Submission 10 - Town Centre Manager

Hello Panel

Please see below an update on progress since the last scrutiny report. I would be delighted to also attend the panel at your next sitting.

Achievements
- Formation of the Jersey Retail Association in 2018 as the retail representative body
- Retail Development Steering Group formed in 2017 to create the next retail strategy
- The Town Centre Manager and Retail Development Group Chairman worked with Skills Jersey to create Retail specific courses at Highlands. This commenced in 2017, Highlands now also offering Retail Diploma course
- Town Centre Manager and PoSH funded and supported the role out of Alive After 5 initiative in 2016
- Town Centre Manager and PoSH have funded and delivered the following events to enliven St Helier
    o 2016 - 16 events
    o 2017 – 19 events
    o 2018 – 22 events
- Pay by Phone and number plate recognition (at Sand Street) rolled out across Jersey
- PoSH, SOJDC & TDF funded new way finder signs in 2016, to support visitors and also add historic facts
- Wi-FI St Helier – PoSH & Digital Jersey funded a feasibility report *(see attached)*
- Search Jersey (Jamazon type site) launched in 2016 with very little uptake from retailers *(see attached)*
- Retail Ambassadors – Jersey Business offered World Host training to over 400 retail / hospitality employees. They can be identified by a Retail Ambassador pin
- Charing Cross was pedestrianised in 2017 and has become an important event space
- Conway Street pavement was extended in 2016 to accommodate pedestrians comfortably
- Bollards along Colomberie were removed at the request of PoSH in 2015
- Minden Place car-park has been modernised

Not yet achieved
- Mystery Shopping report funding stopped in 2017
- Additional work required to extend opening ours further than just Thursday evenings required
- Sunday Trading deregulation. Visit Jersey data highlights the need for this deregulation to enable visitors to have a rounded experience of St Helier
- De Minimis level. Retailers are still experiencing an unfair playing filed and Amazon has now taken over as the largest retailers in Jersey
- Retail Champion is still not clear with minimal political support
- EDD representation not invited to attend Future St Helier Group
- Guy Gothard 2010 Jersey Market Review not applied to markets. Opening hours have not changed
- No data to support retail shift. Additional footfall cameras required in key areas of change
- Digital focus for smaller retailers. Jersey Business worked hard to engage with small business with minimal update on free digital advice
- North of town masterplan not applied
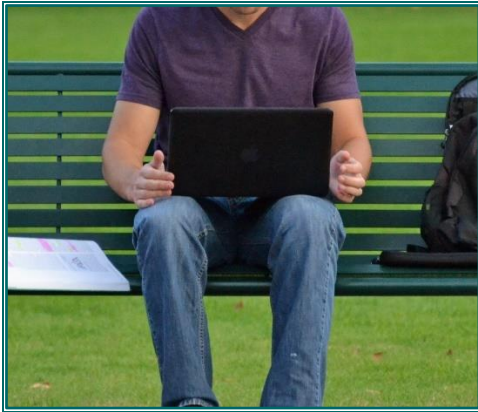- Hopper bus / park & ride scheme

Wish list

- Robust data on the value of retail to the Jersey economy. Monthly gathering of retail sales data would be beneficial and could be used to understand the market. Highlight St Helier as a retail hub with inward investors and highlight issues with certain areas of retail
- Additional footfall cameras throughout the town centre to further understand the movement of people and the impact of development
- Specific funding from government for events. Fete de Noue is extremely underfunded compared to the days of Jersey Tourism
- Benchmark of where we are to feed into the new retail strategy
- Deregulation of Sunday trading
- Government understanding of the value of the sector when the sector is applying for licenced staff. One size does not fit all and poor service reflects on the brand Jersey
- Change in legislation to reduce timescales that retail shops are empty
- More streets accessible for pedestrians between 10am-6pm

Kind regards
Daphne

Daphne East

Director of Customer Services & Town Centre Manager

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Digital Jersey

WiFi in St Helier Town Centre Initiative

Feasibility Report

Version 1.0

October 2017

History

Version	Issued By	Issue Date	Notes / Amendments from Previous Version
1.0	I Ronayne	16 Oct 2017	N/A

Referenced Documents

Document	Version	Issue Date	Author

Contents

1 ABOUT THIS DOCUMENT

This is a feasibility report containing the outcome of a work package undertaken by Ian Ronayne (IR) at the request of Digital Jersey (DJ). The subject of the work package is a feasibility assessment of installing a public WiFi network in St Helier town centre.

2 CONTEXT

The possibility of installing a public WiFi network (often termed municipal WiFi) in St Helier has been raised on several occasions. Interest has chiefly followed news of comparable installations taking place in UK city and town centres.

Previously, the Parish of St Helier (PoSH) has directly investigated the option, engaging with potential WiFi network suppliers to understand what is possible but not progressing beyond discussions. As a result, DJ has agreed to facilitate a focused initiative with the goal of formally deciding to proceed towards the installation of a municipal WiFi network or deciding to not progress further.

The approach taken by IR is to initially undertake a feasibility study with the aim of bringing together sufficient information and views upon which to decide whether to proceed with the initiative or not. If the decision is to move forward with the project, the next stage would be a full business case based on firm requirements and fixed quotations.

3 ABOUT IAN RONAYNE

IR operates as an independent consultant in Jersey, with a specialist expertise in telecoms, communications and technology services. IR has a background of 20 years working within the communications' industry, with primary experience in technology based product development, marketing, business development and project management. Since 2010, IR has operated in a self-employed capacity, working with organisations throughout the island.

In addition to this consultancy work, IR works in several other roles, including as a lecturer in management qualifications, as a trainer in a number of soft skills disciplines including project and change management, as a researcher, writer, guide, historical consultant and speaker. IR is also a published author and recognised historian.

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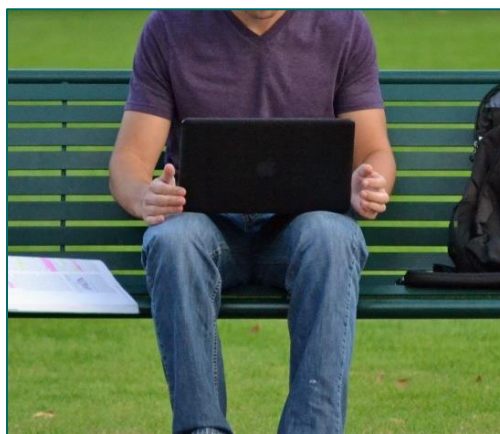
4 EXECUTIVE SUMMARY

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4.1 Summary of findings

Why WiFi?

There is nothing new about municipal WiFi. It's been a concept since the 1990s and a functioning reality since the mid-2000s. There has not been a smooth exponential growth curve, however, **municipal WiFi has gone through several ebbs and flows to reach its position today**.

That position is an **increasing number of city and town centres installing municipal WiFi networks, in the UK at least**. A central government funding initiative is partly responsible, recognising the link between digital savvy and enabled citizens and national economic success. At the same time, municipalities, such as Norwich for example, are investing in WiFi as a means of supporting the highs street and its traders.

Curiously, the current flourishing of municipal WiFi comes at a time when mobile data technology in the form of 4G networks is at last capable of offering genuine and ubiquitous wireless broadband. **Some municipalities want control of the end user experience, however, preferring not to rely on commercial mobile operators**.

Why St Helier?

Given the rise of municipal WiFi elsewhere in the UK, the question is perhaps why not St Helier. Yet discussions with several town centre stakeholders reveal **an inconsistent array of views on whether there is a need for WiFi or not**.

While some firm support exists, primarily for the same reasons put forward in the UK, other views are dismissive, unable to see the benefits or at least the need to prioritise WiFi over other initiatives.

What could a St Helier WiFi network look like

The technology and expertise exists to install a public WiFi network in St Helier, based on proven technology that has been widely deployed elsewhere. The technology allows for a customisable service based on standard features tailored to client requirements.

The critical choices are **how extensive the coverage should be and whether to charge for the service or not**. Both would have significant impact on the business case.

How much would it cost?

Taking an assumed median coverage area encompassing much of the town centre, and a simple, free-to-use service, the e**stimated installation costs are circa £150k - £200k**, although this is just a high-level estimate. Network maintenance and **running costs are circa £20k - £40k per annum**. There would also be a requirement for project management costs along with site acquisition fees and charges.

Who will be responsible?

There are several roles associated with the procurement, installation and operation of municipal WiFi, including a network owner and service operator. The former would assume contractual responsibilities, the latter to define a service specification and ensure it is delivered to end-users.

From discussions with stakeholders, **it's not clear who would take on these and other roles associated with any service**.

Could there be a justifiable business case?

A simple cost / benefits analysis **suggests a positive business case**, but largely on the basis of indirect revenues. A high-level risk analysis suggests a low to medium outlook.

4.2   Summary of conclusions

Point 1	Free-to-use municipal WiFi networks are becoming increasingly commonplace across cities and towns in the UK – they are likely to be viewed as a 'hygiene factor', simply expected by those coming into town centres. There is a risk that **St Helier may seem out of touch by comparison if it does not offer a WiFi network to locals and visitors**.
Point 2	Mobile data technology – specifically 4G – offers a comparable wireless experience with present visitors benefiting from UK mobile operators dropping roaming charges for their subscribers coming to Jersey. Yet mobile operators are commercial entities that may change their policies at any time. There is a risk associated with leaving it to the mobile operators - t**he best way to truly be in control of a wireless service in St Helier is to install a municipal WiFi network.**
Point 3	It's a concern that no consensus exists among consulted stakeholders over whether town centre WiFi is a priority or even needed. There is a risk that without this support that dissent and disagreement could undermine any project or service. **It would be beneficial to present the case for WiFi more firmly,** based on stated benefits, and gain widespread support before proceeding to business case.
Point 4	There will be a cost to install and maintain a fit-for-purpose WiFi network, with the **questionable options for directly recovering the investment.** Municipal WiFi

works best as a free-to-use service, not subject to intrusive sign-up procedures or unsolicited adverts. One **option to limit that cost is to find a supportive technology supplier to partner with**, by widening the potential choices to non-Jersey companies for instance.

Point 5   It is not clear who would own and operate a municipal WiFi network in St Helier, with little appetite among consulted stakeholders. **This is a critical gap in any strategy** – there needs to be a person or organisation responsible for contracting, setting service expectations and dealing with end user issues. There is an alternative to one stakeholder or consortium of stakeholders taking on responsibilities: **create an entity that could perform this role**.
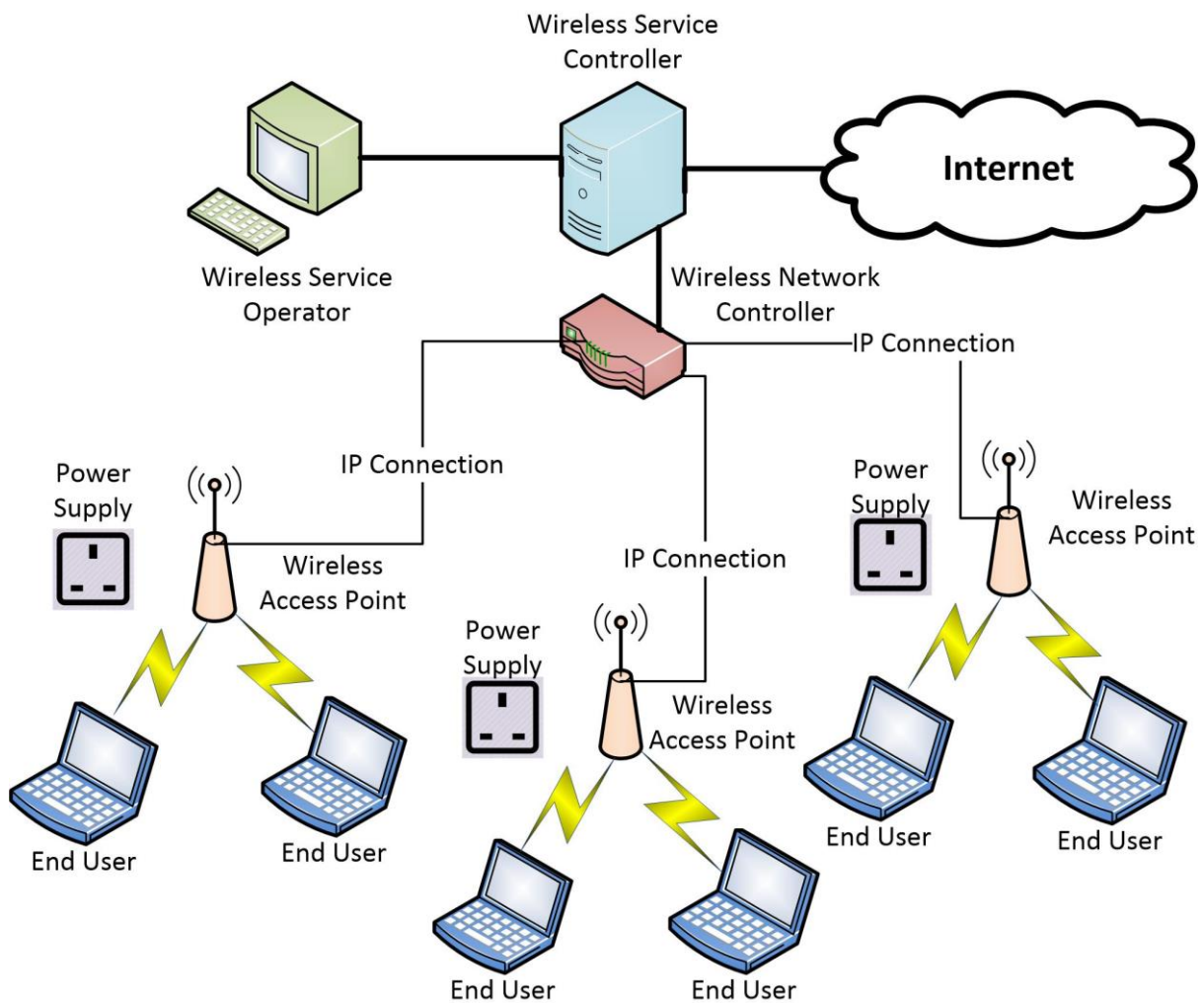
5   ABOUT MUNICIPAL WIFI NETWORKS

5.1   What is a municipal WiFi network?

A wide-scale wireless network installed in town and city centres that offers free, or partially free, highspeed internet access to anyone with a suitable wireless device. Based principally on an array of access points running the 802.11 networking standard, which is common to devices supporting WiFi, including laptops, notebooks, tablets, mobile phones, etc.

5.2   Enabling technology

The diagramme shows a simplified representation of a municipal WiFi network's components, with detail on each explained below.

Wireless Network Controller	Running software that monitors the WiFi network, controlling the operation and synchronisation of the wireless access points.

Wireless Service Controller	Server or cloud-based application that monitors the service performance on the WiFi network at a general and specific level. Specific monitoring includes number of users attached to individual wireless access points, their IP usage, the devices being used, and the internet services being accessed.
	The wireless network controller hosts the 'landing page' reached by the end users when connecting to the network, controls access to the service through username and passwords if specified and the end user service experience parameters, including data throughput speeds, any time constraints, content filtering, etc.
Wireless Service Operator	An application allowing the wireless service operator to configure the service, access network reports, investigate reported end user issues, etc.
Network Application	A range of specific applications or service connected to the network for ancillary purposes - demographic and footfall data, for example, or automatic information or advertising presentation.
Internet	The connection between the WiFi network and the public internet, sized to provide the required end user experience.
IP Connection	Connections between the wireless network controller and each wireless access point, either dedicated or via a repeater unit used to amplify the signal into specific locations. The IP connection may be wired, i.e. using a physical cable, or wireless, using a point-to-point or broadcast solution.
Wireless Access Point	Mounted on walls, poles, masts or other convenient points, wireless access points are standard hardware devices through which end users access the internet.
Power Supply	Each wireless access point requires a standard electricity supply.
End User	People accessing the WiFi network using their devices.

5.3   Historic development

Municipal WiFi networks are a comparatively recent development, with the first significant installations occurring in the early years of the 21st century. The initial focus was on the concept that city authorities should be responsible for providing internet access to their citizens, in the same fashion as roads, pavements, public lighting, sewers, etc. This principle placed internet access

in the same category and other utility services. A counter-argument proposed that it was the role of private companies – chiefly mobile network providers – to run wireless data services, although the absence of high speed mobile broadband made this impractical.

On this basis, some cities began installing and offering a free or partly free municipal WiFi service. They faced challenges, notably on the grounds of cost and expenditure – installing citywide WiFi

was an expensive business. These challenges, led to many of the early networks failing. An example is 'Wireless Philadelphia', one of the first to launch in April 2005. By 2007, the network was in serious trouble, having failed to achieve roll-out targets and struggling with contractual arrangements. By 2008, the service had closed.

In the years between 2005 and the present day, many of the originally installed or conceived largescale municipal WiFi networks have closed or not progressed. The concept continued to be popular, however, employed in smaller scale as publicly accessible infrastructure or private campus-level installations.

5.4 Current position

A renewed charge to deploy municipal WiFi networks has recently come from central governments. Recognising the economic value of digitally connected organisations and individuals, stimulus funds have been made available to encourage the rollout of high speed broadband connections, including those using WiFi networks in city centre locations. An example of this is the UK Government's 'Super Connected Cities', part of a multi-million pound 'Broadband Delivery UK' project – see Appendix A for more information.

At the same time, smaller municipalities have extended the drive to provide high-speed broadband connectivity into their town centres. Within the European Union, a new initiative called 'WIFI4EU' proposes, in the words of the EU President, to '…Equip every European village and every city with free wireless internet access around the main centres of public life by 2020.'

5.5 Competing / complementary technologies

For many years, mobile data has been playing catch-up to other wireless technologies. Until the advent of 4G, the prospect of true mobile broadband was an ambition rather than reality. This has now changed, and will continue to do so as new and even faster mobile data technologies are developed.

What this means is that mobile broadband now provides a genuine alternative to WiFi. It has advantages: established and far wider coverage, for example, better 'handover' between access points when end users are moving, and ease of access – typically no login required. But mobile

broadband also has disadvantages: WiFi is simpler to install and maintain, mobile data usage is chargeable, potentially leading to large bills, and mobile data is often subject to high roaming charges when away from the subscriber's home network.

Jersey has excellent mobile coverage provided by its three operators, each of which offer extensive 4G services. Pay monthly subscribers often have a 'bundle' of mobile data within their tariff plan, which can be added to if paid for. Pay-as-you-go customers typically have less inclusive data, but some options do provide it when adding a set amount of credit.

All this means that many local people coming into St Helier will already have access to a highspeed wireless service and may therefore be less inclined to use a free WiFi network.

Roaming charges have traditionally inhibited the use of mobile data when away from the home network. Recent EU legislation has now eliminated roaming charges between member countries, however, meaning people pay the same when roaming as they do when at home. Correspondingly, mobile data bundles from home apply when abroad, potentially meaning 'free-to-use' mobile data when travelling.

Despite Jersey being outside the EU, the UK mobile operators – Vodafone, O2 and Three – have removed roaming charges for their customers travelling to the Channel Islands. This means that UK visitors with mobile data bundles can continue to use them while in St Helier.

All this means that many overseas visitors to St Helier will already have access to a highspeed wireless service through their mobile subscriptions and may therefore be less inclined to use a free WiFi network.

There is a risk involved in relying on mobile broadband, however, as recognised by at least one UK town centre WiFi operator interviewed as part of this feasibility report. Control of cost and quality rests with the mobile operator, which may decide to change things to meet commercial requirements at any point. Eliminating this risk means installing and operating a comparable wireless data network.
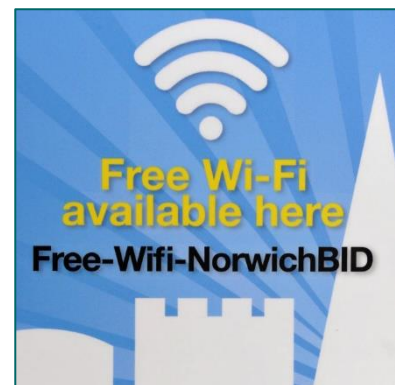
6   COMPARABLE NETWORKS AND SERVICES

Within the UK, there is the growing concept of 'smart cities', with many smaller municipalities installing town centre WiFi networks. Some examples are examined below.

6.1   Norwich

The city of Norwich has installed and operates a municipal WiFi network covering areas of the city centre along with key public buildings. Funding for the initiative came through the 'Business Improvement District' or BID principle, a UK Government backed programme that supports city and town centre development. The stated reasons for installing the municipal WiFi network are:

- Modern business and visitors travel on their internet connection

- Businesses and visitors want to share everything online

- City users want to stay connected to work

- Mobile service alone isn't good enough

- International visitors hate roaming charges

- More devices use WiFi than ever before

There is also an intention to enhance the attractiveness of Norwich compared with out-of-town shopping centres or other town centres, which are competitors for public footfall.

The installation was executed through several contracted suppliers, and achieved with the assistance of expert consultants. The service is free to use without restriction, and without any pop-ups or 'pushed' adverts, which are deemed intrusive and off-putting to end users. Coverage is restricted to outside use only, with minimum in-building penetration except where required.

The response from end users has been reportedly very positive, with a quarter of a million-people accessing the network in the 21 months since its launch.

6.2   Basingstoke

In a similar fashion to Norwich, the Basingstoke BID launched a free WiFi service covering the town centre and adjoining shopping mall in December 2016. The initiative was partly funded by town centre traders through the BID, and partly by the Basingstoke and Deane Borough Council.

As well as providing public access, the network monitors footfall, duration of stay, movement around the town centre, etc.

Subsequent to launch, the BID has reported more than 8,000 unique users, mostly in the younger age groups.
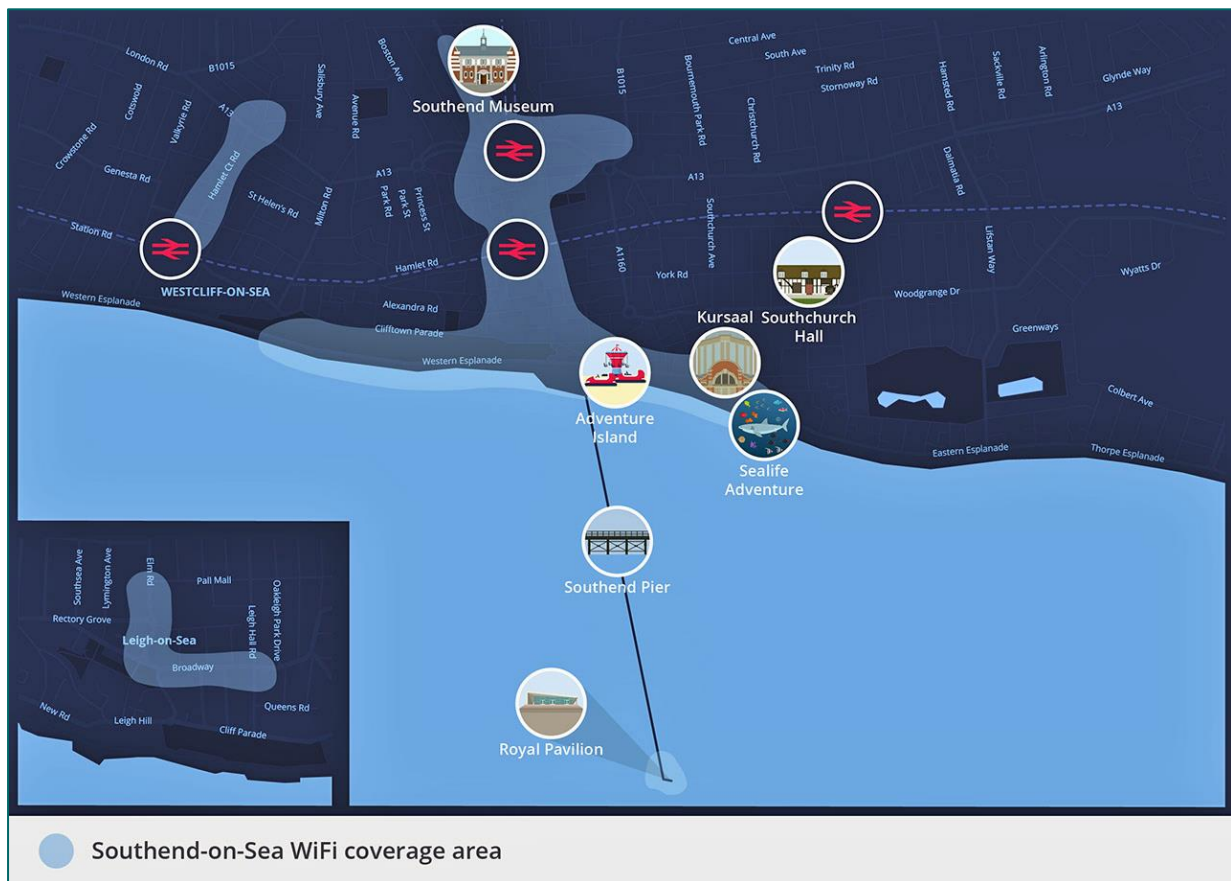
6.3   Southend-on-Sea

Southend-on-Sea Borough Council is presently launching a public WiFi network allowing end users free internet browsing in the city centre. The stated aims of doing so are to:

'…improve the overall visitor experience in the town and help Southend-on-Sea compete as an attractive destination for retail and leisure. It will also increase social inclusion by making the internet free and accessible to anyone in the area of coverage.'[1]

The network will include analytical applications designed to improve parking intelligence and waste collection. There is also a wireless application aimed at allowing residents and visitors to find restaurants, attractions and activities.

The approach taken by Southend on Sea Borough Council is granting a concession to private company IntechnologyWiFi to deploy, monitor and maintain wireless equipment within the city centre, using street furniture and buildings owned by the council and their partners.

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[1] Councillor Trevor Byford, Southend-on-Sea Borough Council

7 STAKEHOLDER ANALYSIS

7.1 Representatives

Identified stakeholders were individuals or organisations with a direct interest in the St Helier town centre, specifically from the perspective of visiting locals and tourists. Among those interviewed as part of this feasibility assessment were: Parish of St Helier, Visit Jersey, Digital Jersey, Jersey Chamber of Commerce, Jersey Heritage, Jersey Retailers Association, States of Jersey - Economic Development Department.

See Appendix B for further details.

7.2 General views

There were mixed stakeholder views on the prospect of free WiFi in St Helier, ranging from important to not required. Excepting PoSH, installing a network was not among the top priorities of any stakeholders, although Visit Jersey believed that access to 'always-on' mobile capabilities would increasingly become a contributing factor with some people when choosing a holiday destination.

Among those who believed free WiFi in St Helier would be beneficial was also a recognition that any installation must be cost justified.

7.3 Potential benefits

Among those who were supportive, the potential benefits envisaged by the installation of a free WiFi network in St Helier were:

- To enhance the experience of people visiting the town centre, for personal or work reasons, by allowing them to connect with their online applications, for communication, information, entertainment and so forth.

- To improve the measurement and understanding of people flows around the town centre, thus allowing more informed planning of urban changes and enhancements.

- To support the positioning of Jersey as an advanced 'digitally connected' location, thus enhancing its broad appeal to potential inward investors or talent.

- To augment the appeal of Jersey as a destination of choice for potential visitors, especially those who view the ability to share real-time experiences via social media as an important aspect of their lives.

- To provide a platform for pushing dynamic data to people coming into the town centre, thus offering them real-time information (e.g. news updates, transport information, factual guides) or commercial (e.g. sales promotion, opportunity awareness).

8   OUTLINE SERVICE DESCRIPTION AND PERFORMANCE EXPECTATIONS

Reviewing comparable networks and potential technologies, along with stakeholder feedback, permits envisaging the following potential municipal WiFi network for St Helier.

8.1 Network coverage

The extent of required coverage differs between stakeholders, though there could be three potential WiFi zones:

Minimum coverage	Encompassing selected popular town centre public spaces – King Street and Queen Street, Royal Square, Weighbridge Place, Liberation Square, Wests Centre, Parade Gardens.
Median coverage ▬▬▬	Encompassing an area bounded by Gloucester Street in the west, Union Street, Burrard Street and Minden Place in the north, Bath Street in the east and La Route de la Liberation, Mulcaster Street and Hill Street in the south.
Maximum coverage ▬▬▬	Encompassing the area bounded by the 'St Helier ring road'.

The network should be primarily accessible in outdoor locations only, with signal strength optimally established to meet this criterion but restrict in-building penetration wherever possible.

There may be a requirement to extend coverage indoors within designated buildings, i.e. harbour terminal, municipal buildings, etc.

8.1.1 Network capacity

There should be sufficient download and upload throughput capacity to allow an acceptable internet access experience for users based on a service level defined by the operator.

8.1.2 Service control

A secure service control function accessible by the operator and potentially contributors that will

allow the monitoring and reporting of WiFi zone performance, both network-wide and access point specific. Examples of information available from this function are traffic loading and distribution, download and upload throughput speeds, user profiles and behaviour.

8.1.3   User experience

The stakeholder's preference is for a 'free-to-use' service, on the basis that any form of charge would be a barrier to usage, but the owner will ultimately decide the commercial operating model. This may involve providing a free service that is time or quality limited, with a charge possibly made for continuous use beyond a defined period of free use, or to access a superior quality service.

Users should be presented with a web landing page designed by the operator when first accessing the network, through which they will provide personal information and select a username and password for future use.

The operator will determine and set fair usage policies such as restricting bandwidth availability after 30 minutes - and content accessibility, such as restricting access to 'adult-themed content'.

8.1.4   Operator services

The network should provide the following services:

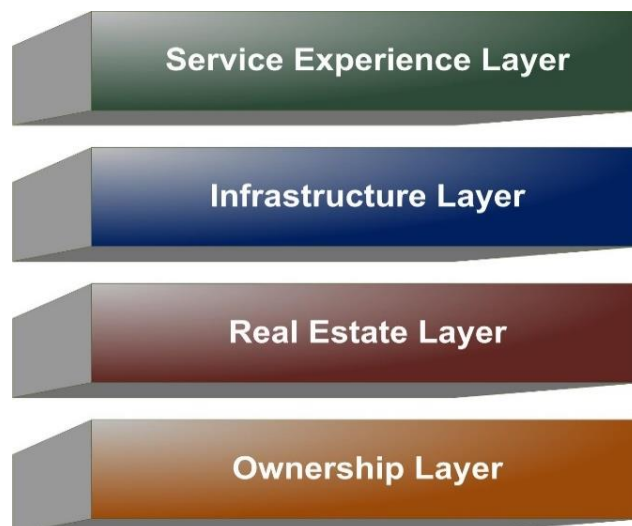|	
Footfall analytics	The network will provide statistical information on the movement of people through the WiFi zone. Busy thoroughfares on a time of day / week basis, for example, or time spent in a particular location.
Information and advertising	The network will allow the contributors to present information and adverts to end users based on their location in the zone. Inviting a user to access a related information website when passing a historic site, for example, or a related special offer when passing a shop or restaurant.

9   AN ANALYSIS OF THE POTENTIAL OPERATING MODEL

9.1   Potential operating model

There are a range of approaches when it comes to procuring, specifying and managing a municipal WiFi network. What can't be overlooked, however, is a fundamental requirement for someone or some entity to be responsible for several separate although complimentary roles.

One was to identify and consider these roles is by defining a potential operating model for the Town centre WiFi network, which divides the service into a number of inter-linked layers. These are explained as follows:

Service Experience Layer

Infrastructure Layer

Real Estate Layer

Ownership Layer

9.1.1   Service Experience

Responsibility for service experienced by Users of the network. Encompasses establishing the service parameters, i.e. breadth of coverage, bandwidth availability, content restrictions, potential payment gateways, etc., interfacing with potential contributors accessing the service, i.e. advertisers, information providers, etc., raising awareness and managing sign-up process, dealing with network and User issues as they arise, defining and collating user statistics and reports.

9.1.2   Infrastructure

Responsibility for planning, installing and maintaining the physical network, including wireless access points, network control system, service management system, internet gateway and connectivity.

9.1.3   Real Estate

Responsibility for securing and the management of the locations needed for the wireless access points, a supply of electricity to each and IP backhaul connectivity.

9.1.4   Ownership

Responsibility for funding, spend and ensuring return on investment, both at initial installation phase and subsequently operational phase, assuming legal ownership of network assets or commercial arrangements with possible managed service providers, accountability for legal and regulatory stipulations, i.e. compliance with data protection provisions.

9.2   Considerations

None of the stakeholders consulted envisaged themselves performing any of the roles identified in the potential operating model. There was a recognition that the roles needed filling, however, and some thoughts about possible individuals or organisations who could do this.

There was also a clear statement from some potential network infrastructure suppliers that they were not interested in providing a 'turnkey' installation and operation, running the WiFi in a concessionaire arrangement.

An alternative to existing stakeholders or potential suppliers operating a municipal WiFi network would be to create an entity that would undertake the task. This could be small organisation charged with taking on all the potential operating model roles under a managed contract, in return for payment or some form of recompense.

10　IDENTIFICATION OF POTENTIAL TECHNICAL SOLUTIONS AND SUPPLIERS

10.1　Potential suppliers

To gauge potential costs for a town centre WiFi network, three local infrastructure suppliers received a request for information (RFI) – JT, Sure and Logicalis.

10.2　Request for information responses

Question	Responses
Are you able to design and install the required technical infrastructure needed to provide all or elements of the town centre WiFi network described?	Yes from all suppliers
Based on the Median Coverage network scenarios can you provide a high-level estimate of the cost of design and installation?	Limited response due to limited initial information, but two suppliers suggested circa £150K - £200K
Can you provide a high-level estimate of the cost of ongoing infrastructure support and maintenance?	Circa £20k - £40k per annum / £250 per wireless access point
Would you be prepared to operate the 'Service Experience Layer' on behalf of a client / network owner, i.e. monitor and manage service quality, liaise with service suppliers such as payment gateways, respond to and resolve end-user service issues.	Varied responses from solid no, to positive yes
Would you be interested in assuming any role in the 'Ownership Layer' of the Town centre WiFi network described, i.e. offer a 'turn-key' solution for a potential client, offer joint or sole investment in the network, consider some form of partnership arrangement with shared risk and reward?	Varied responses from solid no, to positive yes
Are you able to offer a service that would be responsible for the 'Real Estate Layer' of the Town centre WiFi network described, i.e. identifying and acquiring sites, installing services, establishing connectivity?	Varied responses from solid no, to positive yes

11 A COST / BENEFIT ANALYSIS BASED ON OUTLINE COSTS

A detailed business case should follow a decision to proceed with plans to install a network. For the purpose of this feasibility report, however, the following simple cost / benefit analysis provides a subjective evaluation of financial viability.

Costs

Item	One off Cost	Annual Cost
Network infrastructure procurement and installation (1)	£200,000	
Specialist support (2)	£25,000	
Real estate acquisition (3)	£25,000	
Network infrastructure maintenance (4)		£25,000
Real estate rentals (5)		£25,000
Service operation (6)		£10,000
Total:	**£250,000**	**£60,000**

Benefits

Item	Annual Value
Additional retail spend due to Increased town footfall (7)	£30,000
Value arising from network based applications (8)	£15,000
Value from augmenting appeal to digital businesses (9)	£25,000
Additional spend from visitors attracted to the island (10)	£117,480
Revenue arising from commercial applications (11)	£15,000
Total:	**£202,480**

Benefits less costs (12):	**£92,480**

Notes:

(1) Worst case from RFI

(2) Project management / municipal WiFi expertise

(3) Project management / services installation costs

(4) Ongoing network supplier costs from RFI

(5) Assume rentals paid for access point sites

(6) Assume one third of one x individual costing £30k per year

(7) Assume 500 additional visits per month with each person spending £5.00 per visit

(8) Assume savings from better understanding people flows around town

(9) Assume one additional business attracted that contributes £25K in tax and other expenditure

(10) Assume annual tourist numbers increase by 0.5 percent and that each spends £330

(11) Assume revenue from advertising using network

(12) Includes one off procurement and installation costs amortised over five years

12 RISK ASSESSMENT

For the purpose of this feasibility report, a simple risk analysis has been completed comparing the position of moving forward with a town centre WiFi or not.

12.1 Moving forward to install a town centre WiFi network

Risk

(1) Influential stakeholders fail to support project or service

(2) Political interference undermines confidence in project or service

(3) Public discord over cost / benefits of project or service

(4) Fail to obtain access to key sites required for network

(5) Technology failure during installation or operation

(6) Municipal WiFi superseded by other technology or service

Impact

	Low	High
Low	(5) (6)	(2) (3)
High	(1) (4) (5)	

Likelihood

12.2 Not moving forward to install a town centre WiFi network

Risk

(1) St Helier appears increasingly out of touch with modern town centre facilities

(2) Mobile operators change policies to make mobile data prohibitively expensive

(3) Some tourists may decide against coming to Jersey

(4) Jersey appears out of touch with modern digital cities

Impact

	Low	High
Low	(1) (3) (4)	(2)
High		

Likelihood

13 CONCLUSIONS

Point 1

After something of a rollercoaster past, municipal WiFi is on the rise once again. It is being installed in town and city centres across the UK, and will continue to proliferate as central government and municipalities focus on perceived ways of rejuvenating the high street.

It's too early to say whether this latest wave of WiFi installations will deliver the anticipated benefits - this could be a short-lived trend if costs and complexities spiral and municipalities find more important things on which to spend their money. There is a good chance that municipal WiFi becomes a 'hygiene factor' in UK town centres, however, part of an attractions package that helps to maintain footfall against competitive pressure from other town centres or out-of-town shopping centres.

St Helier does not have the same competitive pressures of course – there are limited alternatives to visiting our town for a shopping experience. Yet not having a municipal WiFi network may place St Helier out of step with other town centres.

Point 2

While earlier mobile data technologies failed to provide a wireless service comparable to WiFi, the introduction of 4G technologies has changed that. Mobile broadband is now a reality, and St Helier benefits from having three competing mobile operators offering the service. Generous data bundles also mean that many mobile subscribers have virtually unlimited access.

Moreover, recent moves by the EU to eliminate roaming charges has led to the UK mobile operators including Jersey within its data bundles, meaning that around three quarters of visitors to Jersey will not pay more to use mobile data than they do in the UK.

This positive situation leads to a question: why bother with a municipal WiFi network when mobile data provides an equivalent experience at a potentially affordable price. One answer – as expressed by one comparable town centre – is a need to own and control the end user experience. Only municipal WiFi permits this. Mobile operators are commercial entities, whose policy towards providing mobile data services in St Helier may change at any time, becoming less favourable than present.

Point 3

It's a concern that no consensus exists among consulted stakeholders over whether town centre WiFi is a priority or even needed. While some expressed a general

view that it would be a good thing now, and others believed it would be important in the future, others either dismissed the initiative as unwarranted, or believed there were more important priorities for St Helier.

There is a risk that without this support dissent and disagreement could undermine any project or service. It would be beneficial to present the case for WiFi more firmly, based on stated benefits, and gain widespread support before proceeding to business case.

Point 4	With WiFi networks being routinely installed for both public and private purposes, there is no question that the technology needed for a St Helier municipal WiFi exists in an 'off-the-shelf' format. Likewise, suppliers for such a network are readily available, including local candidates.

Positively, this means that the cost of installation and maintenance benefits from production related economies of scale, while technology risks are minimised.

There remains a considerable cost to install and maintain a town centre WiFi network however – perhaps as high as £200K in capital if coverage is going to satisfy all expectations, along with ongoing maintenance and management costs.

There is a possibility of selling wireless advertising or other service to offset this cost. This prospect should be treated with some caution however. While enticing, selling access to the network would need management and commercial entities willing to pay. Anecdotal evidence also suggests that end users are less likely to accept a service that they don't trust or find tiresome to use.

One option to limit that cost is to find a supportive technology supplier to partner with, by widening the potential choices to non-Jersey companies for instance.

Point 5	There is no discernible consensus among stakeholders over who will own and operate a St Helier municipal WiFi network. And there is limited apparent appetite among potential suppliers to step in and perform these roles on a concessionary basis.

This is a critical gap in any strategy for moving forward with installing a town centre WiFi. While technology suppliers can deliver and maintain, they need firm contracting to ensure requirements, they need to understand service expectations, they need holding to account should something stop working. End users need to know whose service they are using, who to contact if they have any questions, and who to censure if they feel poorly served.

There is an alternative to one stakeholder or consortium of stakeholders taking on responsibilities: create an entity that could perform this role. It would come at

extra cost, but having a person or persons formally focused on the network should mean a quality service and better chance of avoiding any potential risks.

APPENDIX A: SUPERCONNECTED CITIES PROGRAMME

The UK Government has made up to £150 million available to support UK cities to develop the digital infrastructure capability to remain internationally competitive and attractive for investors, business and visitors.

Through the SuperConnected Cities Programme across 22 UK cities, the UK Government has provided:

■ Broadband Connection Vouchers to thousands of small and medium sized businesses to improve digital connectivity

■ Public WiFi in over 1,000 public buildings including museums, libraries and community centres, across city centres and in over 1,200 buses, trams and trains

■ Digital projects increasing broadband capacity and supporting business growth in some of our leading cities

The 22 SuperConnected Cities are:

■ Birmingham, Bristol, Brighton and Hove, Cambridge, Coventry, Derby, Leeds and Bradford (joint proposal), London, Manchester, Newcastle, Oxford, Portsmouth, Salford and York in England

■ Aberdeen, Edinburgh and Perth in Scotland

■ Cardiff and Newport in Wales

■ Belfast and Derry/Londonderry in Northern Ireland

For more details see: www.gov.uk/government/publications/2010-to-2015-government-policy-broadband-investment/2010-to-2015-government-policy-broadband-investment

APPENDIX B: STAKEHOLDERS CONSULTED

Chamber of Commerce	**Eliot Lincoln** - President **Lloyd Adams** – Digital Business Commitee
Digital Jersey	**Tony Moretta** - Chief Executive Officer
Jersey Heritage	**Jeremy Swetenham** - Commercial Operations Director
Jersey Retailers Association	**David Elliot** - Chair
Parish of St Helier	**Neil Macdonald** - Finance Director **Daphne East** – Town Centre Manager
States of Jersey	**Chris Kelleher** – Business Development Economic Development Department
Visit Jersey	**Keith Beecham** – Chief Executive Officer **Meryl Le Feuvre** – Head of Product

Search**Jersey**

Local Online Market

Double Check...
Search Jersey first

Search Jersey is a transactional web site to enable all Jersey retailers to present their goods in a single online marketplace. With a simple search the site will demonstrate both available product instore or for order by local retailers to generating sales and footfall to their stores.

There is no charge for you to list products on Search Jersey. This is about your products, your service and your loyalty schemes.

Search Jersey is a 'local shop' in a global market. People search online primarily by product, then brand, this is how Search Jersey will function. Customers can purchase online, click and collect or just pop in and/or use loyalty cards and purchase direct. Customers may browse and go instore to purchase or vice versa.

Some brands do not allow sale of their product online, but these can still be listed for purchase instore only.

10 Reasons

1　No charge for you to list products on the site

2　We put the product first

3　Simple and easy search for product

4　£258m estimated purchases online from Jersey - May 2014

5　We list products not for sale online creating footfall

6.　Direct payment to your PayPal Account

7.　Commission on sale only

8.　We have no affinity to any one local retailer

9.　More customers review online before buying

10.　Online sales expected to double in five years