

ANNUAL ELECTRONIC COMMUNICATION SECTOR REVIEW

HIGHLIGHTS:

- Sector investments grew to \$136 million
- Mobile penetration increased to 107.9 per cent
- Fixed broadband penetration reached 19.4 per cent
- More than 799 million local calling minutes recorded

PREFACE

The Eastern Caribbean Telecommunications Authority (ECTEL) presents its review of the electronic communications sector for the period April 2017 to March 2018. The presentation focuses on the performance and economic contribution of the sector, as well as, on the deployment and use of electronic communications infrastructure in the ECTEL Member States. It provides a summary of the performance of the sector using a number of economic and statistical indicators which include sector revenue, investment and service penetration.

The statistical indicators in this presentation are based on the International Telecommunications Union's (ITU) core indicators on Information and Communications Technology (ICT) infrastructure and access. The data used to calculate the indicators is based on data available as at May 31, 2018 and revisions to data presented in previous reports where additional information was received. Data was collected through the use of questionnaires to the main electronic communications service providers and from other publicly available sources.

ECTEL aims to provide these economic and market statistics on the electronic communications sector for use by policy makers and other interested parties. 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 presentation. ECTEL would also like to express its gratitude to the National Telecommunications Regulatory Commissions (NTRCs) for coordinating the collection of data.



TABLE OF CONTENTS

- ▶ Preface
- ▶ Key Indicators and Sector Findings
- ▶ Revenue
- ▶ Investment
- ▶ Employment
- ▶ Service Penetration
- ▶ Voice Subscriptions
- ▶ Traffic
- ▶ Broadband
- ▶ Subscriber Television
- ▶ ICT Development Index
- ▶ Broadband Prices
- ▶ Notes
- ▶ Selected Telecoms Indicators
- ▶ Active Telecoms Service Providers



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 2018 are:

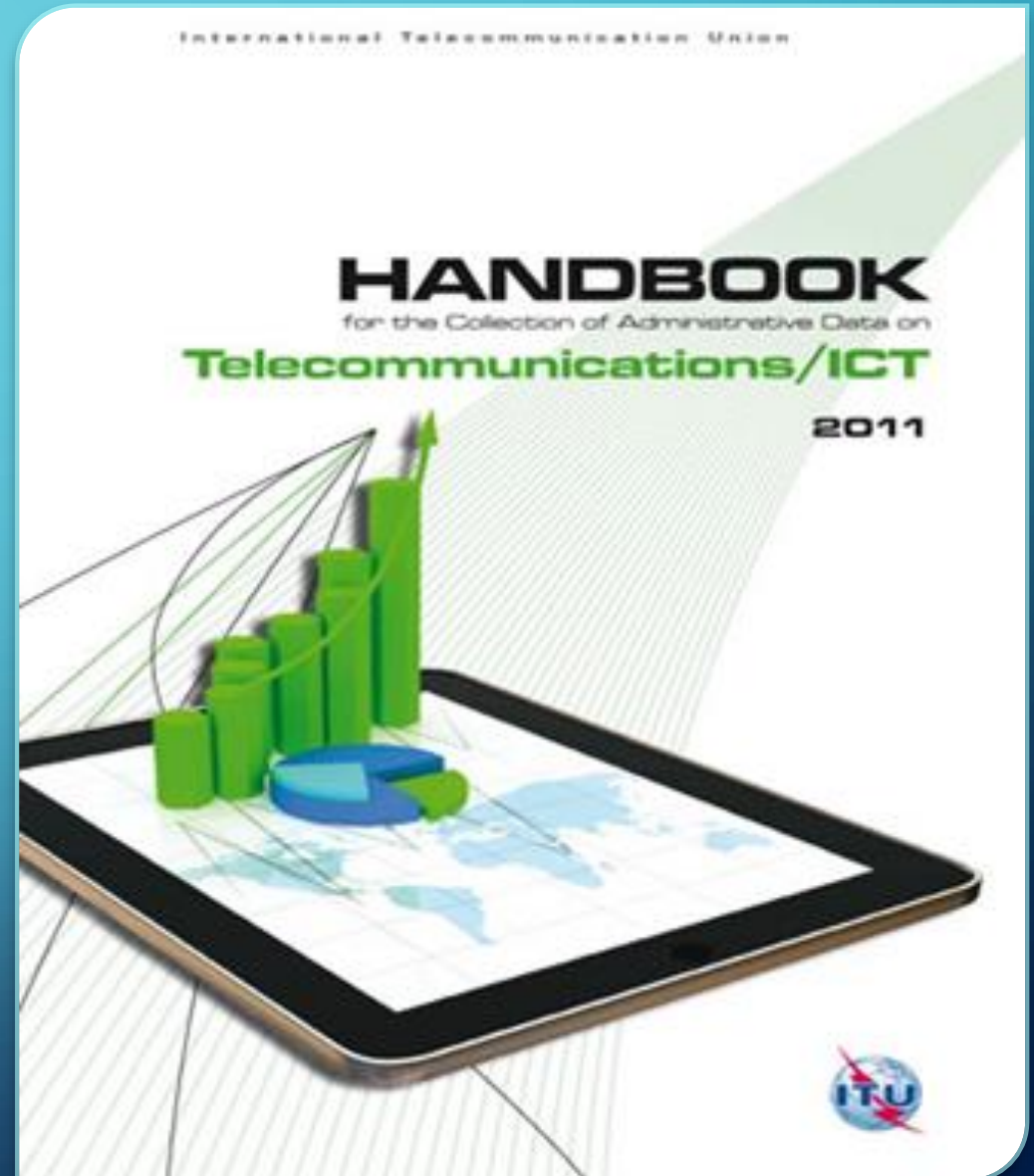
- Sector revenue declined while investment grew: Total revenue reported by telecoms operators recorded a decline, decreasing by **5** per cent to **\$690 million**. After experiencing two successive periods of decline, sector investment **surged** by **37** per cent to **\$136 million**. This resulted mainly from increases in capital spending as telecoms operators completed major infrastructure upgrades for the launch of LTE mobile broadband in the Member States and network operators completed restoration to the networks post Hurricane Maria.
- Fixed broadband subscription fell: Following five years of growth, the number of fixed broadband subscriptions fell by **6** per cent to almost **101,000** leading to a fixed broadband penetration rate of **19.4** per cent, down from **20.7** per cent in the previous period.
- 4G/LTE mobile broadband service available in all ECTEL Member States: At the end of March 2018, mobile broadband via 4G/LTE was available in all ECTEL Member States and the migration of consumers in the Member States from 3G to 4G commenced.
- Following five consecutive year on year declines, call volumes from fixed and mobile networks recorded an improvement of **4** per cent: Fixed originated local calling minutes increased **4** per cent to **333** million minutes while local calling minutes from mobile networks rose by **3** per cent. Overall, consumers generated approximately **799** million local calling minutes.
- International outgoing calling volumes remained relatively unchanged growing slightly by **0.5** per cent.



KEY INDICATORS OF SECTOR PERFORMANCE

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 subscriptions
- Voice traffic – local and international
- Data traffic – mobile and fixed broadband



OVERVIEW

- Economic activity in the Eastern Caribbean Currency Union was estimated to have expanded in 2017. According to the Eastern Caribbean Central Bank's (ECCB's) Annual Economic and Financial Review, the economies of the Member States experienced REAL GDP growth of 1.8 per cent in 2017, in contrast to 2.9 per cent in 2016. The positive performance resulted mainly from expansions in the construction, transport, storage and communications and wholesale and retail trade sectors. All ECTEL Member States except Dominica recorded economic growth.
- The performance of the telecommunications sector in the ECTEL Member States was somewhat mixed. Sector revenue and fixed broadband, fixed line and subscriber television subscriptions contracted. On the other hand, the slowdown in capital spending of the past year was reversed by a 37 per cent rise as telecoms operators continued to rebuild the networks post Hurricane Maria and completed upgrades to infrastructure for the introduction of LTE mobile broadband service. Total local calling volume also recorded a rise of 4 per cent to approximately 799 million minutes.



HURRICANE MARIA

- On 18 September 2017, Hurricane Maria made landfall in Dominica with intense rainfall and winds of over 160 MPH causing catastrophic destruction.
- Economic activity in Dominica contracted by 4.2 per cent in 2017, following growth of 2.6 per cent in the previous year. While the growth in 2016 was marked by recovery from tropical storm Erika (2015), the downturn in 2017 was characterised by considerable damage to the island following the passage of Hurricane Maria and a resultant decline in economic activity.
- The telecommunications sector was greatly impacted as infrastructure was destroyed by the Category 5 Hurricane. This adversely affected revenue, which declined by 15 per cent, as well as services including fixed broadband, mobile broadband, subscriber television and fixed lines in operation.
- The performance of the sector in Dominica thus negatively impacted the overall performance of the ECTEL Member States in several areas.
- Recovery works, however, lead to a 30 per cent increase in capital expenditure in the telecommunication's sector in Dominica.

REVENUE



TOTAL REVENUE

The total revenue generated by the telecommunications sector for the period ended March 2018 was estimated at \$690 million, 5 per cent less than the previous period.

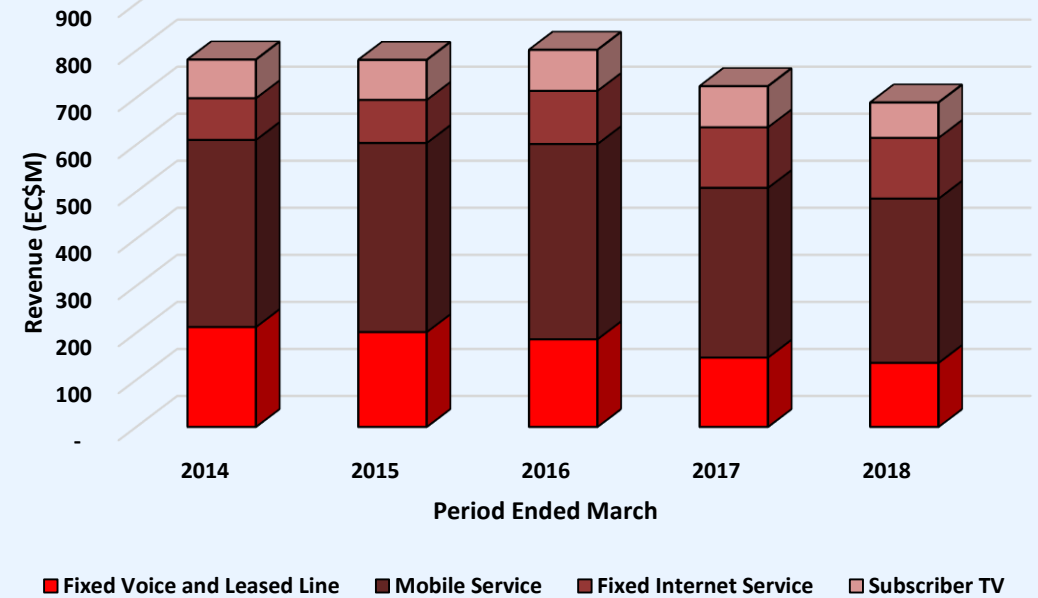
Mobile services accounted for 51 per cent of sector revenue and recorded a 3 per cent reduction to \$349 million.

Fixed voice contributed 20 per cent of total sector revenue or \$181 million falling by 8 per cent.

Fixed broadband service revenue remained relatively unchanged contributing approximately \$129 million or 19 per cent to overall revenue.

Subscriber TV declined by 14 per cent to \$75 million.

Total Telecoms Revenue in ECTEL Member States



REVENUE IN MEMBER STATES

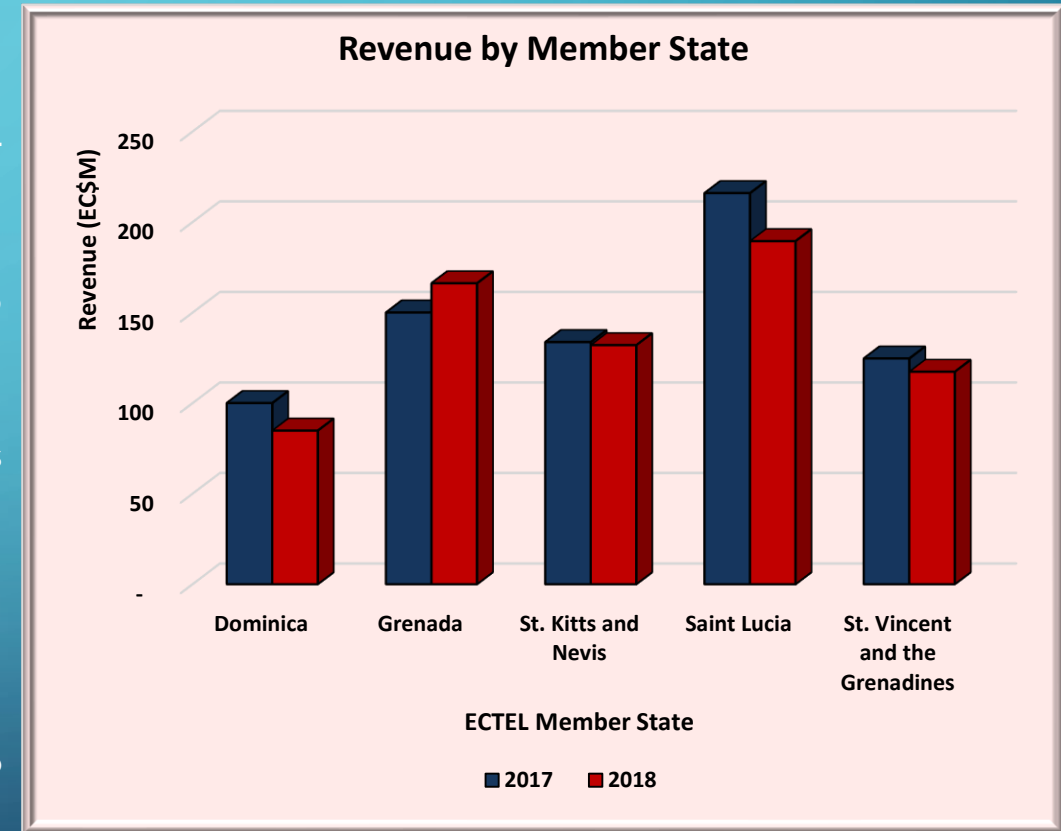
Operator reported revenue for Dominica was \$84 million, a 15 per cent decline from the previous period.

In Grenada, total sector revenue reported increased by 11 percent to \$166 million.

Total revenue from the telecommunications sector in St. Kitts and Nevis experienced a one per cent increase to \$132 million.

The telecommunications sector in Saint Lucia generated \$189 million in total revenue experiencing a reduction of 12 per cent from the previous period.

In St. Vincent and the Grenadines, total sector revenue fell 6 per cent to \$117 million.



INVESTMENT



TOTAL INVESTMENT

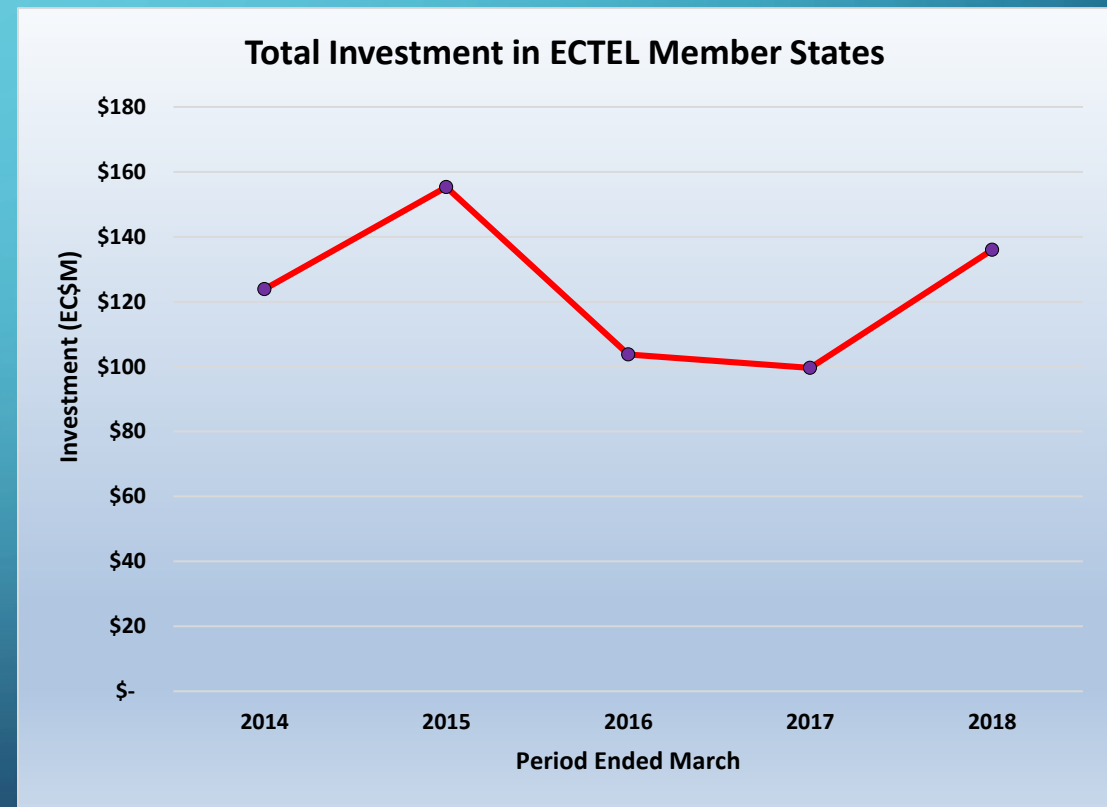
At March 31 2018, telecoms operators reported an estimated \$136 million in investments for the period under review.

Overall investments grew significantly by 37 per cent due to increased capital spending in all of the Member States except for Grenada.

The overall investment rate was 20 per cent.

Capital expenditure was directed to some of the following in the Member States:

- Expansion of LTE network;
- Network upgrade with LTE technology;
- Addition of sites to network;
- IPTV deployment;
- Post Hurricane Maria restoration of fixed network, refreshing of mobile sites and equipping them with LTE technology.



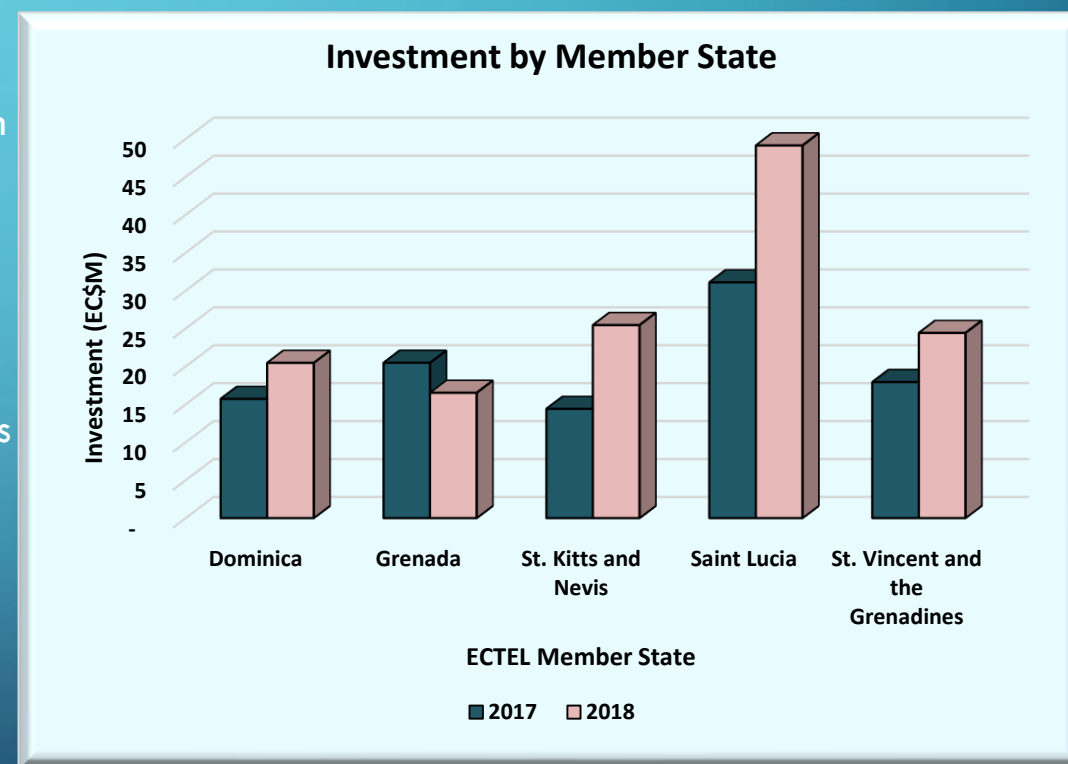
Source: ECTEL/operators



INVESTMENT IN MEMBER STATES

Investment in the Member States for the period ended March 2018:

- In Dominica, investment was \$20 million, 30 per cent increase when compared to the previous period.
- Investments in the sector in Grenada contracted by 19% to an estimated \$17 million.
- \$25 million was invested in the telecommunications sector in St. Kitts & Nevis, 77 per cent more than the previous year.
- Total investments in Saint Lucia increased by 58 per cent to \$49 million.
- St. Vincent and Grenadines experienced an increase of 35 per cent recording \$24 million in investments.



EMPLOYMENT

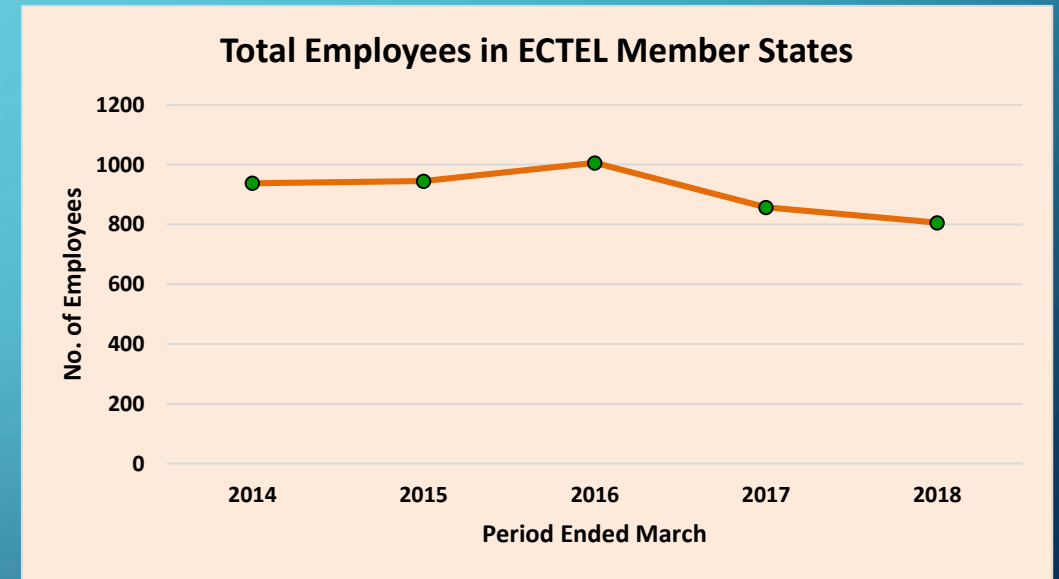


TOTAL EMPLOYMENT

At March 31 2018, an estimated 800 persons were employed by telecommunications operators.

This represented a decrease of 8 per cent in the total number of persons directly employed by the sector, continuing the declining trend of the previous year.

This decline was primarily as a result of the drop in direct employment in Dominica, Grenada and Saint Lucia.



Source: ECTEL/operators



EMPLOYMENT IN MEMBER STATES

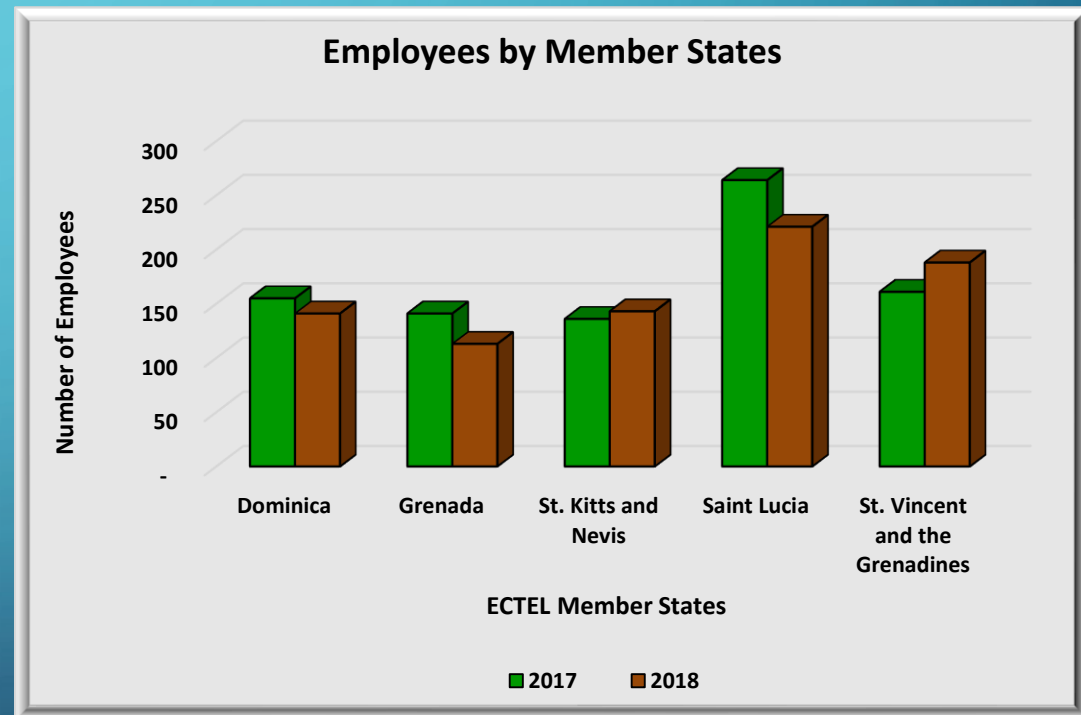
The total number of persons in direct employment in the telecommunications sector declined by 9 per cent to 141 in Dominica.

At March 31 2018, there were 113 full time employees in the telecommunications sector in Grenada, 20 per cent less than the previous period.

Total full time employees in the telecommunications sector in St. Kitts and Nevis grew by 5 per cent to 143 employees.

During the period under review, the total number of persons in full time employment in the sector contracted by 16 per cent to 221 in Saint Lucia.

Full time employment in St. Vincent and the Grenadines was 188 at March 31 2018, a 3 per cent growth from the previous period.



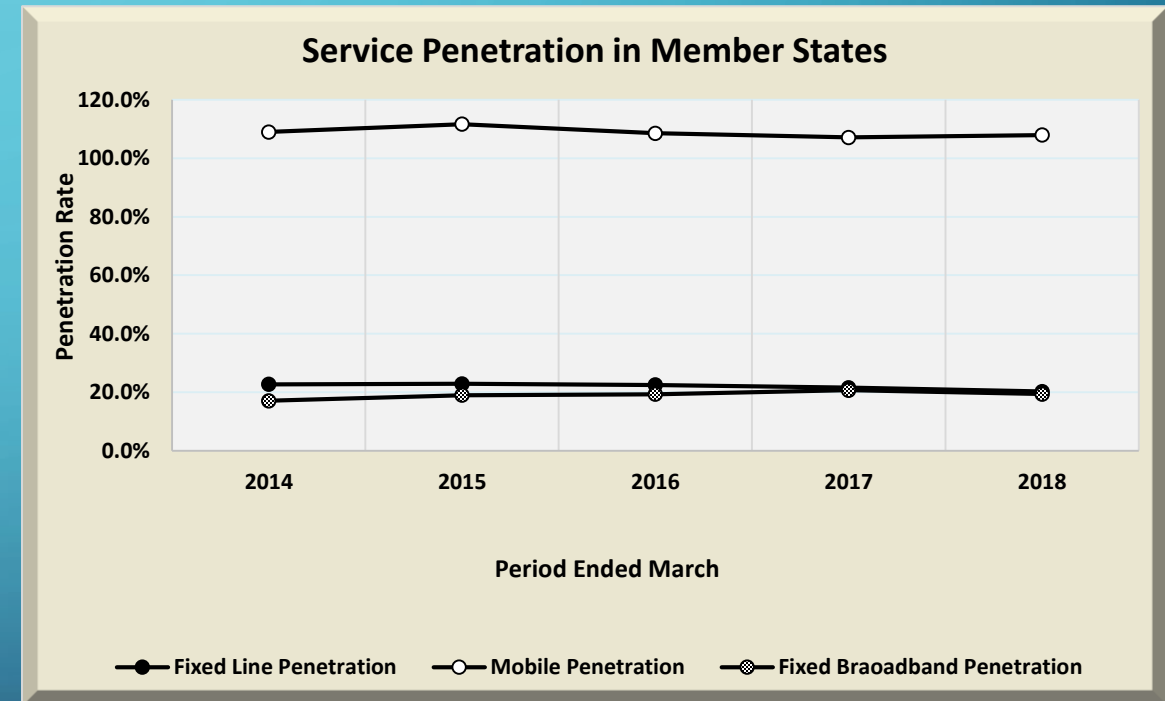
SERVICE PENETRATION



SERVICE PENETRATION

At March 2018, there were:

- More than **101,000** fixed broadband subscriptions; **6** per cent less than in the previous period resulting in an average broadband penetration of **19.4** per cent.
- Over **563,000** mobile subscriptions with a penetration rate of **107.9** per cent; **89** per cent of which were prepaid. This represents a slight improvement in the uptake of mobile services since 2015.
- Five per cent fewer fixed lines in service. This **500** basis point decrease resulted in a **6** per cent decline in fixed voice penetration to **20.3** per cent. This is the third consecutive fall in fixed voice subscriptions since 2015.



SERVICE PENETRATION IN MEMBER STATES

At the end of March 2018:

- Fixed Voice penetration in Dominica decreased **79** percentage points to **4** per cent, the impact of Hurricane Maria.
- The mobile penetration rate declined by **7** percentage points to **147** per cent in St. Kitts and Nevis.
- Fixed broadband penetration dropped by **65** percentage points to **7.5** per cent in Dominica, also the impact of Hurricane Maria.
- The rate of fixed broadband penetration increased by **8** per cent in St. Vincent and Grenadines.
- In Saint Lucia, the mobile penetration rate increased by **4** percentage points to **104** per cent.

	Fixed Voice	Mobile Voice	Fixed Broadband
Dominica	4%	105%	8%
Grenada	28%	105%	24%
St. Kitts and Nevis	32%	147%	32%
Saint Lucia	21%	104%	18%
St. Vincent and the Grenadines	18%	102%	19%

Source: ECTEL/operators



VOICE SUBSCRIPTIONS



FIXED SUBSCRIPTIONS

At March 2018:

There were 106,000 fixed lines, approximately 6,000 less than in the previous period. Residential subscriptions accounted for 64 per cent of total subscriptions.

The total number of fixed lines in operation in Dominica changed significantly by 80 per cent due to the impact of Hurricane Maria.

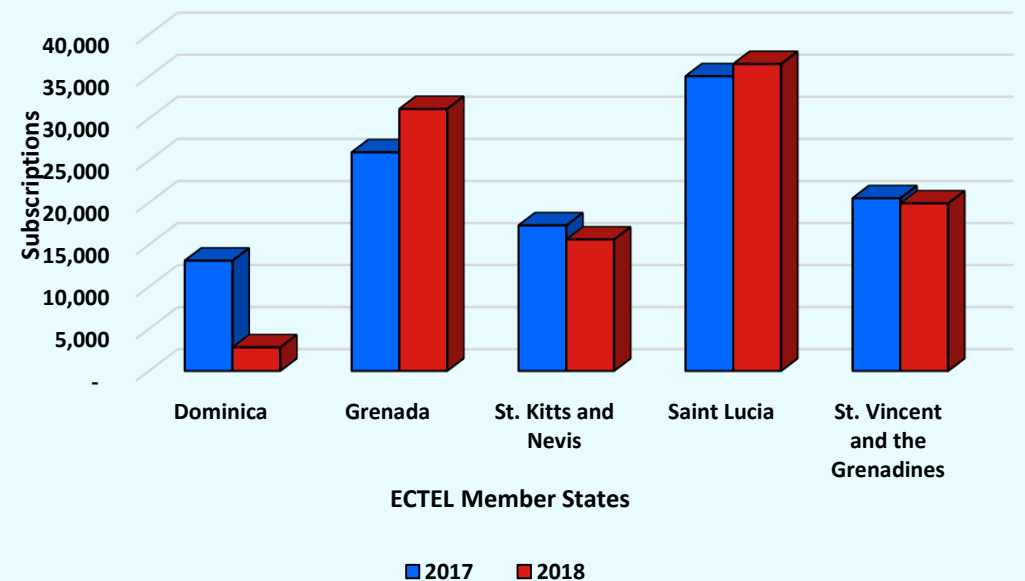
Fixed voice subscriptions grew by 20 per cent in Grenada which recorded a total of 31,000 subscriptions, reversing the general trend across the Member States.

St. Kitts and Nevis recorded total fixed voice subscriptions of 15,600, down 10 per cent from the previous period.

The total number of fixed voice subscriptions in Saint Lucia increased by 4 per cent to 36,500.

Fixed line subscriptions decreased 3 per cent to 20,000 in St. Vincent and the Grenadines.

Fixed Voice Subscriptions in ECTEL Member States



MOBILE SUBSCRIPTIONS

At March 2018:

Overall, mobile service subscriptions increased slightly by just under 2 per cent to 563,500

- Prepaid subscriptions which accounted for 89 per cent of total subscriptions grew by 3 per cent.
- Postpaid subscriptions increased by 11 per cent was also 11 per cent of overall mobile subscriptions.

In Dominica, subscriptions to mobile services grew 2 per cent to 77,000.

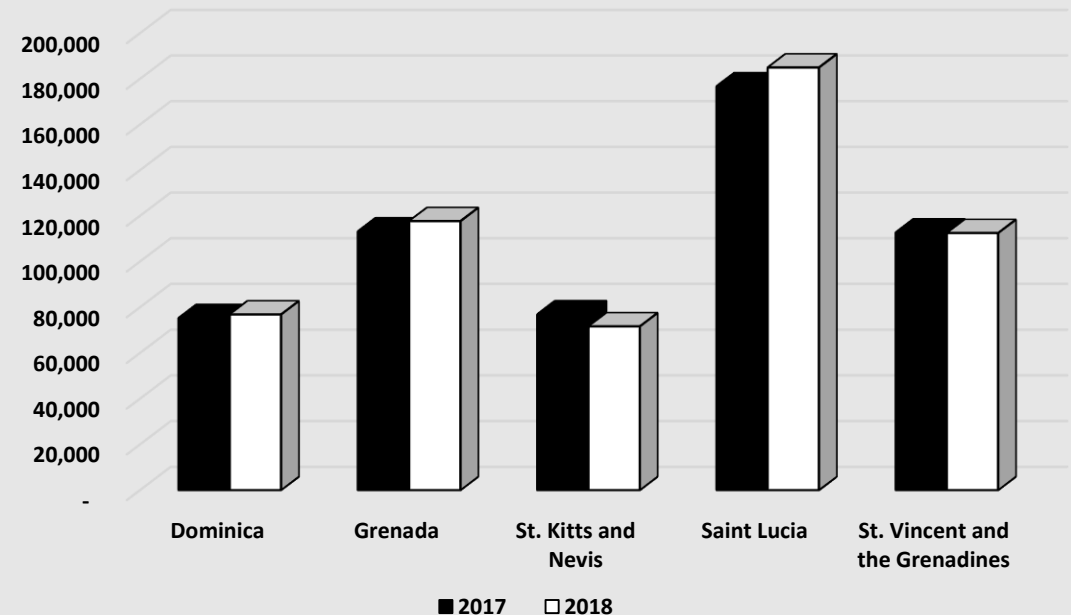
Mobile service subscriptions totaled 118,000 in Grenada, 4 per cent more than the previous period.

There were 71,500 mobile subscriptions in St. Kitts and Nevis, down 7 per cent from the previous period.

Total mobile subscriptions in Saint Lucia increased by 5 per cent to 185,000.

In St. Vincent and the Grenadines the total number of mobile subscriptions remained relatively unchanged at 112,000 when compared to the previous period.

Mobile Voice Subscriptions



Source: ECTEL/operators



TRAFFIC



LOCAL TRAFFIC

Total local call volumes from fixed and mobile networks rose by **4** per cent in 2018, stemming the previous five-year, year-on-year decreases.

Local fixed traffic volumes were up **4** per cent while calls from the mobile networks rose by **3** per cent.

An estimated 799 million local calling minutes were used in the ECTEL Member States:
466 million minutes originated from mobile phones;
333 million minutes from fixed lines.

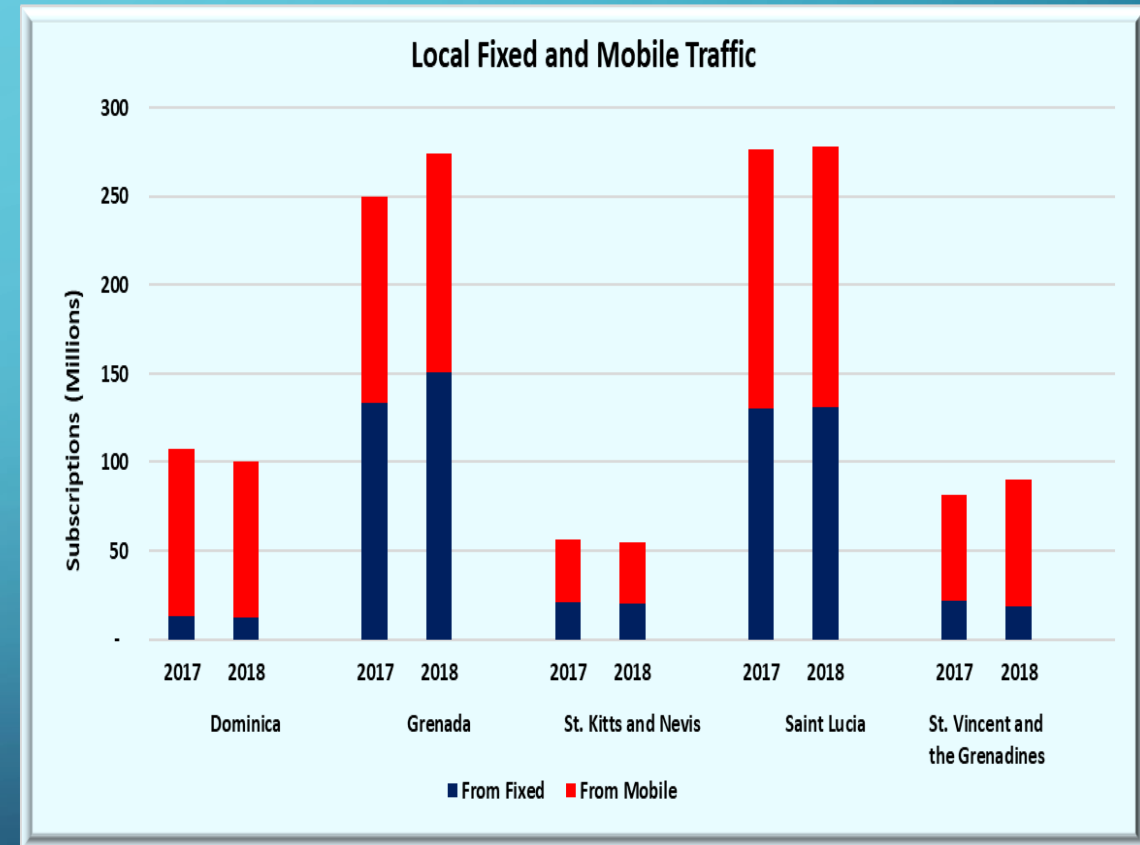
In Dominica, the total number of local network originated minutes continued on its downward trajectory, declining by **6** per cent to **101** million.

Local call volumes in Grenada increased by **9** per cent to **274** million minutes.

Approximately **55** million minutes originated from the local networks in St. Kitts and Nevis, a **2** per cent decrease from the previous period.

An estimated **278** million minutes originated from the local networks in Saint Lucia, a slight bump of 0.4 per cent from the previous period.

Local traffic volumes expanded **11** per cent to **90** million minutes in St. Vincent and the Grenadines.



Source: ECTEL/operators

INTERNATIONAL OUTGOING TRAFFIC

For the review period, a total of **61** million international outgoing minutes originated from the ECTEL Member States. This was **0.5** per cent more than the previous period and represents the first increase in traffic since 2015:

24 million minutes were fixed network originated
37 million minutes were mobile network generated

The overall upturn in international outgoing calling volumes was driven by a **6** per cent increase in traffic originated from fixed networks.

The slight increase was moderated by a **3** per cent reduction in mobile originated network traffic.

13 million minutes of international outgoing traffic was recorded in Dominica, a **25** per cent rise from the previous period.

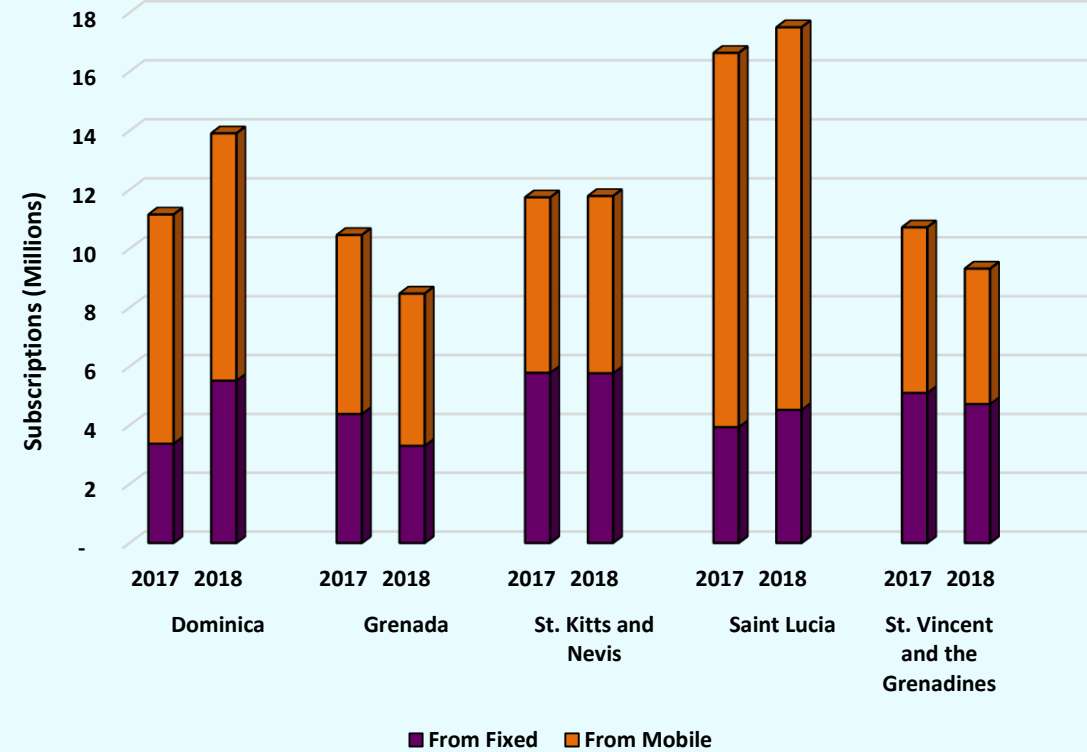
Total outgoing international minutes decreased **19** per cent to an estimated **8** million in Grenada.

After a **42** per cent fall in the previous period, total outgoing international minutes remained steady at **12** million in St. Kitts and Nevis.

International outgoing minutes from Saint Lucia increased **5** per cent to an estimated **18** million.

In St. Vincent and the Grenadines, total outgoing international minutes plummeted **13** per cent to **9** million.

International Outgoing Traffic from Fixed and Mobile



Source: ECTEL/operators



BROADBAND



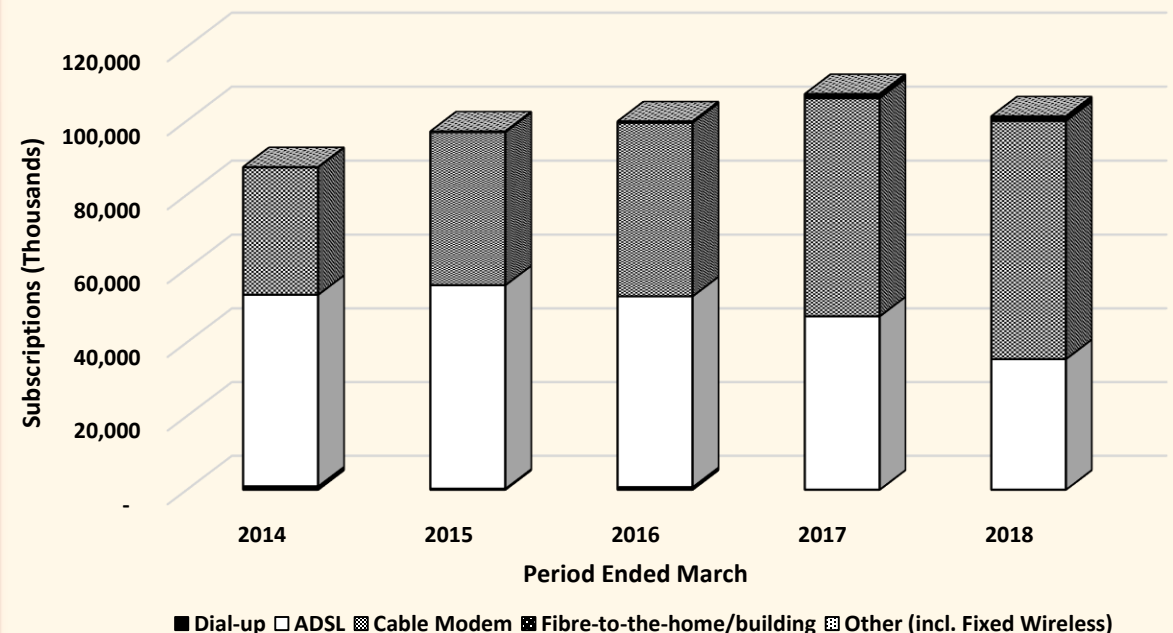
FIXED BROADBAND BY TECHNOLOGY

Cable modem is the dominant technology for fixed broadband access capturing 65 per cent market share. Following consecutive years of growth cable modem grew by 9 per cent when compared to the previous review period.

ADSL technology represented 35 per cent of the fixed broadband market, having declined by 25 per cent. This was largely due to the active migration of customers from ADSL to HFC by a major provider of fixed broadband service.

The number of reported subscription of fibre to the home/building (FTTx) technology declined by 14 per cent following a substantial increase of over 300 per cent the year before. FTTx accounted for only one per cent of the fixed broadband technology market share.

Internet Subscriptions by Technology in ECTEL Member States



FIXED BROADBAND SUBSCRIPTIONS

Total fixed broadband subscriptions for the Member States dipped by 6 per cent to 101,000 at March 31 2018, primarily due to the significant decline in Dominica as a result of the impact for Hurricane Maria. Every other Member State recorded increases in the number of subscriptions.

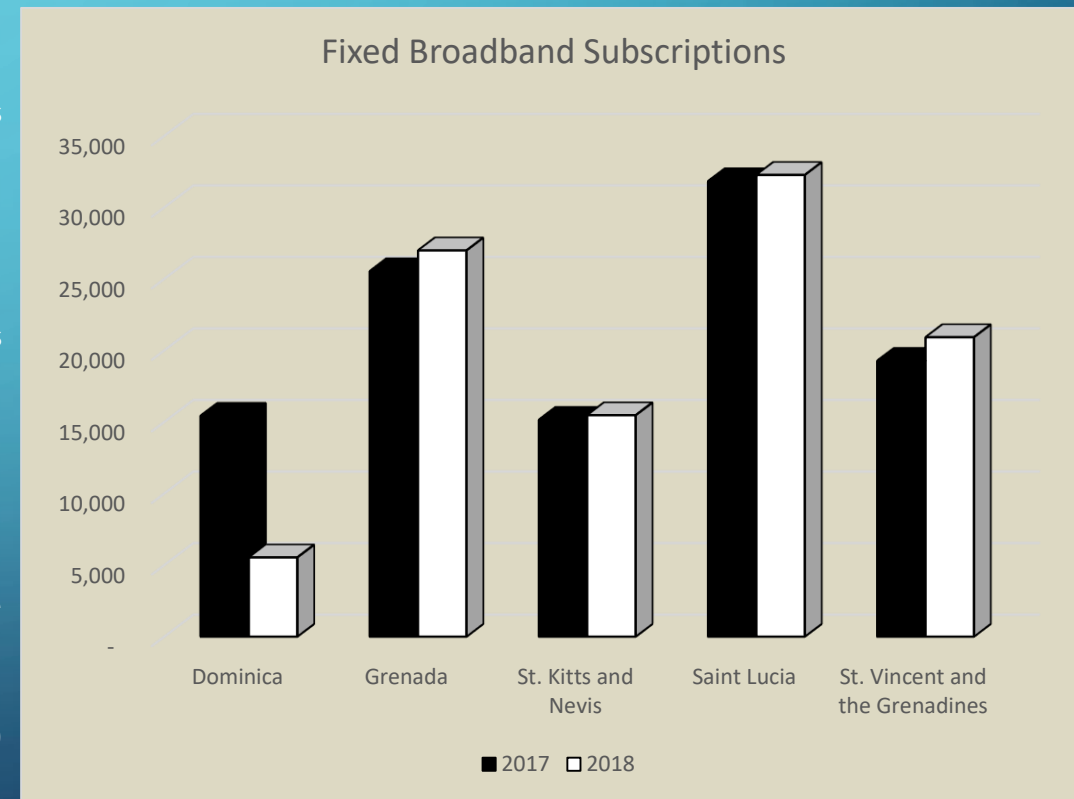
A considerable contraction of 64 per cent to 5,500 fixed broadband subscriptions was recorded in Dominica during the review period. The penetration rate was 7.5 per cent.

For the review period, there were approximately 27,000 broadband subscriptions in Grenada, 6 per cent more than in the previous period. The penetration rate was 24.2 per cent.

At March 31 2018, St. Kitts and Nevis experienced growth of 2 per cent in fixed broadband service subscriptions to 15,000. The penetration rate was 31.7 per cent.

Fixed broadband connections in Saint Lucia was 32,000, 1 per cent more than the pervious review period. The penetration rate was 18.1 per cent.

The number of fixed broadband connections increased by 9 per cent to over 20,000 in St. Vincent and the Grenadines with a penetration rate of 18.9 per cent.



MOBILE BROADBAND SERVICES

- Mobile broadband services are currently being provided predominantly by Cable & Wireless and Digicel in addition to a few smaller providers in the ECTEL Member States.
- During the review period, service providers offering mobile broadband services invested in expanding their networks for LTE Technology and in all Member States **4G/LTE mobile broadband service became available to customers.**
- 3G/4G customers are being actively migrated to LTE Technology.
- Information on the number of mobile broadband subscriptions was not readily available at the time of publication.



SUBSCRIBER TELEVISION



SUBSCRIBER TELEVISION

In the Member States at March 2018, total subscriptions to subscriber TV recorded a 23 per cent drop to 76,000 subscriptions due to declines in every Member State.

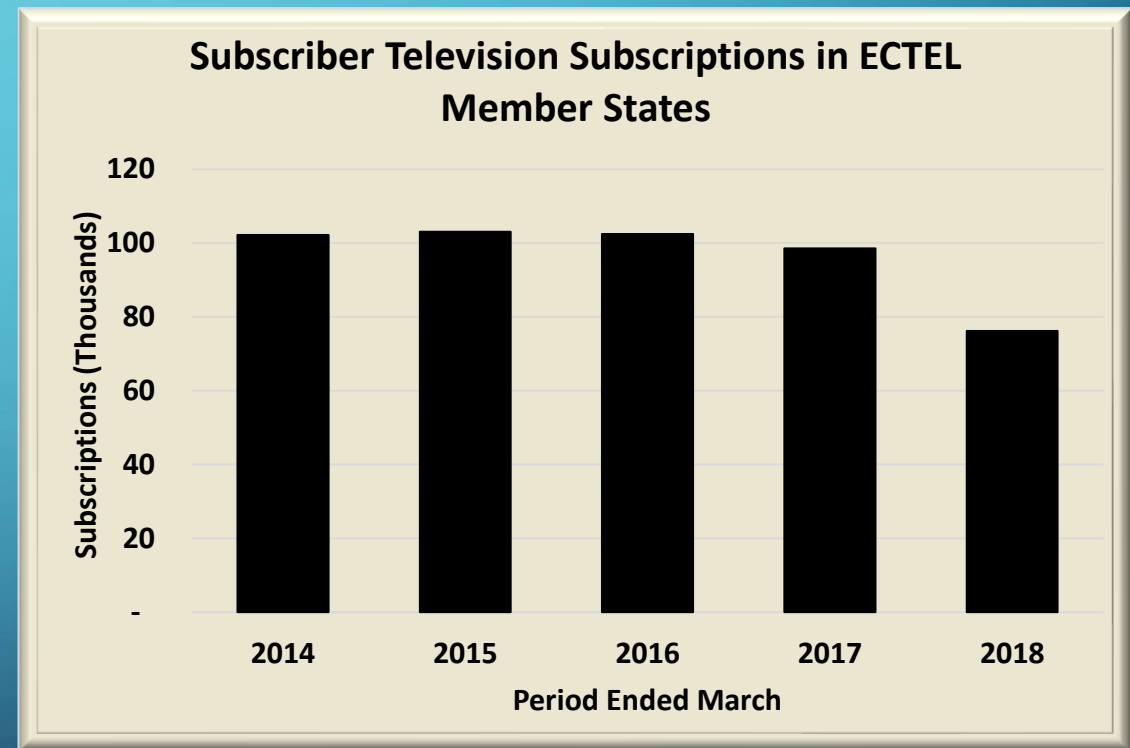
In Dominica, as a result of the impact of Hurricane Maria, during the review period, subscriptions to subscriber TV contracted substantially by 93 per cent to a mere 1,245 subscriptions.

Total subscriptions to subscriber TV declined by 7 per cent to 15,000 in Grenada.

A 3 per cent reduction in subscriptions for subscriber TV was recorded in St Kitts and Nevis to 21,000.

The total number of subscriber TV subscriptions in Saint Lucia decreased by 8 per cent to 28,500 subscriptions.

In St. Vincent and the Grenadines, subscriber TV subscriptions fell 15 per cent to just under 10,500.



BROADBAND PRICES



FIXED AND MOBILE BROADBAND PRICES

Price for entry level fixed broadband service

Member State	Price (EC\$)	Price as % of GNI pc	Download speed
Dominica	83.38	5	2 Mbps
Grenada	99.00	4	15 Mbps
St. Kitts and Nevis	146.72	3	6 Mbps
Saint Lucia	89.01	4	2 Mbps
St Vincent and the Grenadines	95.00	5	3 Mbps

Prices in St. Kitts and Nevis include line rental of \$26.40 but not the monthly rental of \$5

Price for 30 day, 1G prepaid mobile broadband package

Member State	Price (EC\$)	Price as % of GNI pc	Data allowance
Dominica	80.00	5	14G
Grenada	95.00	4	8G
St Kitts and Nevis	100.00	2	10G
Saint Lucia	95.00	4	10G
St Vincent and the Grenadines	95.00	5	10G

UN Broadband Commission targets affordability at <2% of GNI pc by 2025



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

	2014	2015	2016	2017	2018
Provider Revenues (EC\$M)	\$781	\$780	\$802	\$724	\$690
Investment (EC\$M)	\$124	\$155	\$104	\$100	\$136
Employment	938	945	1,006	857	806
Fixed line Penetration	22.7%	22.9%	22.5%	21.6%	20.3%
Mobile penetration	109%	111.7%	108.6%	107.1%	107.9%
Fixed broadband penetration	17.1%	19.0%	19.3%	20.7%	19.4%
Mobile broadband penetration	7.4%	40.2%	44.6%	57.1%	n/a
Local fixed traffic (million minutes)	430	395	376	319	333
Local mobile traffic (million minutes)	662	596	497	452	466
International incoming traffic (million minutes)	177	188	61	45	46
International outgoing traffic (million minutes)	96	82	83	61	61

Source: ECTEL/operators



	2014	2015	2016	2017	2018
Provider Revenues (EC\$M)	\$105	\$108	\$122	\$100	\$85
Investment (EC\$M)	\$14	\$46	\$13	\$16	\$20
Employment	153	160	178	155	141
Fixed line penetration	24%	22%	22%	18%	4%
Mobile penetration	107%	112%	108%	105%	105%
Fixed broadband penetration	15.6%	21.9%	23.3%	21.4%	7.5%
Mobile broadband penetration	0.0%	44.3%	41.9%	41.3%	n/a
Local fixed traffic (million minutes)	23	16	14	13	12
Local mobile traffic (million minutes)	178	158	103	94	89
International incoming traffic (million minutes)	25	22	18	9	8
International outgoing traffic (million minutes)	17	13	14	11	13

DOMINICA

Source: ECTEL/operators



GRENADA

	2014	2015	2016	2017	2018
Provider Revenues (EC\$M)	\$177	\$177	\$174	\$150	\$166
Investment (EC\$M)	\$24	\$29	\$18	\$20	\$17
Employment	163	163	189	141	113
Fixed line penetration	25%	25%	24%	23%	28%
Mobile penetration	108%	110%	108%	102%	105%
Fixed broadband penetration	17.3%	18.2%	18.9%	23.0%	24.2%
Mobile broadband penetration	1.7%	28.1%	32.3%	86.7%	n/a
Local fixed traffic (million minutes)	197	172	166	134	150
Local mobile traffic (million minutes)	143	141	126	116	124
International incoming traffic (million minutes)	65	64	9	8	10
International outgoing traffic (million minutes)	23	16	16	10	8

Source: ECTEL/operators



ST. KITTS AND NEVIS

	2014	2015	2016	2017	2018
Provider Revenues (EC\$M)	\$127	\$134	\$140	\$134	\$132
Investment (EC\$M)	\$9	\$25	\$27	\$14	\$25
Employment	128	125	133	136	143
Fixed line penetration	41%	41%	36%	36%	32%
Mobile penetration	137%	152%	159%	159%	147%
Fixed broadband penetration	29.3%	34.1%	29.4%	31.2%	31.7%
Mobile broadband penetration	46.1%	82.1%	89.4%	75.0%	n/a
Local fixed traffic (million minutes)	45	45	43	21	20
Local mobile traffic (million minutes)	44	44	42	35	35
International incoming traffic (million minutes)	18	18	7	6	6
International outgoing traffic (million minutes)	19	17	20	12	12

Source: ECTEL/operators



SAINT LUCIA

	2014	2015	2016	2017	2018
Provider Revenue (EC\$M)	\$238	\$223	\$233	\$216	\$189
Investment (EC\$M)	\$49	\$30	\$28	\$31	\$49
Employment	361	354	311	264	221
Fixed line penetration	19%	20%	20%	20%	21%
Mobile penetration	110%	109%	101%	100%	104%
Fixed broadband penetration	16.5%	16.5%	17.1%	18.1%	18.1%
Mobile broadband penetration	8.1%	36.0%	39.6%	45.8%	n/a
Local fixed traffic (million minutes)	137	135	131	130	131
Local mobile traffic (million minutes)	170	150	142	147	147
International incoming traffic (million minutes)	30	35	9	7	5
International outgoing traffic (million minutes)	25	24	19	17	18

Source: ECTEL/operators



ST. VINCENT AND THE GRENADINES

	2014	2015	2016	2017	2018
Revenues (EC\$M)	\$134	\$138	\$133	\$125	\$117
Investment (EC\$M)	\$28	\$25	\$17	\$18	\$24
Employment	133	143	195	161	188
Fixed line penetration	17%	18%	19%	19%	18%
Mobile penetration	97%	101%	99%	102%	102%
Fixed broadband penetration	13.4%	15.4%	16.7%	17.5%	18.9%
Mobile broadband penetration	0.0%	38.1%	46.8%	47.7%	n/a
Local fixed traffic (million minutes)	31	26	22	21	19
Local mobile traffic (million minutes)	127	103	83	60	72
International incoming traffic (million minutes)	40	49	17	15	17
International outgoing traffic (million minutes)	13	12	13	11	9

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.

