



Overview of data collection and analysis in ComReg

**Presentation to the World
Telecommunication/ICT Indicators
Meeting, February 10th-11th 2005**

21/01/2005

Statistical overview of Ireland



Population	4.04m (2004)
Households	1.4m (June 2004)
Total area	84,412km
Pop. Density	55/km ² , 40% rural population
GDP	€134,786m (2003) (?3.7%, forecast ?5.3% in 2004)
Inflation rate (HICP)	2.8% (Nov 2004), 2.1% EU-15

Communications Market Overview

- **Total Market**
 - €3.78bn Total revenue for Fixed, Mobile & Broadcasting (3.1% GNP)
 - 14,373 Total employees in the sector
- **Fixed Line**
 - €484m Fixed line revenues in Q3 2004 (51% of total revenue)
 - 1.59m Number of lines
 - 21% OAO Market Share (by revenue)
 - 300,000 CPS lines (Q3 2004), 60,000 wholesale lines rented to OAOs
- **Mobile**
 - 3.57m GSM subscribers, 88% penetration (EU15 = 87%)
 - 46% Overall retail revenues
 - 74% pre-paid subscriptions
- **Internet**
 - 46% households with a PC (June 2004)
 - 38.2% households with Internet access (June 2004)
 - 3% households with broadband Internet access (September 2004)

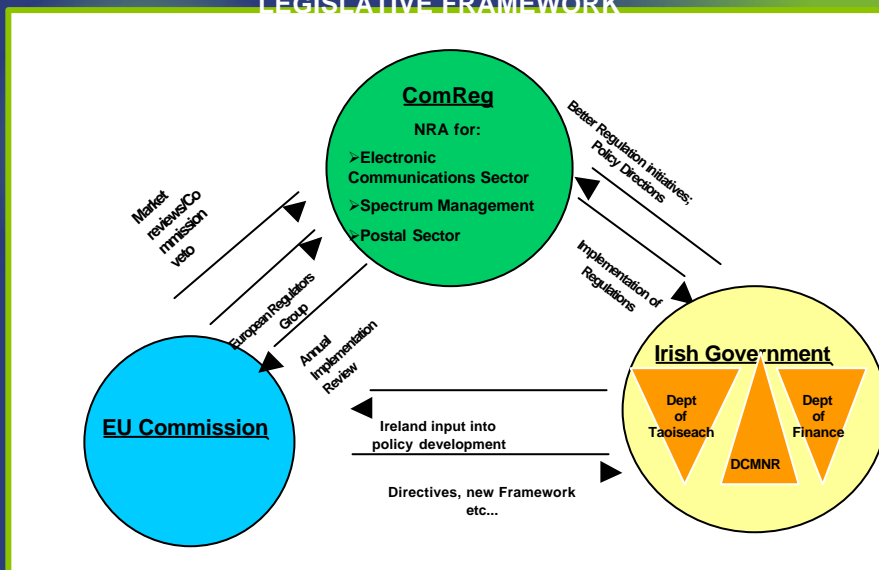
Main telecoms market operators

- **eircom** - Formerly Telecom Eireann, incumbent formed from old state P&T, revenues of €802m & EBITDA of €301m in H1 2004, fully privatised
- **EsatBT** – Indigenous company, sold to BT in 2000, 100K customers, revenues of €289m & EBITDA of €38m in 2003
- **NTL** – Cable company offering limited triple play service in Dublin
- **ESB Telecom** – Carriers' carrier (electricity company's telco arm)
- **Vodafone** – incumbent GSM operator, owned by Vodafone Group, holds 3G licence also
- **O2** – 2nd GSM operator, owned by MMO2, holds 3G licence also
- **Meteor** – 3rd GSM operator – owned by Western Wireless International
- **Hutchison (trading as 3)** – new 3G entrant

Regulatory bodies for the Communications Sector in Ireland

- **Department of Communications, Marine & Natural Resources (DCMNR)**
 - Sets policy for the Irish electronic communications sector
- **Commission for Communications Regulation (ComReg)**
 - Independent regulator which implements policy as set by DCMNR
- **Department of the Taoiseach**
 - Sets Information Society policy
- **Broadcasting Commission of Ireland (BCI)**
 - Independent regulator which licences TV and radio broadcasters and regulates broadcast content
- **RegTel**
 - Independent body which regulates Premium-rate telecoms services
- **Irish Domain Registry**
 - Registry for .ie Internet domain

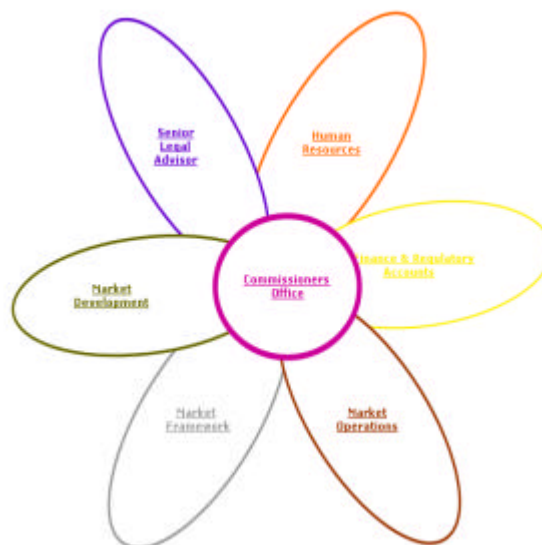
OVERVIEW OF COMREG'S KEY RELATIONSHIPS IN LEGISLATIVE FRAMEWORK



ComReg - who are we...

- **Established as the ODTR in June 1997**
- **The telecoms market was liberalised on 1st December 1998**
- **Wide range of responsibilities**
 - Spectrum Management
 - Numbering Management
 - Telecommunications licensing
 - Broadcasting (spectrum allocation)
 - Post (regulation of universal service provider, licensing)
- **Commission for Communications Regulation (ComReg) established in December 2002 headed by 3-person Commission to replace single Director**
- **C. 120 people**

Organisation Chart



Who collects data in ComReg?

- **Market Development Division**
Market Development is responsible for developing and maintaining an understanding of the status and potential development of the communications sector in Ireland. Market Development is responsible for issuing Market Information Updates and liaises regularly with international telecommunication bodies such as the ITU and the OECD.
- ComReg's current powers to collect data are set out in Article 5 of the EU's Framework Directive and secondary legislation.
- 2 main purposes for data collection:
 - **Market Updates**
 - **Market Analysis/reviews**

Who else collects communications data?

- **The Central Statistics Office under the Statistics Act 1993 has explicit powers to collect data:**
 - Data collected includes annual survey data on access to and usage of ICT by the business sector and residential users.
 - Collects pricing data by means of a quarterly household survey. A monthly Consumer Price Index is produced and data is sent to Eurostat for a Harmonised Index of Consumer Prices.
 - ComReg works closely with the CSO and both bodies supply regular data updates to each other. The CSO's SPAR project is currently compiling information on business statistics collected across the Public Sector with a view to formulating best practice guidelines and avoiding duplication of data collected.

Data collection by ComReg

- **Market Updates**
 - Quarterly primary data collected from telecoms operators by means of a questionnaire, supplemented by data from analysts such as mobile ARPU
 - Fixed (includes Internet and broadband), mobile, broadcasting, tariffs
 - Market surveys (residential, small/large business, Internet) commissioned by ComReg on quarterly and/or annual basis
 - Published as Quarterly Market Commentary & Key Data reports
 - Current questionnaire and reports being reviewed – public consultation in early 2005
- **Market Analysis**
 - In-depth investigations of specific markets (defined at EU-level) by means of primary data collected from operators and supplementary secondary data (market research reports, surveys)
 - Used to determine levels of dominance in each market and appropriate remedies to impose on dominant operators

Issues with data collection

- **Cumbersome processes**
 - Some of the smaller operators do not have streamlined procedures or structured databases for collection of data.
 - This often leads to gaps in data as operators are unable to supply ComReg with data requested.
- **Confidentiality**
 - Some data particularly with regard to market share is submitted by operators in commercial confidence and cannot be published except in aggregate form.
- **Accuracy**
 - Data submitted by the operators contains occasional errors.
 - In addition double-counting, as in the case of Internet subscribers with more than 1 ISP account, can overstate certain indicators.

Latest data available

- **Quarterly Market review**
 - Key data report for Q3 2004 (subscribers, traffic, revenues etc.):
http://www.comreg.ie/fileupload/publications/ComReg04121_b.pdf
 - Commentary report for Q3 2004 (survey data):
http://www.comreg.ie/fileupload/publications/ComReg04121_a.pdf
 - Q4 2004 key data due to be published in March 2005
 - Annual SME telecoms survey published in January 2005
 - Consumer survey (TrendWatch) Q1 2005 survey due to be published in March 2005

Users of ComReg data

- **Industry/telecoms operators**
- **ComReg staff**
- **Brokers/analysts**
- **Other government agencies particularly for parliamentary questions to the Minister**
- **Politicians**
- **Other regulators**
- **Students**
- **Journalists**
- **International bodies such as the OECD, the IRG, the ITU, the European Commission and ECTA**
 - Supply quarterly broadband data to the EC, ECTA and the OECD
 - Supply general telecom stats annually to the OECD and the ITU

Thank you!

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