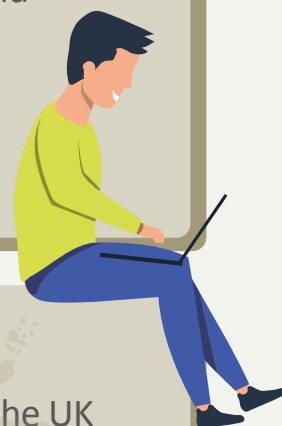


Telecoms retail pricing market study: Key findings & Recommendations

The key findings from the study are:

When compared to the wider international market, costs generally remain competitive for most services, except for fixed broadband services and selected bundled offerings, where Jersey consumers face above average costs. For context, however, costs in the wider international market will span an extensive range, from very competitive to very expensive, with many underlying factors driving this.



As an adjacent and accessible market, many Jersey consumers will directly compare the cost they pay and the services they receive to those experienced by UK consumers, so a comparison with the UK is a natural focus within any international analysis. Care must be taken with this comparison as the cost of goods and services in Jersey is higher than in the UK, along with wages, and this can bias any comparison.



Nevertheless:

Direct comparison with the UK shows that mobile voice and data services are more expensive in Jersey than in the UK. Fixed broadband services of at least 100 Mbps – the minimum speed that Jersey consumer can subscribe to – are on par or better than costs faced by UK consumers.

Fixed voice service costs are lower in Jersey than in the UK, although the use of fixed-voice only is declining in both markets.

When comparing the cost of bundled services to the UK, most bundle types are either more expensive or on par with the UK.

Telecoms retail pricing market study: Key findings & Recommendations

Jersey consumers benefit from a competitive market, with four providers of fixed services and three providers of mobile services. The study highlighted the range of services offered by the different providers and the choice available to consumers, which is often not matched in larger sized markets.

Compared to the other crown dependencies of Guernsey and Isle of Man, as well as selected other similar sized and technologically advanced markets, the costs faced by consumers for the broad range of telecoms services on offer is predominantly competitive and below the overall average.

The recommendations from the study are:

The recommendations from the study aim to increase competition and benefit consumers. Consistent with the Authority's role as regulator of telecommunications services, a number of the recommendations are for the Authority to take forward in its future work programmes.

The Authority would encourage consumers to shop around before agreeing their next contract to find the deal that is best for them.

The Authority will, in future work programmes, take further steps to address problems consumers may face in switching services between providers.

The Authority will consider other service considerations, wider than just pricing, in its future work. A key focus will be on consumer protection, for example, around contractual terms and compensation.

The Authority will work with Teligen to track prices on an annual basis, with a full report update carried out after an appropriate period of time has passed.

