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Mr. Carlton Smith
Chief Executive Officer
Utilities Regulation and Competition Authority
Frederick Street
Nassau, Bahamas

Dear Sir,

Re: Responses to URCA's Preliminary Determination on Retail Cellular Mobile Market Review and Assessment

CBL and Aliv have considered the response from the Bahamas Telecommunications Company to this consultation, as published on URCA's website on 27 April. After reviewing it, we have no comments to add to our submission.

We note BTC's comments about the fixed line market, and consider that these comments apply with even greater force to the Pay TV market, which has changed beyond all recognition from the market which existed the last time that URCA reviewed dominance in this market, in 2014. Since then, global new entrants and mobile and fixed broadband technologies have completely changed the scope and market dynamics of the television/content market, and CBL knows from its daily experience that it is now very competitive.

CBL looks forward to engaging with URCA on its review of the fixed services market, including Pay TV, which is due to be completed by trimester 3 of 2022, according to URCA's recently published Annual Plan 2022. In preparation for this market review, CBL urges URCA to finalize its review of URCA's Position on OTT Services, scheduled to be completed by trimester 3 of 2022. CBL notes from the recent announcement in the Nassau Guardian that URCA intends to publish the results of a recent nationwide survey into consumer preferences for pay TV and FM radio. This is a welcome development and CBL believes such a survey will identify substitution by OTT services as the driving force behind the observed decline in traditional linear TV services. Indeed, URCA's comments in its Annual Report 2021 on the Pay TV Services Market Review on subscriber numbers (page 15) on the

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continuing trend of decline “despite competition” in the market since 2016 and with 2020-2021 statistics seeing the largest decline at 11% year over year to date is most worthy of note.

Respectfully submitted

A handwritten signature in black ink, appearing to be 'L. J. Smith', written in a cursive style.

On behalf of Aliv and CBL

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