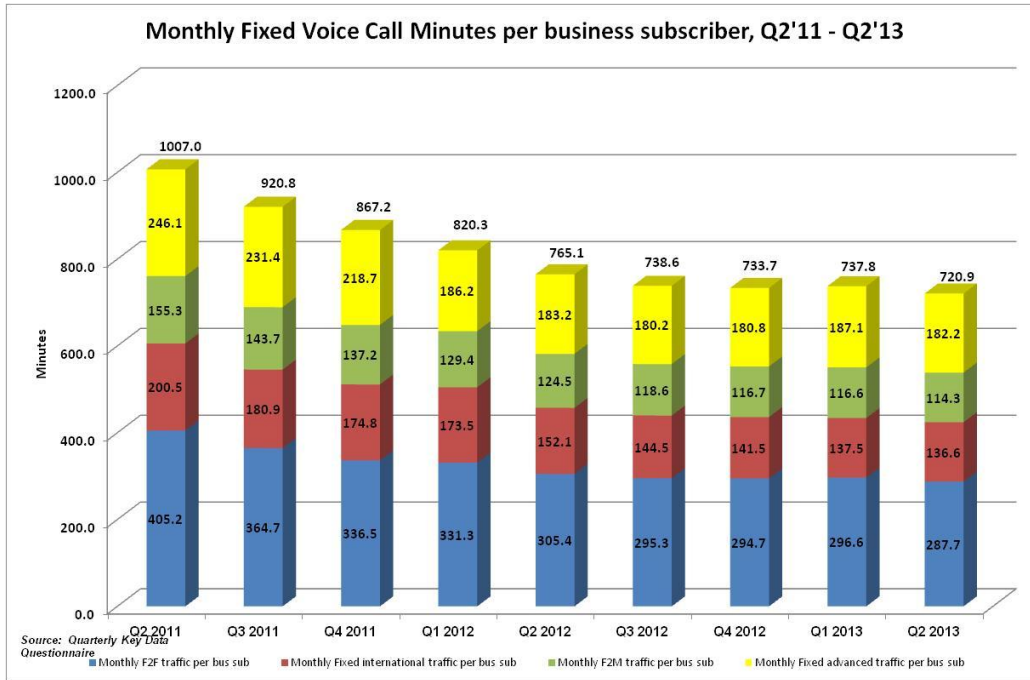
Source: Quarterly Key Data Questionnaire

Figures 2.3.2 and 2.3.3 show the change in the average monthly mobile voice call minutes per business and residential subscribers respectively. In Q2 2013 the average business subscriber originated 720 minutes of voice calls, down 2.3% on Q1 2013 and down 5.8% on Q2 2012. The average residential subscriber usage was slightly above 200 minutes per month, down 7.0% on Q1 2013 and down 15.7% on Q2 2012.

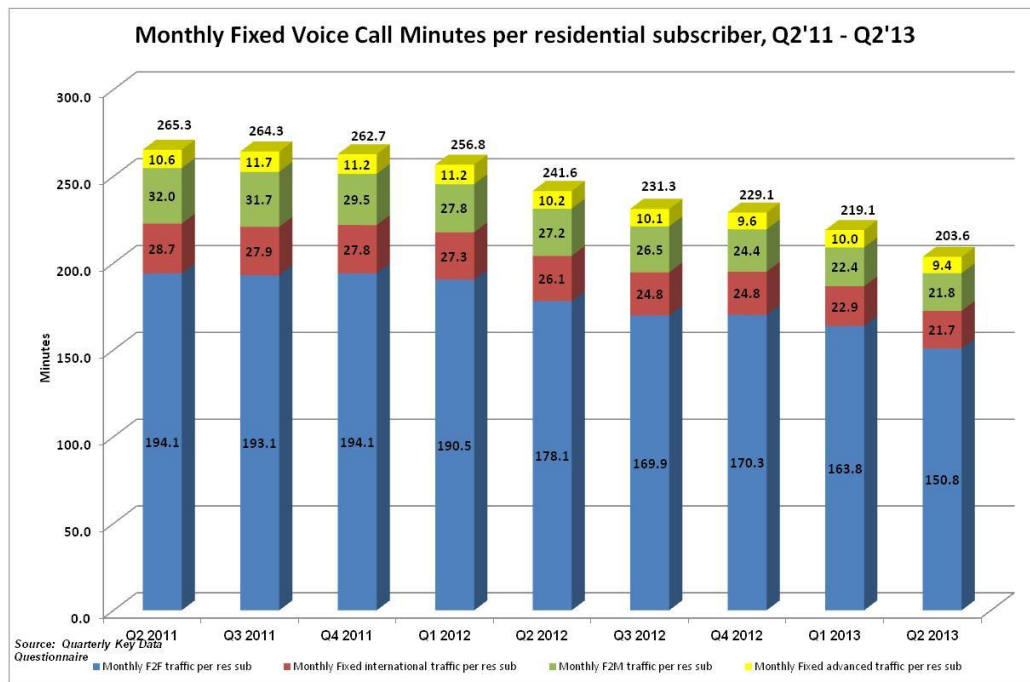
<sup>18</sup> Domestic Calls include local & national calls. Advanced service and other minutes include minutes to premium rate numbers, freephone numbers, callsave, operator services, VPN minutes, payphones and other services.



**Figure 2.3.2 – Fixed Voice Call Volume per business subscriber (Minutes)**



**Figure 2.3.3 – Fixed Voice Call Volume per residential subscriber (Minutes)**

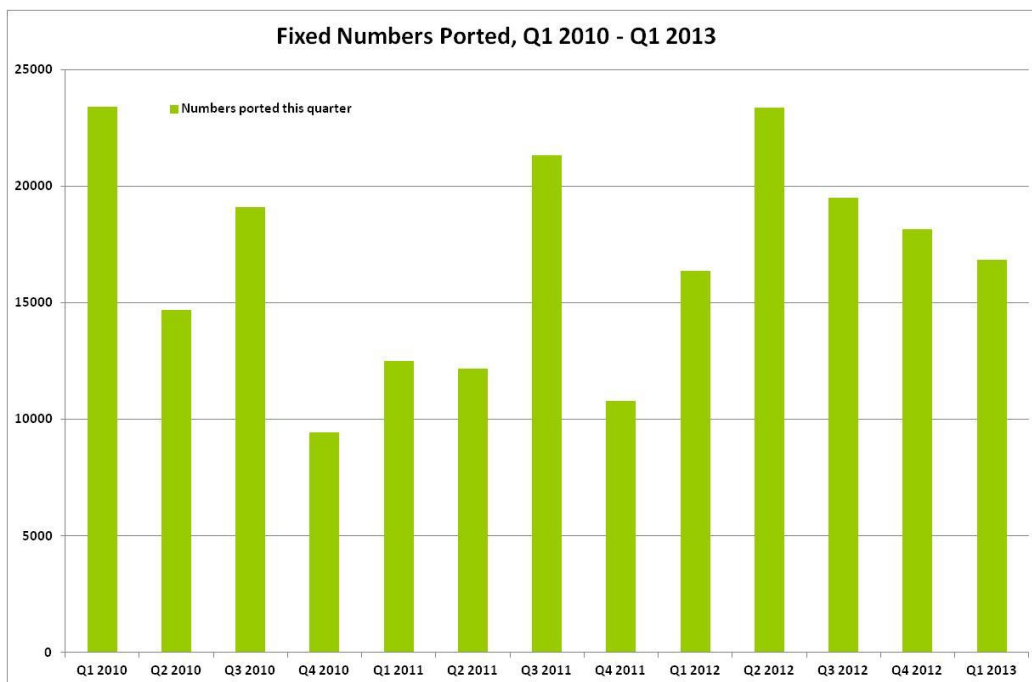


## 2.4 Switching in the Fixed Voice Market

Figure 2.4.1 illustrates the number of fixed numbers (geographic and non geographic) ported between Irish fixed voice service providers since Q1 2010. FNP allows consumers to switch fixed voice provider while retaining their fixed number.

In the quarter to March 2013, 16,855 numbers<sup>19</sup> were ported between operators (77,874 numbers in the twelve months to March 2013). Over the last 12 months, an average of 19,469 numbers has been ported each quarter.

**Figure 2.4.1 – Fixed Numbers Ported**



## 2.5 PSTN Pricing Data

ComReg uses independently-collated Teligen data based on an OECD-approved methodology to examine the relative costs of a number of specific baskets of national and international telecoms services for both residential and business users. The data presented includes EU countries for which data is available<sup>20</sup>.

Using this methodology, data is presented in Euro Purchasing Power Parities (PPPs). The latter provides an indication of the cost of telecoms services in countries analysed in relation to the cost of all other products and services. The basket methodologies are reviewed and revised periodically, the latest of which was in early 2010.

<sup>19</sup> Non geographic ports constitutes approximately 1% of total ports in a quarter.

<sup>20</sup> This will be determined by whether the EU country is also an OECD member.

The methodology used by the OECD/Teligen is based on the following baskets of calls:

### Residential and business PSTN baskets

Type of basket	Basket
Residential	20 calls basket
Residential	60 calls basket
Residential	140 calls basket
Residential	420 calls basket
Business	100 calls business basket, single user
Business	260 calls business basket, single user

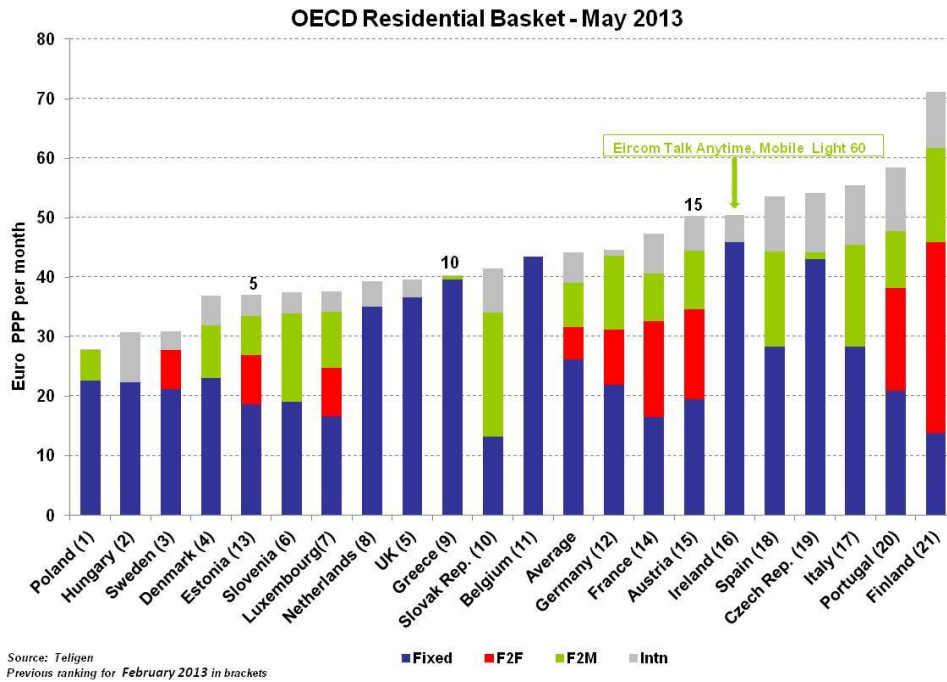
For the PSTN baskets, only the incumbent operator is covered. Discounts are incorporated and only tariffs presented as current tariffs on the operator web pages are considered. Nonrecurring charges (installation of a service) are discounted over 5 years and other fixed costs are included such as line rental and any other additional charges. Fixed, mobile and international calls are included in the baskets. For more detailed information please see ComReg's accompanying Memorandum, document 13/87a.

#### 2.5.1 OECD Residential PSTN Basket

Figure 2.5.1.1 illustrates Ireland's ranking, alongside another 20 EU countries, for residential calls, based on a basket of 140 calls per month. This chart is based on a comparison of the cheapest incumbent package available for a specific customer usage profile. In many cases this will include both line rental and call minutes for a fixed monthly charge.

It should therefore be noted that the "fixed" element in this basket is not an indication of the cost of basic line rental. In May 2013 Ireland ranked in 16<sup>th</sup> position, four places higher than the average of the benchmarked countries in terms of the most competitive pricing for this basket. The Irish package used for this comparison was Eircom's Talk Anytime Mobile Light 60, which was 14.0% more expensive than the average of the European countries charted.

**Figure 2.5.1 - OECD Residential PSTN Basket – May 2013<sup>21</sup>**



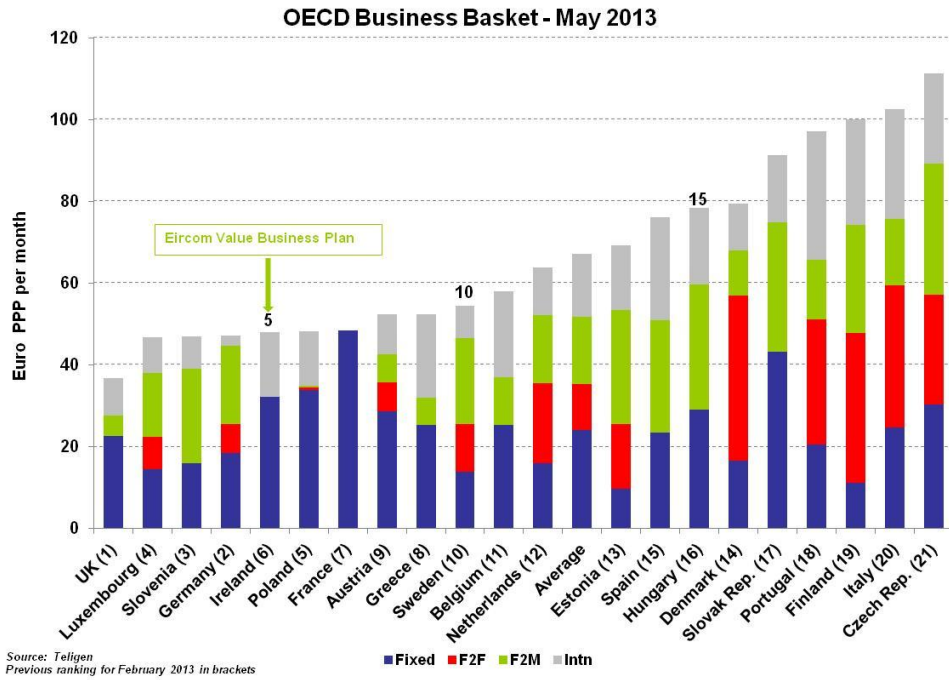
### 2.5.2 OECD Business PSTN Basket

Figure 2.5.2 illustrates Ireland’s ranking, alongside another 20 EU countries, for business calls, based on a basket of 260 calls per month, which also includes a fixed charge for access as part of a bundled service.

It should be noted that the “fixed” element in this basket is not an indication of the cost of basic line rental. In May 2013 Ireland ranked in 5<sup>th</sup> position, 8 places lower than the average of the benchmarked countries in terms of the most competitive pricing for this basket. The Irish package used for this comparison was Eircom’s Value Business Plan, which was 28.3% cheaper than the average of the European countries charted.

<sup>21</sup> Residential tariffs include VAT. VAT rates vary between member states.

**Figure 2.5.2 - OECD Business PSTN Basket – May 2013**



### 3. Internet and Broadband

#### 3.1 Total Internet Subscriptions

At the end of June 2013, there were over 1.67 million active internet subscriptions in Ireland. This was a decrease of 0.2% on the previous quarter but a 0.3% increase on June 2012. There was an increase in the number of cable and DSL broadband subscriptions while the number of 'other', FWA, narrowband and mobile broadband subscriptions decreased this quarter.

Narrowband subscriptions fell by 809 this quarter. Narrowband subscriptions have fallen by 41.0% since Q2 2012. Narrowband subscriptions now account for 0.6% of all internet subscriptions.

Since last quarter, cable subscriptions were up by 1.7% while DSL broadband subscriptions were up in the order of 1.4%. On the other hand, FWA subscriptions were down by 0.6%, 'other' broadband subscriptions were down by 2.8% while mobile broadband subscriptions fell by 3.4% since last quarter. Figure 3.1.1 shows the total number of narrowband and broadband internet subscriptions in Ireland as of Q2 2013.

**Figure 3.1.1 – Total Number of Active Internet Subscriptions**

<b>Subscription Type</b>	<b>Q2'13 Subs</b>	<b>Quarterly Growth Q1'13 – Q2'13</b>	<b>Year-on-Year Growth Q2'12 – Q2'13</b>
<b>Total Narrowband</b>	<b>9,610</b>	<b>-7.8%</b>	<b>-41.0%</b>
<b>DSL Broadband<sup>22</sup></b>	<b>741,256</b>	<b>+1.4%</b>	<b>+2.9%</b>
<b>Mobile Broadband</b>	<b>524,039</b>	<b>-3.4%</b>	<b>-8.1%</b>
<b>Cable Broadband</b>	<b>324,019</b>	<b>+1.7%</b>	<b>+13.1%</b>
<b>FWA Broadband<sup>23</sup></b>	<b>63,607</b>	<b>-0.6%</b>	<b>-2.9%</b>
<b>Other Broadband<sup>24</sup></b>	<b>12,310</b>	<b>-2.8%</b>	<b>+1.0%</b>
<b>Total Internet Subscriptions</b>	<b>1,674,841</b>	<b>-0.2%</b>	<b>+0.3%</b>

<sup>22</sup> DSL refers to a digital subscriber line, the means by which broadband speeds (i.e. in excess of 144k downstream) are delivered over the copper telecoms network. As of Q2 2013 it also includes Very-high-bit-rate digital subscriber lines (VDSL).

<sup>23</sup> FWA subscriptions include an estimate of 2,000 since Q1 2011. This is based on subscriptions to small FWA firms who may not be required to submit a questionnaire response to ComReg as they do not meet ComReg's minimum turnover threshold.

<sup>24</sup> Other Broadband includes fibre, and satellite broadband connections.

Figure 3.1.2 profiles internet subscriptions in Ireland using the classifications of subscription type outlined in Figure 3.1.1. The market share of narrowband subscriptions has fallen by 0.4 percentage points between Q2 2012 and Q2 2013.

Broadband subscriptions accounted for 99.4% of all internet subscriptions in Q2 2013. DSL subscriptions account for the single largest majority of internet subscriptions (44.3%) and its share has increased by 1.2 percentage points over the last year. Mobile broadband subscriptions share has declined again this quarter, now accounting for 31.3% of all internet subscriptions. Cable has a 19.3% share of all internet subscriptions up from 17.1% in Q2 2012. FWA has a 3.8% share of internet subscriptions down from 3.9% in Q2 2012 while other (satellite/fibre) broadband subscriptions represent 0.7% of internet subscriptions in Q2 2013 (the same as in Q2 2012).

**Figure 3.1.2 – Profile of Active Internet Subscriptions**

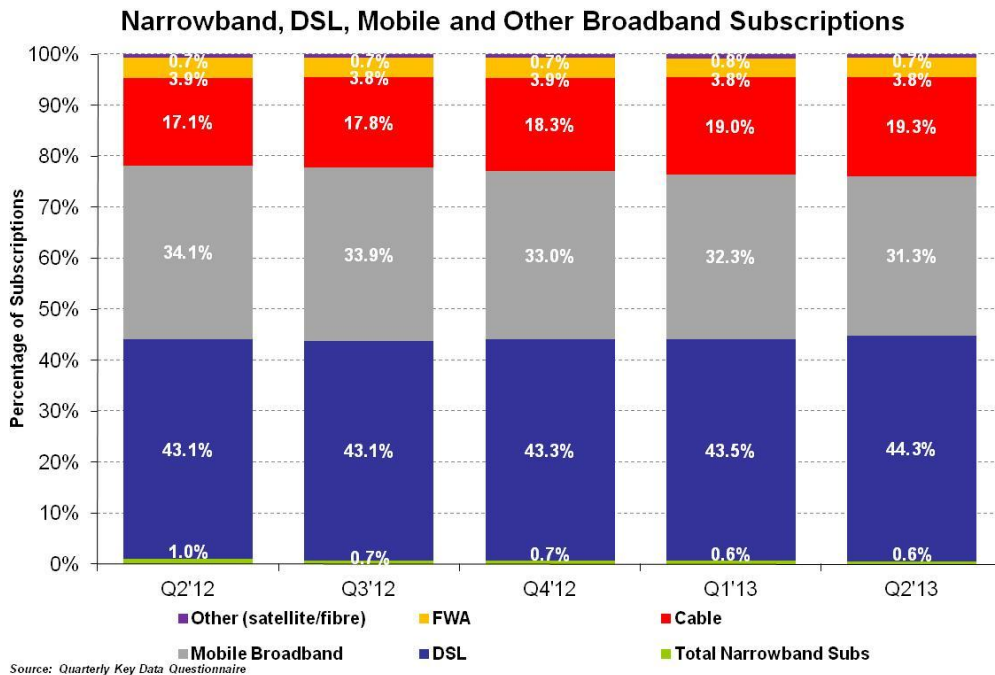


Figure 3.1.3 shows the change in total internet subscriptions, narrowband subscriptions and broadband (fixed, mobile and total) subscriptions since Q2 2011. Broadband subscriptions exceeded narrowband subscriptions for the first time in Q1 2007. In the last two years, narrowband subscriptions have declined from 34,109 to 9,610 subscriptions (-71.8%). Fixed broadband subscriptions continued to increase (up by 9.2% since Q2 2011) while mobile broadband subscriptions continued to decline (down by 10.2% since Q2 2011).

**Figure 3.1.3 – Total Internet Subscriptions**

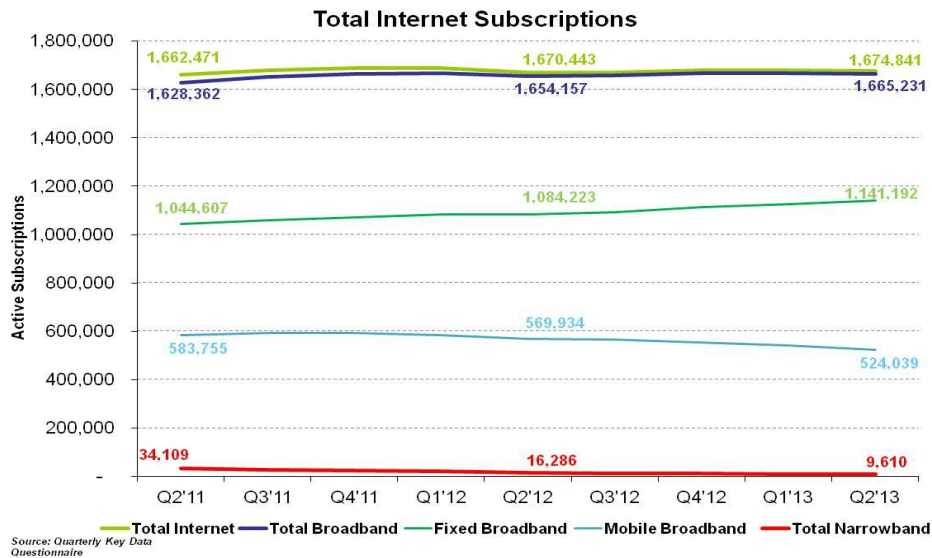


Figure 3.1.4 shows the quarterly percentage change in broadband and internet subscriptions since Q2 2006. In general, there has been a continual slowdown in the rate of growth of broadband subscriptions over the period. It should be noted that ComReg reports active broadband subscriptions and the mobile broadband numbers reported by ComReg do not include broadband access over mobile handsets such as smartphones.

**Figure 3.1.4 – Quarterly Growth in Total Internet and Broadband subscriptions**

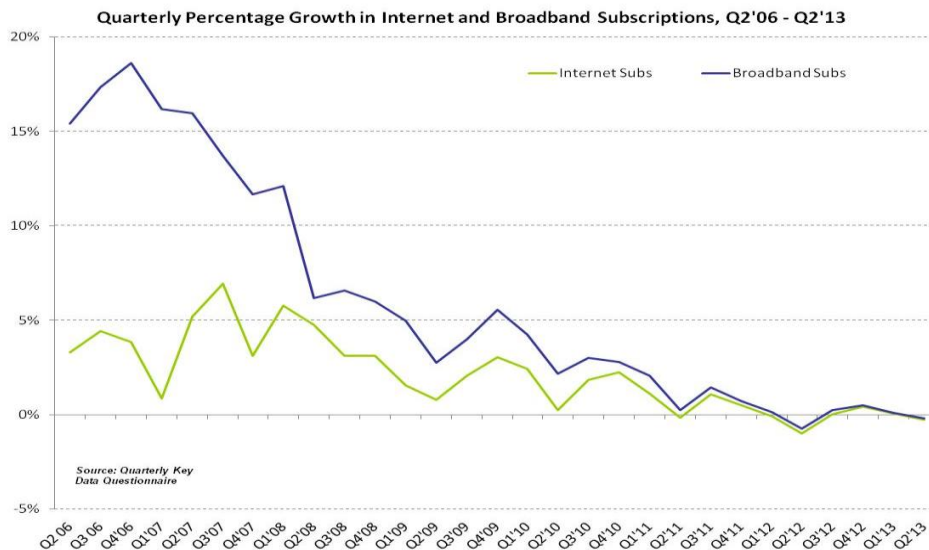
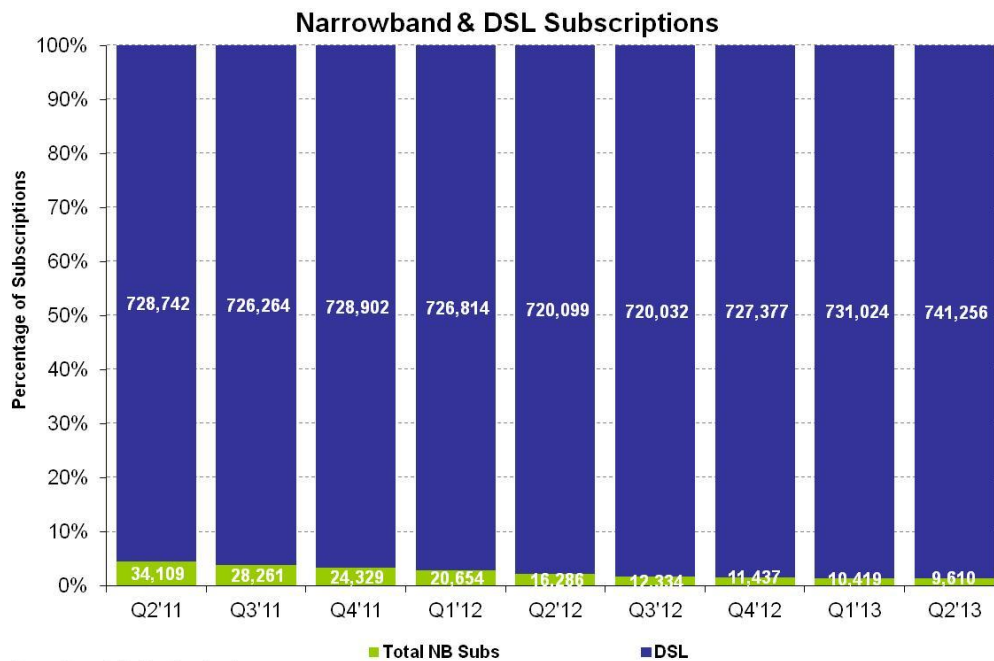




Figure 3.1.5 profiles only those internet subscriptions delivered over the copper telecoms network. It shows narrowband and DSL subscriptions. There were 750,866 active internet subscriptions over the copper telecoms network at the end of June 2013. This was an increase of 14,481 (+2.0%) in the total number of copper-based subscriptions since Q2 2012.

This increase has been driven by the rise in DSL subscriptions. DSL accounted for 98.7% of copper-based internet subscriptions in Q2 2013 compared to 97.8% in Q2 2012 with the remainder accounted for by narrowband subscriptions.

**Figure 3.1.5 – Profile of Copper Based Internet Subscriptions**



Source: Quarterly Key Data Questionnaire

### 3.2 Provision of DSL Access

Figure 3.2.1 examines the provision of DSL access. DSL broadband services are provided to consumers by operators using three alternative methods of access. DSL may be provided directly to the consumer by Eircom using direct access to its network; this accounted for 60.7% of all DSL subscriptions in Q2 2013. Retail DSL may also be provided by alternative operators (OAOs) who use either wholesale bitstream, which enables OAOs to resell another operator’s DSL service, or by offering DSL-based broadband using local-loop unbundling (LLU).

In Q2 2013, 29.4% of all DSL lines were provided by OAOs using wholesale bitstream. In absolute terms there were 217,916 wholesale bitstream lines in Q2 2013, an increase of 9.0% since Q2 2012. The remaining 9.9% of DSL lines were provided to subscribers by OAOs using local-loop unbundling. In Q2 2013 there were 73,175 unbundled local loops, up from 59,844 in Q2 2012 and up from 68,511 in Q1 2013.

Eircom’s market share of retail DSL lines has declined by 3.2 percentage points over the last year.

**Figure 3.2.1 - Provision of DSL Access**

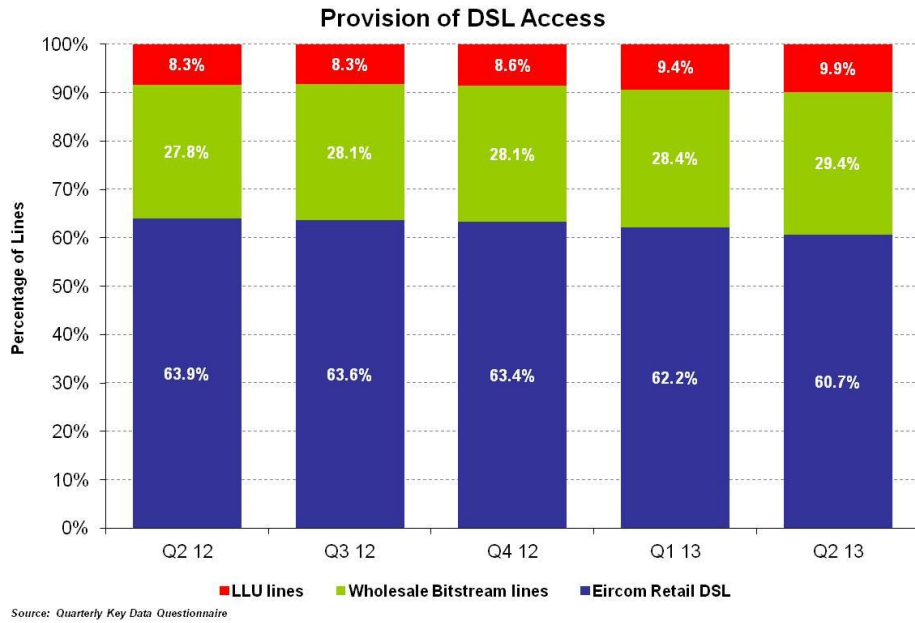
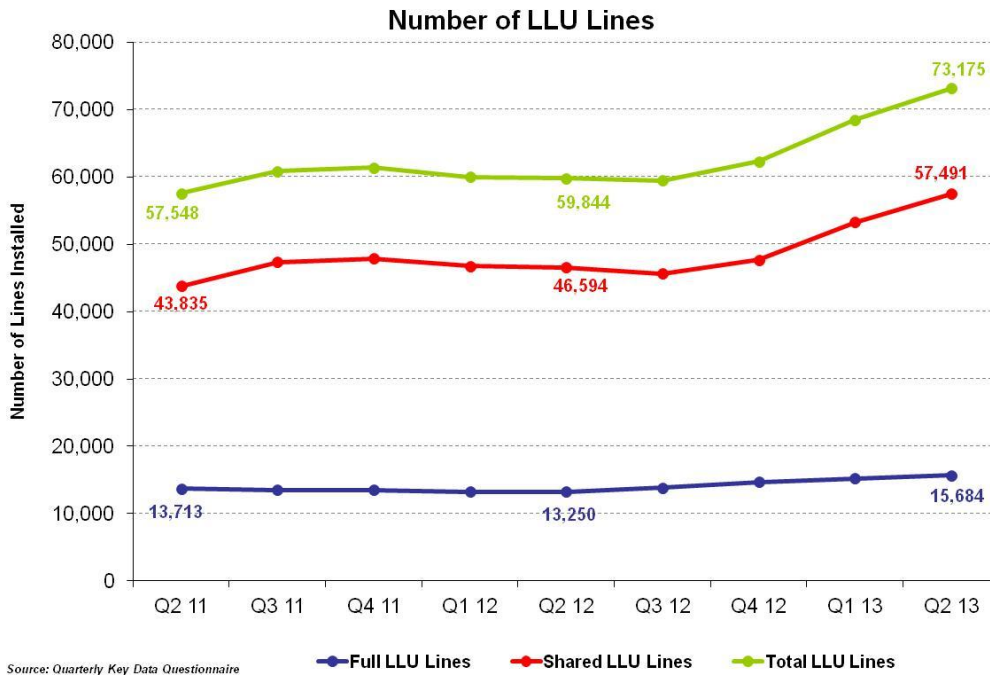


Figure 3.2.2 shows the number of unbundled lines classified by shared and full<sup>25</sup> status. Between Q2 2011 and Q2 2013 the total number of LLU lines increased by 27.2%. Total LLU lines increased by 6.8% this quarter. Full LLU lines increased by 3.3% while shared LLU lines rose by 7.8% this quarter.

**Figure 3.2.2 – Number of Local Loops Unbundled**



<sup>25</sup> Full LLU and shared LLU are two ways a copper loop may be unbundled. While full LLU assigns the entire copper loop to the leasing operator, shared LLU enables other operators and the incumbent to share the same line. With shared access consumers can acquire voice and data services from an operator or alternatively data services alone while retaining the voice services of the incumbent.

### 3.3 Provision of Broadband Services

At the end of June 2013, there were 1,665,231 broadband subscriptions in Ireland. This is an increase of 0.7% since Q2 2012, but a decrease of 0.2% since last quarter. There was an increase in total fixed line subscriptions this quarter (up by 15,071), but mobile broadband subscriptions fell again this quarter (down 18,425 subscriptions). ComReg reports active mobile broadband subscriptions and does not include internet access over mobile handsets such as smartphones in these numbers.

Cable (up by 1.7%) and DSL (up by 1.4%) subscriptions showed positive growth this quarter. Cable subscriptions increased by 13.1% over the last year. FWA<sup>26</sup> (down by 0.6%), 'other' (down by 2.8%) and mobile broadband subscriptions (down by 3.4%) fell this quarter.

**Figure 3.3.1 – Broadband Subscriptions<sup>27</sup> and Growth Rates by Platform**

<b>Platform</b>	<b>Q2'13 Subs</b>	<b>Quarterly Growth Q1'13-Q2'13</b>	<b>Year-on-Year Growth Q2'12-Q2'13</b>
<b>DSL<sup>28</sup></b>	<b>741,256</b>	<b>+1.4%</b>	<b>+2.9%</b>
<b>Cable</b>	<b>324,019</b>	<b>+1.7%</b>	<b>+13.1%</b>
<b>FWA</b>	<b>63,607</b>	<b>-0.6%</b>	<b>-2.9%</b>
<b>Other<sup>29</sup></b>	<b>12,310</b>	<b>-2.8%</b>	<b>+1.0%</b>
<b>Sub-Total</b>	<b>1,141,192</b>	<b>+1.3%</b>	<b>+5.3%</b>
<b>Mobile Broadband</b>	<b>524,039</b>	<b>-3.4%</b>	<b>-8.1%</b>
<b>Total</b>	<b>1,665,231</b>	<b>-0.2%</b>	<b>+0.7%</b>

<sup>26</sup> It should be noted that FWA subscriptions include an estimate of 2,000 since Q1 2011. This is based on subscriptions to smaller FWA firms who may not be required to submit a questionnaire response to ComReg as they do not meet ComReg's minimum turnover threshold. ComReg will update this additional estimate on an annual basis.

<sup>27</sup> ComReg notes that the data provided in this section relates to active subscriptions reported by operators. It takes into account multiple active subscriptions to broadband offerings by individual subscribers.

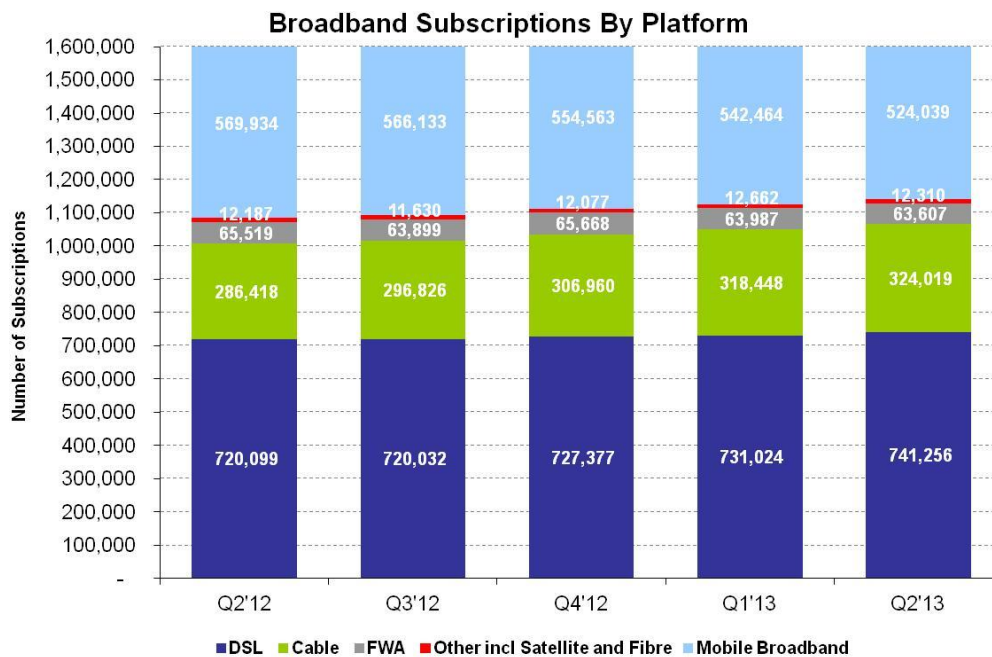
<sup>28</sup> As of Q2 2013 DSL lines also includes Very-high-bit-rate digital subscriber lines (VDSL).

<sup>29</sup> Other Broadband includes Satellite and Optical Fibre broadband subscriptions.

DSL remains the largest broadband access platform in terms of subscriptions. DSL accounts for 44.5% of all broadband subscriptions which is a 1.0 percentage point increase since Q2 2012. Of the remaining broadband subscriptions, mobile broadband accounts for 31.5%, a 3.0 percentage point decrease on Q2 2012. Cable has 19.5% market share, which is a 2.2 percentage point increase on Q2 2012. FWA accounts for 3.8% of broadband subscriptions, down 0.2 percentage points on Q2 2012. Satellite and fibre broadband subscriptions combined account for the remaining 0.7% of the market.

Figure 3.3.2 illustrates the split by type of broadband subscriptions in the Irish market since Q2 2012, while Figure 3.3.3 shows the net additions of broadband subscriptions by each platform. In Q2 2013, the net total broadband increase was driven by fixed broadband subscriptions as mobile broadband contributed negatively to broadband growth.

**Figure 3.3.2 – Broadband Subscriptions by Platform**



Source: Quarterly Key Data Questionnaire

**Figure 3.3.3 – Broadband Subscriptions - Net additions, Q4 2011 – Q2 2013**

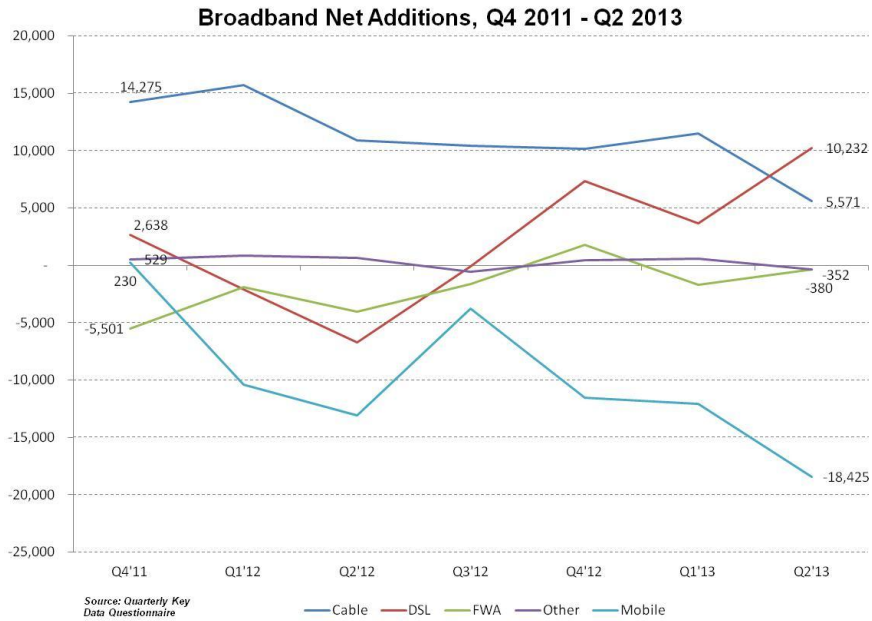


Figure 3.3.4 provides an estimate of the proportion of business and residential subscriptions to DSL, cable, fixed wireless, mobile broadband, fibre and satellite broadband services. In Q2 2013 83.1% of broadband subscriptions on all platforms were classed as residential broadband subscriptions. The platform with the highest percentage of residential vis a vis business subscriptions is cable broadband, while the 'other' category (satellite/fibre) has the highest percentage of business customers.

**Figure 3.3.4 – Broadband Subscriptions by Subscription Type**

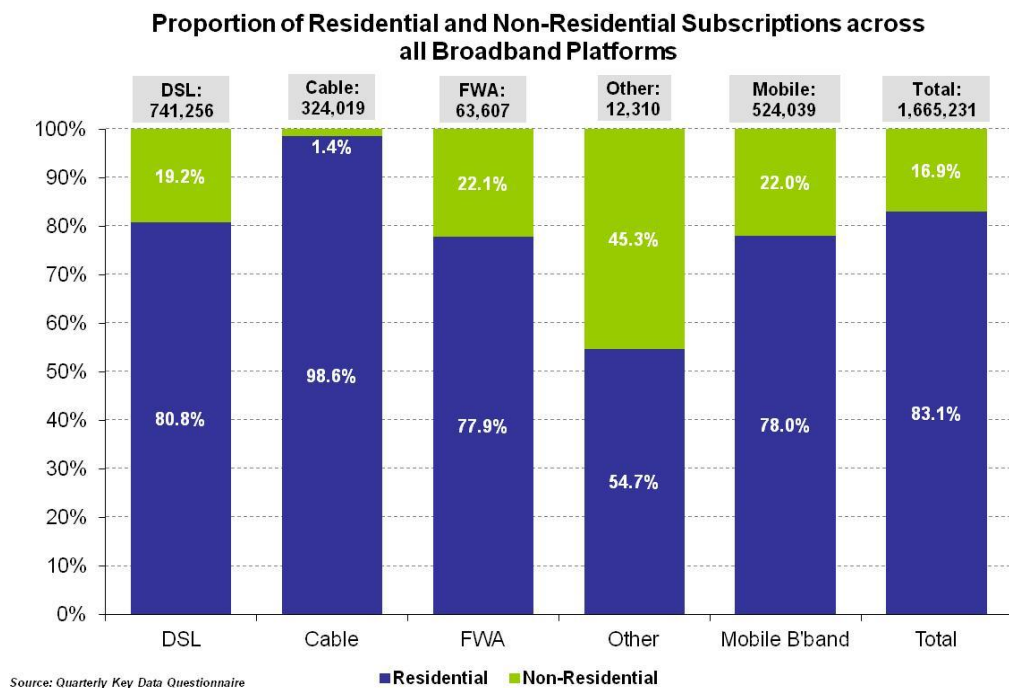
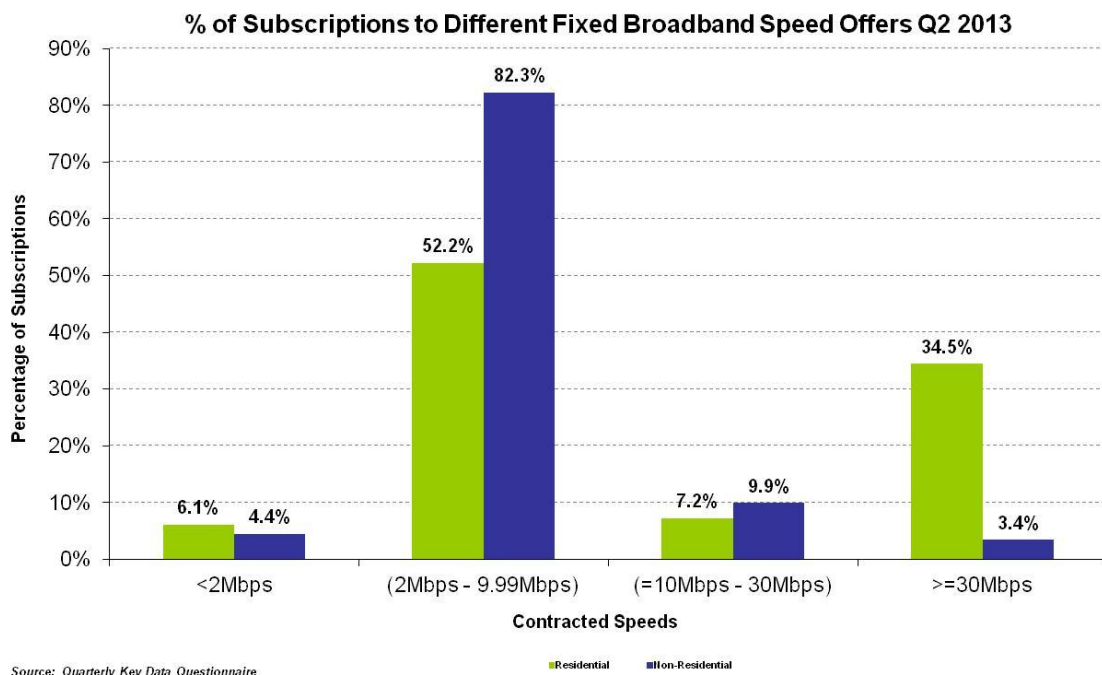


Figure 3.3.5 illustrates the breakdown of broadband subscriptions by contracted speed across all fixed broadband platforms (mobile broadband is excluded). In total, approximately 37.5% of broadband subscriptions were  $\geq 10$ Mbps (with 29.9%  $\geq 30$ Mbps). This equates to approximately 41.7% (34.5%  $\geq 30$ Mbps) of residential subscriptions and 13.3% (3.4%  $\geq 30$ Mbps) of business subscriptions. Residential subscriptions  $\geq 10$ Mbps are primarily accounted for by cable subscriptions, where almost 100% of subscriptions are  $\geq 10$ Mbps.

The data suggest that both residential and business users are most likely to subscribe to packages of between 2Mbps - 10Mbps. Many larger firms access their broadband services over dedicated leased lines. Leased lines are not included in these charts. Leased line speeds can range up to speeds in excess of 1 gigabyte per second.

**Figure 3.3.5 – Fixed Broadband Subscriptions<sup>30</sup> by Contracted Download Speeds and Subscription Type**



<sup>30</sup> As of Q2 2013 mobile broadband subscriptions are excluded from the overall broadband subscriptions in broadband speeds analysis.

Figure 3.3.6 shows broadband subscriptions by contracted speed and the type of broadband platform subscribed to.

**Figure 3.3.6 – Fixed Broadband Subscriptions by Contracted Download Speeds and Broadband Platform<sup>31</sup>**

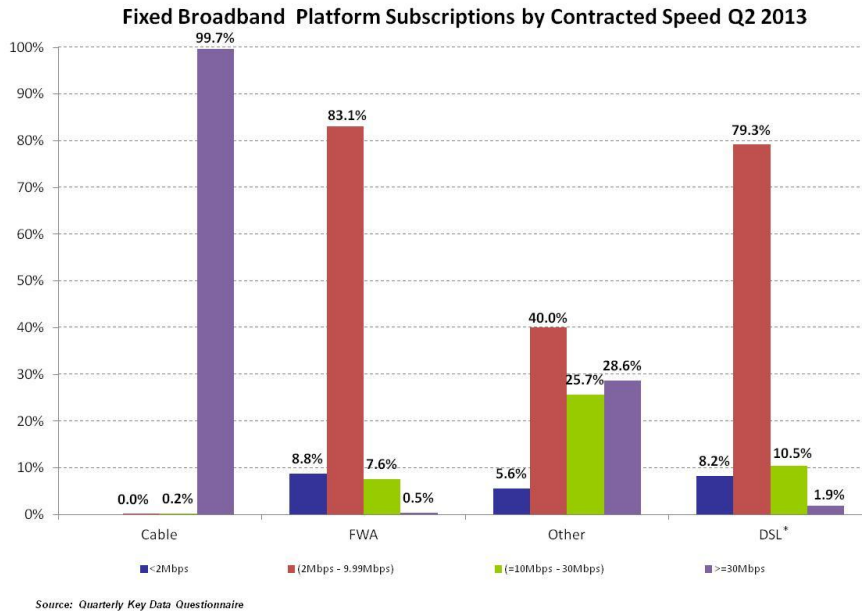
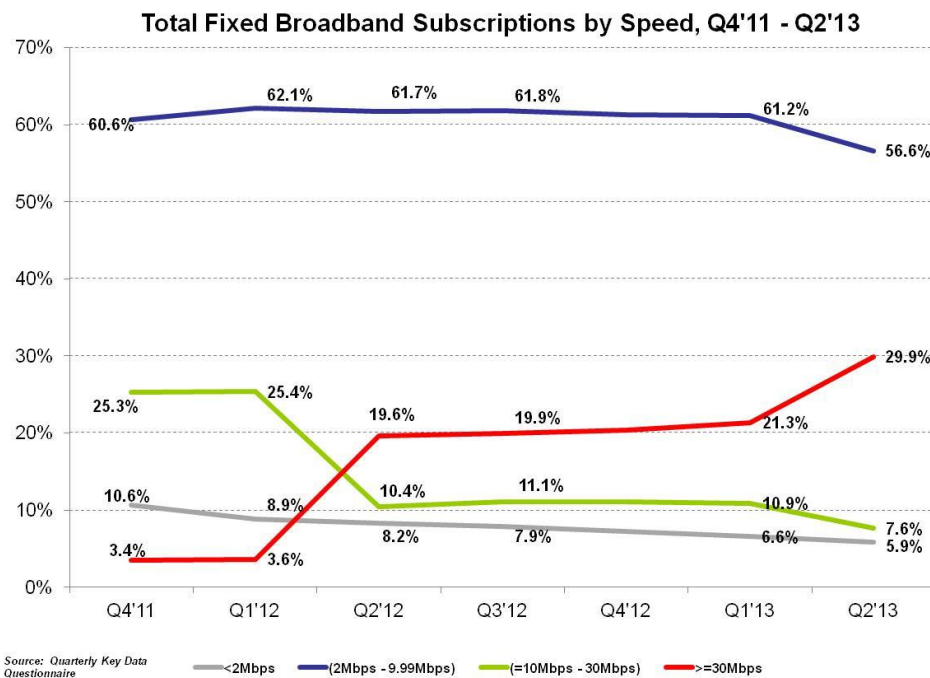


Figure 3.3.7 shows the change in fixed broadband subscriptions by contracted download speeds between Q4'11 and Q2'13. Growth in broadband speeds has been in the >=30Mbps category, which has increased from 3.4% to 29.9% over this period. Cable subscriptions represented approximately 95% of total subscriptions >=30Mbps.

**Figure 3.3.7 – Fixed Broadband Subscriptions by Contracted Download Speeds**



<sup>31</sup> \*Estimate percentage split.



Figure 3.3.8 illustrates Eircom’s market share of fixed broadband subscriptions when compared to other authorised operators’ (OAO) share of overall fixed broadband subscriptions (DSL, cable, FWA, satellite, and fibre broadband subscriptions). Eircom’s share of fixed broadband subscriptions continued to decline this quarter. In Q2 2013 Eircom’s market share was 39.5% compared to 42.5% in Q2 2012, and OAOs had the remaining 60.5% of fixed broadband subscriptions.

**Figure 3.3.8 – Market Share of Fixed Broadband Market**

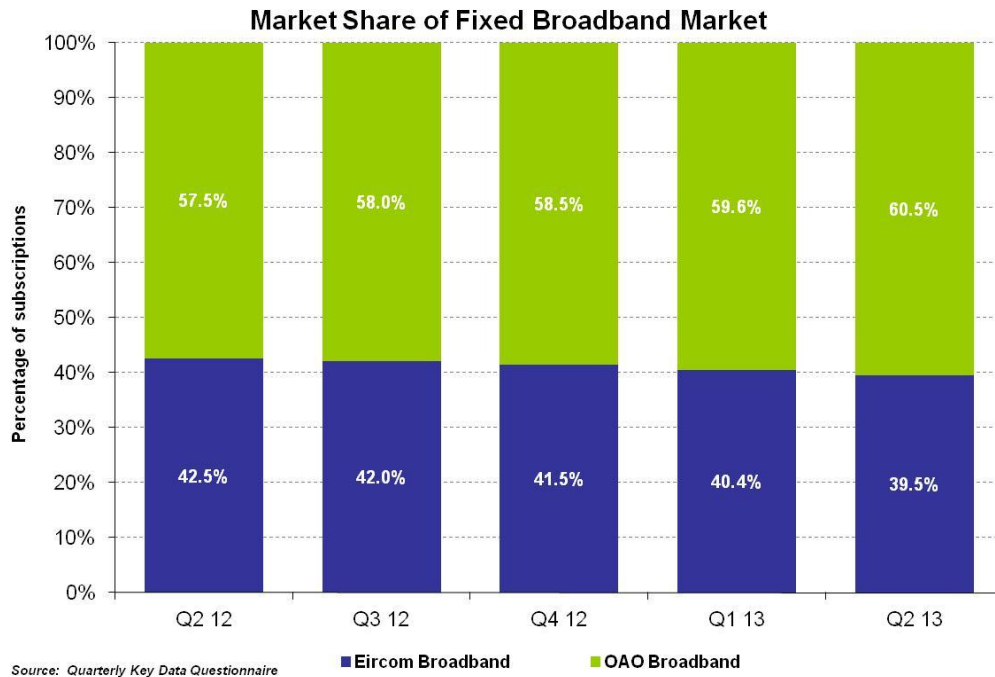


Figure 3.3.9 provides the market share of fixed broadband operators by number of subscriptions. DSL, cable modem, FWA, satellite and fibre subscriptions are all used to calculate fixed broadband market shares.

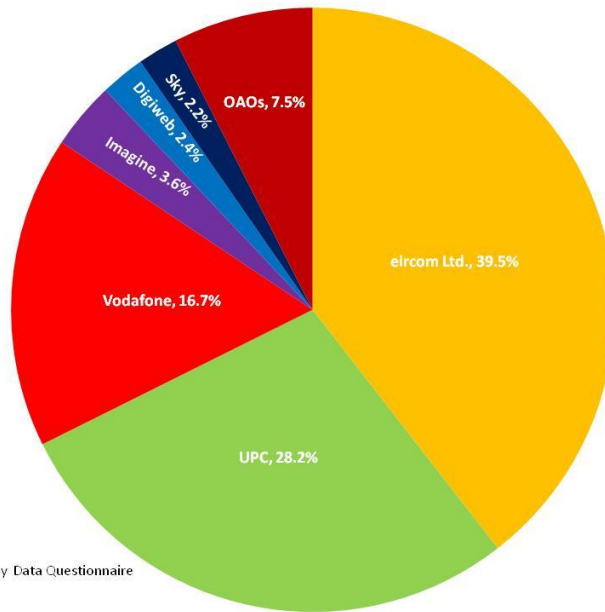
Operators with a market share of 2% or more are shown in the chart below. All those operators with less than 2% of total fixed broadband subscriptions are then grouped together under OAOs.

According to the data received from operators for Q2 2013, Eircom had 39.5% of total fixed broadband subscriptions, followed by UPC who had 28.2% of subscriptions. Vodafone had a 16.7% market share (excluding mobile broadband subscriptions), Imagine had 3.6%, while Digiweb had 2.4% and Sky Ireland had 2.2%. All other operators combined accounted for the remaining 7.5% fixed broadband subscriptions.



**Figure 3.3.9 – Subscription Market Share of Fixed Broadband Market**

Fixed Broadband Market Share (Subscriptions), Q2 2013

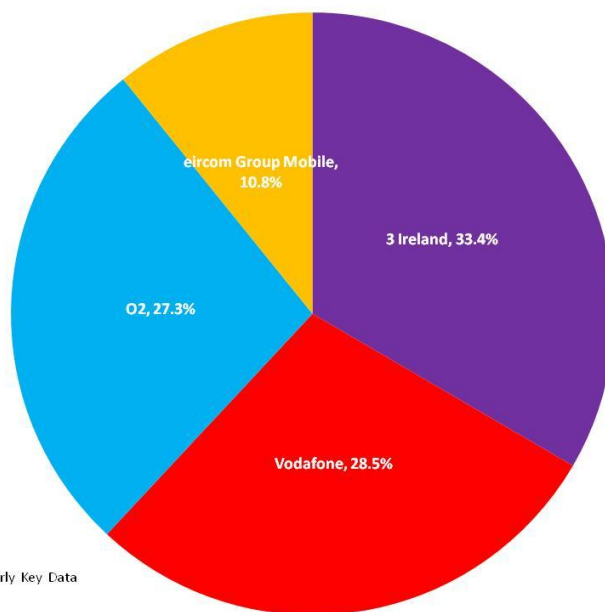


Source: Quarterly Key Data Questionnaire

Figure 3.3.10 shows the market share of mobile broadband operators by subscriptions. As of Q2 2013, 3 had the largest share with 33.4%,<sup>32</sup> up from 33.0% in Q2 2012. Vodafone’s market share was 28.5%, up from 28.1% in Q2 2012. O2 had a market share of 27.3% down from 27.7% in Q2 2012, while eircom group mobile had a market share of 10.8% down from 11.3% in Q2 2012.

**Figure 3.3.10 – Subscription Market Share of Mobile Broadband Market**

Mobile Broadband Market Shares (Subscriptions), Q2 2013



Source: Quarterly Key Data Questionnaire

<sup>32</sup> 3’s National Broadband Scheme subscriptions are included in this data.

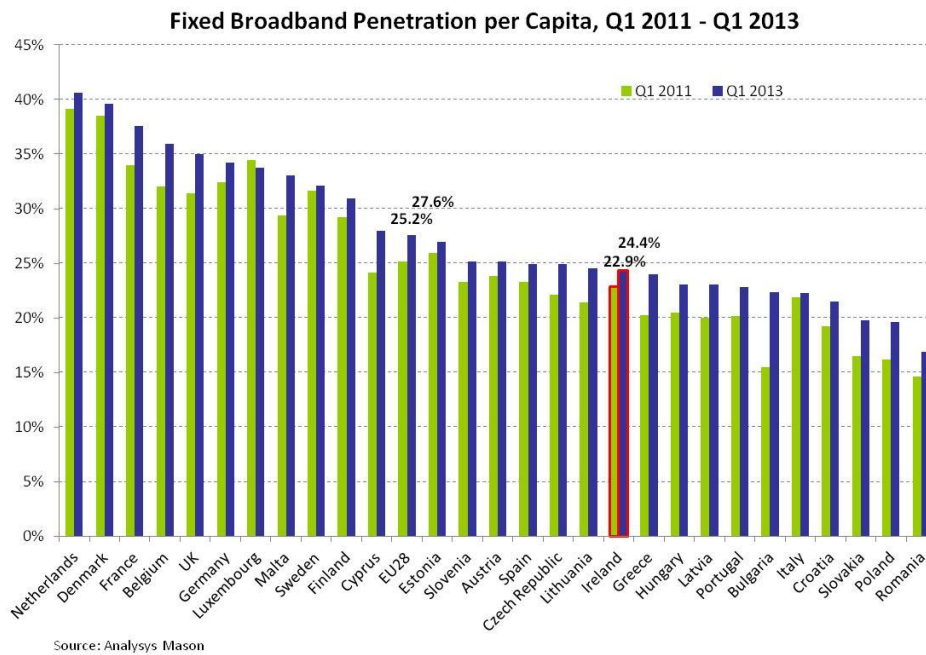
### 3.4 Broadband Penetration

The total number of broadband subscriptions in Ireland for Q2 2013 was 1,665,231. Using fixed residential broadband subscriptions only, 974,389 (i.e. excluding business subscriptions and mobile broadband subscriptions), the estimated fixed broadband household penetration rate (there were 1,687,000 households in Ireland using CSO Q1 2013 estimate) as of Q2 2013 was 57.8%.

Based on the total number of broadband subscriptions in Ireland for Q2 2013, the broadband per capita penetration rate (including mobile broadband) was 36.2%. When mobile broadband is excluded, the penetration rate was 24.8%.<sup>33</sup> These figures are based on a population of 4,598,600 from Central Statistics Office (CSO) data.<sup>34</sup>

Figure 3.4.1 shows fixed broadband subscriptions per capita among 28 EU countries in Q1 2011 and Q1 2013. Based on this data, Ireland’s fixed broadband per capita penetration rate (24.4%) remains behind the benchmarked EU28 average of 27.6%.

**Figure 3.4.1 – Broadband Subscriptions per Capita, Q1 2011 – Q1 2013**



<sup>33</sup> It should be noted that ComReg reports dedicated mobile broadband subscriptions (i.e. on the basis of mobile dongles/datacards) only. Subscriptions with Internet access over a handset are not included. Therefore, the total number of mobile broadband users (i.e. dedicated mobile broadband and handset subscriptions with internet access) will be higher than stated in this report. On the other hand, a broadband subscriber may have both a fixed and mobile broadband subscription and therefore, a broadband penetration rate based on both mobile and fixed subscriptions may overestimate the penetration rate.

<sup>34</sup> Estimates based on Quarterly National Household Survey (QNHS).

Figure 3.4.2 shows the proportion of households with broadband connections from 2008 to 2012. Both fixed and mobile broadband<sup>35</sup> are included. Ireland's household broadband penetration rate at 65% is lower than the EU27 average of 72%. Penetration has increased by 22 percentage points since 2008 while the EU27 penetration has increased by 23 percentage points.

**Figure 3.4.2 – Household Broadband Subscriptions, 2012**

	Broadband internet connections		
	2008	2010	2012
AT	54	64	77
BE	60	70	75
BG	21	26	51
CY	33	51	62
CZ	36	54	68
DE	55	75	82
DK	74	80	85
EE	54	64	74
EL	22	41	51
ES	45	57	67
<b>EU-27</b>	<b>49</b>	<b>61</b>	<b>72</b>
FI	66	76	85
FR	57	66	77
HU	42	52	68
<b>IE</b>	<b>43</b>	<b>58</b>	<b>65</b>
IT	31	49	55
LT	43	54	61
LU	61	70	68
LV	40	53	67
MT	55	69	77
NL	74	80	83
PL	38	57	67
PT	39	50	60
RO	13	23	50
SE	71	83	87
SI	50	62	73
SK	35	49	72
UK	62	:u	80

Source: Eurostat, Statistics in Focus 50/2012.

<sup>35</sup> Households with at least one member aged 16–74. Broadband connection includes: DSL, wired fixed (cable, fibre, Ethernet, PLC), fixed wireless (satellite, WiFi, WiMax) and mobile wireless (3G/UMTS).

### 3.5 WiFi Broadband Access

While WiFi originally emerged as an alternative to share broadband connectivity in the home and to provide access to nomadic laptop users in airports and other public places, it is now being used by a broader range of players with different business models and services which include in home connectivity, outdoor access for nomadic users, and off-loading and coverage alternative for mobile operators.

ComReg presents data on the WiFi market based on the number of public WiFi hotspots and access points located nationally. Internet hotspots are typically public wireless access points where a computer, usually a laptop, or other portable device such as an iPhone or tablet can connect to the internet. A WiFi hotspot can be made up of one or more WiFi access points<sup>36</sup>. WiFi hotspots tend to be found in airports, hotel lobbies and cafés and restaurants. In most cases, the user pays for high-speed internet access at an access point, based either on a vouchered payment for a specific amount of time online or a recurring monthly subscription. There are a number of providers of these services in Ireland including Bitbuzz, Eircom, Sky Ireland and BT Ireland.

The number of WiFi hotspots and access points have increased by approximately 84.0% and 26.9% respectively, comparing Q2 2012 to Q2 2013. WiFi minutes increased by 170.6% over this period. This may be a reflection of the increasing take up of smartphones and tablet devices among Irish consumers, as well as changes in WiFi operators' conditions of access. It should be noted that due to changes in policy by some WiFi operators towards termination of a session (i.e. in the past a users session was terminated if they dropped of the network for a short period of time. However, a user can now be off the network for longer periods before the session is terminated) the number of WiFi minutes has increased as a result.

A breakout of the data by operators' percentage shares in Q2 2013 is also provided below.

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<sup>36</sup> Hotspots are typically public locations at which broadband internet access can be obtained. At these hotspots, users with a computer (usually a laptop) can wirelessly connect to the internet either for free or on payment of a fee. Typical locations for such hotspots include cafes and restaurants, hotels and airports. In general terms, more than one access point can be found at a hotspot.

**Figure 3.5.1 – WiFi Hotspots, Access Points and Minutes of Use**

	<b>Q2 2013</b>	<b>Q2'12-Q2'13 Growth</b>	<b>Q1'13-Q2'13 Growth</b>
<b>WiFi Hotspots</b>	<b>2,655</b>	<b>84.0%</b>	<b>9.9%</b>
<b>WiFi Access Points</b>	<b>4,454</b>	<b>26.9%</b>	<b>5.4%</b>
<b>WiFi Minutes of Use</b>	<b>269,714,394</b>	<b>170.6%</b>	<b>34.4%</b>

<b>% Share - Q2 2013</b>	<b>Bitbuzz</b>	<b>Eircom</b>	<b>OAOs</b>
<b>WiFi Hotspots</b>	<b>13.9%</b>	<b>84.1%</b>	<b>2.0%</b>
<b>WiFi Access Points</b>	<b>41.4%</b>	<b>57.3%</b>	<b>1.3%</b>
<b>WiFi Minutes of Use</b>	<b>52.9%</b>	<b>45.0%</b>	<b>2.1%</b>

### 3.6 Broadband Pricing Data<sup>37</sup>

In this report broadband tariff baskets have been supplied by Teligen using their T-Connect product for fixed broadband comparisons and their T-Wireless product for mobile broadband comparisons.

The speed categories were chosen for these operators across all benchmarked countries to ensure that a meaningful comparison can be made between packages in terms of contracted speeds offered. Operators' broadband packages are compared on the assumption that their products should be available nationally. The prices represented in each basket are based on the lowest priced tariffs available for those baskets. Packages which limit usage with speed restrictions when usage exceeds allowance are included.

It should also be noted that the recurring and non-recurring costs of the broadband packages which are part of the broader bundle (broadband with voice and/or TV services) are the costs of the whole bundle. On the other hand, the usage costs are always broadband specific. Bundled packages are included when there are few or no other options from broadband services provider.

Further information on the composition of the broadband basket can be found in the Explanatory Memorandum which accompanies this report.<sup>38</sup>

#### **T-Connect (Fixed Broadband Baskets)**

In order to ensure that services can be adequately compared, the benchmarking model prices a range of DSL and cable services based on defined usage of 30 hours per month, with each session assumed to last for 30 minutes for residential consumers while a usage of 100 hours per month with a 60 minute average session for business consumers is assumed.

<sup>37</sup> This section does not include broadband tariff packages that are offered as special promotions. All residential tariffs are inclusive of VAT but all business tariffs are exclusive of VAT. VAT rates vary between Member States.

<sup>38</sup> ComReg Document 13/87a.

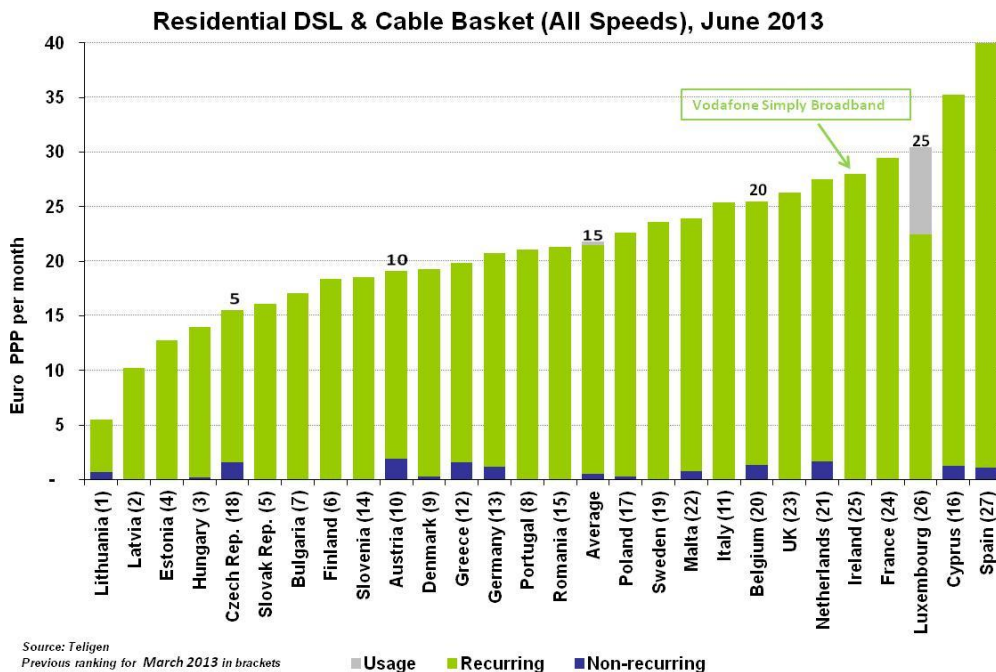
While broadband is an always-on product, the assumption of an average user profile ensures that packages are comparable across countries. It further assumes a download usage of 5 Gigabytes every month for each service for residential consumers and 20 Gigabytes every month for business consumers. Upload and download speeds (based on contracted speeds) are also analysed.

The data presented in the following charts illustrates the cheapest product available in each country from the largest fixed line market player (Eircom for Ireland), the next largest DSL operator (Vodafone for Ireland) and the largest cable operator (i.e. UPC for Ireland) under these usage assumptions.

These packages are based on advertised download speeds. The charts below represent speed categories<sup>39</sup> of all residential speeds and speeds >10 Mbps in the business market.

The lowest monthly residential DSL & cable pricing for all speeds is charted in figure 3.6.3. Ireland ranks in 23<sup>rd</sup> place in the group of 27 European countries. Ireland is 8 places behind the benchmarked country average. The pricing for Ireland is based on Vodafone’s Simply Broadband package.

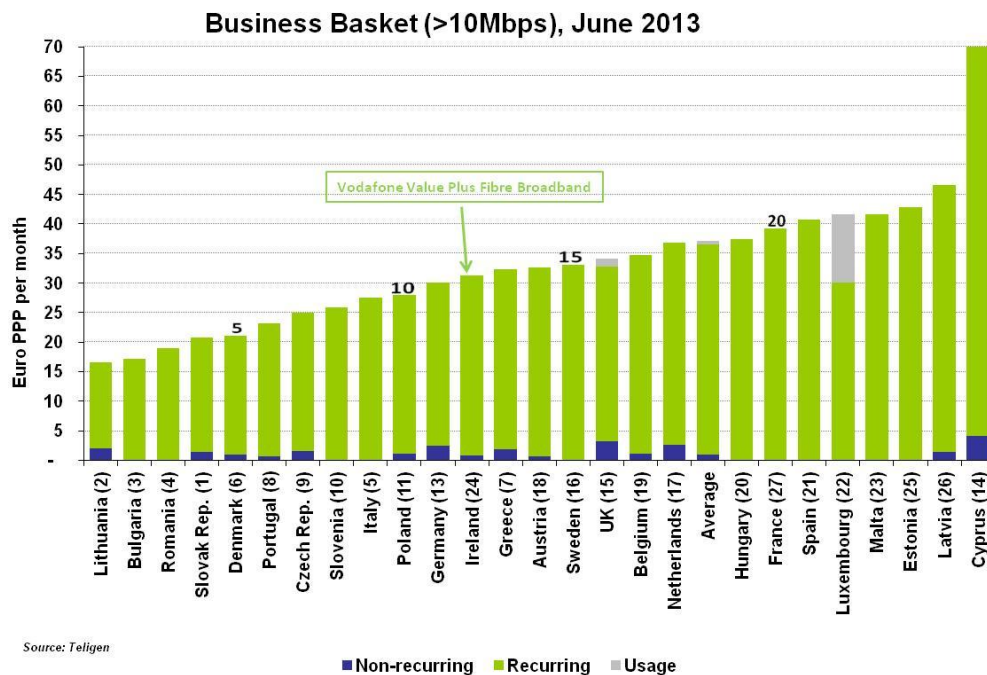
**Figure 3.6.1 - Residential DSL & Cable Basket (All Speeds)**



<sup>39</sup> Due to limited availability of standalone broadband offers in the Irish market at the time that Teligen conducted their research, comparable data cannot be reported for the 1-4 Mbps and 4-10 Mbps baskets this quarter.

The lowest monthly business pricing for DSL and cable in the >10 Mbps speed category is charted in figure 3.6.4. Ireland is in 12<sup>th</sup> place among the group of 26 European countries. Ireland’s package is 7 places above and 18.8% cheaper than the benchmarked country average. The pricing for Ireland is based on Vodafone’s Value Plus Fibre package.

**Figure 3.6.2 – Business DSL and Cable Basket (>10Mbps)**



Source: Teligen

**T-Connect (Mobile Broadband Baskets)**

This benchmarking model prices a range of mobile broadband services for PC, tablet and standalone tariffs. All Irish mobile network operators are included in the model. These packages are based on advertised download speeds.

The pre-pay residential basket is based on a usage profile of 8 hours and 1.5GB downloaded per month and the post-pay residential basket is based on a usage profile of 15 hours and 3GB download per month. For business customers the basket chosen is based on a usage profile of 5 hours and 1.5GB downloaded per month.

These baskets have been chosen to be representative of the market on the basis of the average size of monthly download/upload traffic among mobile broadband consumers in Ireland in Q2 2013.



Figure 3.6.5 shows that out of the 20 benchmarked European countries, Ireland (13<sup>th</sup>) ranks one place above the benchmarked country average. The pricing for Ireland is based on Vodafone’s iPad 30 day plan package. Ireland’s pricing is approximately 1.0% cheaper than the benchmarked country average.

**Figure 3.6.3 – Pre-Pay Residential Mobile Broadband Basket (All Speeds)**

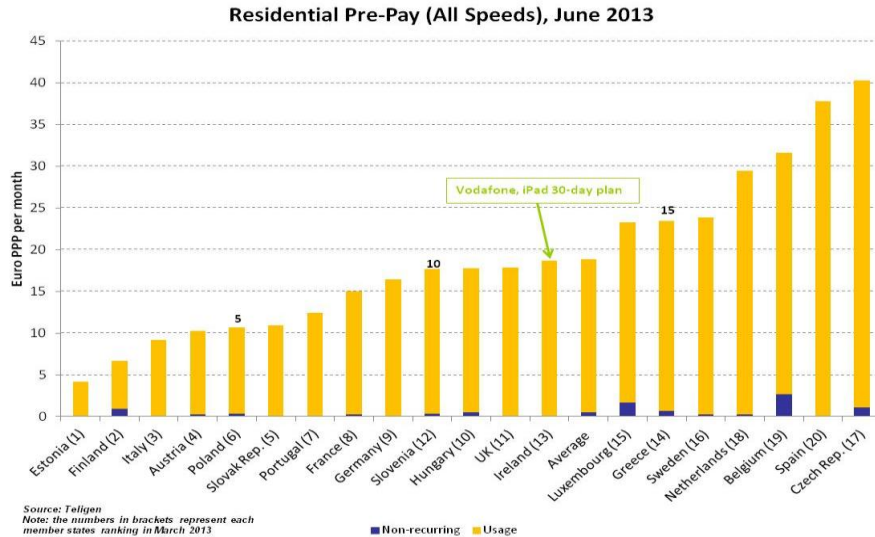


Figure 3.6.6 compares post-pay residential mobile broadband tariffs. Ireland ranks in 13<sup>th</sup> place among the 21 benchmarked European countries, one place ahead of the benchmarked country average. Ireland’s pricing is based on Meteor’s Broadband to Go 5GB package and is approximately 4.5% cheaper than the benchmarked country average.

**Figure 3.6.4 – Post-Pay Residential Mobile Broadband Basket (All Speeds)**

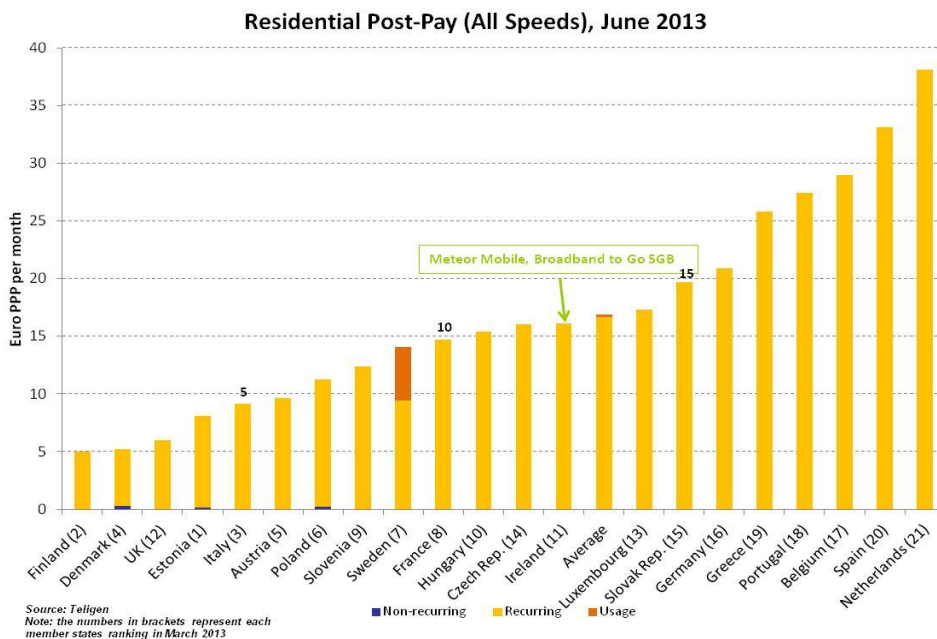
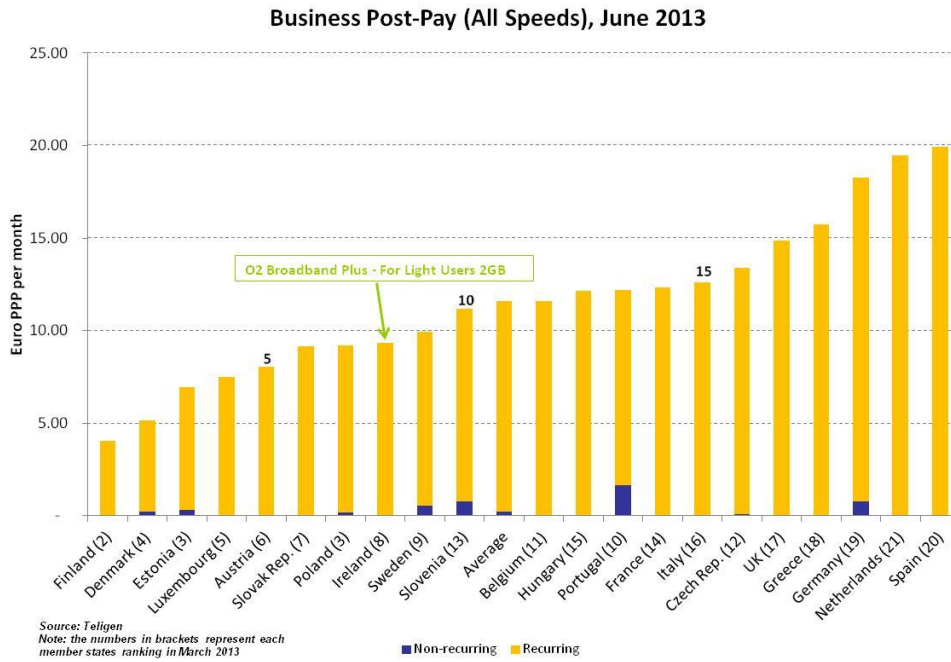




Figure 3.6.7 compares the pricing for a post-pay business mobile broadband basket among 21 European countries. Ireland ranks in 8<sup>th</sup> place among these countries, 3 places ahead of and 19.2% cheaper than the benchmarked country average. Ireland’s pricing is based on O2’s Broadband Plus for Light Users 2GB package.

**Figure 3.6.5 – Post-Pay Business Mobile Broadband Basket (All Speeds)**

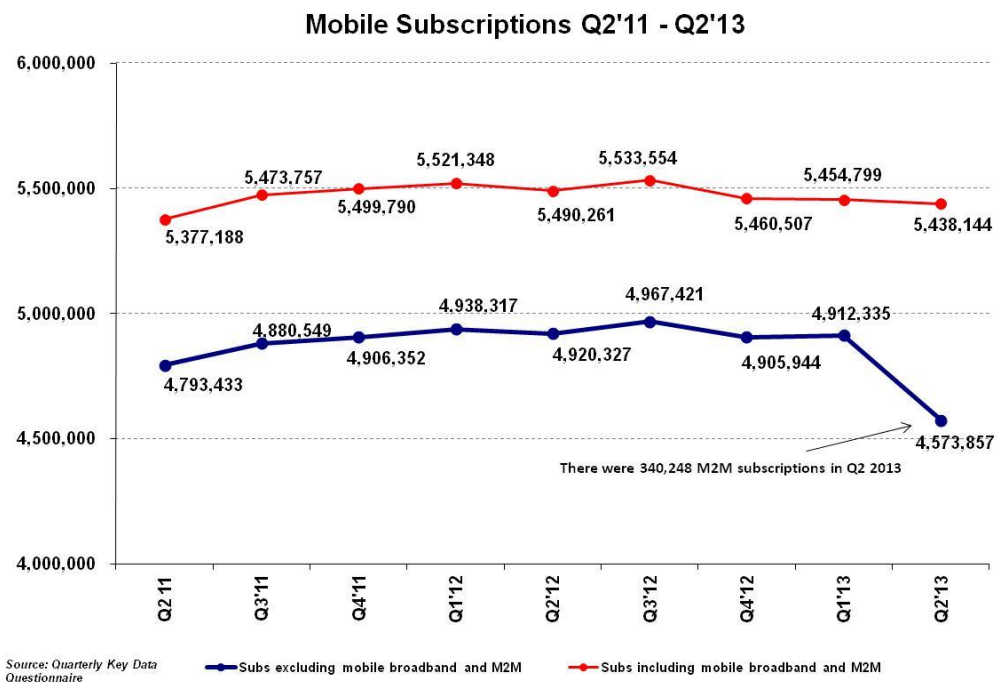


## 4. Mobile Market Data

### 4.1 Number of Subscriptions and Penetration Rate<sup>40</sup>

At the end of June 2013 there were 5,438,144 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine<sup>41</sup> subscriptions. If mobile broadband subscriptions (524,039 this quarter) and Machine to Machine subscriptions (340,248) are excluded, the total number of mobile subscriptions in Ireland was 4,573,857. Total mobile subscriptions have decreased by 0.3% this quarter and decreased by 0.9% in the year to Q2 2013. Mobile broadband subscriptions declined by 3.4% this quarter.

Figure 4.1.1 – Mobile Subscriptions



In Q2 2013 there were 4,326,244 3G SIMs in Ireland. These 3G SIMs are based on 3G equivalent standards, protocols or technologies, enabling access to advanced data services such as web/internet content, online multiplayer gaming content, Video on Demand (VoD) or other equivalent advanced data services (excluding SMS and MMS). SIMs used in mobile handsets as well as other mobile devices such as USB modems and tablet computing devices are included in this metric.

<sup>40</sup> Mobile subscriptions do not include data from MVNOs Postfone and Lycamobile.

<sup>41</sup> As of Q2 2013 M2M subscriptions are excluded from mobile voice subscriptions. Therefore, changes in subscriptions are not directly comparable to previous periods.

As a subset of total 3G SIMs in Ireland, there were (including dedicated mobile broadband) 2,974,038 active 3G users in Ireland in Q2 2013. Total active 3G users as a proportion of total 3G SIMs was 68.7% in Q2 2013. Active 3G users are users who have accessed advanced data services such as web/internet content, online multiplayer gaming content, video on demand or other equivalent advanced data services (excluding SMS and MMS) by making a transaction in the last 90 days via a handset, dongle/USB modem or other mobile internet device. SIMs used in mobile handsets as well as other mobile devices such as tablets and USB modems are included.

Total active 3G users (2,974,038) minus dedicated mobile broadband subscriptions (524,039) can be taken as a general indication of the number of active smartphones and tablet users (for example ipads) in Ireland. This represents approximately 53.6% of all mobile subscriptions (excluding dedicated mobile broadband) in Q2 2013, up from 49.3% last quarter.

Figure 4.1.2 below shows the breakdown of total active SIMs, total 3G SIMs and active 3G users in Ireland from Q2 2012 to Q2 2013.

**Figure 4.1.2 – Mobile Subscriptions including Smartphones/Tablets (SIMs)**

	Q2 '13	Q2'12	Quarterly Change (Q1'13 – Q2'13)	Annual Change (Q2'12 – Q2'13)
<b>Total active SIMs</b>	<b>5,438,144</b>	<b>5,490,261</b>	<b>-0.3%</b>	<b>-0.9%</b>
<b>Total 3G SIMs</b>	<b>4,326,244</b>	<b>4,305,044</b>	<b>-0.3%</b>	<b>+0.5%</b>
<b>Dedicated mobile broadband and Smartphone/tablets (SIMs)<sup>42</sup></b>	<b>2,974,038</b>	<b>2,772,864</b>	<b>+0.3%</b>	<b>+7.3%</b>
<b>Smartphone/tablets (SIMs)<sup>43</sup></b>	<b>2,449,999</b>	<b>2,202,930</b>	<b>+1.2%</b>	<b>+11.2%</b>

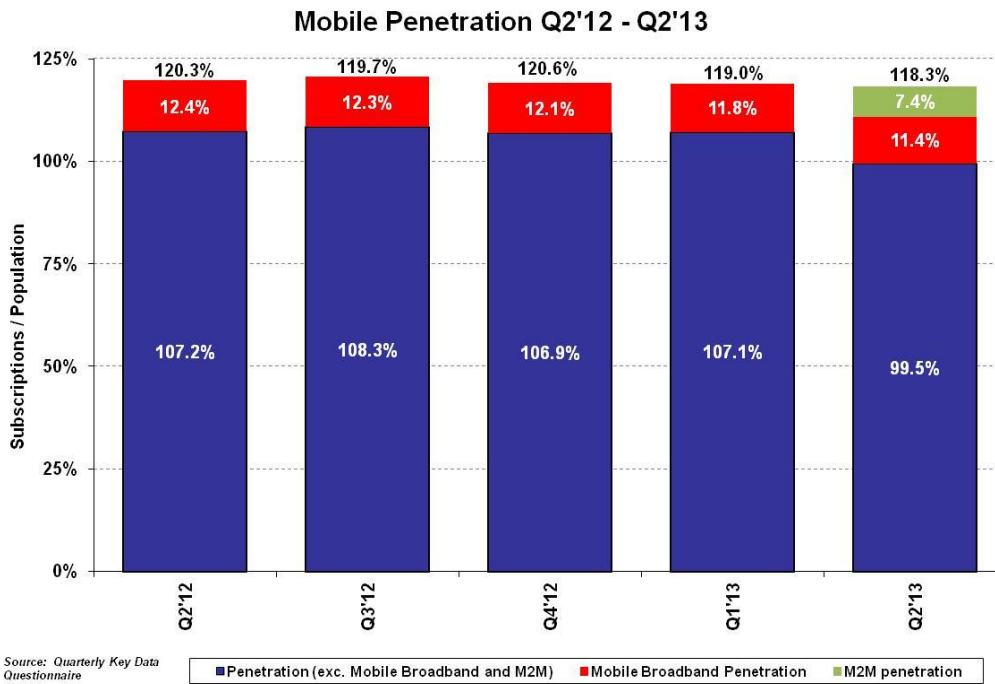
Figure 4.1.3 charts mobile penetration since Q2 2012 and shows that at the end of June 2013, mobile penetration, based on a population of 4,598,600 (using CSO Q1 2013 estimate), was 118.3% including mobile broadband and M2M and 99.5% excluding mobile broadband and M2M. Mobile penetration is recognised as the standard metric internationally to measure the adoption of mobile services, and is calculated based on the number of active SIM cards per 100 of the population.

<sup>42</sup> Active 3G SIMs.

<sup>43</sup> Active 3G SIMS excluding dedicated mobile broadband SIMs.

Given that some mobile users may have used more than one active SIM card during the period, there is likely to be some over-estimation of actual individual mobile penetration using this metric. ComReg’s calculation of mobile subscriptions includes active SIMs bundled with mobile broadband datacards and USB modems for internet access via laptops/PCs, SIMs that enable the flow of data between Machines as well as SIM cards used in mobile phones for voice and data services.

**Figure 4.1.3 – Irish Mobile Penetration Rate**

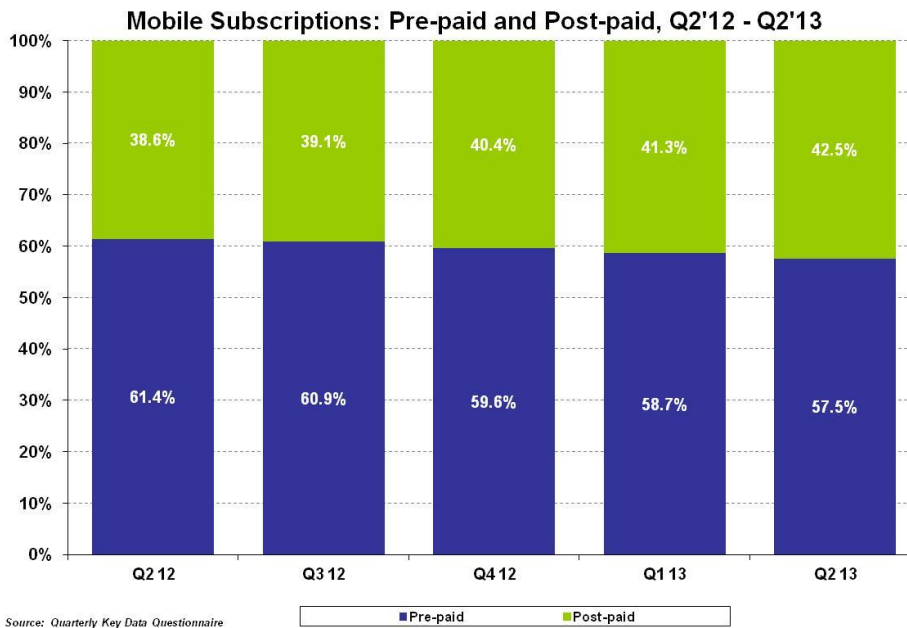


## 4.2 The Profile of Mobile Subscriptions in Ireland

Mobile users pay for their mobile service by either purchasing pre-paid credit, or by receiving a monthly bill from their mobile operator, described in this report as a post-paid payment option.

Figure 4.2.1 and 4.2.2 illustrate the mobile subscription base (including mobile broadband and M2M) in Ireland classified by the proportion of pre-paid and post-paid subscriptions on both 2G and 3G networks at the end of June 2013. Post-paid subscriptions are becoming more popular, accounting for 42.5% of subscriptions in Q2 2013, up from 38.6% one year previously at the expense of a decline in pre-paid subscriptions. The majority of both pre-paid and post-paid subscriptions include broadband/data packages while all M2M subscriptions are post-paid.

**Figure 4.2.1 – Profile of Pre-Paid and Post-Paid Subscriptions**



**Figure 4.2.2 – Mobile Subscriptions by Pre-pay/Post-pay Split, Q2’12 – Q2’13**

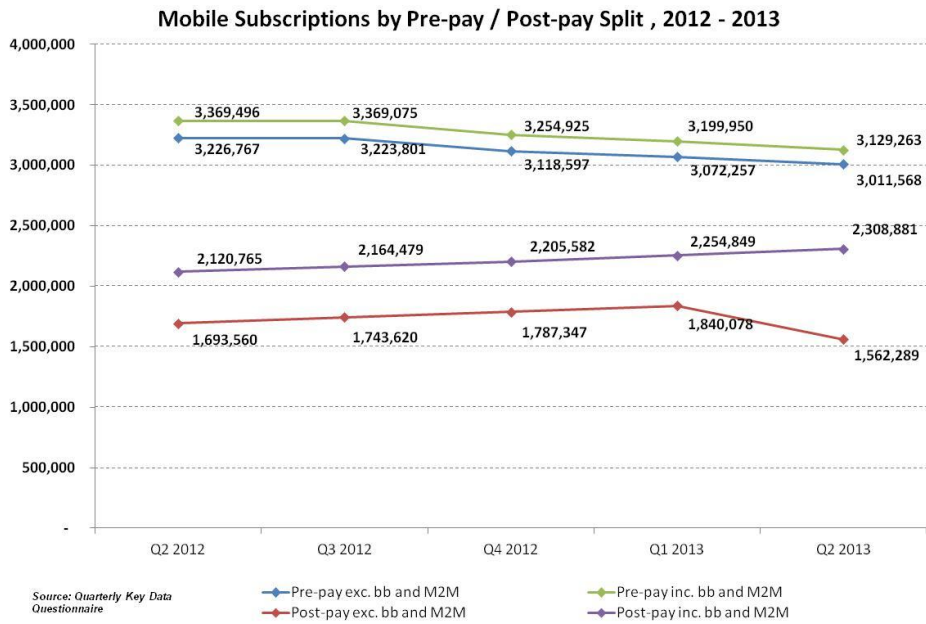


Figure 4.2.3 shows the pre-paid and post-paid subscription profile for each of the mobile operators in the Irish market. Mobile broadband and M2M subscriptions are included in this data. As of Q2 2013, 61.9% of Vodafone’s subscriptions were pre-paid. O2 had 47.7% pre-paid subscriptions, eircom Group Mobile had 66.5% pre-paid subscriptions, and 36.6% of 3’s mobile subscriptions were pre-paid. 93.7% of Tesco Mobile’s subscription base was pre-paid.

**Figure 4.2.3 – Profile of Pre-Paid and Post-Paid Subscriptions by Operator**

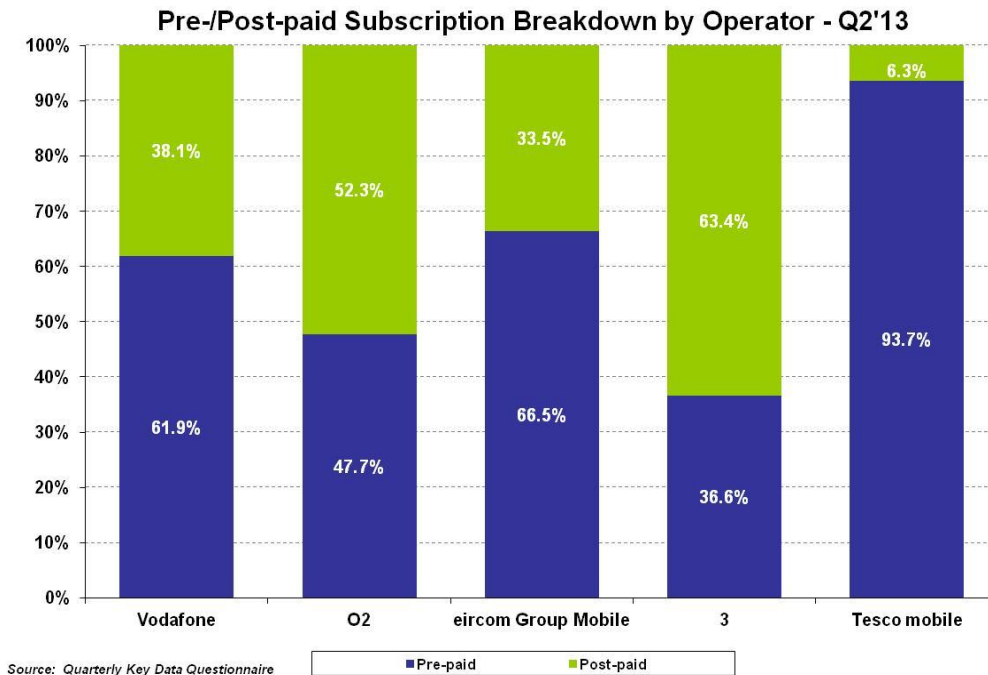


Figure 4.2.4 shows the split between pre-paid and post-paid mobile broadband subscriptions between Q2 2012 and Q2 2013. 77.5% of all mobile broadband subscriptions were post-paid at the end of June 2013, up from 75.0% one year previously.

**Figure 4.2.4 – Profile of Pre-Paid and Post-Paid Mobile Broadband Subscriptions**

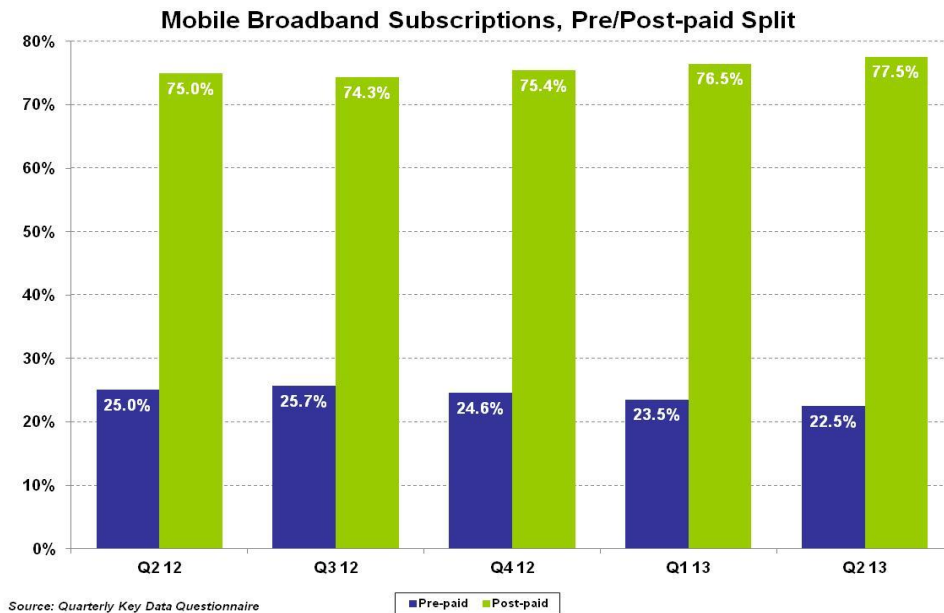


Figure 4.2.5 shows the split of post-paid business and non business mobile subscriptions including and excluding mobile broadband and M2M in Q2 2012 to Q2 2013. The number of post-paid subscriptions increased across all categories. Approximately 39.7% of post-paid mobile subscriptions (including mobile broadband and M2M) and 29.5% of post-paid mobile subscriptions (excluding mobile broadband and M2M) were classed as business subscriptions in Q2 2013.

**Figure 4.2.5 – Post-Paid Business and Residential Mobile Subscriptions**

	Q2 2013	Q1 2013	Q4 2012	Q3 2012	Q2 2012
<b>Residential subs inc. mobile broadband<sup>44</sup></b>	<b>1,392,468</b>	<b>1,341,780</b>	<b>1,336,669</b>	<b>1,311,777</b>	<b>1,280,486</b>
<b>Residential subs exc. mobile broadband</b>	<b>1,101,469</b>	<b>1,041,383</b>	<b>1,028,298</b>	<b>1,000,668</b>	<b>963,724</b>
<b>Business subs inc. mobile broadband and M2M</b>	<b>916,413</b>	<b>890,452</b>	<b>868,913</b>	<b>852,702</b>	<b>840,279</b>
<b>Business subs exc. mobile broadband and M2M</b>	<b>460,820<sup>45</sup></b>	<b>776,078</b>	<b>759,049</b>	<b>742,952</b>	<b>729,836</b>

<sup>44</sup> All M2M subscriptions are assumed to be business subscriptions.

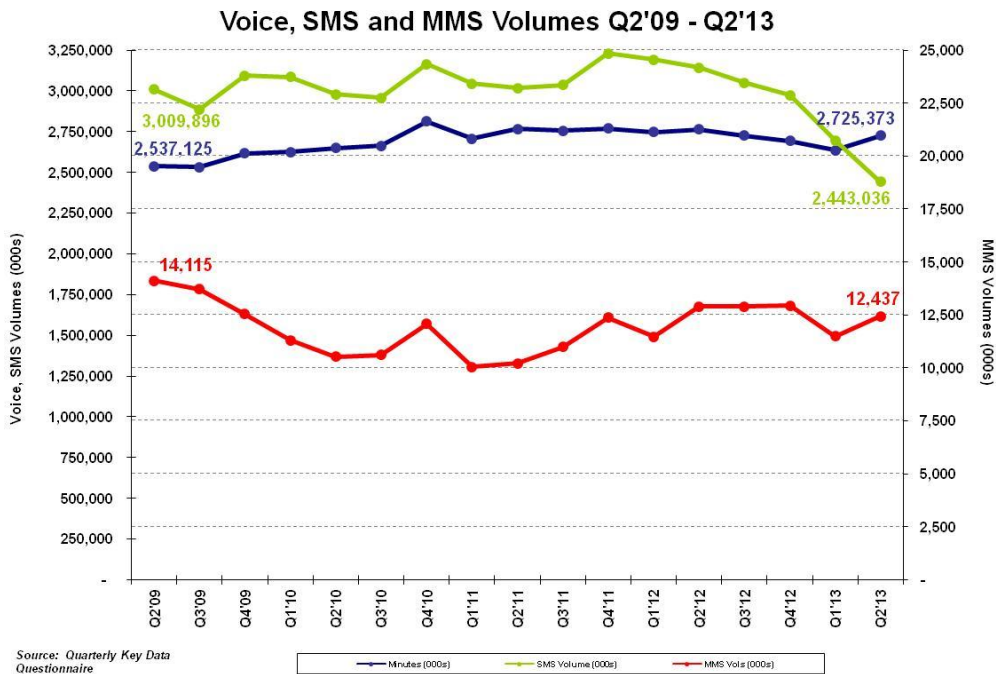
<sup>45</sup> There were 340,248 M2M subscriptions in Q2 2013. Subscriptions in previous quarters have included M2M subscriptions.

### 4.3 Mobile Volumes

Figure 4.3.1 illustrates the change in voice minutes, SMS, and MMS (Multimedia Messaging Service) messages sent over mobile networks since Q2 2009. Total retail mobile voice traffic totalled 2.73 billion minutes in Q2 2013, an increase of 3.4% on the previous quarter but a decrease of 1.4% on Q2 2012.

The total number of SMS messages sent by mobile users in Ireland was over 2.44 billion in Q2 2013, down 9.4% on the previous quarter and down 22.3% on Q2 2012. The number of multimedia messages (MMS) sent increased by 8.2% this quarter but was down 3.5% compared to Q2 2012. Some of these changes may be reflective of seasonal activity (i.e. peaks during Q4 holiday period, and decline in summer months).

**Figure 4.3.1 – SMS, MMS and Call Minute Volumes<sup>46</sup>**



<sup>46</sup> It should be noted that prior to Q1 2009 some mobile data minutes were included under mobile advanced minutes. As these volumes are not based on voice calls, they were removed in Q1 2009 as they had a downward impact on overall mobile voice traffic.



Figure 4.3.2 illustrates the share of types of mobile voice call minutes. As of Q2 2013, 76.7% of all mobile voice minutes were classified as mobile-to-mobile (on-net and off-net); 11.0% of mobile voice minutes were to fixed line phones, 9.5% were classified as international and roaming and the remaining 2.8% were advanced voice minutes which include calls to premium rate services.

**Figure 4.3.2 – Voice Call Minute Volumes by Type**

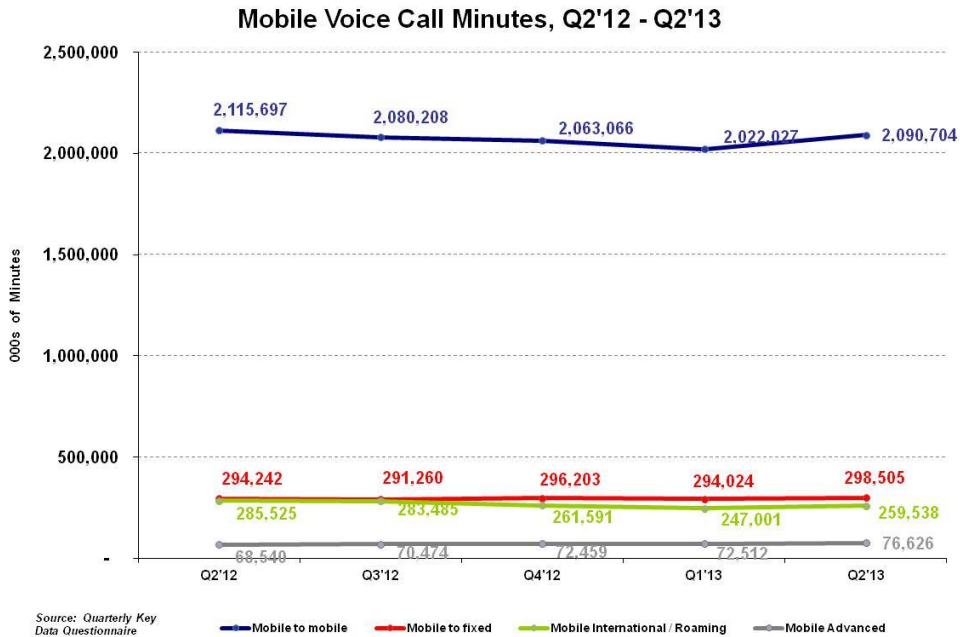


Figure 4.3.3 shows the change in the on net/off net mobile to mobile voice call minutes since Q2 2012. As of Q2 2013, 66.5% of all mobile to mobile voice minutes were classified as on-net down from 67.8% last quarter and down from 69.6% in Q2 2012.

**Figure 4.3.3 – Mobile to Mobile Voice Call Minute Volumes by Type**

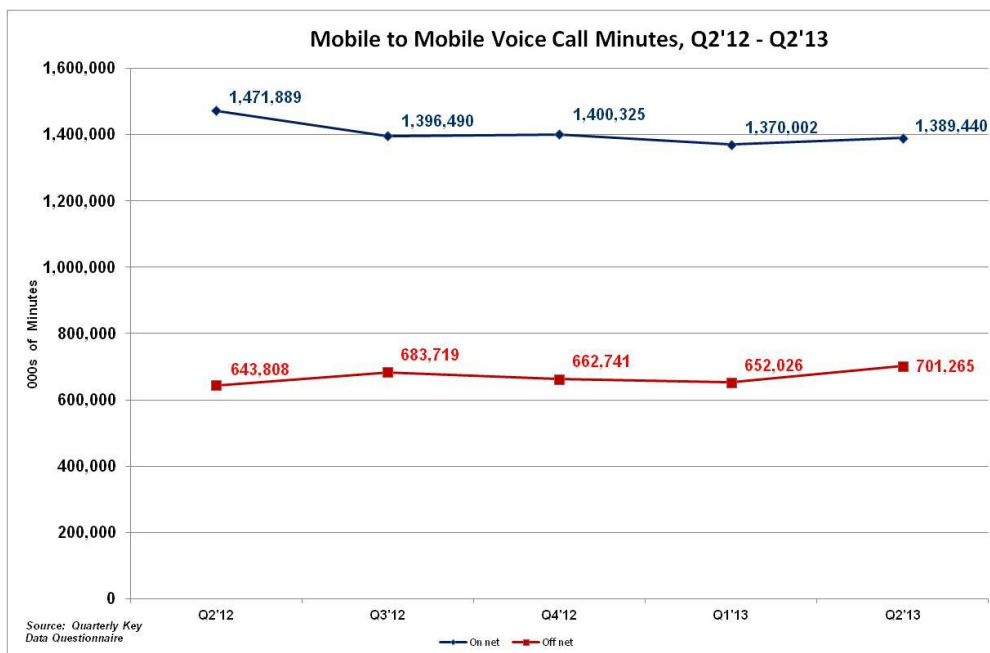
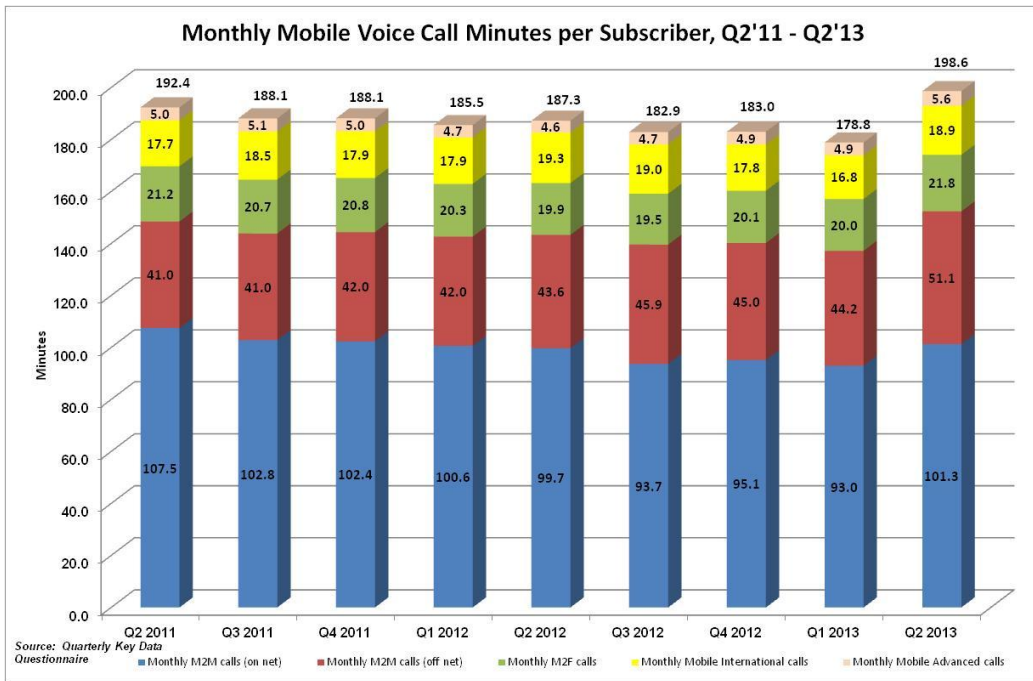


Figure 4.3.4 shows the change in the monthly mobile voice call minutes per subscriber. In Q2 2013 the average usage was just below 200 minutes. Q2 2013 mobile voice subscriber base is affected by subtraction of M2M subscriptions and thus, average minutes per subscriber reported for Q2 2013 are not directly comparable with the corresponding values in the previous quarters.

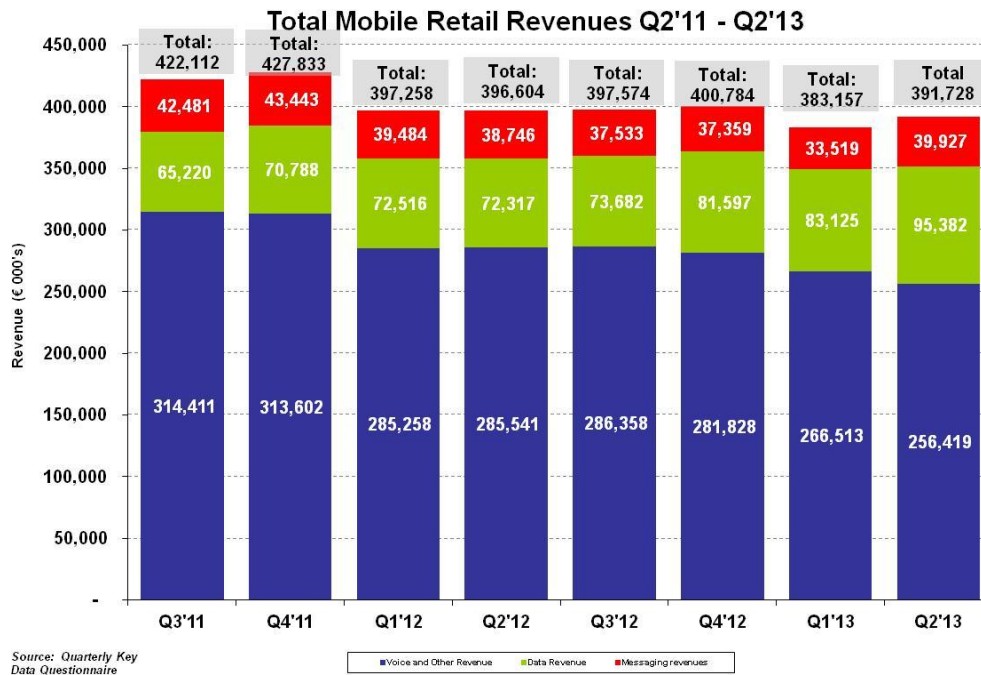
**Figure 4.3.4 – Monthly Mobile Voice Call Minutes per Subscriber by Type**



### 4.4 Mobile Revenues

Figure 4.4.1<sup>47</sup> shows that mobile retail revenues for Q2 2013 were over €391 million, up by 2.2% from Q1 2013 but down by 1.2% since Q2 2012. ComReg notes that in Q2 2013 retail international roaming messaging and data revenues were included into *messaging*<sup>48</sup> and *data*<sup>49</sup> revenue categories respectively. These revenues were previously included in the *Voice and other data*<sup>50</sup> category. Thus, the comparisons in growth of revenues between different revenue categories cannot be directly made this quarter.

**Figure 4.4.1 – Total Mobile Retail Revenues**



<sup>47</sup> Due to the corrections to the revenues provided by one mobile operator, as noted in page 5 of this document, the revenues in Figure 4.4.1 cannot be compared with revenues reported in previous Quarterly Key Data Reports.

<sup>48</sup> SMS and MMS revenues and roaming SMS and MMS revenues.

<sup>49</sup> Revenues from mobile broadband and mobile internet services and international roaming data revenues.

<sup>50</sup> Please note that since Q2'09 and until Q2'13 voice and other category revenues includes voice call revenues and net handset sales revenues, connection and rental charges, premium rate SMS and MMS revenues, roaming SMS, MMS and data revenues. Handset sales revenues prior to Q2'09 were reported on a gross revenue basis.

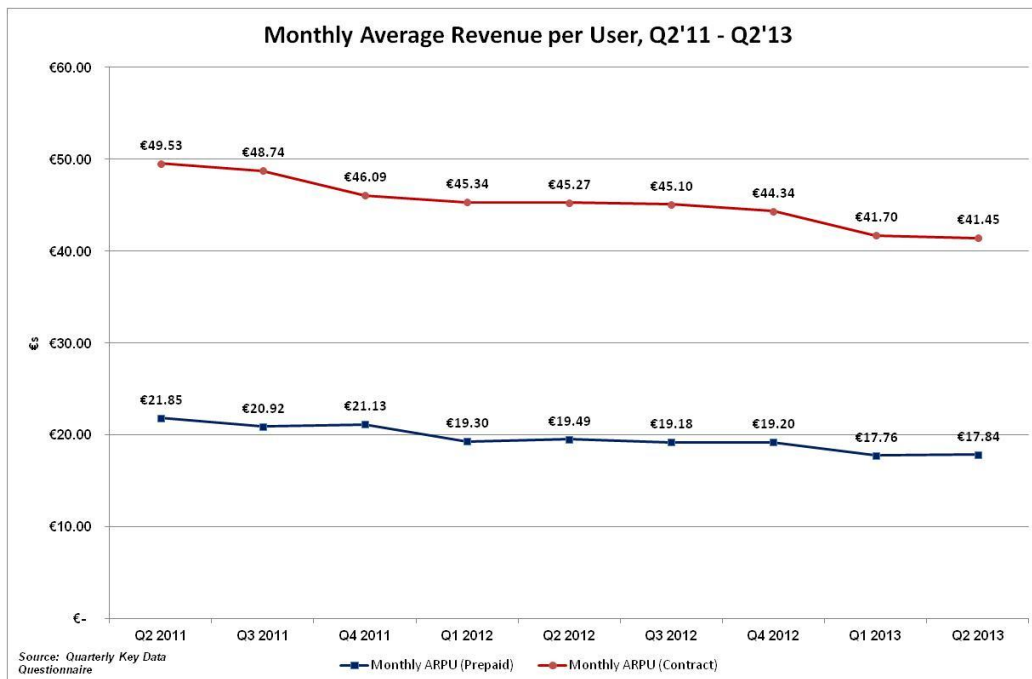
### 4.5 Average Monthly Revenue per User

Mobile ARPU is a function of both the price of mobile services and the level of usage of mobile services. In Q2 2013 mobile APRU was €27.4 per month, down from €27.8 last quarter and down from €29.4 in Q2 2012. This decline is in line with a general downward trend in ARPU across Western European countries. Based on data from Analysys Mason’s Telecom Matrix monthly mobile ARPU across the average of 14 Western European countries fell by 8.4% in Q1 2013 compared to Q1 2012.

Figure 4.5.1 illustrates the change in ARPU for prepaid and contract subscribers. In Q2 2013 mobile ARPU for prepaid subscriber was just below €18 per month (down 8.5% since Q2 2012) while mobile ARPU for contract subscribers was over €41 per month (down 8.4% since Q2 2012).

This decline in ARPU is likely to be a reflection of a number of factors such as those attributable to worsened economic conditions in Ireland (e.g. reduced consumer spending), lower priced mobile plans, increased sales of bundled products (combining mobile with fixed calls and sometimes broadband) and reductions in roaming and mobile termination rates, among others.

**Figure 4.5.1 – Monthly Average Revenue per User by Type**



#### **4.6 Machine to Machine subscriptions**

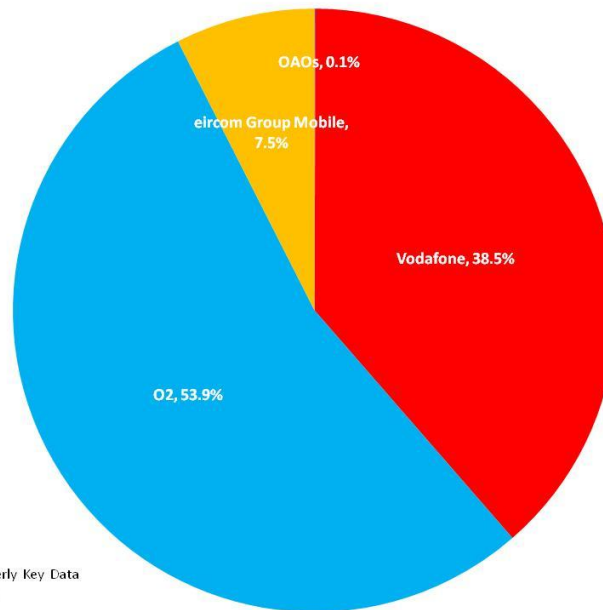
Machine to Machine (M2M) refers to technologies that involve data communication between devices or systems in which, at least in principle, human intervention is not a part. These technologies may encompass either wireless or wired communications, or both. M2M communication is already widely deployed in Ireland and its usage is set to grow rapidly, driven in no small part by the expansion of next generation telecommunications technology and a decline in the cost of the embedded wireless modules and sensors that enable M2M services. This continued improvement in the infrastructural environment around M2M has led to a rapid growth of applications and services that meet users' business and lifestyle needs. M2M technologies transfer data on the condition of physical assets and devices to a central location (which is at a distance from the devices) for effective monitoring and control. M2M has many a multitude of uses, with current deployments in the healthcare, energy, home automation and transportation sectors. Specific examples of applications include smart metering, vehicle and consignment tracking and alarm monitoring systems of various kinds, ATM machines signalling the need for cash replacement, smart grid monitoring of real time electricity demand, smart home applications such as switching on and off lights, heating, appliances.

Different networking technologies can be used to connect M2M devices, depending on the amount of mobility needed, quality required, data rate, the degree of dispersion of devices over an area, and so on. Gathering data on dedicated M2M mobile connections assists ComReg in assessing future regulatory needs for M2M, e.g. for numbering resources. The additional data also allows for more accurate assessment of mobile telephony and broadband connections.

Figure 4.6.1 outline market shares based on active M2M subscriptions. As of Q2 2013, O2 has the highest market share of these subscriptions with 53.9%, followed by Vodafone with 38.5% market share and Eircom Group Mobile with 7.5%. The remaining OAOs have 0.1% of M2M subscriptions.

**Figure 4.6.1 – Market Share – Number of M2M Subscriptions**

Machine to Machine Market Shares (Subscriptions), Q2 2013

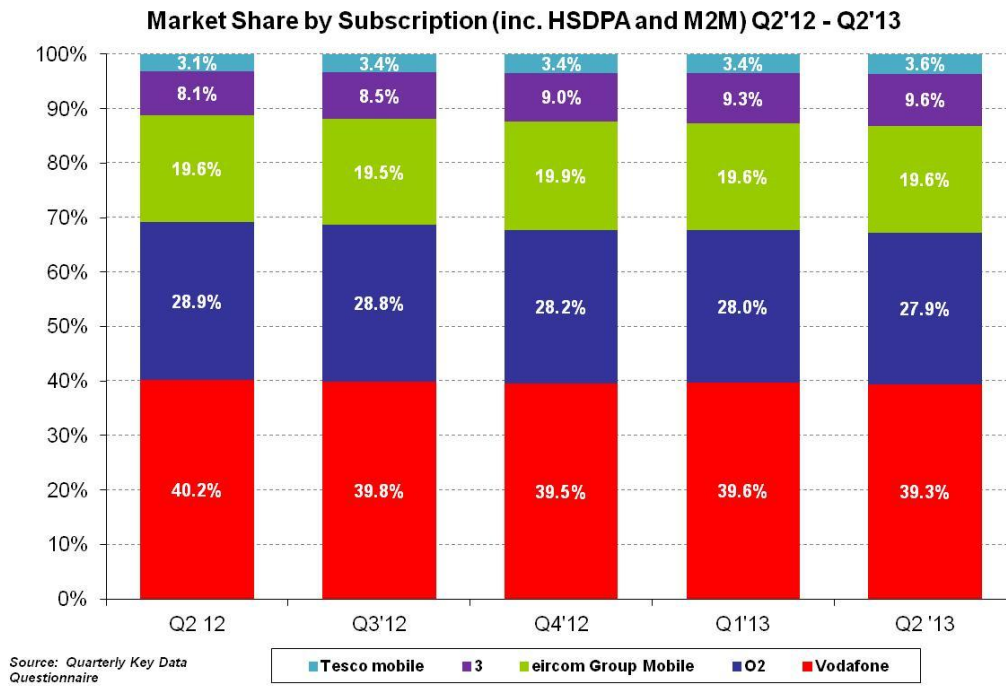


Source: Quarterly Key Data Questionnaire

**4.7 Competition in the Mobile Market**

Figures 4.7.1 and 4.7.2 outline mobile market shares based on the number of active subscriptions reported by each operator. Figure 4.7.1 includes mobile broadband and M2M while figure 4.7.2 excludes mobile broadband and M2M. Vodafone has the highest market share including and excluding mobile broadband and M2M (39.3% and 40.6%), followed by O2 (27.9% and 26.0%), eircom Group Mobile (19.6% and 21.5%), 3 (9.6% and 7.6%) and Tesco Mobile (3.6% and 4.3%). It should be noted that due to the subtraction of M2M subscriptions, in Figure 4.7.2 market shares in Q2 2013 are not directly comparable to market shares in the previous periods.

**Figure 4.7.1 – Market Share – Number of Subscriptions (inc. mobile broadband and M2M)**



**Figure 4.7.2 – Market Share – Number of Subscriptions (ex. mobile broadband and M2M)**

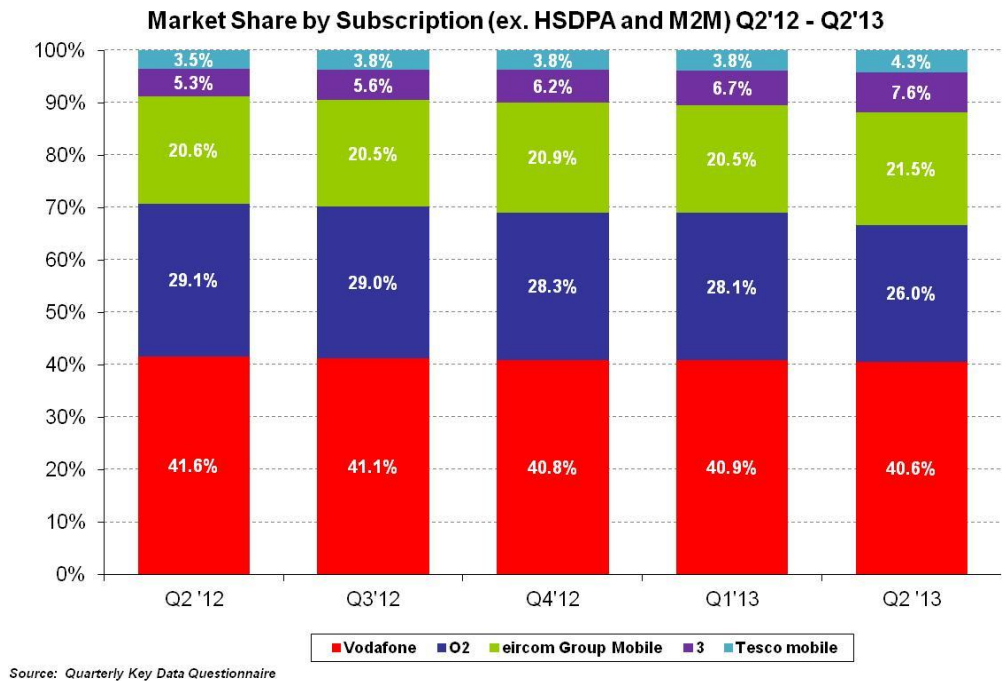
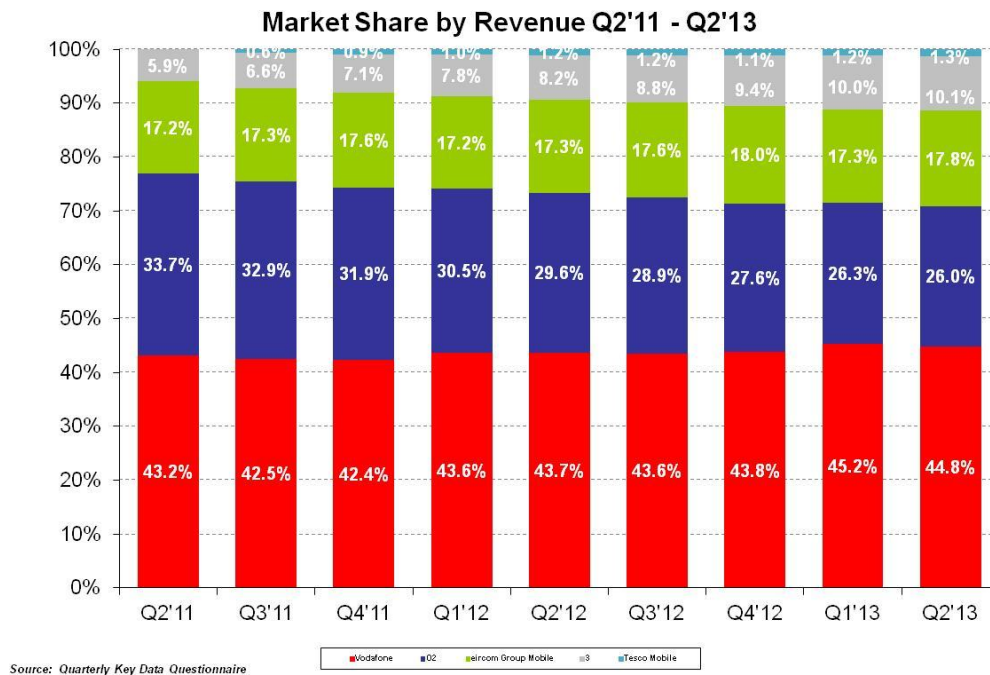


Figure 4.7.3<sup>51</sup> provides an analysis of market shares by total revenue for mobile operators in the Irish market. Tesco Mobile is included for the first time from Q3 2011 in this chart. Therefore, changes in market shares previous to Q3 2011 are not directly comparable. Vodafone’s market share remains highest at 44.8% followed by O2 at 26.0%. Eircom Group Mobile’s market share is the next largest at 17.8% followed by 3 and Tesco mobile at 10.1% and 1.3% respectively.

**Figure 4.7.3 – Revenue Market Share**



<sup>51</sup> Due to the corrections to the revenues noted in page 5 of this document, the revenue market share in Figure 4.7.3 cannot be compared with revenue market shares reported in previous Quarterly Key Data Reports.

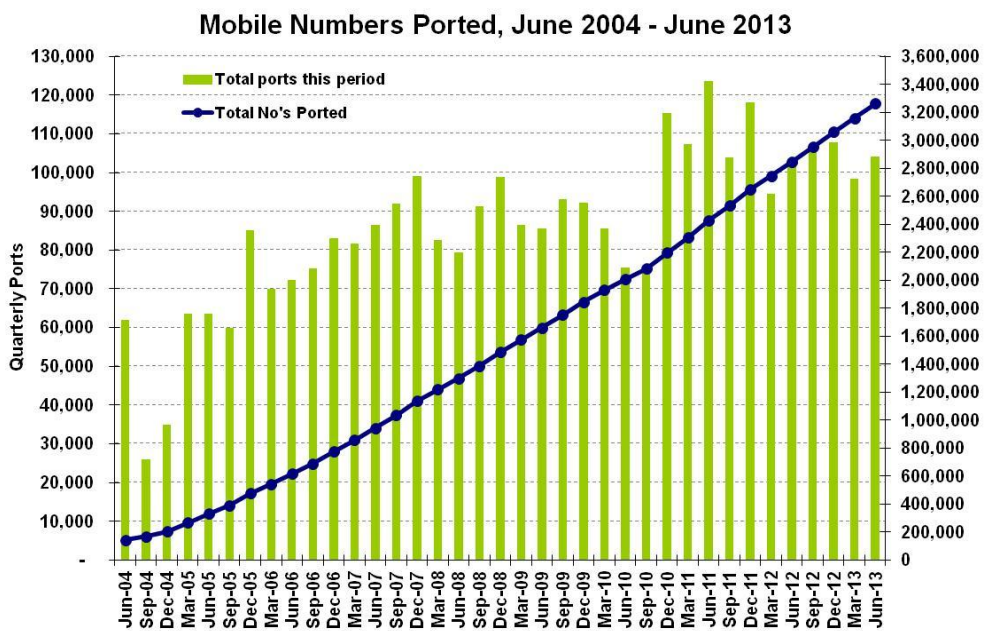


### 4.8 Switching in the Mobile Market

Figure 4.8.1 illustrates the cumulative total of mobile numbers ported between Irish mobile operators since June 2004. MNP allows consumers to switch mobile operator while retaining their mobile number.

Over 3.26 million numbers have been ported since June 2003. In the quarter to June 2013, 104,037 numbers were ported between operators (416,011 numbers in the twelve months to June 2013). Over the last 12 months, an average of 104,003 numbers has been ported each quarter.

**Figure 4.8.1 – Cumulative Mobile Numbers Ported**



Source: Quarterly Key Data Questionnaire

#### 4.9 Mobile Pricing Data<sup>52</sup>

The OECD mobile pricing basket definitions have been updated by Teligen and were adopted by the OECD in March 2010. These definitions have been derived from data provided by operators and regulators in OECD countries, and have been reviewed by the OECD country authorities.

The OECD mobile baskets include at least 2 operators for each country. If these cover less than 50% of subscriptions in any country, additional operators may be included as well. Therefore, the reported figures reflect the cheapest prices offered by these operators, which may not necessarily be the cheapest offers in the entire market. All of the most common packages are included for each operator. This means that the current update covers over 3,730 packages across the 34 OECD countries. Both pre-paid and post-paid packages are included.

Mobile offers used are typically 2G and 3G services with the main focus on voice. The basket methodologies can be used to compare different types of offers such as pre-paid, post-paid or SIM-only plans. The new methodology used by the OECD/Teligen is based on the following baskets of calls:

<b>Baskets</b>
30 calls per month
100 calls per month
300 calls per month
900 calls per month
40 calls per month pre-paid basket
400 messages per month basket

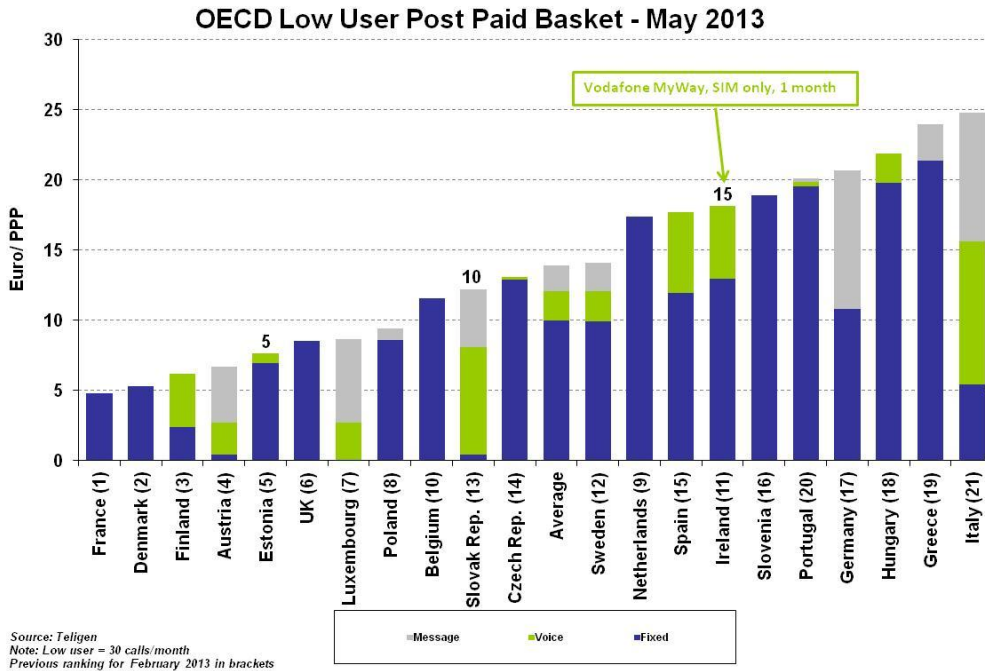
The Teligen mobile baskets presented in this Quarterly Report, termed as “low user”, “medium user” and “high user” are, based on the 30 calls, 100 calls and 300 calls per month baskets respectively described above. They are calculated and analysed independently by Teligen, using an OECD methodology which includes PPPs (Purchasing Power Parities) to reflect the real cost of mobile services compared to all other costs within a country.

<sup>52</sup> The ‘Fixed’ component of price refers to the standard charges imposed by operators, regardless of the amount of calls made (i.e. connection and rental). Teligen’s calculation of this Figure is made up of: Installation Charge/5 + Rental charge for 1 year. The ‘Voice’ component of price refers to the charges imposed by operators, arising from the number of voice calls made by the user, while “Message” refers to the charges imposed by operators, arising from the number of SMS and MMS messages sent by the user.

**4.9.1 Low User Post Paid Mobile Basket<sup>53</sup>**

For the “low user” post paid mobile basket, Ireland ranks in 15<sup>th</sup> position among the European countries benchmarked. Ireland is four places behind of and 30.5% more expensive than the benchmarked country average. The Irish package represented here is Vodafone’s MyWay SIM only, 1 month package.

**Figure 4.9.1.1 - OECD Low User Post Paid Mobile Basket (30 calls)**

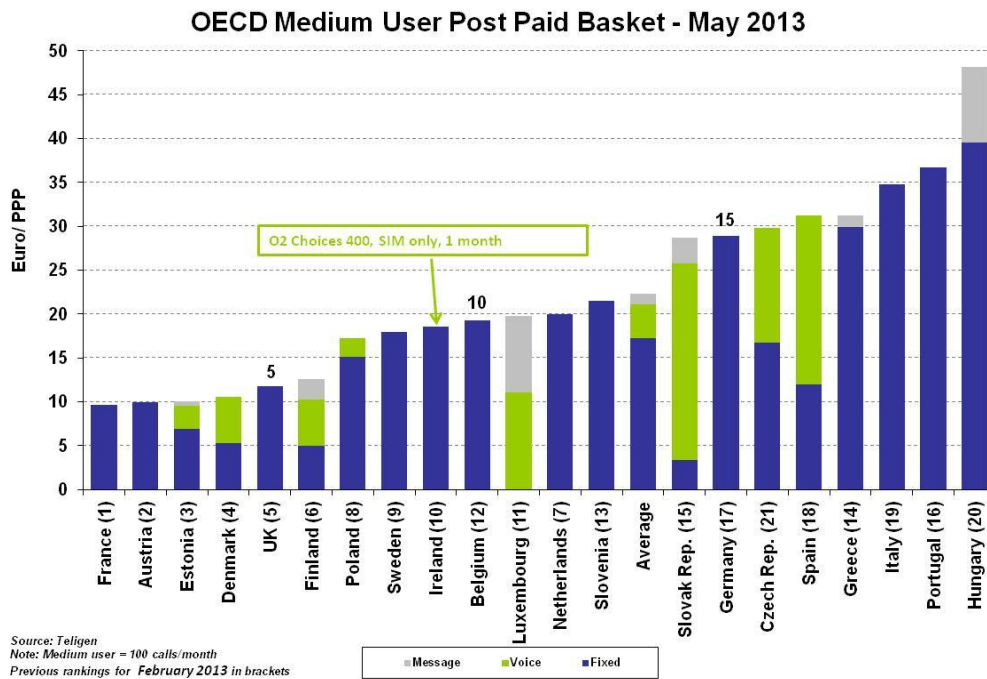


<sup>53</sup> All tariffs are inclusive of VAT, rates will vary between Member States.

### 4.9.2 Medium User Post Paid Mobile Basket

For the medium user post paid mobile basket, Ireland ranks in 9<sup>th</sup> position out of the 21 benchmarked countries. Ireland is 5 places ahead of and 17.0% cheaper than the benchmarked average. The package used for Ireland is O2’s Choices 400, SIM Only, 1 month package.

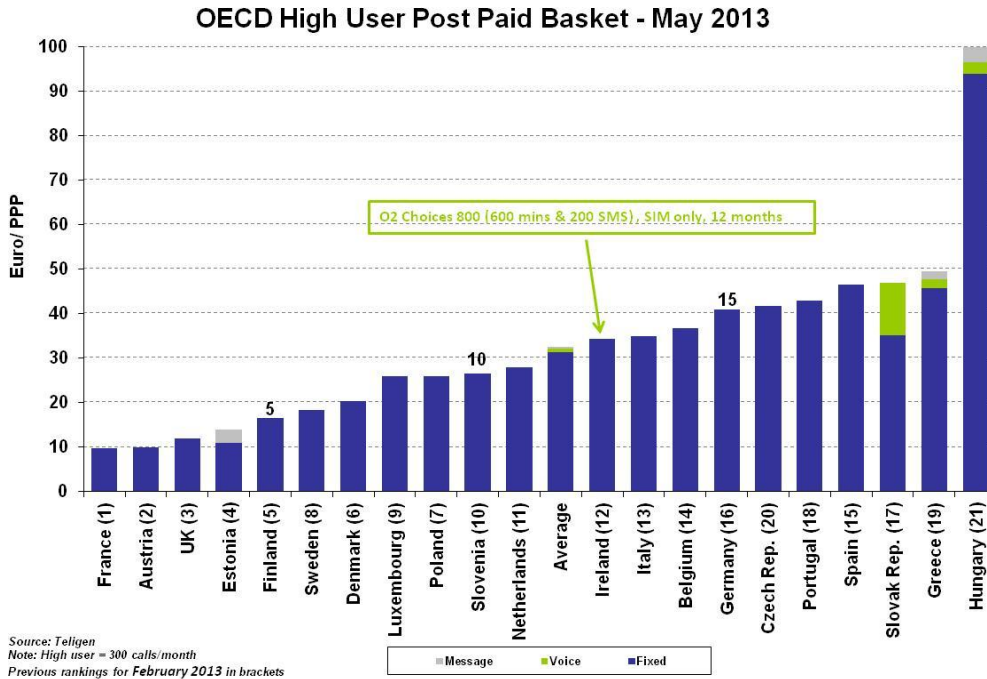
**Figure 4.9.2.1 - OECD Medium User Post Paid Mobile Basket (100 calls)**



### 4.9.3 High User Post Paid Mobile Basket

Ireland ranks in 12<sup>th</sup> place among the countries benchmarked in the high user post paid mobile basket. The Irish package in this basket is O2's Choices 800, SIM Only 12 months package. Ireland is one place behind and 5.7% more expensive than the average of the 21 benchmarked countries.

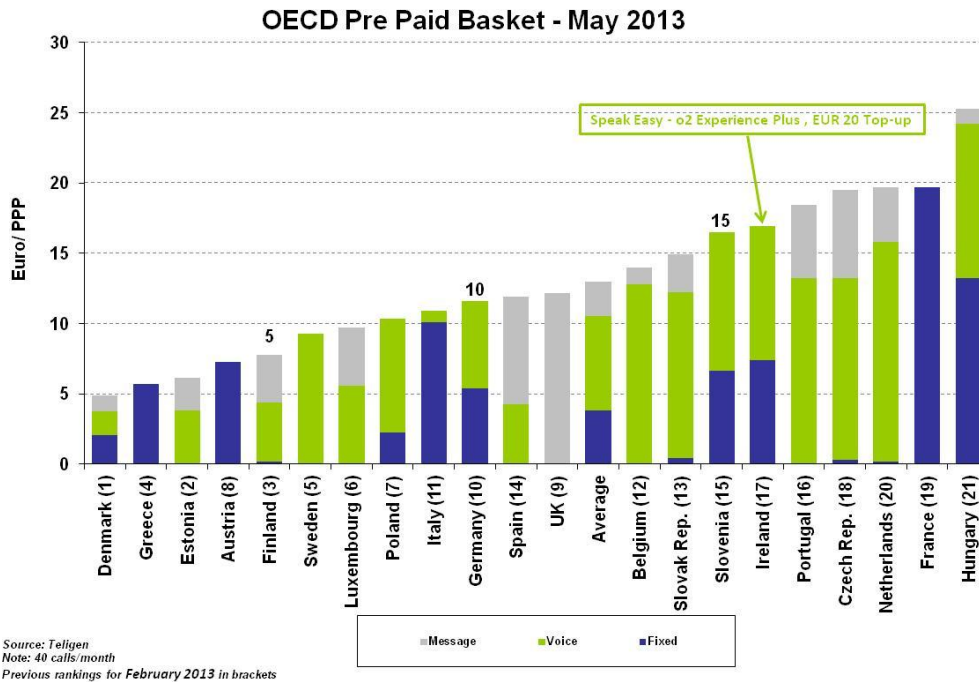
**Figure 4.9.3.1 - OECD High User Post Paid Mobile Basket (300 calls)**



#### 4.9.4 Pre-Paid Mobile Basket

In the pre-paid mobile basket, Ireland is in 16<sup>th</sup> position among the benchmarked countries. The package used for Ireland in this basket is O2’s Speak Easy, Experience Plus, €20 Top-up. Ireland is 4 places behind the average of the 21 benchmarked countries and the cost of this basket in Ireland is approximately 30.3% more expensive than the benchmarked country average.<sup>54</sup>

**Figure 4.9.4.1 - OECD Pre-Paid Mobile Basket (40 calls)**



<sup>54</sup> This is the cheapest plan available from operators that cover at least 50% of the market i.e. Vodafone and O2, and does not necessarily reflect the cheapest offer available in the entire market.

## 5. Broadcasting

### 5.1 Overall Broadcasting Market\*<sup>55</sup>

As analogue terrestrial TV switch off (ASO) occurred on the 24th of October 2012 the numbers reported in this section for September 2013 show some fluctuations from previous periods. ComReg expects that the data should become more stable in future reporting. Some analogue terrestrial TV customers did not switch at ASO, and this therefore, affects the numbers reported for September 2013 (see footnote 52 for more detail). This broadcasting data is from the Nielsen TV Audience Measurement (TAM) Establishment Survey.<sup>56</sup> The survey indicated that there were 1,585,000 TV homes in Ireland in September 2013. Figure 5.1.1 shows the estimated number of TV homes by reception type in September 2012 and September 2013 on the basis of the reception method through which the highest number of TV channels is received. Irish terrestrial DTT only homes represented 10.7% of all TV homes as of April 2013. Cable/satellite platforms represented the remaining 89.3% of all TV homes in Ireland.<sup>57</sup>

**Figure 5.1.1 – TV Homes by Reception Type<sup>58</sup>**

	September 2013	September 2012	September 2013 as % of Total TV Homes	% Change September '12 – September '13
Reception	(000s)	(000s)	%	% change
Irish Terrestrial	169	202	10.7%	-16.3%
Multi Total	1,416	1,395	89.3%	+1.5%
Multi Terrestrial	N/A	84	N/A	N/A
Analogue Cable/Sat	31	48	2.0%	-35.4%
Digital Cable/Sat	1,385	1,263	87.4%	+9.7%
Total Cable/Sat	1,416	1,311	89.3%	+8.0%
<b>Total TV Homes</b>	<b>1,585</b>	<b>1,597</b>	N/A	<b>-0.8%</b>
<b>RECEPTION:</b> Reception type categories are hierarchically defined and mutually exclusive. A home is classified once within reception type and this is based upon the highest form of reception available within the home.				
<b>Multi Total:</b> Made up of UK DTT / FTA Satellite, Cable, and SKY homes.				
<b>Irish Terrestrial</b> In September 2013 homes which only receive any or all of the following: RTÉ One, RTÉ Two, TV3, TG4, RTÉ One+1, RTÉ News Now, RTÉ jr via an aerial and a set-top box or an aerial and an integrated digital TV or via Saorsat.				

<sup>55</sup> \*Note to data. The September 2013 Irish DTT figure represents all homes that use Irish DTT as their reception type. Universes for "Irish Terrestrial" prior to November 2012 would have included both analogue and digital terrestrial homes. The penetration of TV as of the September 2013 universes is 94% (1,585,000 TV homes compared to 1,687,000 total homes as per smoothed CSO Q1 2013 QNHS).

<sup>56</sup> The Establishment Survey is a survey produced by Nielsen TV Audience Measurement (fieldwork is carried out by Behaviours and Attitudes) on behalf of Television Audience Measurement Ireland Ltd (a TV ratings body). The Establishment Survey covers areas such as ownership of TV related equipment, method of TV reception and demographics of TV household individuals such as age etc.

<sup>57</sup> MMDS (Multichannel Multipoint Distribution Service) is included under cable/satellite. MMDS is a wireless telecommunications technology, used usually in sparsely populated rural areas, where laying cables is not economically viable. Approximately 275,000 of those reported above as digital cable/sat and total cable/sat are UK DTT/FTA satellite.

<sup>58</sup> Source: Nielsen TV Audience Measurement Establishment Survey on behalf of TAM Ireland.

**Cable/Satellite:** Includes UK DTT / FTA Satellite, Cable, IPTV and SKY homes. Sky homes based on the possession of SKY boxes, not on being SKY subscribers.

Figure 5.1.2 charts TV homes by reception method <sup>59</sup> from September 2011 to September 2013. The percentage of cable/satellite TV homes (this does not include other satellite i.e. respondents who said 'don't know' and satellites that receive foreign language stations including freesat) has averaged 70% over the last two years. <sup>60</sup> Television homes that subscribe to other satellite services besides Sky represented 14% of TV homes in September 2013. Reception by other/local supplier (deflector/relay services), and IPTV methods is relatively low. Approximately 38% of TV homes have Irish DTT.

**Figure 5.1.2 – TV Homes by Reception Method<sup>61</sup>**

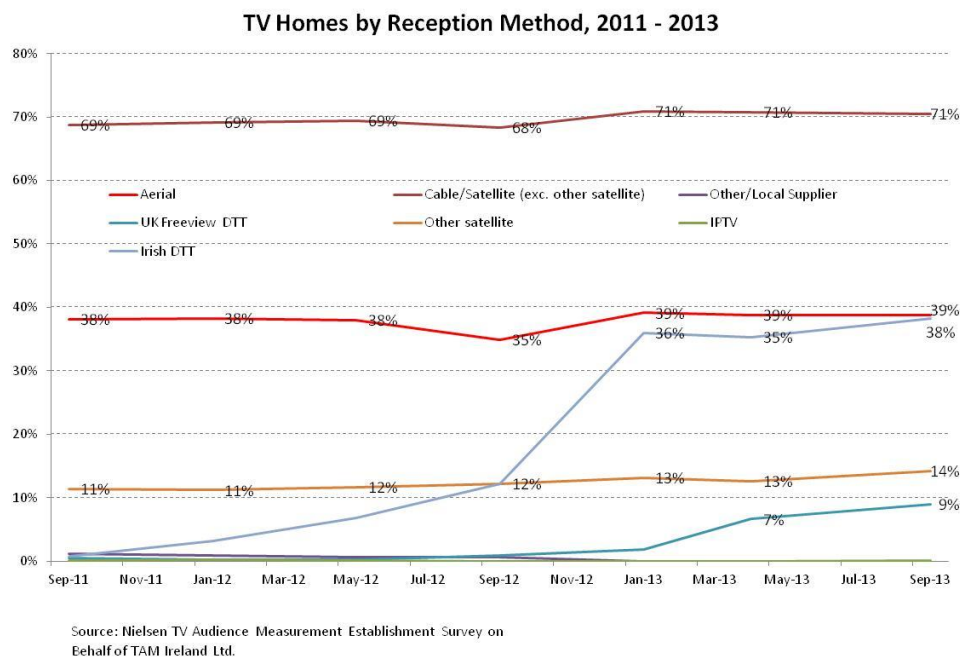


Figure 5.1.3 shows that, the total number of TV homes increased in September 2013 (for reference see footnote 52 on page 70). Digital TV homes now represent 98.0% of all TV homes compared to 52.1% in September 2008.

<sup>59</sup> This is determined by the method by which homes with a TV receive their channels. Each home can have more than one method of reception e.g. aerial and cable or digital satellite, digital satellite and cable, etc. The question is asked for their main and up to 9 TV sets. For this reason, the total for the reception methods adds up to more than 100%.

<sup>60</sup> It should be noted that from September 2011 the reporting of the cable/satellite figure has changed. This is because up to September 2011 cable/satellite reception method included homes that had both cable and satellite twice (i.e. (1) cable, (1) satellite). Nielsen now publish homes with cable and satellite as one reception method - as cable or satellite (i.e. cable or satellite (1)).

<sup>61</sup> Reception Method is not benchmarked for September 2013. As of November 2012 'Aerial' includes MMDS and Saorsat homes. Irish DTT includes Saorsat. Cable/satellite includes MMDS and IPTV, excludes UK DTT, Irish DTT and Saorsat.



**Figure 5.1.3 – TV Homes 2008 –2013**

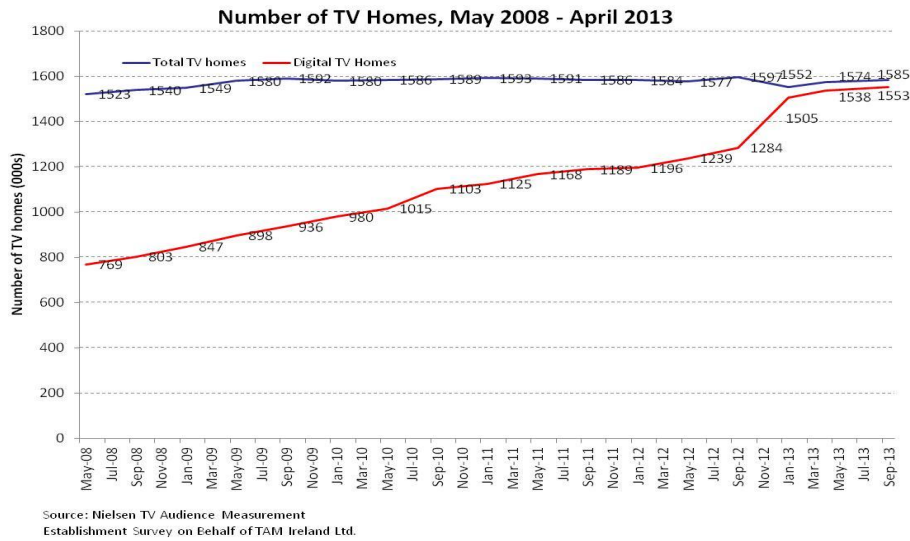
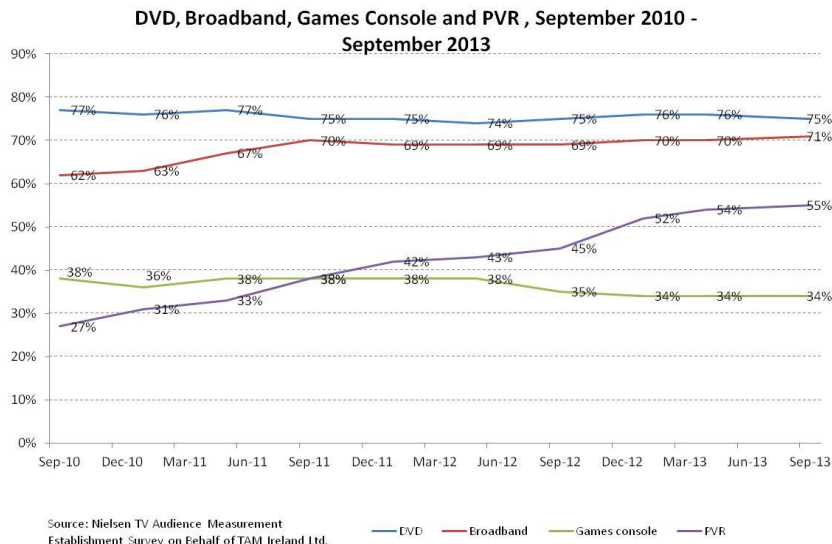


Figure 5.1.4 shows TV homes by DVD<sup>62</sup>, broadband<sup>63</sup> access, game console and PVR<sup>64</sup> ownership between September 2010 and September 2013. Three quarters of television homes have a DVD player but this figure has declined slightly over the last three years; down by 2 percentage points over the period. Broadband access was present in circa 71% of homes with a television in September 2013. The number of homes with games consoles has decreased over the last three years from 38% to 34% and this remained stable over the last year. PVR ownership continues to increase albeit at a slower pace, reaching 55% in September 2013; up from 27% in September 2010.

**Figure 5.1.4 – DVD, Broadband, Games Console and PVR Trends**



<sup>62</sup> It should be noted that as of Sep 13 universes VCR and DVD numbers are combined.

<sup>63</sup> Both fixed and mobile broadband.

<sup>64</sup> A PVR is an electronic device used to record media digitally. The PVR is also known as a digital video recorder or DVR. A PVR records and plays back television programmes, but, unlike the VCR, it stores the programs in digital rather than analogue format, for example, SKY+Box, or UPC Digital Video Recorder.

Figure 5.1.5 shows the level of household penetration of pay TV services and free to air TV services in Ireland based on reception method. This chart has been derived by ComReg using Nielsen data and is not a classification used by Nielsen or a classification used as part of the survey itself. Homes with a pay TV (cable, satellite and IPTV homes)<sup>65</sup> service have generally been stable since 2009 at 70%, on average, of all TV homes.

**Figure 5.1.5 – Pay TV vs Free to Air TV Homes, 2005 - 2013**

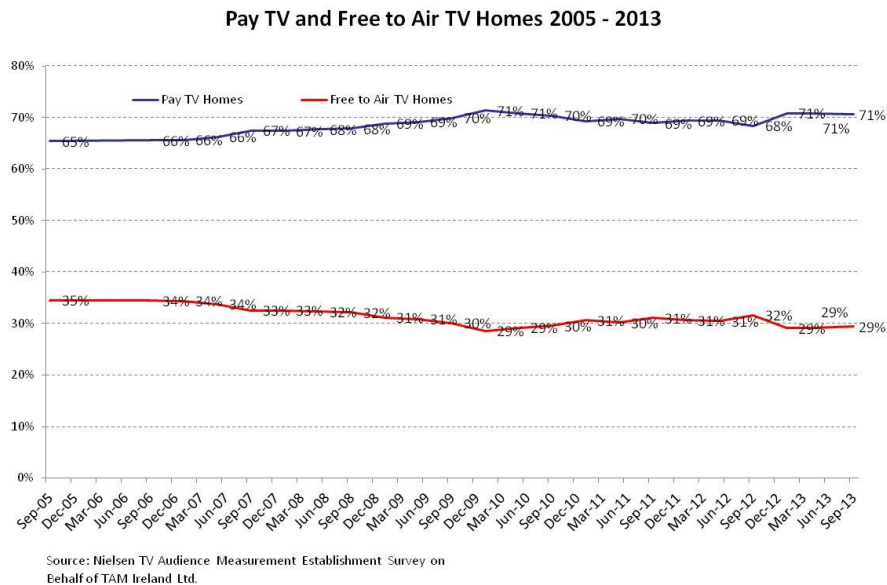
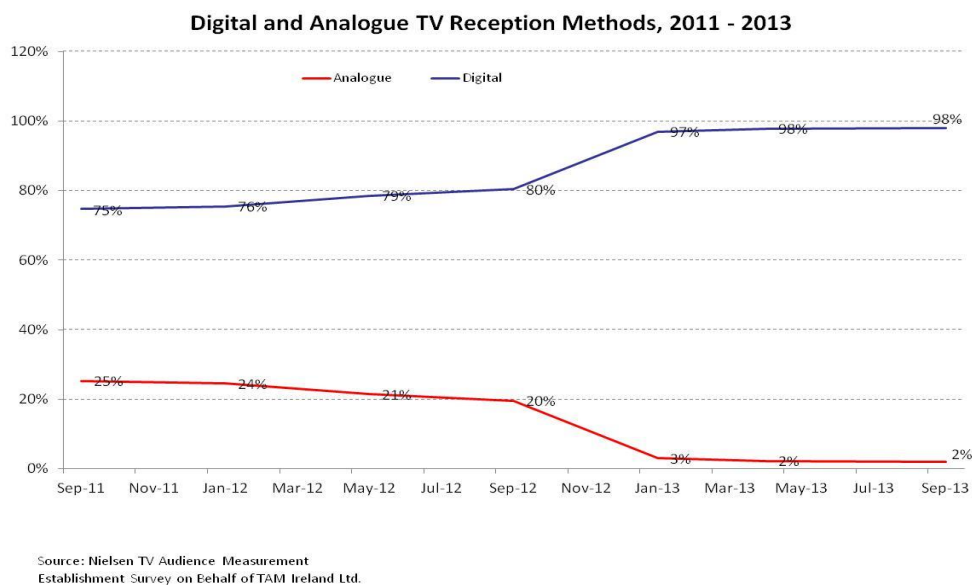


Figure 5.1.6 shows the proportion of digital to analogue TV reception methods in Ireland across all platforms. Digital TV reception (98%) increased significantly between September 2012 and September 2013 in light of analogue terrestrial switch off.

**Figure 5.1.6 – Digital and Analogue TV Reception, 2011 - 2013**



<sup>65</sup> IPTV is included from September 2011.

## 6. Appendix

Sky Ireland's distribution of subscriptions by type (single play, double play or triple play) is estimated using percentage distribution of Sky Ireland's subscriptions obtained from the market survey data conducted by RED C Research & Marketing Ltd. The filedwork on ComReg's behalf was carried out on August 19<sup>th</sup>-21<sup>st</sup>, 2013.

1003 respondents<sup>66</sup> were asked the following question:

- Does the telecommunications service provider, Sky, provide any of the following telecommunications services in your home?
  - TV
  - Internet/Broadband
  - Home Landline Telephone Service

The respondents who stated that Sky provides more than one service were then asked the following question:

- You mentioned that Sky provides your (x,y and/or z service). Do you receive one bill for these services (if 2 services mentioned) or Do you receive one bill for at least two of this services (if 3 services mentioned)?

The respondents who gave the positive answer to the second question are categorized as bundle subscribers.

Survey results showed that 87.6% of Sky Ireland's subscribers were subscribing to one service, 4.8% to two services and 7.6% to three services.

Table 1: Sky Ireland's distribution of subscriptions by type.

Fixed subscription type (n=525)	Number of Sky's subscribers	% share of total Sky's subscribers
TV	422	80.3%
Broadband	21	4.0%
Fixed Voice	17	3.2%
TV and Fixed Voice	9	1.7%
TV and Broadband	13	2.5%
Fixed Voice and Broadband	3	0.6%
TV, Fixed Voice and Broadband	40	7.6%

<sup>66</sup> The sample is nationally representative.

Aggregated SB-WLR Performance Statistics, as supplied by Eircom, are published in accordance with ComReg Decision Notice (07/61) Section 6.6 (vii).

**Performance metrics: Q2 2013**

**Apr-13**

Order Type	% Orders Validated within Performance Target	% Orders Delivered within Performance Target
DR	-	99.73%
LE	-	100.00%
PW	-	99.62%
LNI/LTI/MI	-	99.57%
LNI/LTI/MI	-	99.96%
CL	-	99.75%
LNN/LTN/MN	99.64%	95.58%
CH	-	99.77%
CN	-	97.47%
CM	-	100.00%
FA	-	100.00%

**May-13**

Order Type	% Orders Validated within Performance Target	% Orders Delivered within Performance Target
DR	-	99.59%
LE	-	100.00%
PW	-	99.80%
LNI/LTI/MI	-	99.42%
LNI/LTI/MI	-	99.95%
CL	-	99.81%
LNN/LTN/MN	100.00%	96.85%
CH	-	99.86%
CN	-	95.81%
CM	-	100.00%
FA	-	100.00%

**Jun-13**

Order Type	% Orders Validated within Performance Target	% Orders Delivered within Performance Target
DR	-	99.88%
LE	-	99.97%
PW	-	99.75%
LNI/LTI/MI	-	99.16%
LNI/LTI/MI	-	99.98%
CL	-	99.94%
LNN/LTN/MN	97.48%	92.13%
CH	-	99.78%
CN	-	100.00%
CM	-	99.80%
FA	-	100.00%

Count of Time Interval	SB-WLR Repair performance metric Qrt 2 Apr - Jun 2013		
QRT 2 2013	Percentage of faults		
	<=2	<=5	<=10
<b>Grand Total</b>	79.52%	95.62%	99.23%

**Glossary**

<b>DR</b>	Data request: supply of list of numbers, DDIs/MSNs and Ancillary Service for a customer account
<b>PW</b>	Provide Wholesale Line Rental (WLR) and Carrier Selection (CS)
<b>CH</b>	Modify or provide Ancillary Services
<b>CL</b>	Cease Line
<b>LTN</b>	Provide WLR and Carrier Pre-Selection (CPS) and additional line to a specified Customer Account (Non-Insitu)
<b>LNI</b>	Provide WLR and Carrier Pre-Selection (CPS) and new line to a new Customer Account (In-Situ)
<b>LTI</b>	Provide WLR and Carrier Pre-Selection (CPS) and additional line to a specified Customer Account (In-Situ)
<b>LNN</b>	Provide WLR and CPS and new line to a new Customer Account (Not In-Situ)