

Office of Utility Regulation

Telecommunications Market Report July – December 2008

Information Note

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Guernsey Telecoms Market – Executive Summary

In July 2008 the OUR commenced a data collection exercise with the operators in the telecoms market. The purpose of this exercise is to collect and report on activity in the telecoms market at regular intervals. This report presents the key findings from the second edition of the Industry Questionnaires.

Guernsey Telecoms Market has registered generally a significant growth in all of its segments in terms of subscribers, usage, and revenue.

Data collected covers four periods: January –June 2007, July-December 2007, January-June 2008, and July-December 2008. This information helps build a profile of market activity and developments and informing regulatory decisions going forward. The following are the main developments and key figures on the telecoms market and each of the telecoms industry sectors between the first and the second half of 2008:

- **Overall telecoms market.** Total industry turnover growth rate was above 4.5%.
- **Fixed market.** The evolution in the number of minutes originated in the Bailiwick's fixed networks seems to show some signs of recovery. Though the number of analogue and digital lines has kept relatively stable in the second half of 2008, total fixed telecoms revenues (including wholesale and corporate services revenues) registered a significant increase of more than 16% from the previous period.
- **Mobile market.** Total number of subscribers remained relatively constant in the second half of 2008, with revenues growing by 12.7%.
- **Internet market.** The internet market is showing steady growth. The total number of subscribers increased 5.8%. Internet penetration rate is 34%, with broadband penetration rate at 29%, and internet total revenues (including wholesale revenues) increased by 10.2%.

The Director General would like to record his appreciation for the operators' assistance in compiling this report.

1. Telecoms Market

This report presents data about the Bailiwick of Guernsey (“Guernsey”) telecommunications sector, based primarily on the Industry Questionnaires data submitted by licensed operators, and covering the six month period from July to December 2008.

The Office of Utility Regulation (“OUR”) issued the first edition of the Industry Questionnaires in July 2008. This report is based on the second edition of questionnaire issued in February 2009, where licensed operators in Guernsey provide information regarding their commercial activities and their services for the previous six month period¹.

Table 1.1 **Total number of telecommunications licensees**

	31 December 2008
Number of fixed licences	9
Number of mobile licences	3
Total	12

Source: OUR, Industry Questionnaire, December 2008

As of 31 December 2008 Guernsey has a total of 12 licensed operators registered, 9 of them licensed to provide fixed telecommunications services, and the remaining 3 licensed to provide mobile telecommunications services². The data on which this report is based has been collected from the licensed operators between February and March 2009³.

a. Total Turnover

The telecommunications sector in Guernsey across its fixed, mobile, and internet segments, registered a total turnover of nearly £38 million for the six months ending in 31 December 2008. This represents a growth from the previous six month period of 4.5%, where total turnover was £36 million. At the end of June 2008 the licensed operators employed 325 people.

¹ The Industry Questionnaire is based in a time unit period of six months (one half of a year). For the purposes of this questionnaire every year will comprise two six months period, the first period comprehended from January to June, and the second period from July to December.

² A list of all the telecommunications licensed operators is available at http://www.regutil.gg/licensing_legal/list_of_licensees.asp?Sector=Telecommunications

³ Between the first and the second edition of the Industry Questionnaire operators have provided updated figures on their previously submitted data, which makes the current version of the report not directly comparable with the previous Telecoms Market Report. In some sections of the current report a revision of the methodology applied in compiling the data has been also undertaken. The data presented in this report includes estimates where the OUR has not received data from operators.

Figure 1.1 **Telecommunications turnover, Guernsey**



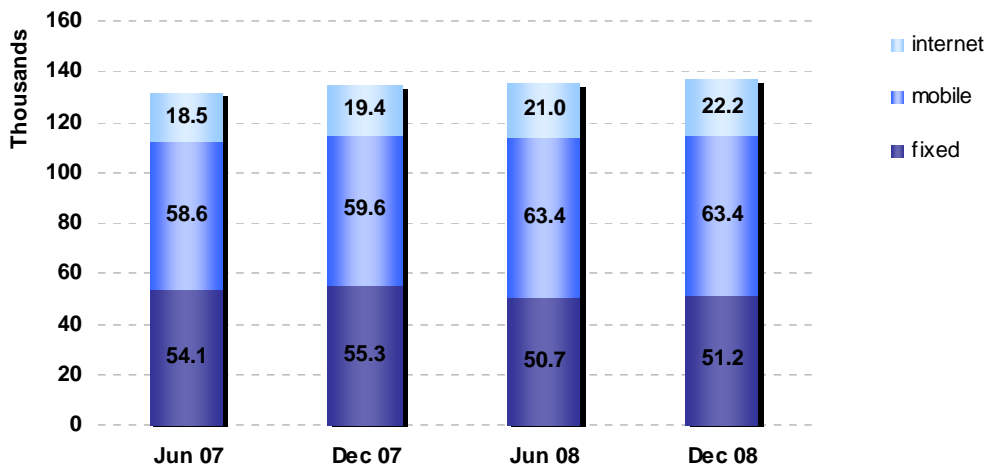
Source: OUR, Industry Questionnaire, December 2008

For the year ending in December 2008 the total turnover of the telecommunications industry in Guernsey was around £74 million.

b. Subscribers by communications market

At the end of December 2008, the overall number of subscribers for fixed, mobile, and internet (dial-up and broadband) services had surpassed the 136,000 mark, an increase of 1.2% from the previous period.

Figure 1.2 **Fixed, mobile and internet subscribers**



Source: OUR, Industry Questionnaire, December 2008

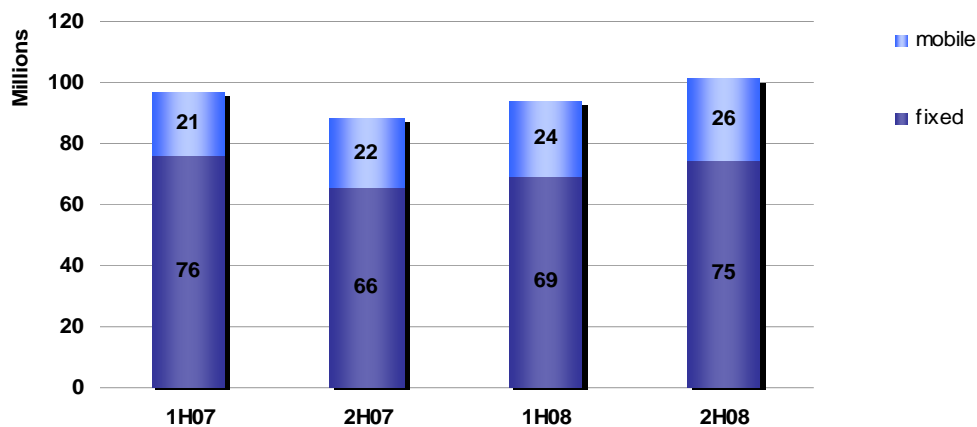
Compared with the previous period, the internet sector had the highest growth with an increase of 6% in the subscriber base, while the fixed sector reversed the trend of the last

two periods with an increase in subscribers of 1%⁴. After the increase registered from 2007 to 2008, the number of active subscribers in the mobile sector has remained stable over the second half of 2008, at around 63,400, although this sector continues to register the highest share of subscribers within the three sectors. The number of internet subscribers kept increasing steadily and by the end of December 2008 there were 22,200 internet subscribers in Guernsey.

c. Originated minutes

The last period uptake in the number of fixed subscribers seems to have reflected also in the number of minutes originated on fixed networks, which increased 7.4% in the last period, and is now at 75 million originated minutes, close to the first half of 2007 levels.

Figure 1.3 Total originated minutes



Source: OUR, Industry Questionnaire, December 2008

In the second half of 2008 the number of minutes originated on the mobile networks (26 million) was more than 26% of the total number of minutes originated in Guernsey (on both the fixed and mobile networks). This figure compares with 35% in the previous period.

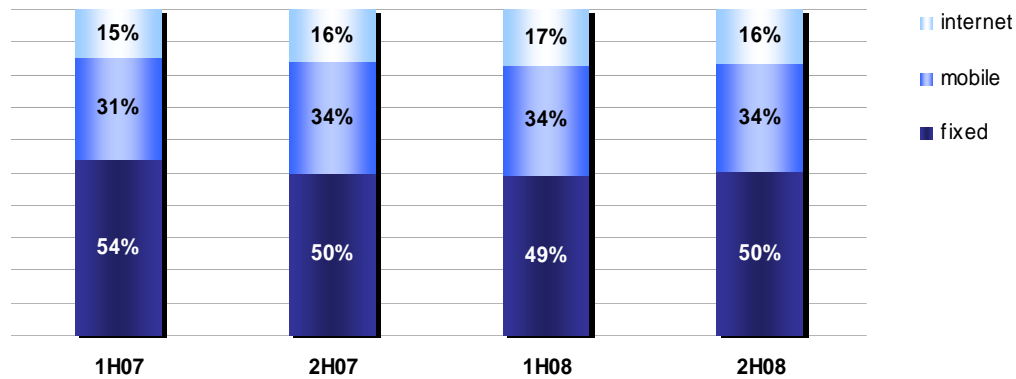
d. Fixed, Mobile and Internet revenues

Telecoms revenues⁵ have increased by 12.2% from £29 million in the first half of 2008 to £33 million by the end of the second half of 2008.

⁴ The decrease in the number of fixed telecoms subscribers from the second half of 2007 to the first half of 2008, as referred in the last version of the report, is due at least in part to changes in operators' subscribers accounting systems that took effect from the first half of 2008. In previous periods if a subscriber had more than two lines then in some cases they would have previously been counted as two subscribers rather than two lines, but with the new subscribers accounting system this is no longer the case. This means that the number of fixed telecoms subscribers registered up to December 2007 is not directly comparable with the series registered after that date.

⁵ Excluding interconnection revenues.

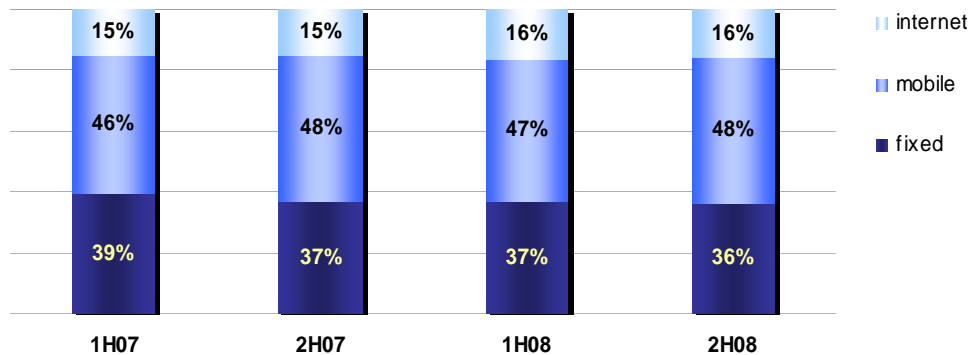
Figure 1.4 Telecoms revenue by market segment (%)



Source: OUR, Industry Questionnaire, December 2008

The biggest share of revenue is generated on the fixed sector. Fixed telecoms revenues increased more than 16% from the first to the second half of 2008, with this segment contributing to half (50%) of the total telecoms revenues during the second half of 2008. However the data does point to the continued growth of mobile and broadband services in the Bailiwick, though in the second half of 2008 this occurs at a slower rate than the growth in revenues in the fixed sector.

Figure 1.5 Retail service and access revenues by market segment



Source: OUR, Industry Questionnaire, December 2008

The balance between the revenue generated in each sector is significantly different when we consider only the revenues generated by each sector retail services (usage and access services, Figure 1.5). In this case, the mobile sector is responsible for generating more than 48% of the retail service and access revenues in the second half of 2008, while the fixed sector accounts for 36% of these revenues (slightly lower than the 37% in the first half of 2008), and internet for 16% (the same weight as in the first half of 2008).

2. Fixed market

a. Total number of lines and subscribers

There were a total of 56,799 telephone lines installed in Guernsey at the end of December 2008, a figure relatively constant when compared with the previous period. Around 96.5% of the total number of lines installed in Guernsey are analogue lines. The remaining 3.5% are basic and primary digital lines⁶.

Table 2.1 Total number of installed lines

	June 2007	December 2007	June 2008	December 2008
Analogue	55,516	55,828	54,671	54,789
Digital:				
Basic	1,774	1,787	1,812	1,832
Primary	178	192	194	178
Total (analogue and digital)	57,468	57,807	56,673	56,799
Leased lines				
On Island leased lines	1,351	1,208	1,174	1,048
Off Island leased lines	291	300	269	303

Source: OUR, Industry Questionnaire, December 2008

The existing 56,799 lines in December 2008 are used by nearly 51,200 fixed telecoms subscribers. As mentioned in the last report, due to changes in the operators' subscriber accounting methodology, this figure is not directly comparable with the number of subscribers registered in previous years. In future it is intended that numbers will be presented to reflect this revised approach.

The number of on-island leased lines continues its decreasing trend and in December 2008 fell by 11% from the previous period, while the number of off-island evolved in the opposite direction with an increase close to 13% in the same period.

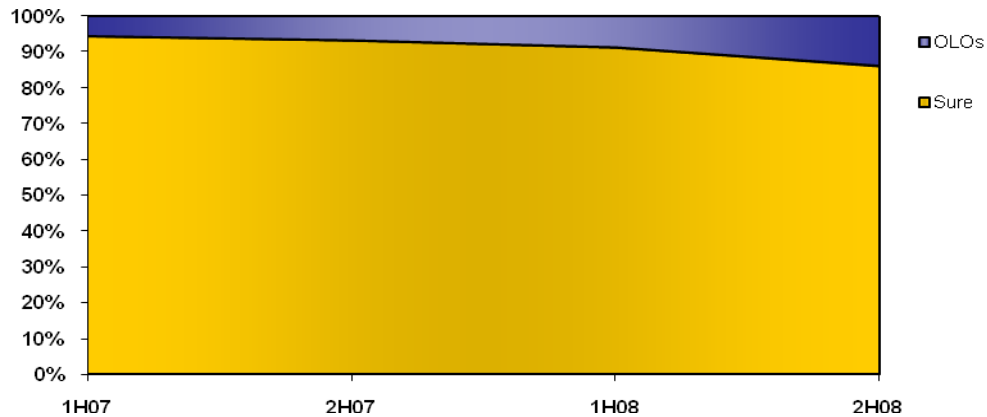
b. Voice originated minutes market share

The incumbent operator Sure Cable & Wireless Guernsey ("Sure") accounts for 86% of the total minutes originated by fixed operators in Guernsey. Its market share has been decreasing over time and Other Licensed Operators (OLO), which use indirect access⁷ to the incumbent operator network in order to compete and provide fixed telecoms services at the retail level, have been gaining market share and accounted in the second half of 2008 for 14% of the total fixed originated minutes.

⁶ Digital lines are Integrated Services Digital Network (ISDN) lines that typically have more than one access per line. In ISDN lines the number of equivalent accesses is two for each basic ISDN line and 30 for each primary ISDN line.

⁷ Currently, OLOs use Carrier Selection as the only mean of indirect access to the incumbent fixed network.

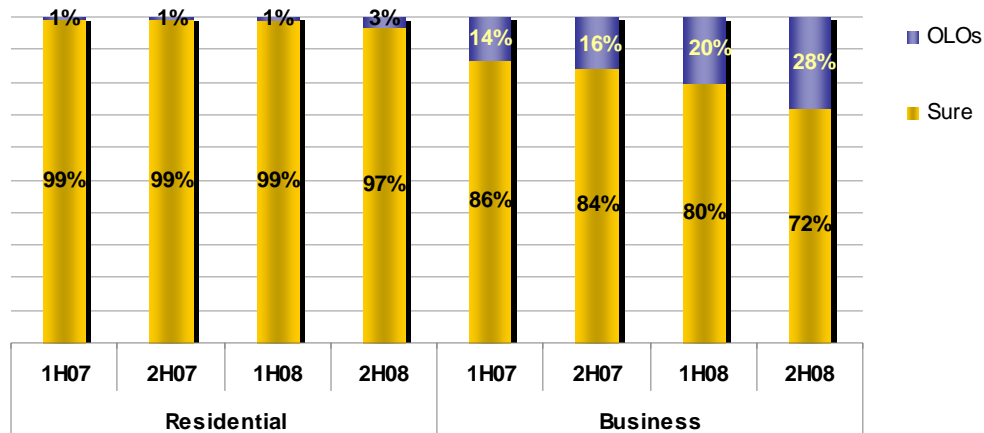
Figure 2.1 Market share in fixed originated minutes



Source: OUR, Industry Questionnaire, December 2008

Figure 2.2 below shows the fixed incumbent operator and OLOs' share of the total originated minutes in the residential and business segments of the market. In the residential segment, Sure's share in terms of minutes originated is significantly higher than in the business segment. Though this is decreasing, Sure originates approximately 97% of the total residential minutes in Guernsey. In the business segment the impact of OLOs in originated minutes is higher than in the residential segment. OLOs account for 28% of the total business originated minutes, which represents a growth of 8 base points from the first half of 2008.

Figure 2.2 Residential vs business fixed originated minutes

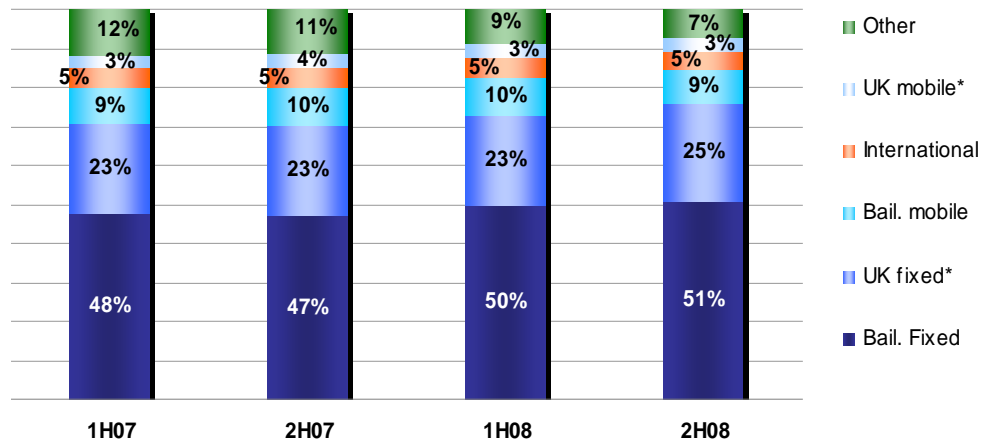


Source: OUR, Industry Questionnaire, December 2008

c. Share of voice originated minutes

The proportion of call minutes that are originated in Guernsey and destined to Guernsey's fixed network have been increasing over time. In the second half of 2008, 51% of call minutes originated on Guernsey's fixed network were also terminated on the fixed network.

Figure 2.3 Profile of fixed originated minutes, by call destination



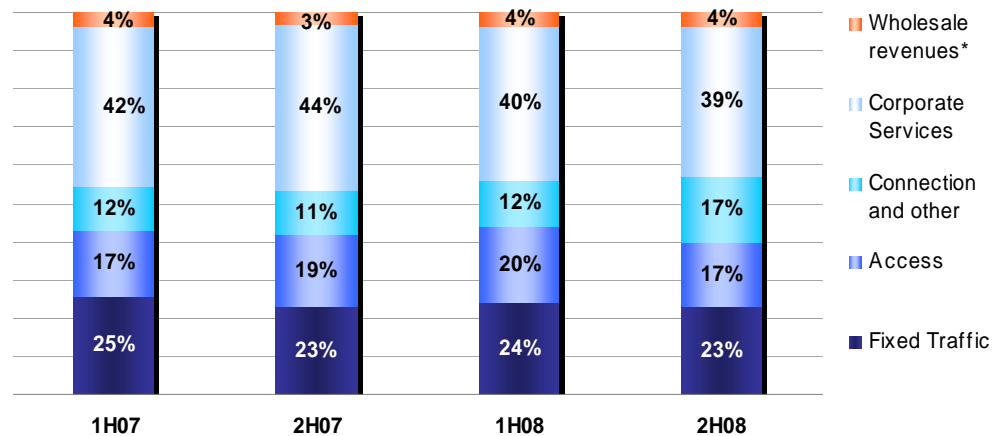
Source: OUR, Industry Questionnaire, December 2008; * Includes calls destined to Jersey

The UK fixed networks are the second most frequent destination for the minutes originated on Guernsey’s fixed network, with a share of 25% in the second half of 2008 (which has increased slightly, though had previously been relatively constant – this includes call minutes destined to Jersey fixed networks). 9% of the call minutes originated on the fixed network are destined to Guernsey’s mobile networks, and 5% are international call minutes. The remaining minutes were used on calls destined to the UK mobile networks (3%, which also includes call minutes destined to Jersey mobile networks) and other destinations (7%).

d. Share of fixed services revenues

Traffic and access are an important source of the fixed services revenues. Its aggregate weight in total fixed services revenues is more than 40% in the second half of 2008, as can be seen in Figure 2.4 below. Corporate Services revenues represent 39.6% of total revenues from fixed services in the same period.

Figure 2.4 Distribution of fixed revenues



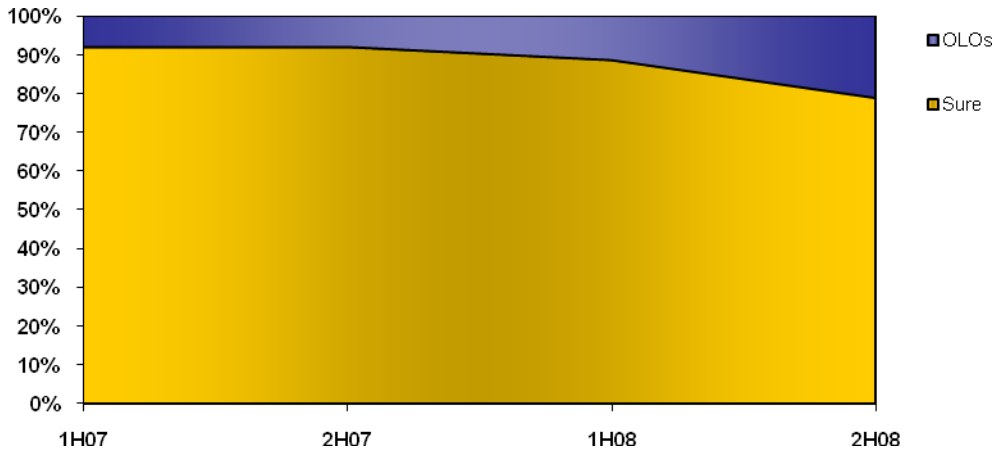
Source: OUR, Industry Questionnaire, December 2008; *Excluding interconnection revenues

The other categories of revenue are connection and other retail fixed telecoms revenues, which account for 16.8% of total fixed services revenues in the second half of 2008, and wholesale revenues, accounting for 3.8% of total fixed service revenues in the same period.

e. Revenues from voice (origination)

Despite the slight decrease over time, in December 2008 Sure represents approximately 79% of the fixed voice revenues in the market. This trend reflects the pattern in the fixed voice volumes market.

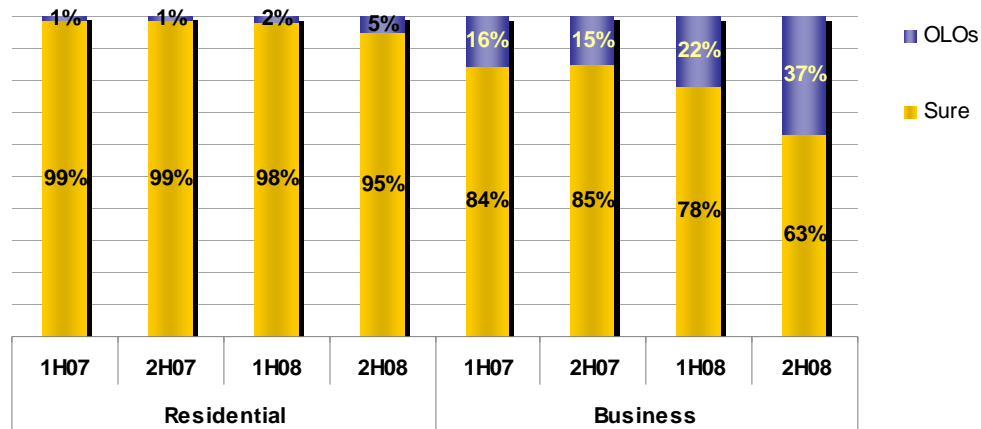
Figure 2.5 Share of fixed voice revenues



Source: OUR, Industry Questionnaire, December 2008

The breakdown of the fixed voice revenues by the residential and business segments has similar patterns to that observed in the fixed voice volumes.

Figure 2.6 Residential and business fixed voice revenues



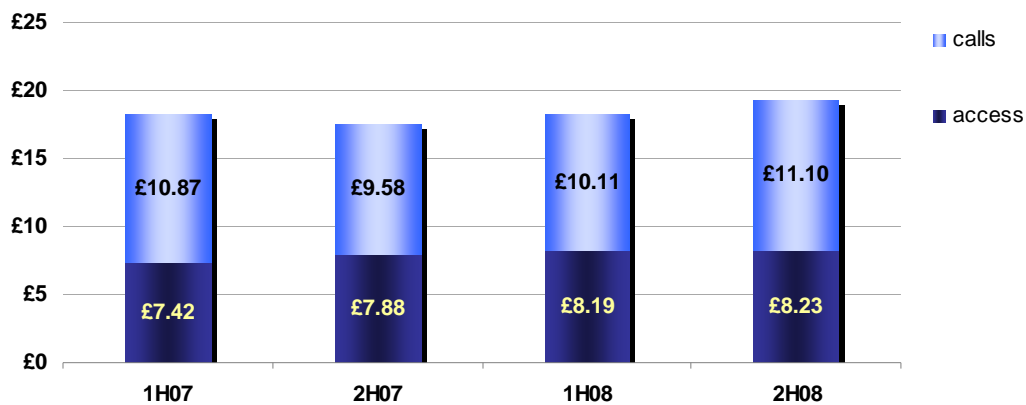
Source: OUR, Industry Questionnaire, December 2008

While in the residential segment Sure generates almost all the fixed voice revenues in the market (95%), in the business segment OLOs saw their market share increase to 37% of the business fixed voice revenues in the second half of 2008 (up from 22% in the first half of 2008).

f. Average monthly revenue

The next figure presents the average monthly voice revenue per fixed line in the Bailiwick of Guernsey.

Figure 2.7 Average monthly voice revenue per fixed line, Guernsey



Source: OUR, Industry Questionnaire, December 2008

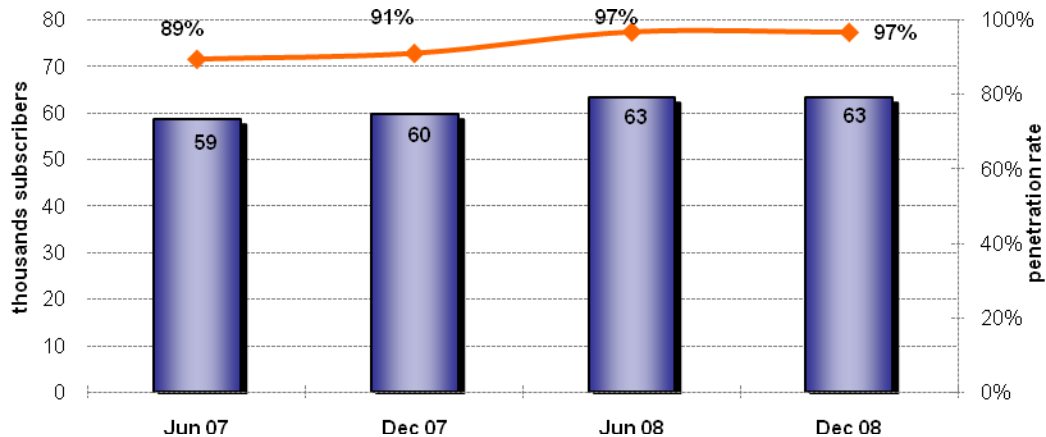
Over the last two periods, the average monthly access revenue per fixed line increased about 0.5%, while the average monthly call revenue has increased nearly 10%.

3. Mobile market

a. Subscribers, penetration rate and market players

As of 31st December 2008 there were three mobile network operators (MNO) with commercial activities in Guernsey – Sure Cable & Wireless (Sure), Wave Telecom (Wave), and Airtel-Vodafone (Airtel).

Figure 3.1 Number of subscribers and penetration rate



Source: OUR, Industry Questionnaire, December 2008; States of Guernsey Policy Council, Guernsey Facts and Figures 2008

During the second half of 2008 the number of existing active mobile subscribers⁸ was almost equal to Guernsey's total (estimated) population⁹. This is fairly common in most developed countries now. At 31st December 2008 there were more than 63,000 active mobile subscribers in Guernsey, practically the same number as in the end of the first six months of that year.

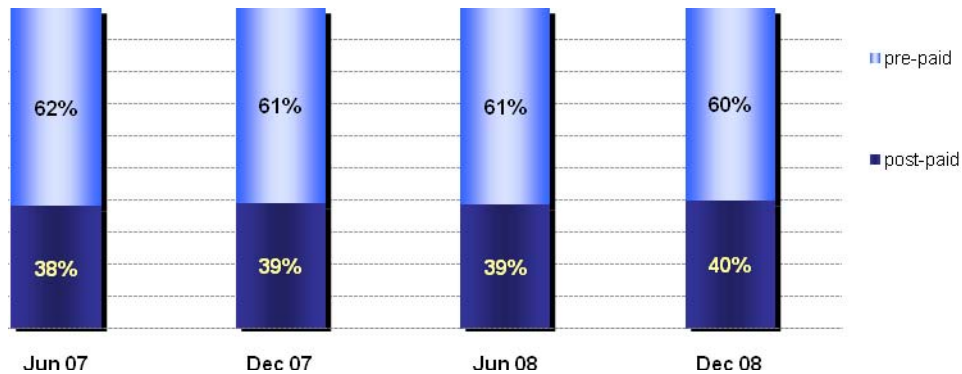
The proportion of pre-paid and post-paid subscribers¹⁰ has been relatively stable over time. The number of mobile post-paid subscribers relative to the number of pre-paid subscribers has been increasing, representing 40% in December 2008, (from 39% in June 2008).

⁸ Active subscriber is defined as a subscriber that has paid the subscription fee, or used a payable service, at least once in the last 90 days.

⁹ The population figure used over the four periods to calculate the penetration rate was the 2007 estimated population as of *Guernsey Facts and Figures 2008* (added by the population of Alderney and Sark). The figures presented here are revised when newer information regarding population data is made available.

¹⁰ Post-paid subscribers include customers on Business tariffs.

Figure 3.2 Pre-paid and post-paid subscribers

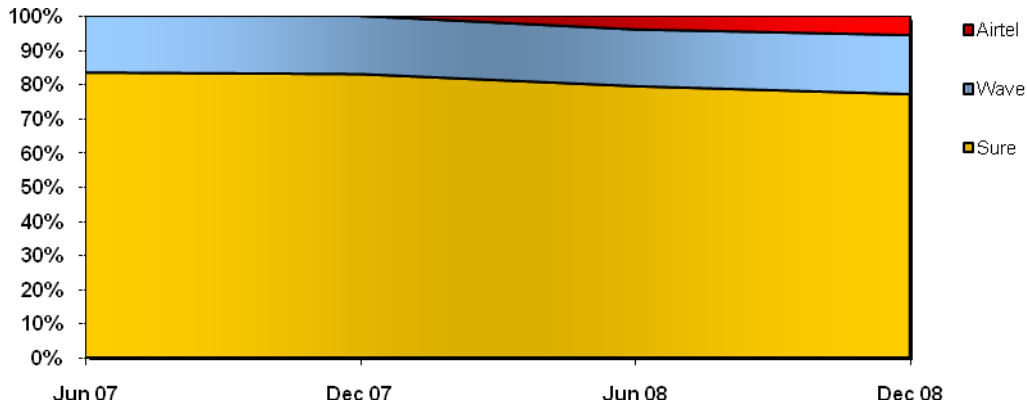


Source: OUR, Industry Questionnaire, December 2008

b. Subscribers market share

The change in the market share of the three operators from June 2008 to December 2008 reflects the entry of the new mobile operator, Airtel-Vodafone, during the first half of 2008.

Figure 3.3 Mobile subscribers market share



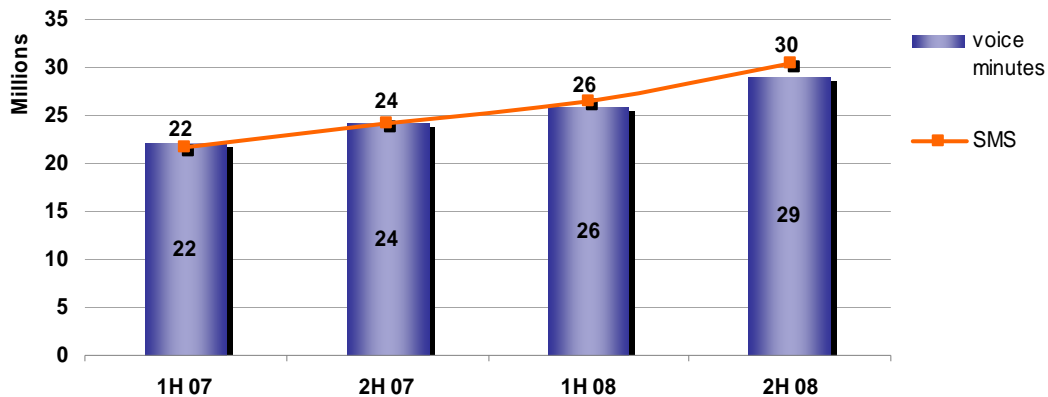
Source: OUR, Industry Questionnaire, December 2008

In the first nine months of activity Airtel gained 5.5% market share of mobile subscribers. Sure’s market share has reduced from approximately 80% in June 2008 to 77% in December 2008, while in the same period Wave’s market share increased slightly from 16% to 17%. For future reports it will be interesting to note the impact of Mobile Number Portability, which went live on 1 December 2008, on the development of competition between the networks.

c. Voice and SMS volumes

Mobile voice and SMS volumes have increased steeply over the four periods.

Figure 3.4 Mobile minutes and SMS originated volumes¹¹



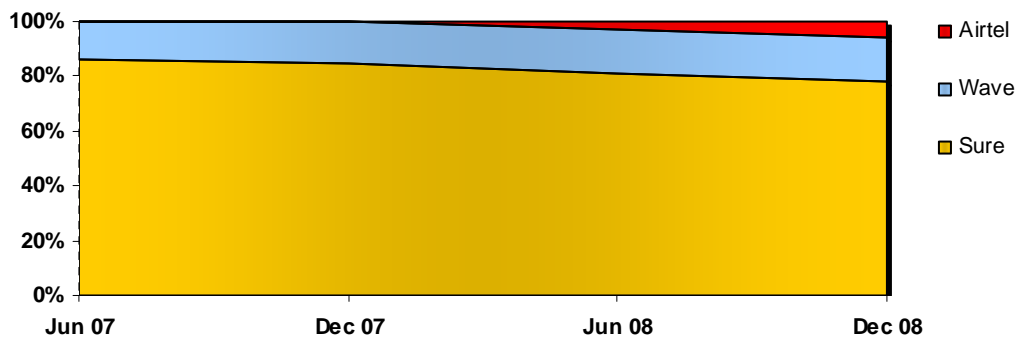
Source: OUR, Industry Questionnaire, December 2008

In the second half of 2008 Guernsey’s mobile operators originated approximately 29 million minutes (a growth rate of more than 11% from the first half of 2008), and more than 30 million SMS were sent from their networks (close to 15% increase over the same period).

d. Share of mobile voice originated minutes

Wave’s share of mobile voice originated minutes decreased from 16.2% during the first half of 2008 to 15.8% in the second half of the year.

Figure 3.5 Mobile market share by originated minutes



Source: OUR, Industry Questionnaire, December 2008

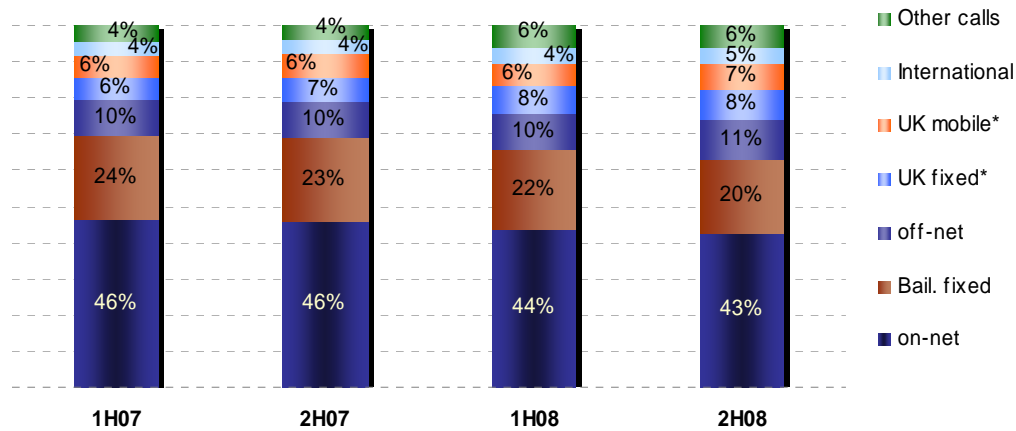
Sure also experienced a decrease in its mobile market share in terms of originated minutes, from 81.2% in the first half of 2008 to 78.1% in the second half of 2008. Airtel continued to increase its share of mobile voice originated minutes from 2.6% in the first

¹¹ Outbound minutes and SMS from foreign network subscribers while roaming in the Bailiwick are not included.

half of 2008 (where it commenced services mid-way through the period) to 6% by the end of that year.

A significant share of the mobile originated minutes¹² is represented by on-net mobile minutes, which means that the call minutes are destined to the same mobile network where the call was initiated.

Figure 3.6 Profile of mobile originated minutes, by call destination



Source: OUR, Industry Questionnaire, December 2008; * Includes calls destined to Jersey

In the second half of 2008 on-net call minutes represented 43% of the total mobile originated minutes down from 44% in the first half of 2008. Off-net call minutes (calls destined to a Guernsey mobile network operator different from the mobile network operator where the call is initiated) represented 11% of the mobile originated calls in the same period (10% in the first half of 2008). Again it will be interesting to observe what change occurs in this area with the advent of MNP. The fixed networks within the Bailiwick receive 20% of the minutes from calls originated in the mobile networks.

With regards to other destinations for call minutes originated on Guernsey's mobile networks in the second half of 2008, UK fixed and mobile networks (which include, respectively, minutes from calls destined to Jersey fixed and mobile networks) account for 8% and 7% of the total mobile originated minutes, while international destinations and other destinations account for 5% and 6% respectively.

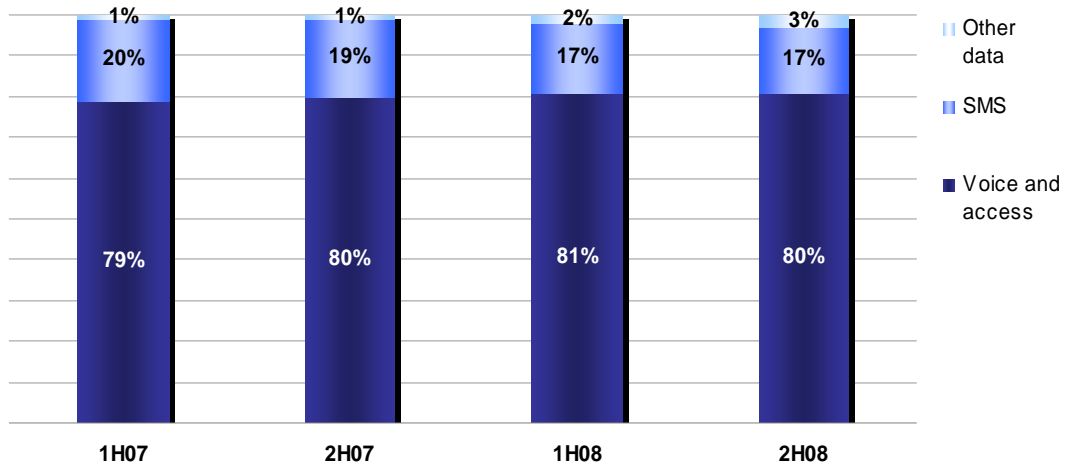
e. Share of mobile revenues by type of service and subscriber

Voice traffic and access account for the vast majority of revenues in the mobile retail market. In the second half of 2008 voice traffic and access represented 80.4% of the mobile retail revenues. SMS kept its relative weight in the mobile retail revenues on 17% in the second half of 2008. Finally, data mobile services represent a small proportion of

¹² Roaming minutes are excluded.

mobile retail revenues, although its share increased from 1.4% to 2.7% between the first half of 2008 and the second half of 2008.

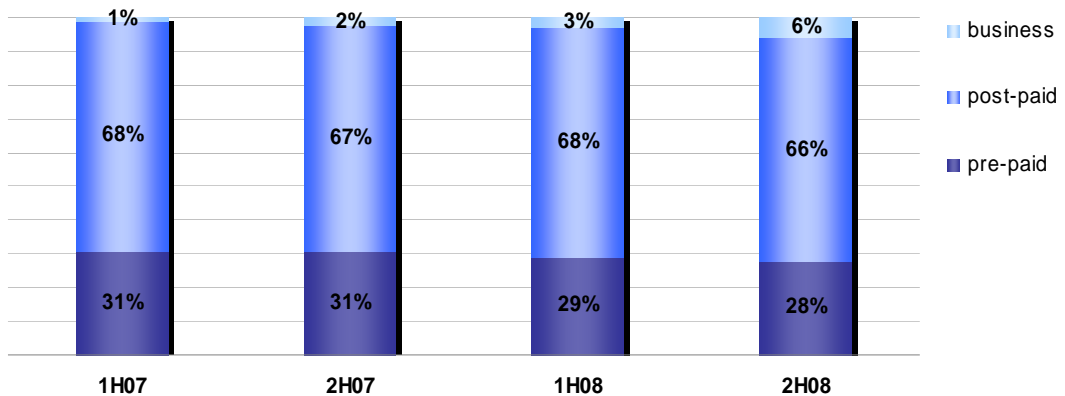
Figure 3.7 Revenues by type of mobile service



Source: OUR, Industry Questionnaire, December 2008

Figure 3.8 presents mobile retail revenues by type of tariff. Post-paid tariff subscribers account for the majority of mobile retail revenues, 66% at the end of 2008 compared with 68% in the first half of that year. The share of revenue from customers on business tariffs continues to increase, most likely due to an increased focus by the mobile operators on tailored packages for this segment of the mobile market.

Figure 3.8 Mobile retail revenue by type of tariff

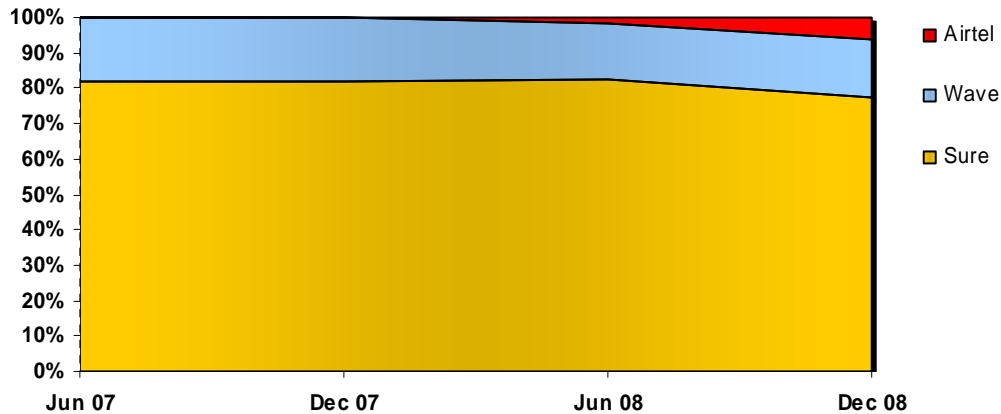


Source: OUR, Industry Questionnaire, December 2008

f. Share of mobile retail service revenues

In line with what was observed for the market share in terms of subscribers and originated minutes, Sure’s mobile market share in terms of voice and access revenue decreased from 82.3% in the first half of 2008 to 77.3% by the end of 2008.

Figure 3.9 Mobile market share, by voice and access revenue

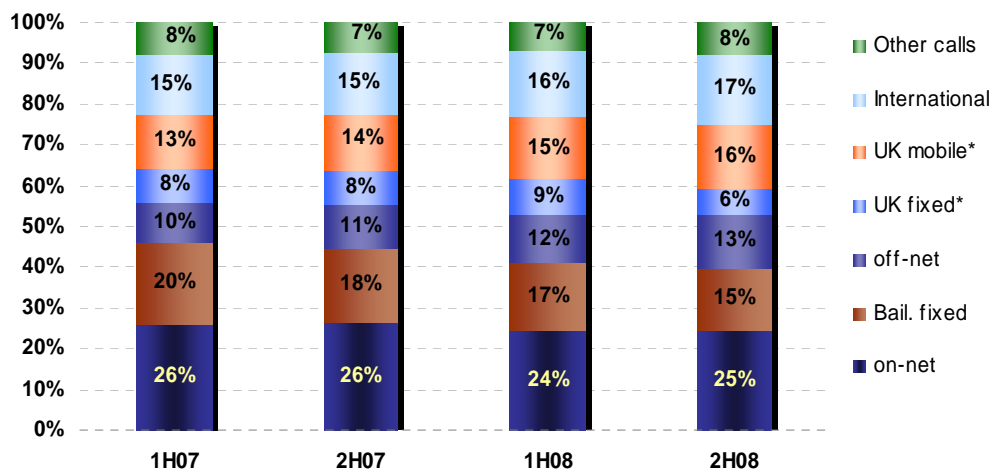


Source: OUR, Industry Questionnaire, December 2008

Wave saw its mobile market share in terms of revenue being maintained at 16% between the first half and the second half of 2008. Airtel’s share of mobile voice and access revenues increased from 1.8% to 6.3% within the same periods.

On-net calls were the type of calls that generate most revenues¹³ for the mobile operators in Guernsey (25%) in the second half of 2008. International calls, UK mobile calls (including calls destined to Jersey), and calls destined to Guernsey fixed network follow next in terms of the weight they have in the mobile voice revenues (respectively 17%, 16%, and 15% for the same period), followed by off-net calls and calls to other destination networks (6% and 8% respectively). While revenue with mobile calls destined to the Bailiwick fixed networks has been decreasing over time, off-net calls have been increasing their share of the revenues they generate in the mobile sector.

Figure 3.10 Share of mobile voice revenues, by call destination



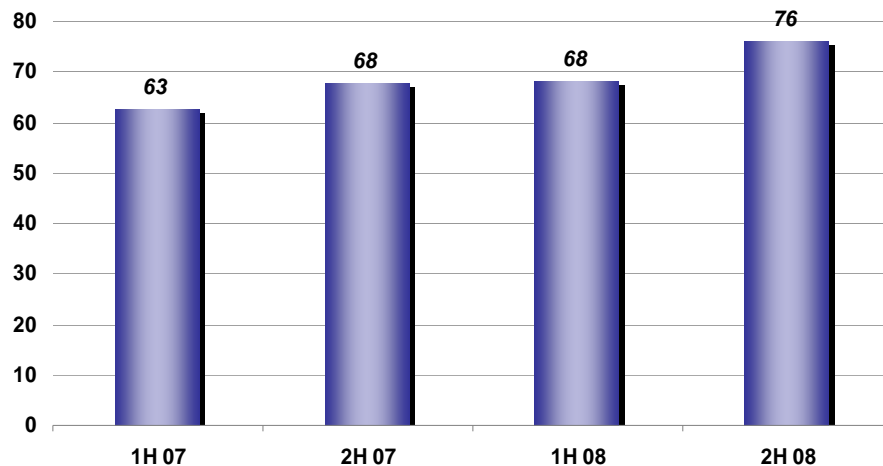
Source: OUR, Industry Questionnaire, December 2008; * Includes calls destined to Jersey

¹³ Roaming revenues are not considered.

g. Average usage and revenue

The average monthly originated minutes of usage (MoU) per subscriber has been increasing steadily for Guernsey mobile operators over time. In the second half of 2008 a mobile subscriber was using his phone at an average of 69 minutes a month, which represents an increase of approximately 9.2% from the average 64 minutes/month in the first half of 2008.

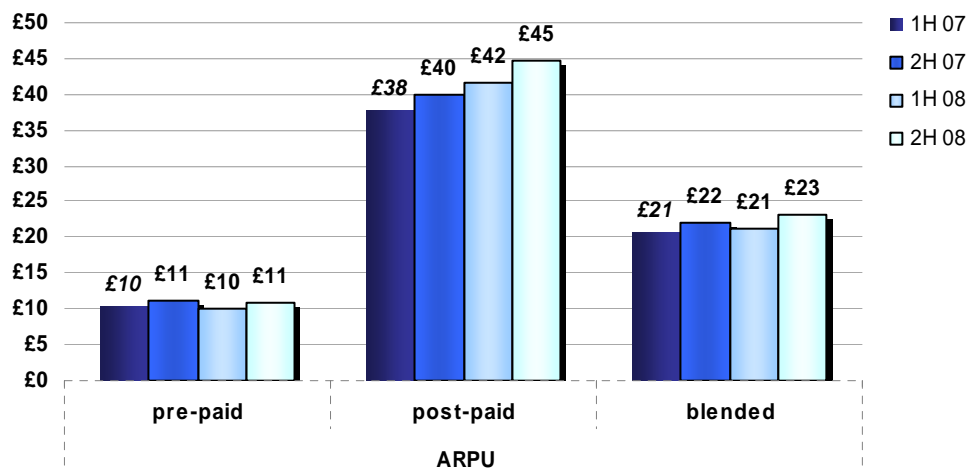
Figure 3.11 Average monthly originated MoU, per subscriber



Source: OUR, Industry Questionnaire, December 2008

The average revenue per user has increased from £21 in the first half of 2008 to £23 in the second half of that year. It is apparent that post-paid subscribers account for higher revenue streams, with a monthly average revenue per user of £45 in the second half of 2008 (an increase of 7.4% from the first half of 2008), while pre-paid subscribers average revenue has been relatively stable at £10-£11 per month/user.

Figure 3.12 Monthly average revenue per user (ARPU), per type of subscriber



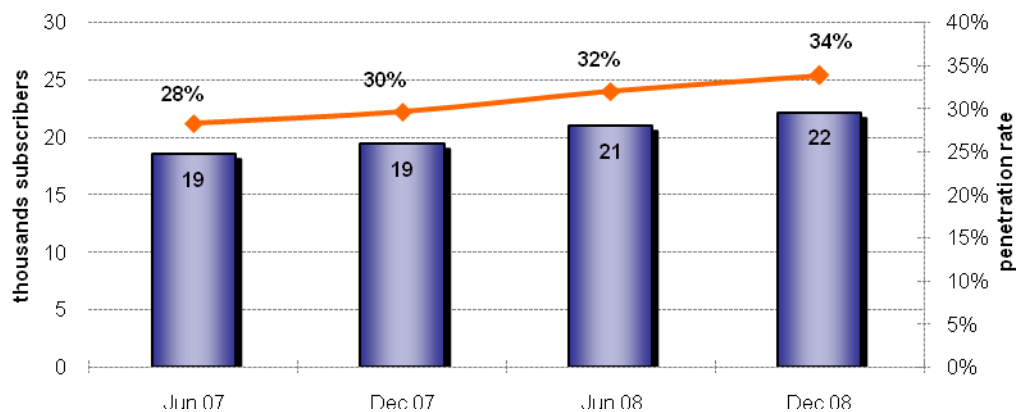
Source: OUR, Industry Questionnaire, December 2008

4. Internet market

a. Subscribers and penetration rate

The number of internet subscribers has been increasing steeply over time in Guernsey. At the end of December 2008 there were more than 22,000 internet subscribers, an increase of 6% from the previous period and 20% from the first half in 2007. The vast majority of these subscribers use a broadband connection (either fixed or mobile) – more precisely 86.2% subscribers, which means broadband subscribers stand at around 19,100.

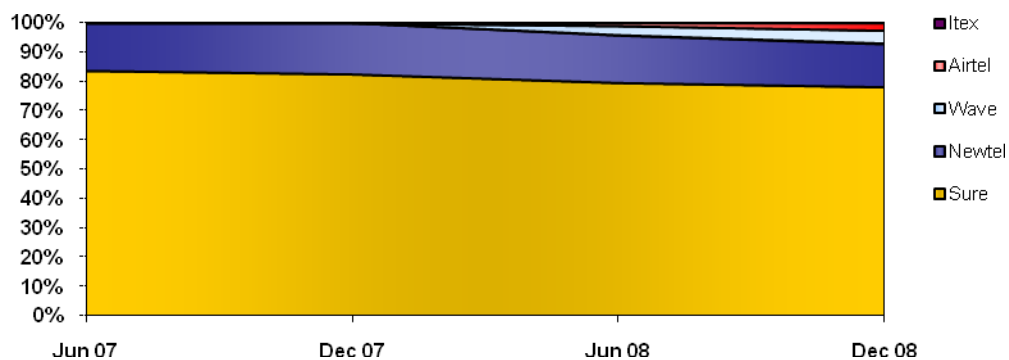
Figure 4.1 **Internet subscribers and penetration rate**



Source: OUR, Industry Questionnaire, December 2008

At the end of December 2008 within Guernsey there were 34 internet subscribers per 100 inhabitants, 29 of which were broadband subscribers. As fixed internet (both broadband and dial-up) is provided through a fixed line connection, it is likely that each internet access point will serve more than one person.

Figure 4.2 **Internet market share, by subscriber**

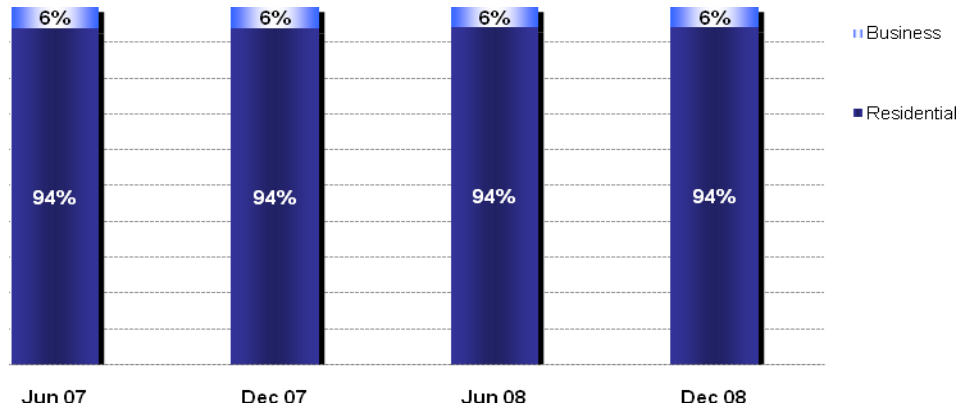


Source: OUR, Industry Questionnaire, December 2008

As in the fixed and the mobile sectors, Sure is the dominant operator in the internet market in terms of subscriber numbers. By the end of December 2008, Sure's market

share in terms of subscribers was approximately 78%, which represents a drop from June 2008 when it had a share of 79%. The main competitor is Newtel¹⁴, which has seen its market share in the second half of 2008 reduced to 15% from the 16% in the previous period. Wave, Airtel and Itex provide services for the remaining 7% of internet subscribers.

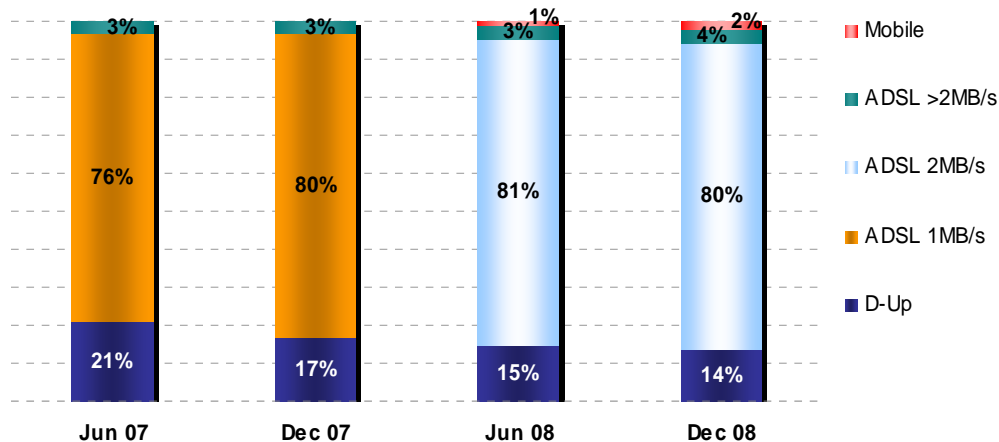
Figure 4.3 Residential and business internet subscribers



Source: OUR, Industry Questionnaire, December 2008

Residential subscribers account for the vast majority of total internet subscriptions, approximately 94%, a figure that has remained mostly unchanged over time. The business segment represents the remaining 6% of the internet market in terms of subscribers. One possible explanation for the small proportion of business internet customers is that business subscribers may require more tailored products of higher capacities (like leased lines) which are not captured in the above figure.

Figure 4.4 Share of internet subscribers by type of access



Source: OUR, Industry Questionnaire, December 2008

¹⁴ In 2007 Sure and Newtel were the only two providers in the internet market. Wave and Airtel started providing internet services during the first half of 2008.

All Guernsey consumers have a uniform type of fixed broadband access available to them, in terms of the download and upload speeds of the service. Up to the end of 2007, the fixed broadband access available to consumers provided a service with download speeds up to 1 MB/s, and 80% of the consumers that had any type of internet access subscribed to this product.

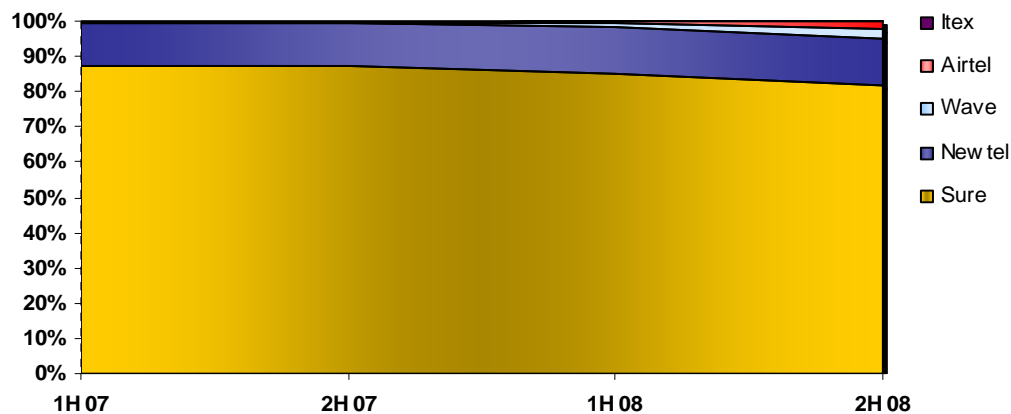
During the first half of 2008, Sure ended a phase of network upgrading, which enabled the provision of a uniform fixed broadband service with increased download speeds of up to 2MB/s. Consequently, all the consumers using the up to 1MB/s download service were migrated to the newer service, which in the end of December 2008 accounted for 80% of all the internet subscribers. Comparatively, only 14% of subscribers used dial-up to access the internet by the end of 2008 with a further 4% using a premium service with download speeds above 2MB/s.

In parallel with the upgrade of the fixed broadband service, mobile broadband was also introduced during the first half of 2008. At the end of the second half of 2008, 2.7% of internet subscribers in Guernsey were using mobile broadband to access the internet.

b. Share of internet revenues

The market share in terms of subscribers is largely repeated when we consider revenues as the basis for each operator’s share of the market. Sure represented almost 82% of the revenues generated in Guernsey’s internet market in the second half of 2008. Of the OLOs, Newtel is the main competitor in the market (as it was in the case of subscriber market share), with approximately 13% of the internet revenues, while Wave, Airtel and Itex were responsible for the remaining 5%.

Figure 4.5 Internet market share, by revenue

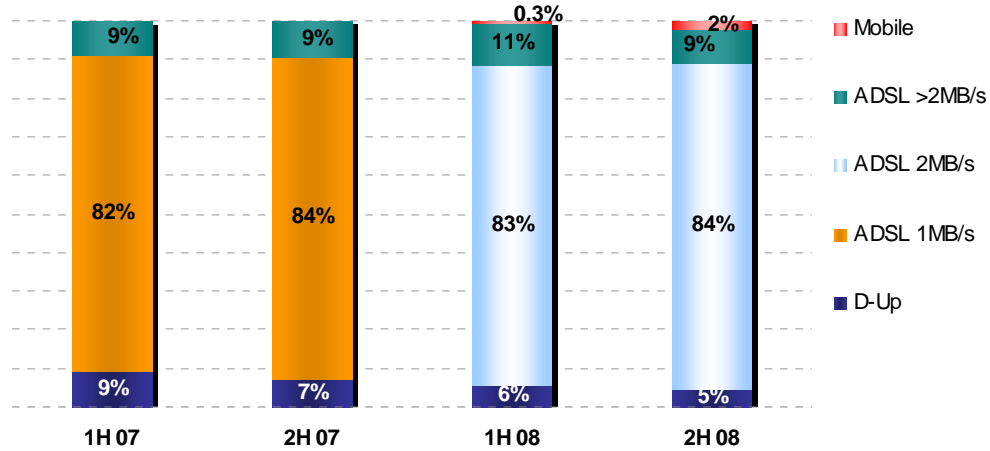


Source: OUR, Industry Questionnaire, December 2008

As expected, higher quality internet access services are closely linked to a higher stream of generated revenue. This may explain why the 14% of internet subscribers that use a dial-up access, in the second half of 2008, account for only 5% of the internet revenues in that period, while the 4% of internet subscribers that use the premium internet access

service are responsible for 9% of total internet revenues. The majority of revenues come from basic ADSL services, with 84% share of revenues.

Figure 4.6 Share of internet revenues by type of internet access

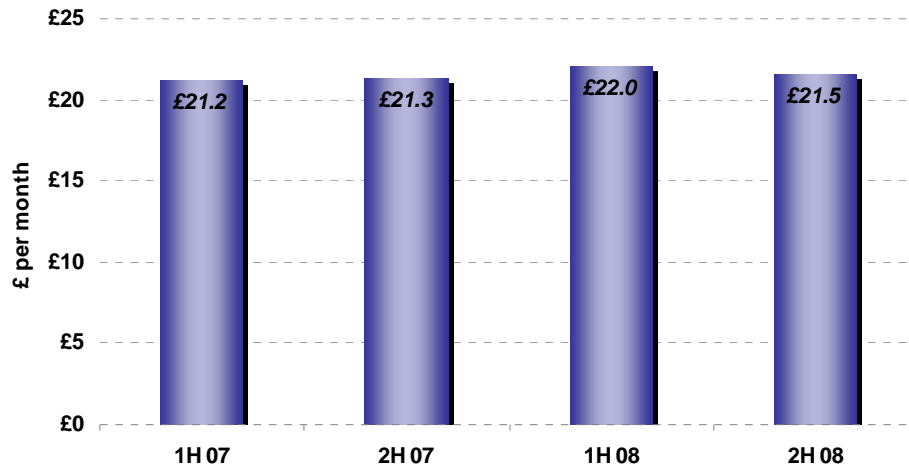


Source: OUR, Industry Questionnaire, December 2008

c. Average internet revenues

Figure 4.7 presents the monthly revenue that on average internet service providers in Guernsey receive for each of its subscribers. The monthly average revenue per internet subscriber has been relatively stable, and while the first half of 2008 saw a peak of above £22, the second half of 2008 saw a monthly average revenue per internet user of £21.50.

Figure 4.7 Internet monthly average revenue per subscriber



Source: OUR, Industry Questionnaire, December 2008

Glossary

- 2G** Second generation of mobile telephony systems. Uses digital transmission to support voice, low-speed data communications, and short messaging services.
- 3G** Third generation of mobile systems. Provides high-speed data transmission and supports multimedia applications such as full-motion video, video-conferencing and internet access, alongside conventional voice services.
- 3.5G** 3.5G refers to evolutionary upgrades to 3G services starting in 2005-2006 that provide significantly enhanced performance. High Speed Downlink Packet Access is expected to become the most popular 3.5G technology (see HSDPA).
- ADSL** Asymmetric Digital Subscriber Line. A digital technology that allows the use of a standard telephone line to provide high-speed data communications. Allows higher speeds in one direction (towards the customer) than the other (in opposition to DSL, which provides symmetric speeds in each direction).
- ARPM** Average Revenue Per Minute. A commonly used key performance indicator for telecommunications operators, corresponds to the ratio of retail service revenues by the number of originated minutes for a given period.
- ARPU** Average Revenue Per User. A commonly used key performance indicator for telecommunications operators, it is obtained by dividing the retail service revenues by the number of users subscribing that service, in a given period.
- GSY** Bailiwick of Guernsey.
- ISDN** Integrated Services Digital Networks. A standard developed to cover a range of voice, data, and image services intended to provide end-to-end, simultaneous handling of voice and data on a single link and network.
- MNO** Mobile Network Operator. An organisation that has its own allocation of spectrum or its own wireless network, which it uses to provide mobile telephony services to its customers, or wholesale mobile telephony access to its network.
- MoU** Minutes of Usage. A commonly used key performance indicator for telecommunications operators, it is represented by the quotient between the total number of originated minutes and the number of users that subscribe the telephony service.

- OLO** Other Licensed Operators. Acronym used to refer to all the other operators besides the incumbent operator, which are licensed to provide a specific telecommunications service in a given area.
- OUR** Office of Utility Regulation. The OUR is the independent regulatory agency for the three utility sectors of telecommunications, post and electricity in the Bailiwick of Guernsey.