

A healthy and innovative market

Industry Forum, Autumn 2017

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David Edmonds CBE

Chairman

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A healthy and innovative market

Today's agenda

- Session 1: encouraging a healthy market
- Session 2: Deloitte's mobile consumer survey
- Session 3: supporting innovation in the market



Deloitte.

A healthy market places consumers at its heart. Consumers are confident and trusting, treated fairly, well-informed and satisfied with their phone-paid service.



Most of the market healthy, but NPS varies across sectors



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Complaints currently around 1,200 – 1,400/month

93% of our contacts are dealt with by our automated systems

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Light touch where we can be, tighter rules where required

1,600 pieces of compliance advice in FY16/17

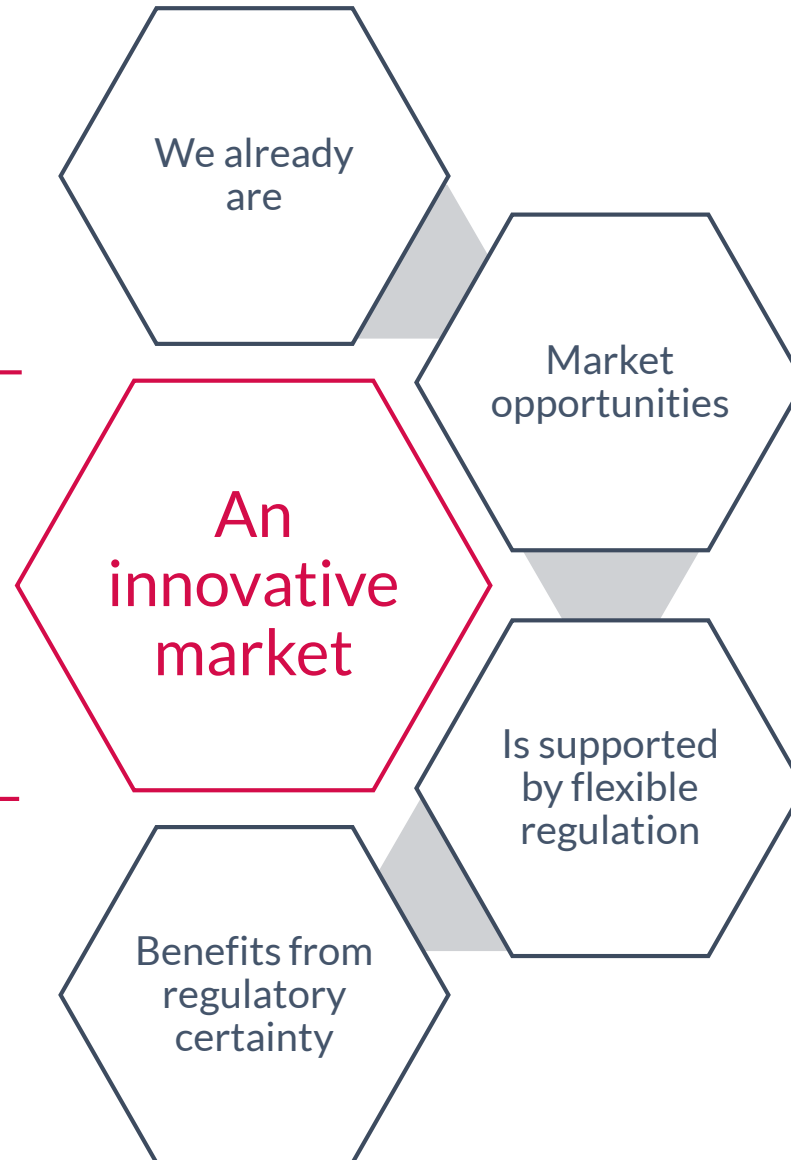
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RFI & IE are informal processes

80% of cases dealt with quickly and informally

An innovative market attracts new entrants, content, goods and services. The market is competitive, both within itself and as an alternative payment mechanism.



We already are

Big blue chips in the market
Operator billing growing
Charities generate £100m+

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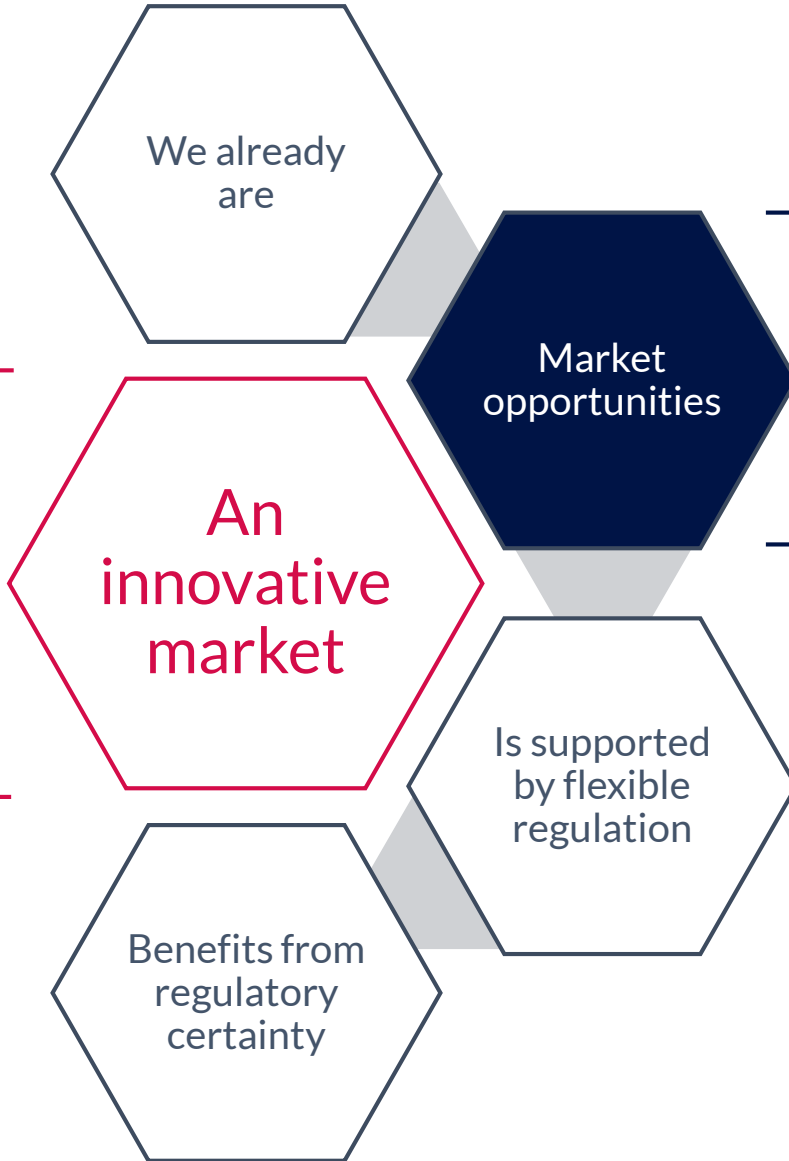
An innovative market

Market opportunities

Is supported by flexible regulation

Benefits from regulatory certainty

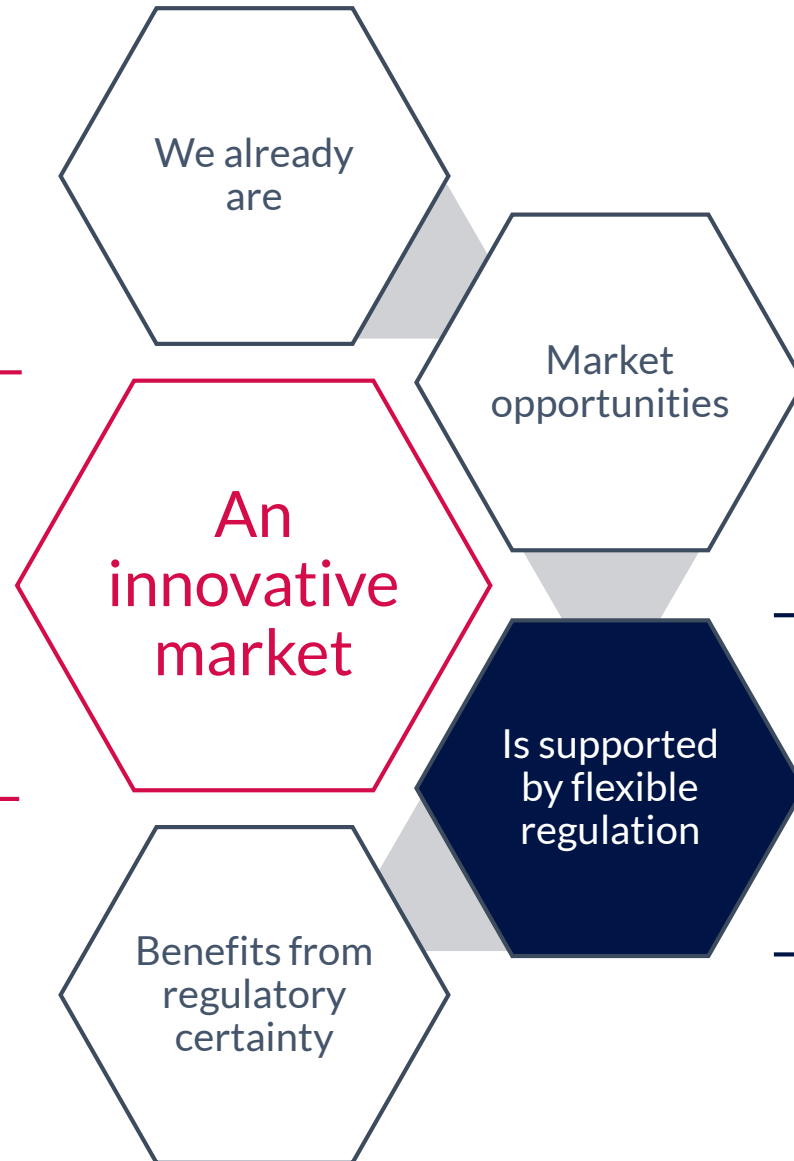
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PSD2

Society lotteries

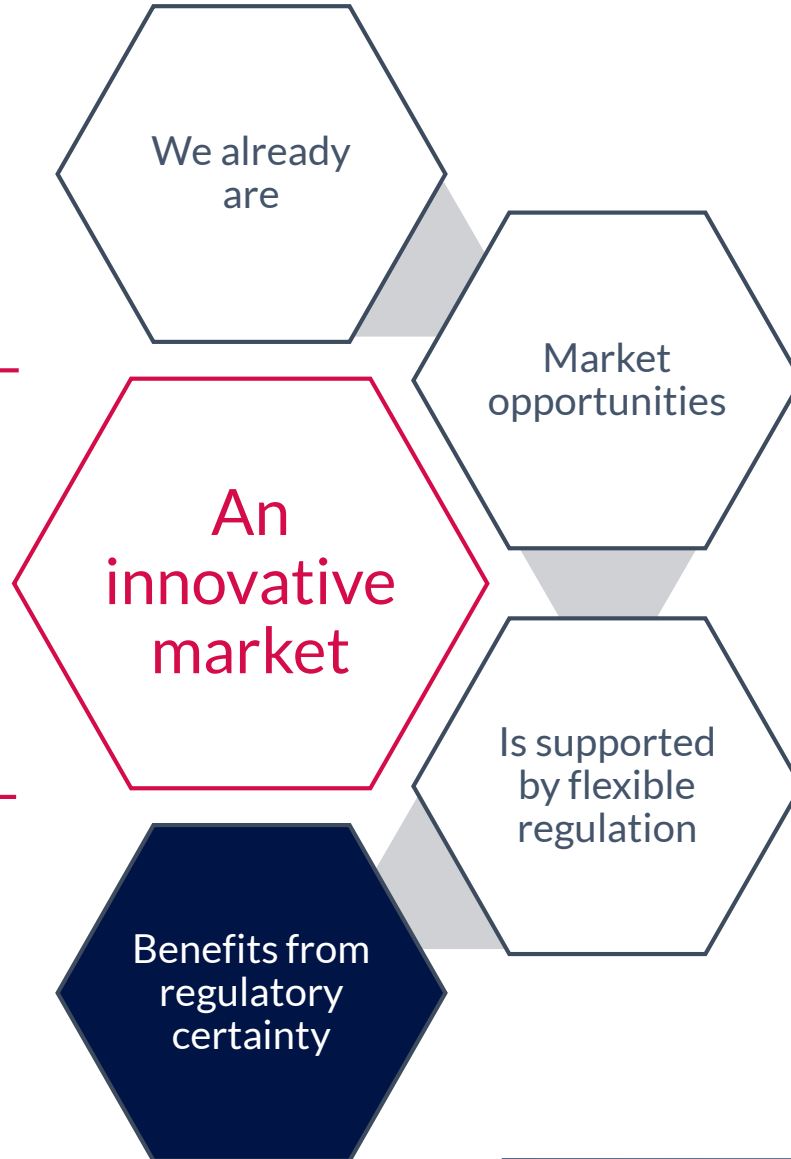
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Exemptions for app stores, charities & 087

New registration pilot launched

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Regulatory framework is fit for purpose

In summary

- We're working hard to create the right regulatory conditions for a healthy and innovative market to flourish. That includes:
 - Support for new services
 - Removal of unnecessary barriers
 - Maintenance of market integrity
 - Improved consumer confidence.
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Q&A

Panel discussion

Encouraging a healthy market

Steve Ricketts, PSA Board Member

Nick Lane, Mobilesquared

Jennie Avery, EE

Mark Stannard, Boku

Simon Towler, PSA

Cornelia Calugar-Pop

Deloitte



Panel discussion

Supporting Innovation

Kevin Brown, PSA Board Member

Danny Barclay, O2 Telefonica

Stephen Hunter, Docomo Digital

Rory Maguire, aimm

Mark Collins, PSA

David Edmonds CBE

Chairman
