

ANNUAL ELECTRONIC COMMUNICATIONS SECTOR REVIEW

Key Trends, Indicators and Statistics



HIGHLIGHTS:

- Sector investments exceeded \$105 million
- Mobile broadband penetration surpassed 40%
- Fixed broadband subscriptions increased 11%
- More than 800 million local calling minutes recorded



PREFACE

The Eastern Caribbean Telecommunications Authority (ECTEL) produces a review of the electronic communications sector annually. This report provides information on the performance and economic contribution of the sector, as well as information on deployment and use of electronic communications infrastructure in the ECTEL Member States.

The report presents a review of the electronic communications sector for the period April 2015 to March 2016, and tracks the performance of the sector using a number of economic and statistical indicators which include sector revenue, investment and service penetration. The main focus of the report is to present important economic and market statistics on the electronic communications sector for use by policy makers and other interested parties. The information contained in the report is based on data available as at May 31, 2017, and also includes revisions to data presented in previous reports where additional data was received.

The statistical indicators in the report are based on the International Telecommunications Union's core indicators on Information and Communications Technology (ICT) infrastructure and access. The data used to calculate the indicators was collected through the use of questionnaires to the main electronic communications service providers and from other publicly available data.

ECTEL would like to thank all the service providers, the Eastern Caribbean Central Bank (ECCB) and other institutions that provided the data required to produce this report. ECTEL would also like to express its gratitude to the National Telecommunications Regulatory Commissions (NTRCs) for coordinating the collection of the data.



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KEY INDICATORS AND SECTOR FINDINGS



Sector Findings

The key findings of the review of the electronic communications sector across the ECTEL Member States for the period ended March 2016 are:

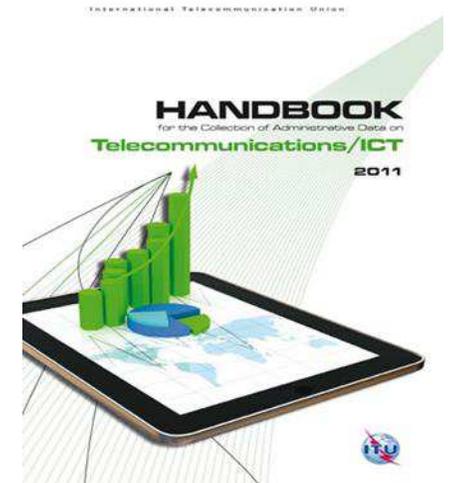
- Sector revenue improved while investment declined: Total revenue reported by telecoms operators improved marginally, increasing by 3 per cent to \$800 million. Following robust double digit growth in the past two years, sector investment recorded a dramatic decline of 33 per cent to \$105 million. This resulted mainly from reductions in capital spending as telecoms operators completed major infrastructure upgrades for the launch of 4G/HSPA+ mobile broadband services in the Member States.
- Fixed broadband subscription grew: The number of fixed broadband subscriptions increased by 11 per cent to 107,000 leading to a fixed broadband penetration rate of 20.2 per cent, up from 19.2 per cent in the previous period.
- 4G/HSPA+ mobile broadband service available in all ECTEL Member States: At the end of March 2015, mobile broadband via HSPA+ technology was available in all ECTEL Member States. As the migration of consumers in the Member States from 2G to 4G continued in 2016, the number of mobile broadband subscriptions rose albeit at a declining rate of 7 per cent to 253,000.
- Call volumes from fixed and mobile networks fell a further 13 per cent: Fixed originated local calling minutes fell 8 per cent to 365 million minutes and local calling minutes from mobile networks was 17 per cent less than in the previous period. Overall, consumers generated more than 800 million local calling minutes.
- International incoming and outgoing calling volumes sank by 68 per cent and 9 per cent respectively.



KEY INDICATORS OF SECTOR PERFORMANCE

The International Telecommunications Union (ITU) recommends the following key indicators to measure the performance of the electronic communications sector:

- Operator revenue
- Investment
- Direct sector employment
- Service penetration
- Fixed voice, mobile service, fixed broadband and mobile broadband
- Voice traffic – local and international
- Data traffic – mobile and fixed broadband



OVERVIEW

According to the Eastern Caribbean Central Bank's (ECCB) Annual Economic and Financial Review, the economies of the Eastern Caribbean Currency Union (ECCU) are estimated to have experienced REAL GDP growth of 2.2 per cent in 2016. Though a decline from the 2015 performance, the positive outlook was driven mainly by gains in the construction, wholesale and retail trade and the hotel and restaurant sectors. Acceleration in economic activity was recorded in the ECTEL Member States of Dominica, Grenada, St. Kitts and Nevis and St. Vincent and the Grenadines. This was however moderated by a contraction in economic activity in Saint Lucia.

The telecommunications sector of the ECTEL Member States does not appear to have fully mirrored the performance of the economy. The sector recorded declines in some of the key indicators including investment and local traffic volumes. Following two years of robust double digit growth, investment in the sector slowed dramatically by 25 per cent as telecoms operators completed upgrades to infrastructure to launch 4G/HSPA+ mobile broadband service. Total local calling volume also dipped by 13 percent to less than 900 million minutes. On the other hand, sector revenue and fixed and mobile broadband subscriptions increased.



REVENUE



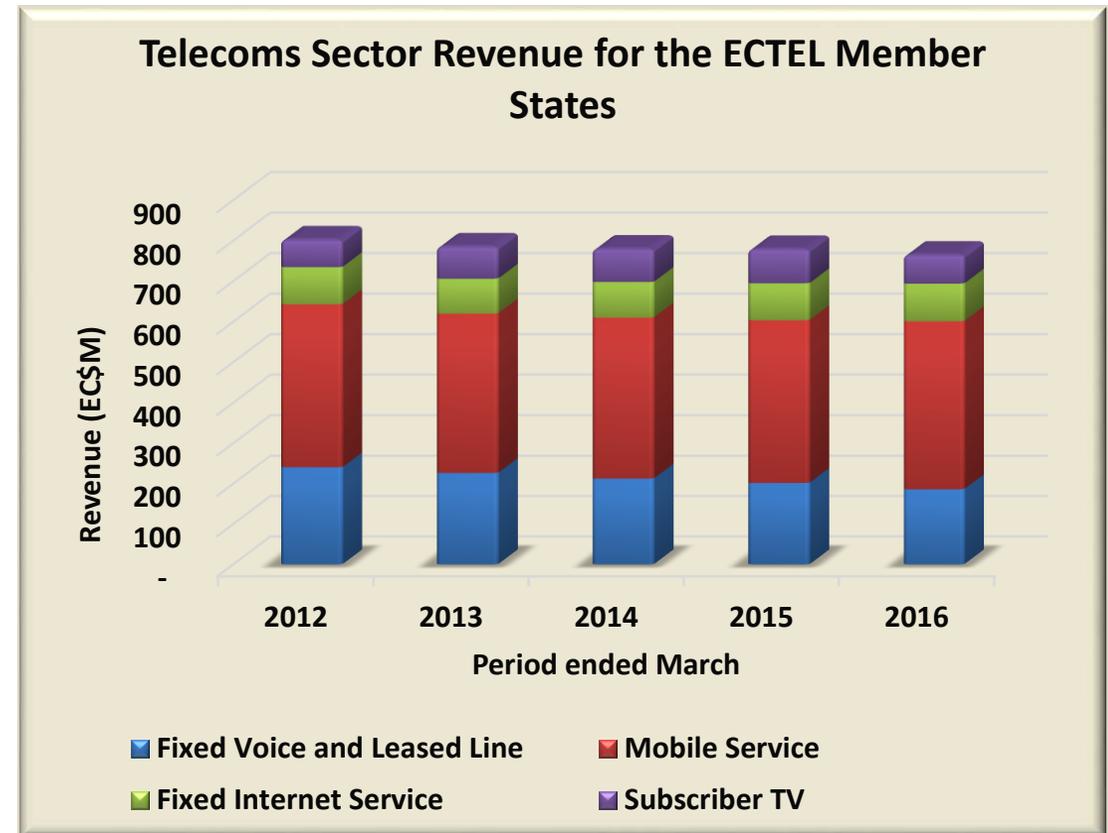
TOTAL REVENUE

After four years of consecutive declines, total revenue generated by the sector was estimated to have increased by 3 per cent from March 31, 2015 to \$800 million.

Mobile services generated 52 per cent of sector revenue and recorded a 3 per cent increase to \$415 million.

Fixed voice contributed 23 per cent to total sector revenue and declined 8 per cent to \$186 million.

Fixed broadband service revenue grew by 22 per cent to \$111 million – its share of total revenue increasing from 12 per cent to 14 per cent.



Source: ECTEL/operators



REVENUE IN MEMBER STATES

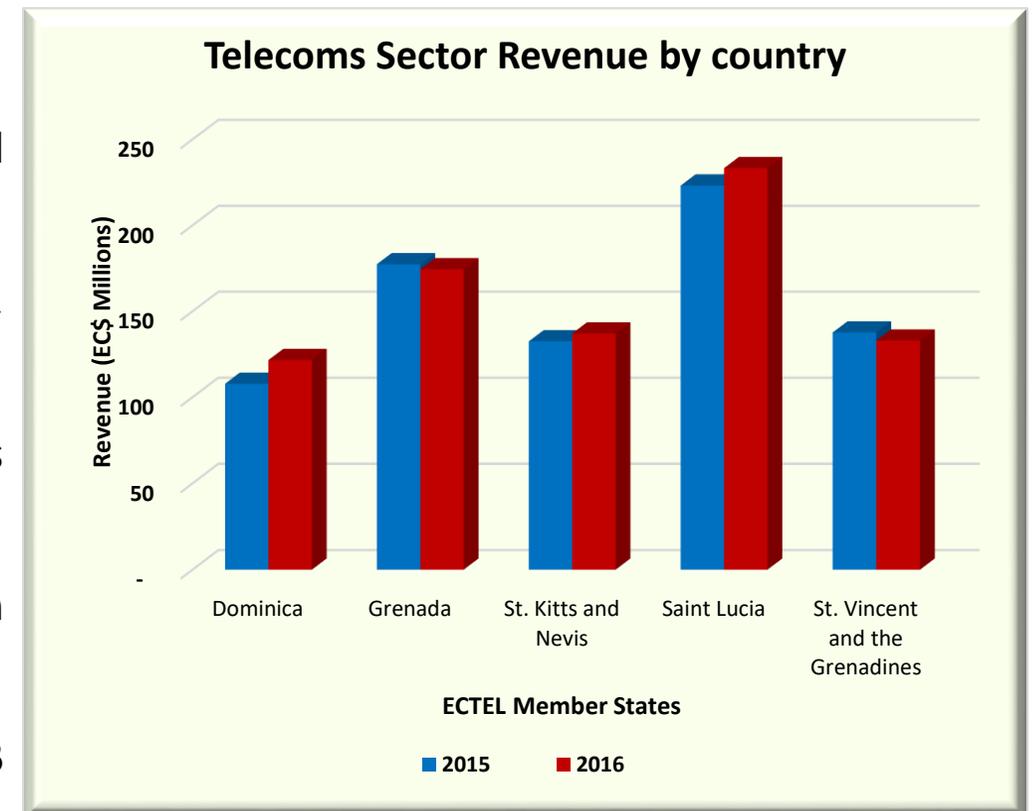
The telecoms sector in Dominica generated \$122 million in total revenue, an increase of 13 per cent from the previous period.

Total operator reported revenue for Grenada was \$174 million, down 2 per cent from the previous period.

Total revenue from the telecoms sector in St. Kitts and Nevis experienced a 3 per cent increase to \$137 million.

Telecoms operators recorded total revenues of \$233 million in Saint Lucia, up 5 per cent.

In St. Vincent and the Grenadines, total sector revenue fell 3 per cent to \$133 million.



Source: ECTEL/operators



INVESTMENT



TOTAL INVESTMENT

At March 31 2016, investments by telecoms operators declined following two consecutive periods of double digit growth.

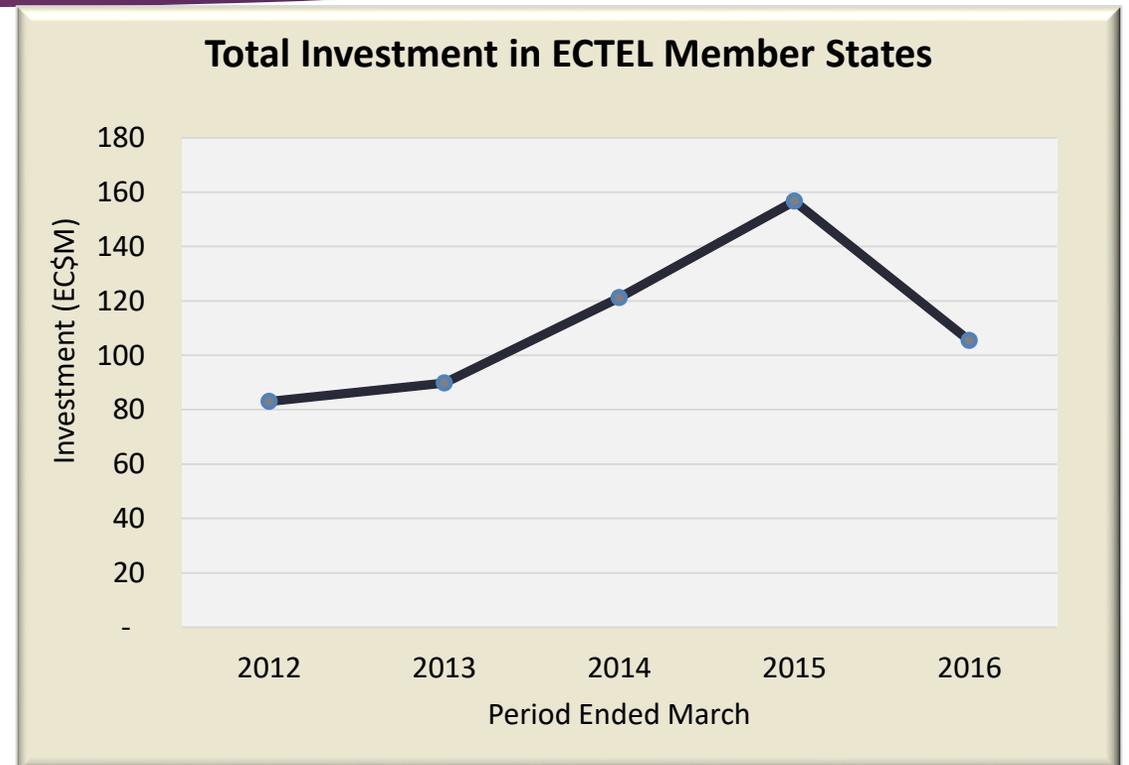
Spending was estimated at more than \$105 million, a significant decrease of 33 per cent from the previous period.

The overall investment rate dropped by 700 basis points to 13 per cent.

All Member States except St. Kitts and Nevis recorded declines in capital spending.

Capital expenditure was directed to:

- Upgrades to the mobile network;
- Broadband capacity upgrades.



Source: ECTEL/operators



INVESTMENT IN MEMBER STATES

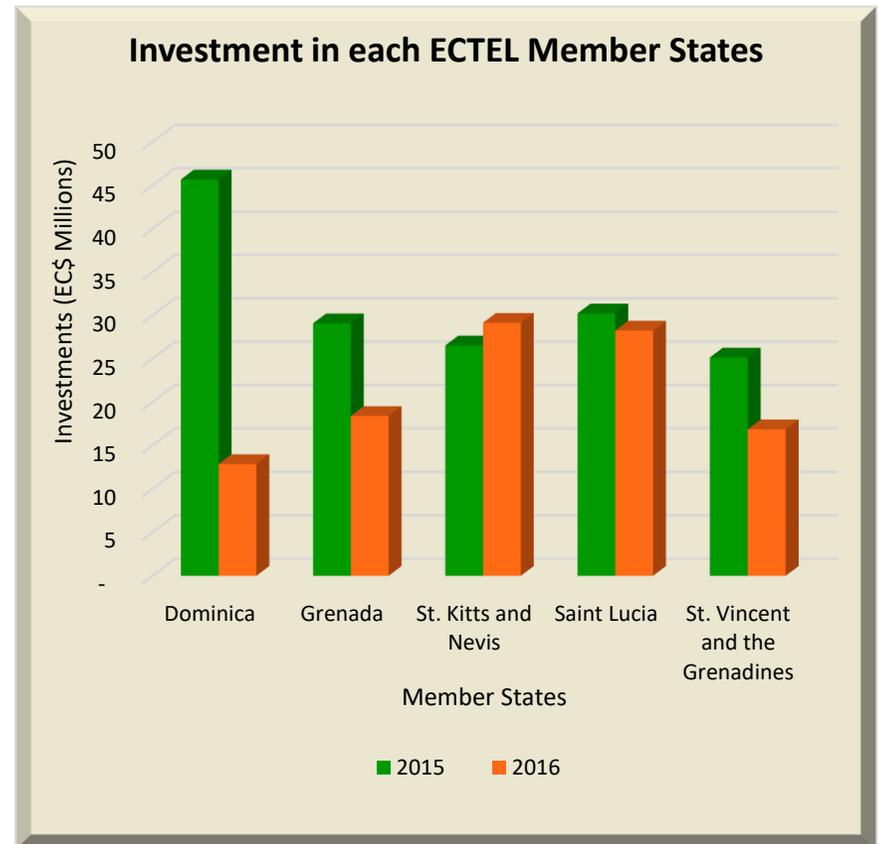
After experiencing three digit growth in 2015, investment in the telecoms sector in Dominica recorded a dramatic fall of 72 per cent to almost \$13 million.

In Grenada, investment by telecoms operators recorded a substantial reduction of 37 per cent to \$18 million. This followed double digit growth in 2015.

Investment in St. Kitts and Nevis's telecoms sector recorded an increase of 10 per cent to \$29 million, having surged by 313 per cent in 2015.

In Saint Lucia, investment in the telecoms sector contracted by 7 per cent to \$28 million.

Total investment in the telecoms sector in St. Vincent and the Grenadines was \$17 million, a notable decline of 33 per cent from the previous period.



Source: ECTEL/operators



EMPLOYMENT



TOTAL EMPLOYMENT

At March 31 2016, an estimated 1000 persons were employed by telecoms operators.

This represented an increase of 6 per cent in the total number of persons directly employed by the sector and a reverse of the declining trend observed from 2012.

This surge resulted predominantly from a 36 per cent rise in direct employment in St. Vincent and the Grenadines. Gains were also made in all other ECTEL Member States except Saint Lucia.



Source: ECTEL/operators



EMPLOYMENT IN MEMBER STATES

The total number of persons in direct employment in the telecoms sector rose by 11 per cent to 178 in Dominica.

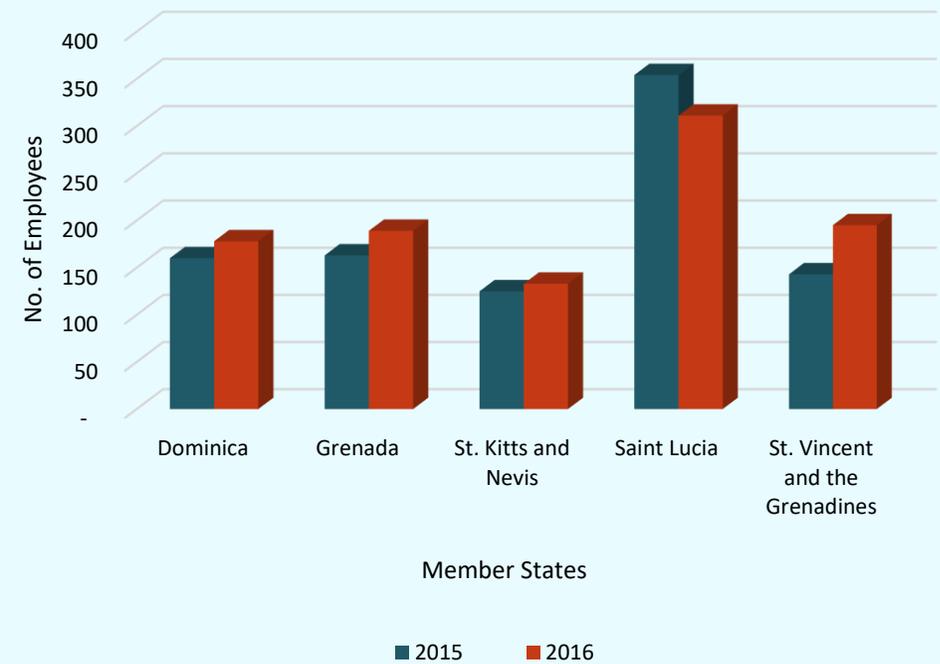
At March 31 2016, there were 190 full time employees in the telecoms sector in Grenada, a 16 per cent increase over the previous period.

Total full time employees in the telecoms sector in St. Kitts and Nevis increased by 6 per cent to 133.

During the period under review, the total number of persons in full time employment contracted by 12 per cent to 311 in Saint Lucia.

Full time employment in St. Vincent and the Grenadines was 195 at March 31 2016, a 36 per cent surge from the previous period. This was led by the hiring of 50 new employees to operate Digicel's EC Call Centre.

Total Employees in each Member State



Source: ECTEL/operators



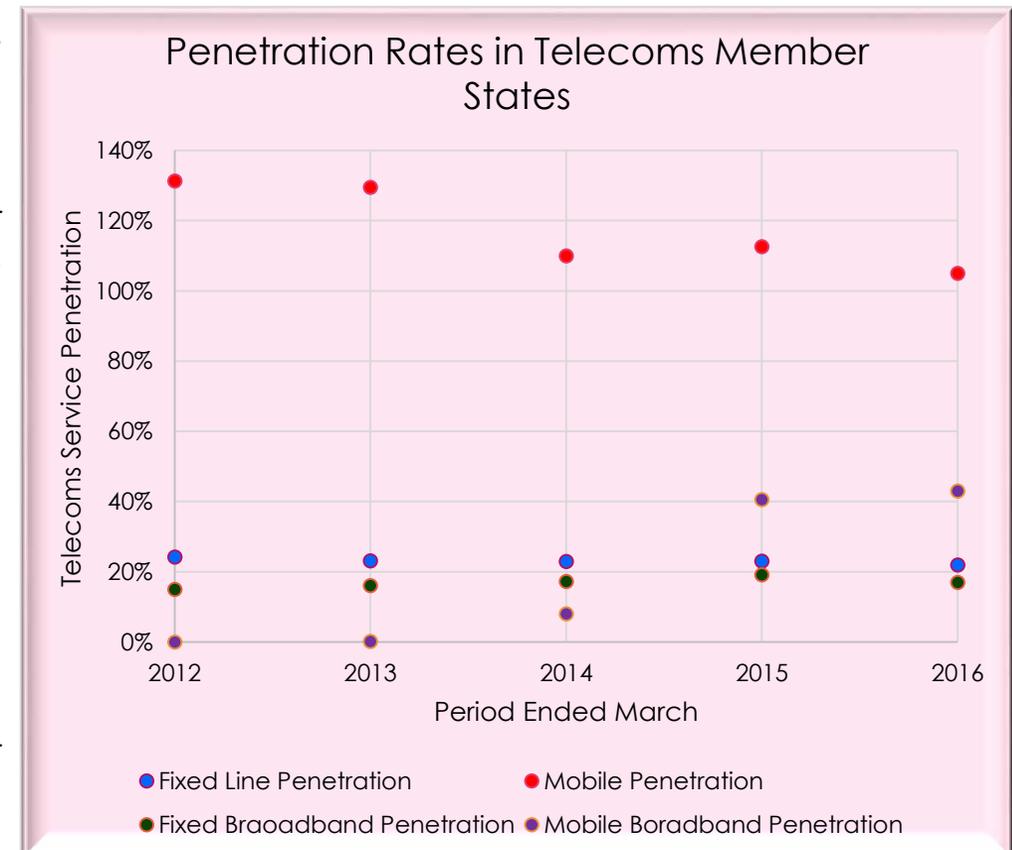
SERVICE PENETRATION



SERVICE PENETRATION

At March 2016, there were:

- More than 107,000 fixed broadband subscriptions; 11 per cent more than in the previous period resulting in an average broadband penetration of 23 per cent.
- 557,000 total mobile subscriptions with a penetration rate of 105 per cent; 88 per cent of which were prepaid. A fall in the rate of mobile penetration can be observed from 2012.
- 229,000 mobile broadband subscriptions; with an average penetration rate of 47 per cent.
- The number of fixed lines in service decreased by 200 basis points, penetration declined 6 percentage points to 22 per cent. The fall in fixed line penetration followed 3 years of stable penetration.
- Both fixed and mobile broadband penetration have been trending upwards. The growth in mobile broadband penetration has however outpaced fixed broadband penetration.



Source: ECTEL/operators



SERVICE PENETRATION IN MEMBER STATES

At the end of March 2016:

Fixed Voice penetration in St. Kitts and Nevis decreased 26 percentage points to 31 per cent.

The mobile penetration rate declined by 13 percentage points to 95 per cent in Saint Lucia.

Fixed broadband penetration climbed by 15 percentage points to 40 per cent in St. Kitts and Nevis.

The rate of mobile broadband penetration increased by 18 percentage points to 33 per cent in Grenada.

	Fixed Voice	Mobile Voice	Fixed Broadband	Mobile Broadband
Dominica	21%	105%	23%	41%
Grenada	25%	111%	19%	33%
St. Kitts and Nevis	31%	137%	40%	77%
Saint Lucia	19%	95%	17%	37%
St. Vincent and the Grenadines	19%	99%	17%	47%

Source: ECTEL/operators



VOICE SUBSCRIPTIONS



FIXED SUBSCRIPTIONS

At March 2016:

There were 116,000 fixed lines, approximately 1,000 less than in the previous period. 71 per cent were residential subscriptions.

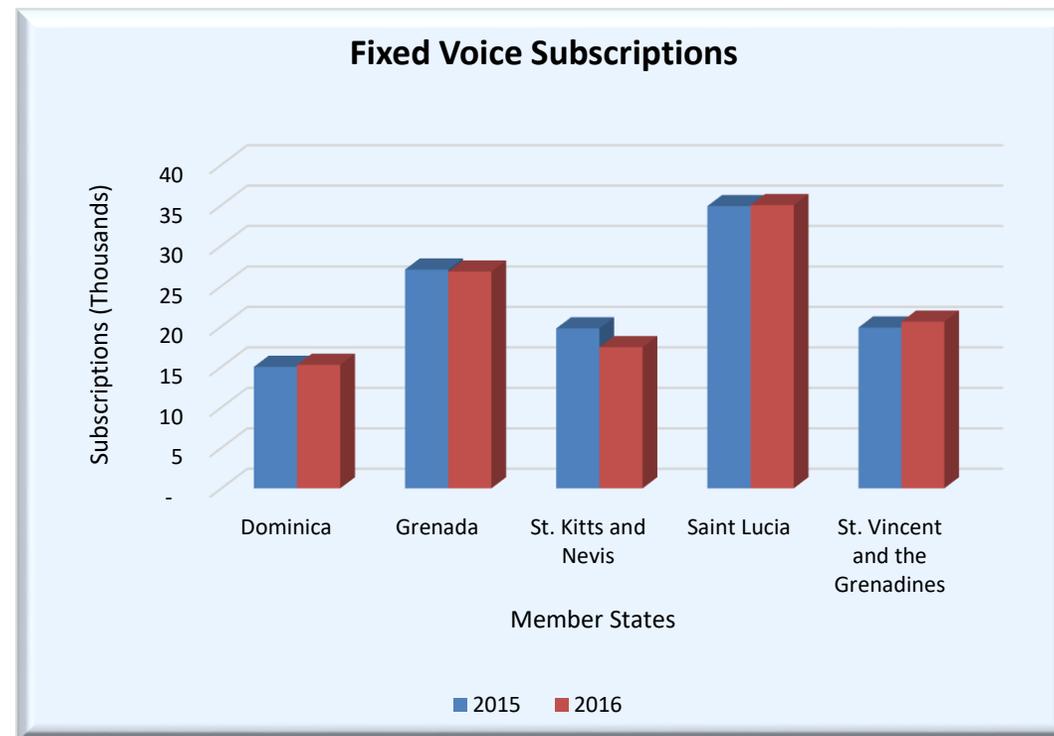
The total number of fixed lines in operation in Dominica remain unchanged at 15,000.

Fixed voice subscriptions also remained constant at 27,000 in Grenada.

In St. Kitts and Nevis, telecoms operators recorded total fixed voice subscriptions of 17,000, down 12 per cent from the previous period.

The total number of fixed voice subscriptions in Saint Lucia increased by 2 per cent to 36,000.

Fixed line subscriptions increased 4 per cent to 21,000 in St. Vincent and the Grenadines.



Source: ECTEL/operators



MOBILE SUBSCRIPTIONS

At March 2016:

There was a 2 per cent decline in mobile voice subscriptions to 557,000;

Prepaid subscriptions fell 3 per cent.

Postpaid subscriptions increased 7 per cent.

Subscriptions to mobile voice services dropped 1 per cent to 76,000 in Dominica.

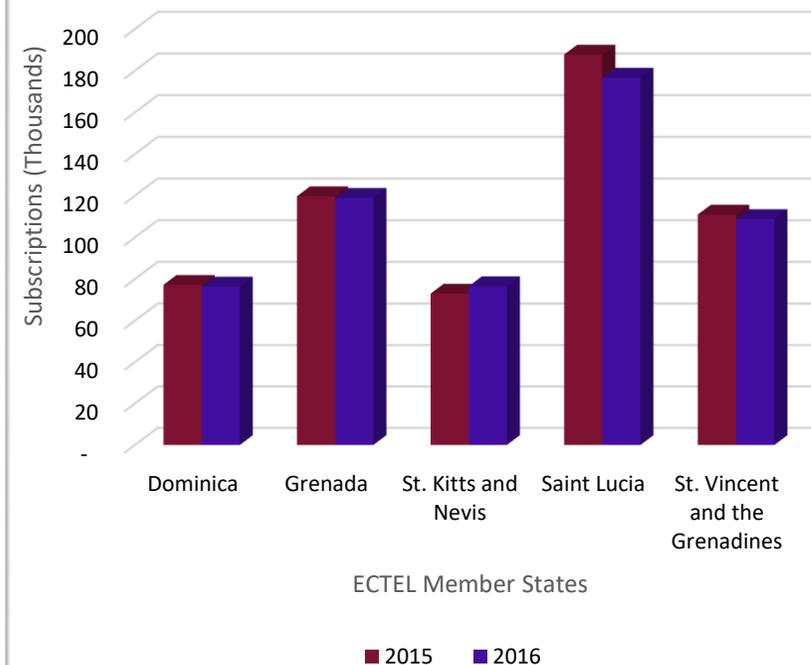
Mobile voice subscriptions totaled 119,000 in Grenada, 1 per cent less than the previous period.

There were 77,000 mobile subscriptions in St. Kitts and Nevis, up 5 per cent from the previous period.

Total mobile subscriptions in Saint Lucia declined by 6 per cent to 177,000.

The total number of mobile voice subscriptions decreased 2 per cent to 109,000 in St. Vincent and the Grenadines.

Mobile Voice Subscriptions



Source: ECTEL/operators



TRAFFIC



LOCAL TRAFFIC

Consistent with the declining trend seen from 2012, total local call volumes fell 13 per cent compared to 9 per cent in the previous period.

Contractions in traffic volumes were experienced for both fixed (8 per cent) and mobile (17 per cent) networks.

An estimated 862 million calling minutes were used in the ECTEL Member States:

497 million minutes originated from mobile phones;

365 million minutes from fixed lines.

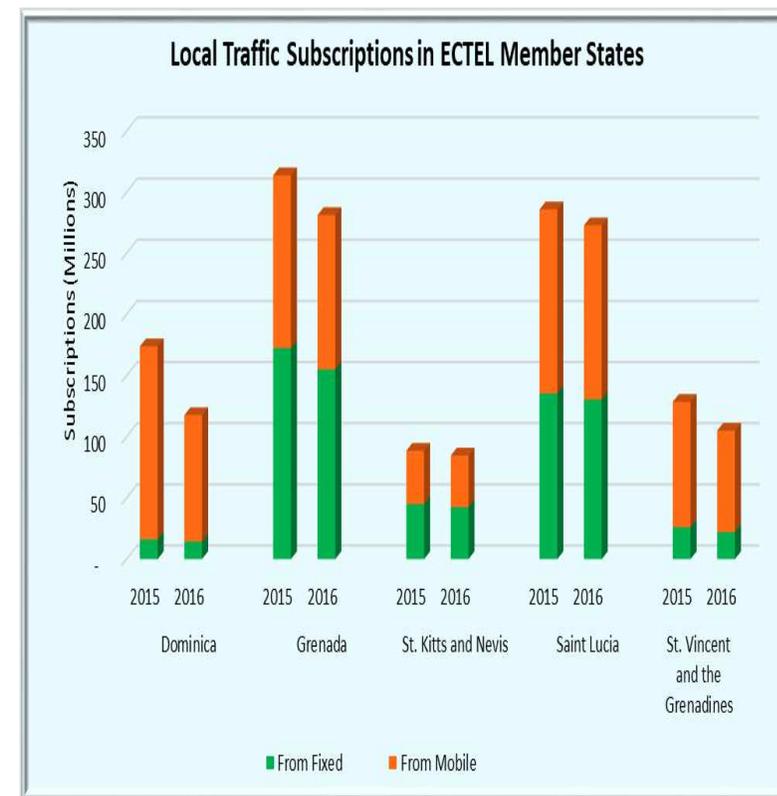
In Dominica, the total number of local network originated minutes continued on its downward trajectory, declining drastically by 32 per cent to 118 million.

Local fixed call volumes in Grenada decreased by 10 per cent to 281 million minutes from 2015.

Approximately 85 million minutes originated from the local networks in St. Kitts and Nevis, a 4 per cent reduction from the previous period.

An estimated 274 million minutes originated from the local networks in Saint Lucia, down 4 per cent from the previous period.

Local fixed traffic volumes contracted 18 per cent to 105 million minutes in St. Vincent and the Grenadines during the review period.



Source: ECTEL/operators



INTERNATIONAL OUTGOING TRAFFIC

For the review period, a total of 74 million international outgoing minutes originated from the ECTEL States. This was 9 per cent less than the previous period and continues the declining trend observed from 2012:

26 million minutes were fixed network originated

48 million minutes were mobile network generated

The overall decrease in international outgoing calling volumes was driven by an 11 per cent contraction in traffic originated from mobile networks.

Fixed originated network traffic declined at a slightly slower rate of 6 per cent.

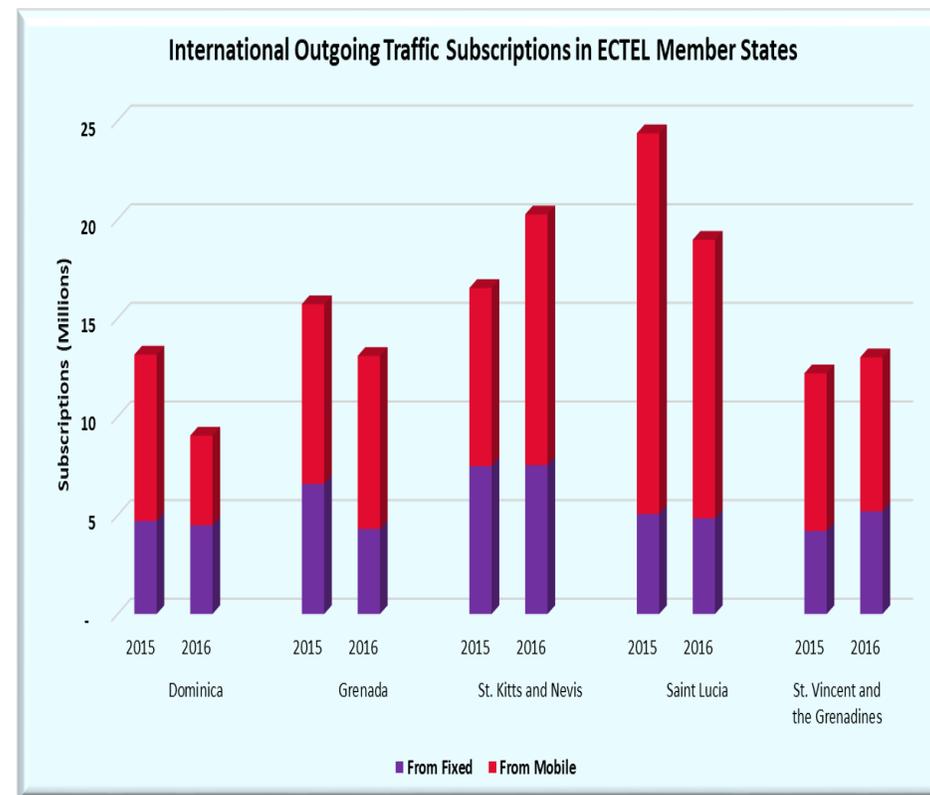
9 million minutes of international outgoing traffic was recorded in Dominica, a 31 per cent drop from the previous period.

Total outgoing international minutes decreased 17 per cent to an estimated 13 million in Grenada.

After an 11 per cent fall in the previous period, total outgoing international minutes increased 23 per cent to 20 million in St. Kitts and Nevis.

International outgoing minutes from Saint Lucia declined 22 per cent to an estimated 19 million.

In St. Vincent and the Grenadines, total outgoing international minutes rose 7 per cent to 13 million.



Source: ECTEL/operators



BROADBAND



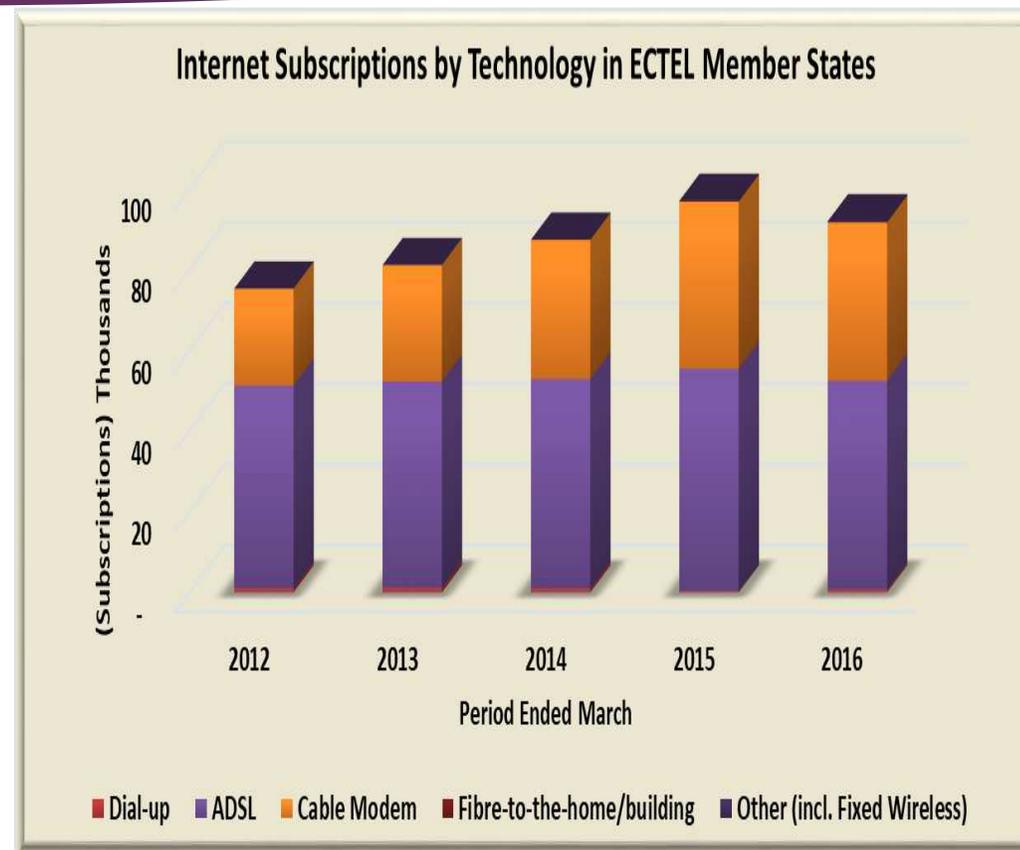
FIXED BROADBAND BY TECHNOLOGY

For the first time, Cable Modem surpassed ADSL as the dominant source of technology for fixed broadband access capturing 51 per cent market share. This followed 3 years of constant growth in cable modem uptake. ADSL represented 48 per cent of the fixed broadband technology market share.

Deployment of Fibre to the Home (FTTH) technology remained slow.

Overall, there was a:

- 6 per cent decline in the ADSL subscriptions
- 34 per cent increase in Cable Modem subscriptions
- 30 per cent growth in FTTH subscriptions.



Source: ECTEL/operators

FIXED BROADBAND SUBSCRIPTIONS

Fixed broadband subscriptions rose by 11 per cent to 107,000 at March 31 2016, continuing the increasing trend recorded from 2015.

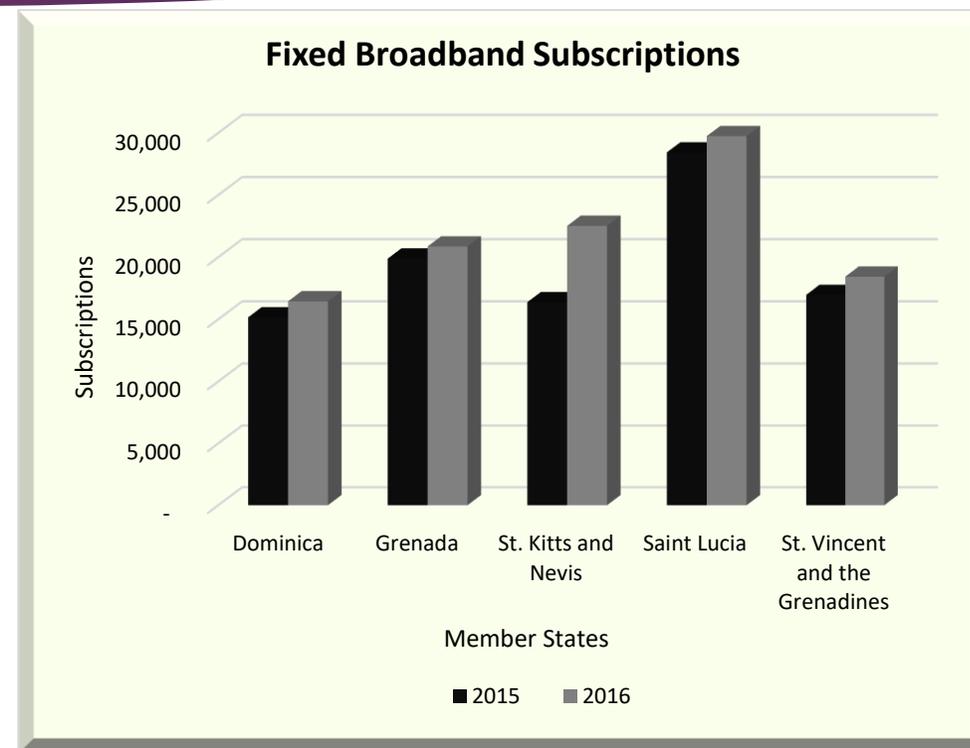
For the review period, there were 16,000 broadband subscriptions in Dominica, 8 per cent more than in the previous period. The penetration rate was 23 per cent.

At March 31 2016, there was a 2 per cent hike in fixed broadband service subscriptions to 21,000 in Grenada. The penetration rate was 19 per cent.

A significant growth of 38 per cent to approximately 23,000 fixed broadband subscriptions was recorded in St. Kitts and Nevis during the review period. The penetration rate was 40 per cent.

Fixed broadband connections was up 5 per cent to 30,000 in Saint Lucia. The penetration rate was 17 per cent.

The number of fixed broadband connections increased by 7 per cent to over 18,000 in St. Vincent and the Grenadines with a penetration rate of 17 per cent.



MOBILE BROADBAND SUBSCRIPTIONS

During the review period, mobile broadband(4G) subscriptions rose 12 per cent across ECTEL Member States.

Prepaid 4G subscriptions increased 11 per cent to 196,000

Post-paid 4G subscriptions increased 15 per cent to 33,000

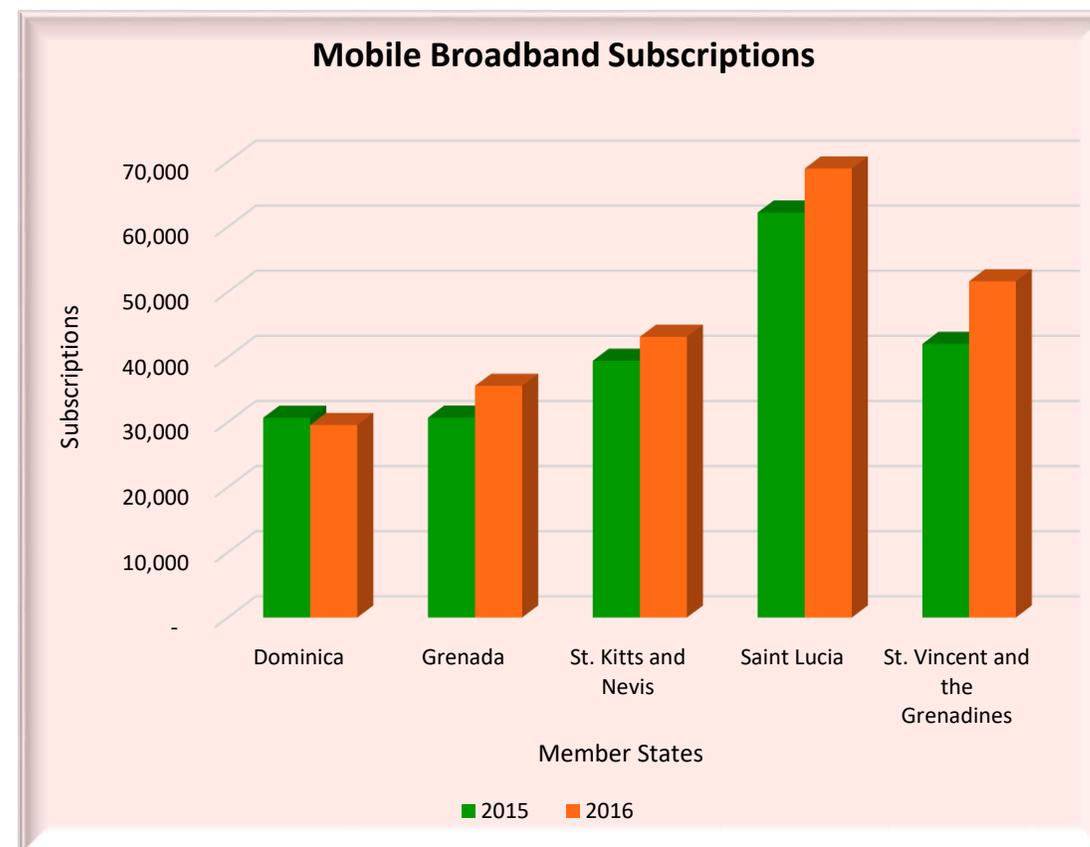
Mobile broadband subscriptions in Dominica decreased 4 per cent to 30,000, a penetration rate of 41 per cent.

Total number of mobile data connections surged 16 per cent to 36,000 in Grenada.

In St. Kitts and Nevis, an estimated 43,000 mobile broadband subscriptions were recorded. This represented a 77 per cent penetration and a 9 per cent increase from the previous period.

There was an estimated upsurge of 11 per cent in mobile broadband subscriptions to 69,000 in Saint Lucia – a 37 per cent penetration.

Mobile broadband subscriptions grew 23 per cent to 52,000 in St. Vincent and the Grenadines– a penetration rate of 47 per cent.



Source: ECTEL/operators



SUBSCRIBER TELEVISION



SUBSCRIBER TELEVISION

At March 2016, total connections to Subscription TV in the Member States recorded a modest fall of 1 per cent to over 102,000.

Subscriptions to Subscriber TV recorded a 11 per cent expansion to more than 18,000 in Dominica.

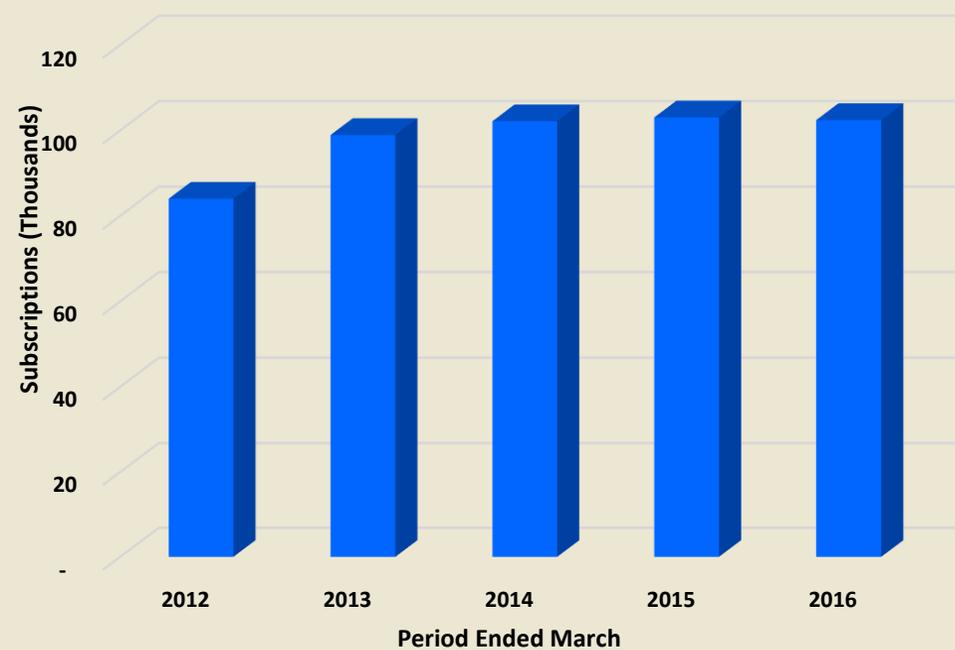
A 3 per cent increase in subscriptions for Subscriber TV was recorded in Grenada to 18,000.

Total subscriptions to Subscriber TV decreased 2 per cent to 21,000 in St. Kitts and Nevis.

In Saint Lucia, total Subscriber TV subscriptions dropped by 6 per cent to more than 32,000.

Total number of Subscriber TV Subscriptions fell 3 per cent to 13,000 in St. Vincent and the Grenadines.

Subscriber Television Subscriptions in ECTEL Member States



Source: ECTEL/operators

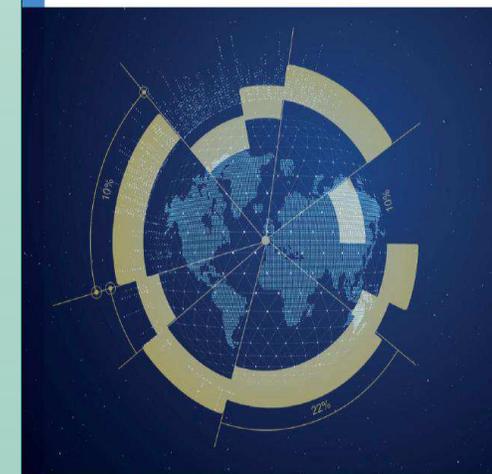


ICT DEVELOPMENT INDEX



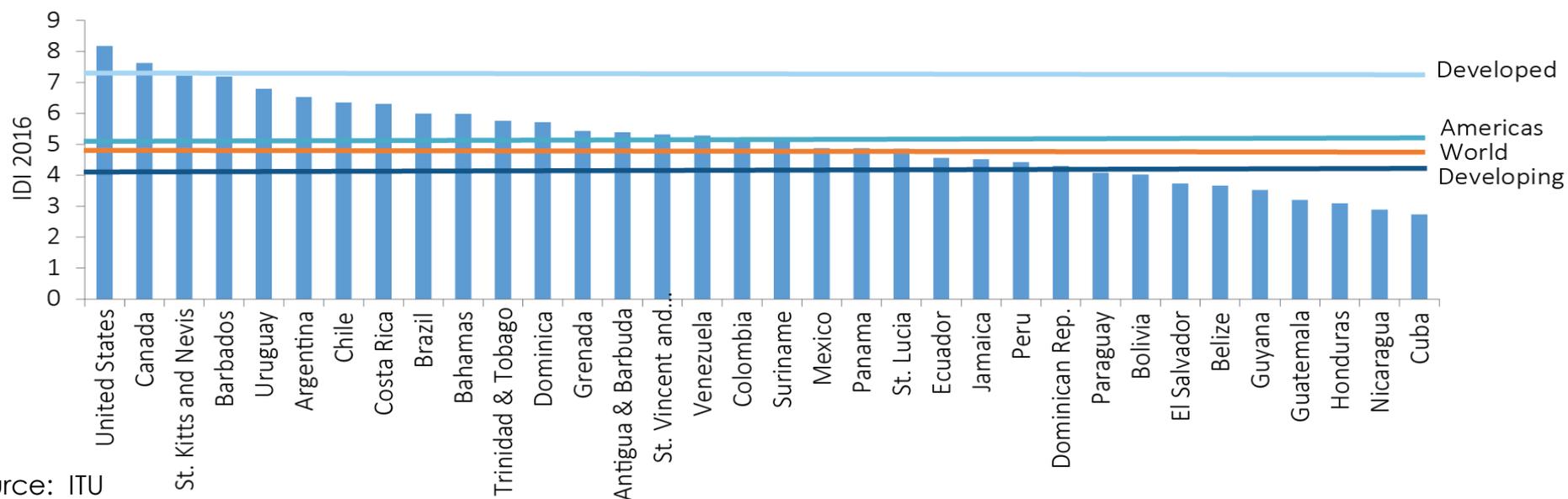
INDICES USED TO MEASURE ICT PERFORMANCE

- The ITU has also developed two ICT indices
- The ICT Development Index (IDI)
 - a composite index combining eleven indicators into one benchmark that can be used to monitor and compare developments in ICT between countries over time
- The ICT Price Basket
 - a price index to track affordability of ICT services in countries around the world
 - Index comprises sub-baskets for fixed broadband, fixed voice and mobile services
- Information on both indices are published in the annual Measuring Information Society Report



THE ICT DEVELOPMENT INDEX (IDI)

- ▶ The IDI is an index of 11 indicators developed by the ITU and used to compare ICT development across countries.
- ▶ Takes in account ICT infrastructure(access), ICT Use and ICT skills.
- ▶ All ECTEL Member States rank above the developing country average. All Member States except Saint Lucia rank above or are in line with the Americas average performance. Importantly, St. Kitts and Nevis's performance is line with the developed country average.



Source: ITU



BROADBAND PRICES



FIXED AND MOBILE BROADBAND PRICES

Price for entry level fixed broadband service

Price for 30 day, 1G prepaid mobile broadband package

Member State	Price (EC\$)	Price as % of GNI pc	Download speed
Dominica	76.50	5.58	2 Mbps
Grenada	79.50	4.30	12 Mbps
St. Kitts and Nevis	99.00	2.83	6 Mbps
Saint Lucia	89.01	5.98	2 Mbps
St Vincent and the Grenadines	91.64	7.33	2 Mbps

Member State	Price (EC\$)	Price as % of GNI pc	Data allowance
Dominica	77.49	5.90	1G
Grenada	67.50	3.37	1G
St Kitts and Nevis	119.99	1.10	3G
Saint Lucia	94.85	2.45	3G
St Vincent and the Grenadines	94.85	2.69	1G

UN Broadband Commission targeted affordability at <5% of GNI pc by 2015

Price as % of GNI pc from Measuring Information Systems Report 2016



NOTES

1. All figures have been rounded to the nearest million, thousand, and whole number or to the second decimal place.
 - ▶ -- denotes 'nil'
 - ▶ 0.0 denotes 'negligible'
 - ▶ n.a. denotes 'not available'
 - ▶ ** denotes 'not applicable'
 - ▶ All dollar amounts are in Eastern Caribbean dollars (EC\$). Where it was necessary to convert from another currency to Eastern Caribbean dollars the following exchange rates were used:
 - ▶ US\$1 = EC\$2.70
 - ▶ The telecommunications statistics in this report are subject to revision from time to time to ensure accuracy. Some data in this report was restated from previous Sector Reviews to reflect updated information.
2. Telecommunications revenues are the revenues received from providing mobile cellular, fixed internet, subscriber TV and fixed voice and other telecommunications services.
3. Fixed line penetration is obtained by dividing the number of fixed line subscriptions by the population and multiplying by 100.
4. Mobile penetration is obtained by dividing the number of cellular subscriptions by the population and multiplying by 100.



Notes continued

5. Fixed broadband penetration is obtained by dividing the number of fixed broadband subscriptions by the population and multiplying by 100.
6. Mobile broadband penetration is obtained by dividing the number of mobile broadband subscriptions by the population and multiplying by 100.
7. Outgoing international traffic is the total telephone traffic measured in minutes that originated from a fixed or mobile phone in the specified state with a destination outside the state.
8. Residential fixed line access charge is the recurring fixed charge for subscribing to a fixed line service.
9. Telecommunications investment is the expenditure associated with acquiring ownership of plant and property used for telecommunications services and includes land and buildings.
10. Employment refers to the total number of staff employed by a telecommunications provider. This does not include sub-contract staff.
11. The data for populations are the mid-year estimates from the Eastern Caribbean Central Bank (ECCB).
12. Gross Domestic Product (GDP), Gross National Income (GNI) and other economic indicators are from the National Accounts and Economic and Financial Review reports produced by the Eastern Caribbean Central Bank.
13. Rates for services were obtained from company websites and are VAT inclusive and peak rates except where stated otherwise.



SELECTED TELECOMMUNICATIONS INDICATORS



ECTEL MEMBER STATES

	2012	2013	2014	2015	2016
Provider Revenues (EC\$M)	\$802	\$785	\$780	\$779	\$800
Investment (EC\$M)	\$83	\$90	\$121	\$157	\$105
Employment	1,369	1,202	938	945	1006
Fixed line Penetration	24.2%	23.1%	23.0%	23.1%	21.7%
Mobile penetration	131.3%	129.6%	110.1%	112.7%	104.8%
Fixed broadband penetration	15.0%	16.1%	17.3%	19.2%	20.2%
Mobile broadband penetration	-	0.2%	7.5%	40.6%	43.0%
Local fixed traffic (million minutes)	532	471	430	395	365
Local mobile traffic (million minutes)	794	762	662	596	497
International incoming traffic (million minutes)	191	204	177	188	61
International outgoing traffic (million minutes)	132	103	96	82	74



Source: ECTEL/operators

DOMINICA

	2012	2013	2014	2015	2016
Provider Revenues (EC\$M)	\$108	\$106	\$105	\$108	122
Investment (EC\$M)	\$12	\$13	\$14	\$46	13
Employment	237	213	153	160	178
Fixed line penetration	21%	20%	23%	21%	21%
Mobile penetration	142%	143%	103%	107%	105%
Fixed broadband penetration	13.0%	14.4%	15.0%	20.9%	22.5%
Mobile broadband penetration	-	0.0%	0.0%	42.4%	40.5%
Local fixed traffic (million minutes)	23	23	21	16	14
Local mobile traffic (million minutes)	196	182	178	158	103
International incoming traffic (million minutes)	23	33	25	22	18
International outgoing traffic (million minutes)	12	14	17	13	9

Source: ECTEL/operators



GRENADA

	2012	2013	2014	2015	2016
Provider Revenues (EC\$M)	\$167	\$173	\$177	\$177	174
Investment (EC\$M)	\$16	\$18	\$24	\$29	\$18
Employment	256	239	163	163	189
Fixed line penetration	26%	27%	25%	25%	25%
Mobile penetration	123%	120%	108%	110%	111%
Fixed broadband penetration	14.9%	16.7%	17.4%	18.3%	18.9%
Mobile broadband penetration	-	0.9%	1.7%	28.2%	33.3%
Local fixed traffic (million minutes)	244	228	197	172	155
Local mobile traffic (million minutes)	180	183	143	141	126
International incoming traffic (million minutes)	76	77	65	64	9
International outgoing traffic (million minutes)	27	26	23	16	13



Source: ECTEL/operators

ST. KITTS AND NEVIS

	2012	2013	2014	2015	2016
Provider Revenues (EC\$M)	\$122	\$120	\$125	\$133	137
Investment (EC\$M)	\$15	\$19	\$6	\$27	\$29
Employment	182	149	128	125	133
Fixed line penetration	42%	41%	42%	42%	31%
Mobile penetration	165%	167%	141%	156%	137%
Fixed broadband penetration	28.1%	28.6%	30.1%	34.9%	40.2%
Mobile broadband penetration	-	0.0%	47.2%	84.1%	77.0%
Local fixed traffic (million minutes)	45	44	45	45	43
Local mobile traffic (million minutes)	40	43	44	44	42
International incoming traffic (million minutes)	18	19	18	18	7
International outgoing traffic (million minutes)	39	21	19	17	20

Source: ECTEL/operators



SAINT LUCIA

	2012	2013	2014	2015	2016
Provider Revenue (EC\$M)	\$263	\$247	\$238	\$223	\$233
Investment (EC\$M)	\$29	\$23	\$49	\$30	\$28
Employment	506	425	361	354	311
Fixed line penetration	21%	20%	19%	20%	21%
Mobile penetration	129%	125%	110%	109%	95%
Fixed broadband penetration	13.1%	14.6%	16.5%	16.5%	16.0%
Mobile broadband penetration	-	0.0%	8.1%	36.0%	37.1%
Local fixed traffic (million minutes)	147	143	137	135	131
Local mobile traffic (million minutes)	241	217	170	150	142
International incoming traffic (million minutes)	43	36	30	35	9
International outgoing traffic (million minutes)	25	25	25	24	19

Source: ECTEL/operators



ST. VINCENT AND THE GRENADINES

	2012	2013	2014	2015	2016
Revenues (EC\$M)	\$142	\$140	\$134	\$138	\$133
Investment (EC\$M)	\$11	\$18	\$28	\$25	\$17
Employment	188	176	133	143	195
Fixed line penetration	22%	19%	18%	19%	19%
Mobile penetration	122%	121%	103%	106%	99%
Fixed broadband penetration	14.0%	13.4%	14.2%	16.2%	16.8%
Mobile broadband penetration	-	0.0%	0.0%	40.2%	46.9%
Local fixed traffic (million minutes)	73	33	31	26	22
Local mobile traffic (million minutes)	137	138	127	103	83
International incoming traffic (million minutes)	31	39	40	49	17
International outgoing traffic (million minutes)	30	17	13	12	13

Source: ECTEL/operators



ACTIVE TELECOMS SERVICE OPERATORS

Licence	Fixed Public Network	Public Mobile Telecoms	Internet Network and Services	Subscriber TV	Submarine Cable
Dominica	<ul style="list-style-type: none"> Cable & Wireless Marpin 2K4 Ltd. SAT Telecommunications (Digicel Play) 	<ul style="list-style-type: none"> Cable & Wireless Digicel 	<ul style="list-style-type: none"> Cable & Wireless Marpin 2K4 Ltd. SAT Telecommunications (Digicel Play) 	<ul style="list-style-type: none"> Marpin 2K4 Ltd. Digicel Play SAT Telecommunications (Digicel Play) 	<ul style="list-style-type: none"> Cable & Wireless Middle Caribbean Network
Grenada	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Digicel Aislecom 	<ul style="list-style-type: none"> Cable & Wireless Grencomm Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Southern Caribbean Fiber
St. Kitts and Nevis	<ul style="list-style-type: none"> Cable & Wireless The Cable Caribbean Cable Communications 	<ul style="list-style-type: none"> Cable & Wireless UTS-CariGlobe Wireless Ventures (Digicel) 	<ul style="list-style-type: none"> Cable & Wireless The Cable Caribbean Cable Communications 	<ul style="list-style-type: none"> The Cable Caribbean Cable Communications 	<ul style="list-style-type: none"> Cable & Wireless Southern Caribbean Fiber
Saint Lucia	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Digicel 	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Antilles Crossing Southern Caribbean Fiber
St. Vincent and the Grenadines	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Digicel 	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) SilvaKast 	<ul style="list-style-type: none"> Cable & Wireless Columbus Communications (FLOW) 	<ul style="list-style-type: none"> Cable & Wireless Southern Caribbean Fiber



About ECTEL

The Eastern Caribbean Telecommunications Authority (ECTEL) was established on 04 May, 2000, by Treaty signed in St. George's, Grenada, by the Governments of five Eastern Caribbean States – Commonwealth of Dominica, Grenada, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines.

ECTEL is the regulatory body for telecommunications in its Member States. It is made up of three components – A Council of Ministers, a regional Directorate and a National Telecommunications Regulatory Commission (NTRC) in each Member State.

The Council of Ministers comprises the Ministers responsible for Telecommunications in the ECTEL States. The Director General of the OECS as an ex-officio member. Responsibilities include giving directives to the Board of Directors on matters arising out of the Treaty, and ensuring that the Board is responsive to the needs of the Member States in the implementation of telecommunications policy.

The Board of Directors comprises one member and an alternate from each Member State and the Managing Director of ECTEL as an ex-officio member. Responsibilities include making recommendations to the Council on any matter relating to telecommunications, and establishing rules and procedures consistent with the Treaty for the management and operation of the ECTEL Directorate.

The NTRCs – National Telecommunications Regulatory Commissions – are the Telecommunications regulators at the national level in each Member State. They are responsible for the processing of applications and advising the Minister on the award of licences.

