



NO. 14 2019 - 2020

# ANNUAL ELECTRONIC COMMUNICATIONS SECTOR REVIEW

## Number Portability Gives Customers Flexibility



### HIGHLIGHTS

- Sector investment was \$146 million
- Mobile broadband penetration reached 73.1 per cent
- Fixed broadband penetration rose to 22.4 per cent
- Over 702 million local calling minutes generated

## **ECTEL MEMBER STATES**

*Commonwealth of Dominica*  
*Grenada*  
*The Federation of St. Christopher (St. Kitts) and Nevis*  
*Saint Lucia*  
*St. Vincent and the Grenadines*

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## Preface

The Eastern Caribbean Telecommunications Authority (ECTEL) produces this review of the electronic communications sector<sup>1</sup> annually. The 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 2019 to March 2020 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, 2021, and 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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<sup>1</sup> Electronic communications sector refers to broadcast and telecommunications.

## Electronic Communications in the ECTEL Member States – Key Indicators and Sector Findings

### Key Indicators

**Table i: Key telecommunications service indicators in the ECTEL Member States**

	2016	2017	2018	2019	2020
<b>Provider Revenues (EC\$M)</b>	\$802	\$724	\$690	\$642	\$626
<b>Investment (EC\$M)</b>	\$104	\$100	\$136	\$190	\$146
<b>Employment</b>	1,006	857	806	740	784
<b>Fixed line Penetration</b>	22.5%	21.6%	20.3%	18.7%	16.7%
<b>Mobile penetration</b>	108.6%	107.1%	108.1%	95.9%	95.9%
<b>Fixed broadband penetration</b>	19.3%	20.7%	18.6%	20.0%	22.4%
<b>Mobile broadband penetration</b>	44.6%	57.1%	53.7%	71.7%	73.1%
<b>Local fixed traffic (million minutes)</b>	376	319	333	308	254
<b>Local mobile traffic (million minutes)</b>	562	518	543	529	448
<b>International incoming traffic (million minutes)</b>	61	46	46	41	36
<b>International outgoing traffic (million minutes)</b>	83	61	61	49	34

Source: ECTEL/operators

### Main Sector findings

The key findings of the review of the electronic communications sector across the ECTEL Member States for the period ended March 2020 are:

- Sector investment dropped to \$146 million and sector revenue fell by 2 per cent:** Following two consecutive periods of double-digit growth, there was a drop in capital expenditure during the period under review. Although enhancements and upgrades were made to fixed and mobile networks, service providers spent 23 per cent less or \$146 million at the end of March 2020. The drop in capital spending was accompanied by a 2 per cent fall in sector revenue.
- Fixed broadband penetration expanded by 2.4 percentage points to 22.4 per cent:** Fixed broadband subscriptions recorded double-digit expansion for the first time in four years. The number of connections increased by 12 per cent to 117,300 resulting in a fixed broadband penetration rate of 22.4 per cent, up from 20.0 per cent in the previous period.
- Mobile broadband subscriptions recorded a slight increase:** During the review period, there was a slight increase in the number of mobile broadband subscriptions. At the end of March 2020, there were 382,900 subscriptions which caused a less than 2 per cent increase in the penetration rate.
- Call volumes from fixed and mobile networks contracted 16 per cent:** Fixed originated local calling minutes fell by 18 per cent to 254 million minutes and local calling minutes from mobile networks was 15 per cent less than in the previous period. Overall, consumers generated just over 702 million local calling minutes.

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# 1 Impact of Covid-19 on ECTEL Member States

## 1.1 Overview

In March 2020, the World Health Organization (WHO) officially declared the outbreak of COVID-19 as a global pandemic. The WHO confirmed that there were over 118,000 cases of the coronavirus illness in over 110 countries and territories worldwide and highlighted the sustained risk of further global spread. The Caribbean Public Health Agency (CARPHA) in its Situation Report No. 28 (March 27, 2020) reported 1,063 cases in 32 countries/territories in the Caribbean region. CARPHA also indicated that the risk of further importation of cases to the Caribbean was extremely high, and countries were strongly urged to strengthen their health sector response and move to a state of readiness and rapid response.

The quarter, April to June 2020, marked the official start of the Covid-19 pandemic in the region. The ECTEL Member States like the rest of the world faced global travel restrictions, disruptions in the global supply chain, curfew restrictions, extensive lockdowns, and commercial disruptions to economic activity as Governments imposed measures to contain national spread.

The Eastern Caribbean Currency Bank (ECCB) in its half year Economic & Financial Review June 2020 estimated that economic activity in the Eastern Caribbean Currency Union (ECCU) contracted in the first half of 2020 when compared to the corresponding period in 2019. This contraction can be attributed to declines in all the major sectors in all the Member States, specifically, tourism and its ancillary sectors including the transport, storage and communications sector.

The ECTEL Member States recorded contractions in overall economic activity with tourism activity registering declines in all major categories. Contractions in the tourism sector ranged from a low of 34 per cent in Dominica and Grenada to a high of 58.6 per cent in St. Kitts and Nevis. However, in Dominica and St. Vincent and the Grenadines activity (output) in the agricultural sector grew due to increased investment by the public and demands for crops and livestock.

At the same, national lockdowns and restricted movement caused students, businesses, and Governments in the region to depend heavily on ICT for education, healthcare, commercial activity, and government services. Recognizing the increased reliance of these sectors on telecommunications networks and services, service providers implemented a number of measures to provide support including:

- Creating virtual retail stores where customers made inquiries and payments, conducted online purchases, applied for new services, upgraded services, topped up and activated plans;
- Providing free access to learning websites and applications such as FLOW Study or Learning Hub;
- Providing free access to Covid-19 Hotlines;
- Offering free on-net calls during specific times;
- Increasing data allowances and international minutes and
- Offering day specials such as access to movie channels, free calls between prepaid customers in the case of service provider, FLOW.

During the April to June 2020 period, there were no significant changes noted in overall subscriptions. In fact, fixed internet subscriptions grew nominally by 0.3 per cent, mobile data subscriptions fell slightly by 2 per cent, fixed line subscriptions dipped by a mere 0.05 per cent and mobile subscriptions grew by 2 per cent. On the other hand, local fixed and mobile traffic minutes recorded an estimated 10 per cent escalation compared to the same period in the previous year. Despite this, service providers reported an estimated \$140 million in revenue generated by the sector, 10 per cent lower than the same period in 2019.

## THE ELECTRONIC COMMUNICATIONS SECTOR

### ECTEL MEMBER STATES

#### 2.1 Overview

##### 2 Summary of Findings - ECTEL Member States

The Eastern Caribbean Central Bank (ECCB), in its 2019 Annual Economic and Financial Review, estimated that economic activity expanded by 3.3 per cent across the Eastern Caribbean Currency Union in 2019, from 3.9 per cent in 2018. The expansion is an indication of improved performances in a number of key sectors such as hotels and restaurants and transport storage and communications. Economic activity is projected to have increased in all ECTEL Member States.

The performance of electronic communications sector in the ECTEL Member States varied with the overall performance of the ECCU economies. Total revenue declined slightly by 2 per cent to \$626 million compared to \$642 in the previous year. Investment in the sector also shrank by 23 per cent with an investment rate of 23 per cent. However, employment in the sector grew by 6 per cent to 784 direct employees.

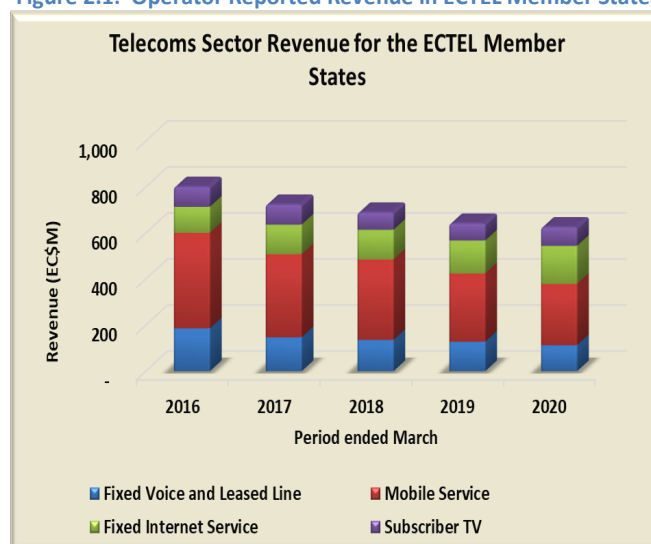


### 2.1.1 Revenue

The electronic communications sector in the ECTEL Member States generated approximately \$626 million in revenue at the end of March 2020, a contraction of 2 per cent from the previous period (Figure 2.1). This contraction was driven by reductions of 12 and 10 per cent respectively in revenues from mobile and fixed voice services. Revenues from fixed broadband services recorded the fifth year of continuous growth, rising by 16 per cent to \$166 million. Subscriber television revenues also grew by 10 per cent to 81 million.

Despite a 3 percentage drop, mobile services remained the largest contributor to overall sector revenue at 43 per cent. This was followed by fixed broadband whose share of total revenue grew by 4 percentage points to 26 per cent.

Figure 2.1: Operator Reported Revenue in ECTEL Member States



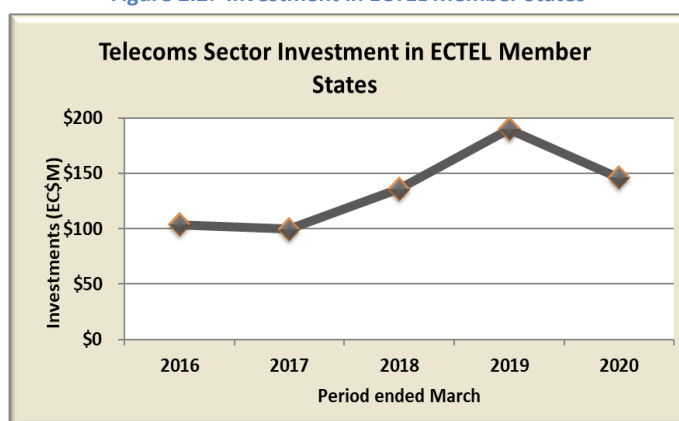
Source: ECTEL/operators

### 2.1.2 Investment

The ECTEL Member States recorded \$146 million in investment spending, 23 per cent less than the previous period. Correspondingly, the investment rate fell by 7 percentage points to 23 per cent. This contraction in capital spending was preceded by two periods of double-digit increases (Figure 2.2).

The major spends included enhancements and upgrades to the fixed and mobile networks and subscriber television Hybrid Fiber-Coax networks.

Figure 2.2: Investment in ECTEL Member States



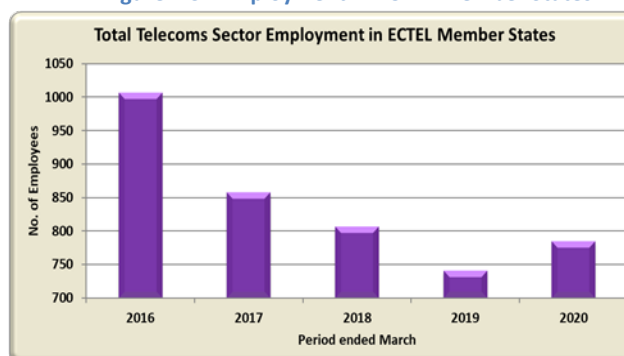
Source: ECTEL/operators

### 2.1.3 Direct Employment

Following three (3) years of consecutive reductions in direct employment in the sector, the number of full-time employees of licensed electronic communications service providers grew by 6 per cent to an estimated 784 at the end of March 2020 (Figure 2.3). Full time workers employed in the sector have been lower than 1,000 from 2017.

Four out of the five member states recorded increases in overall employment except for Grenada which recorded a slight reduction of 2 per cent or 2 employees.

Figure 2.3: Employment in ECTEL Member States



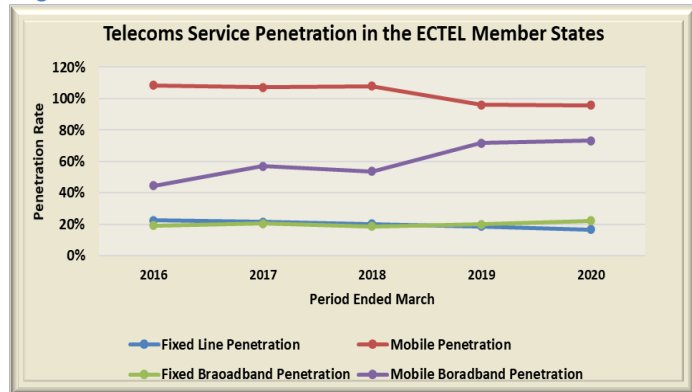
Source: ECTEL/operators

### 2.1.4 Telecoms Service Penetration

During the period under review:

- Mobile broadband penetration grew by 1.4 percentage points to 73.1 per cent from 71.7 per cent in the previous year (Figure 2.4).
- Mobile penetration remained unchanged at 95.9 per cent.
- Fixed broadband penetration was 22.4 per cent, 2.4 percentage points higher than the previous period.
- Fixed voice penetration fell 2 percentage points to 16.7 per cent.

Figure 2.4: Telecoms Service Penetration in ECTEL Member States



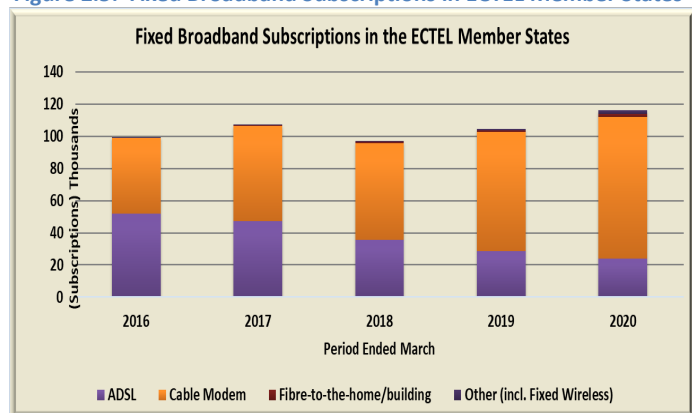
Source: ECTEL/operators

## 2.2 BROADBAND SERVICES

### 2.2.2 Fixed Broadband Service

At the end of March 2020, the total number of fixed broadband subscriptions surpassed 117,300. This was 12 per cent more than the previous period (Figure 2.5). Cable broadband subscriptions, which accounted for the greatest share of total subscriptions, grew by 19 per cent while ADSL subscriptions fell by 16 per cent and accounted for 20 per cent of total subscriptions. There were significant increases in subscriptions over the Fibre-to-the-Home and other Fixed Wireless networks at 141 and 178 per cent, respectively.

Figure 2.5: Fixed Broadband Subscriptions in ECTEL Member States



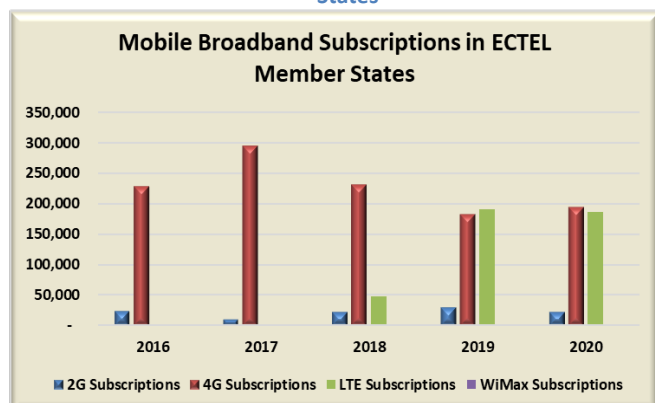
Source: ECTEL/operators

### 2.2.3 Mobile Broadband Service

Mobile broadband connections experienced a minor improvement during the review period. There were 382,900 subscriptions at the end of March 2020, a slight increase of 2 per cent over the previous period (Figure 2.6). The growth in mobile broadband service has become more stable in the past two reporting periods.

3G/4G (51 per cent) and LTE (49 per cent) subscriptions accounted for most of the connections in the ECTEL Member States. Subscriptions over the LTE network decreased by 3 per cent to 186,000 connections but 3G/4G and WiMax subscriptions grew by 6 and 11 per cent, respectively. Prepaid subscriptions accounted for 88 per cent of total mobile broadband connections.

Figure 2.6: Mobile Broadband Subscriptions in ECTEL Member States



Source: ECTEL/operators

## 2.3 VOICE SERVICES

### 2.3.2 Subscriptions

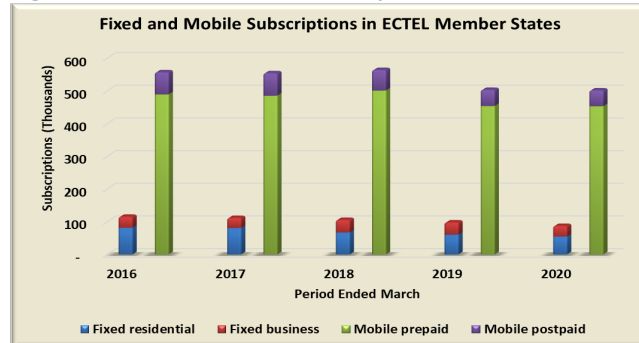
#### Mobile Voice Subscriptions

Subscriptions to mobile voice services declined marginally by 0.4 per cent to 502,200 subscriptions across the ECTEL Member States (Figure 2.7). Both postpaid and prepaid subscriptions fell by 0.1 per cent and 2 per cent, respectively. Ninety (90) per cent of all mobile subscriptions were prepaid and 10 per cent were postpaid.

#### Fixed Voice Subscriptions

Fixed voice subscriptions registered its fifth straight year of decline. The number of fixed lines in service in the ECTEL Member States decreased by 11 per cent during the period under review to 87,600 fixed lines. Residential lines accounted for 63 per cent of total lines while business lines accounted for 37 per cent.

Figure 2.7: Fixed and Mobile Subscriptions in ECTEL Member States



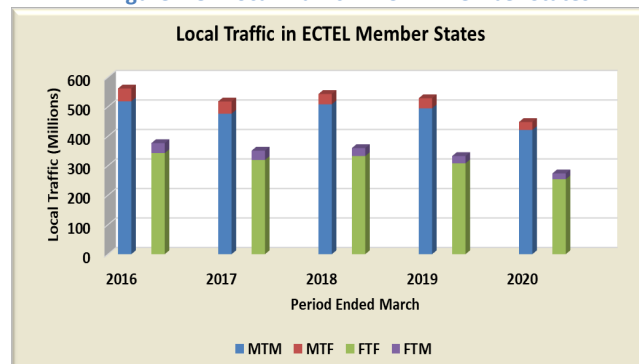
Source: ECTEL/operators

### 2.3.3 Network Traffic

Both fixed and mobile networks recorded contractions in traffic volumes during the period under review:

- Total calling minutes from the fixed and mobile networks was 702 million, down by 16 per cent from the previous period (Figure 2.8).
- Mobile originated calling fell by 15 per cent to 448 million minutes.
- Local call traffic from fixed networks also declined by 18 per cent to 254 million minutes.
- The proportion of local calling minutes that originated from mobile networks was 64 per cent, one percentage point higher than the previous year.

Figure 2.8: Local Traffic in ECTEL Member States

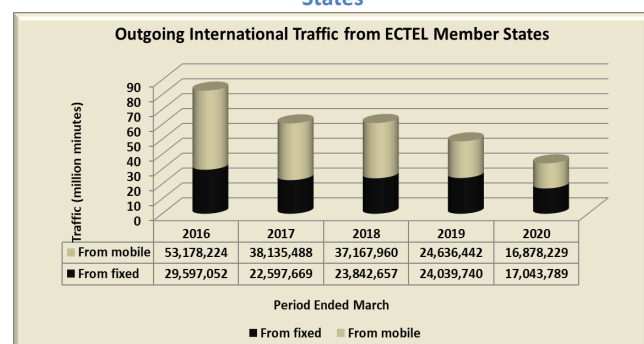


Source: ECTEL/operators

### 2.3.4 International Outgoing Traffic

International outgoing traffic continued to decline annually. During the period under review, international outgoing traffic fell by 30 per cent to approximately 34 million minutes (Figure 2.9). There was an even split in the number of minutes generated from each network at approximately 17 million minutes. Traffic from mobile and fixed networks declined by 31 per cent and 29 per cent, respectively.

Figure 2.9: Outgoing International Traffic from ECTEL Member States



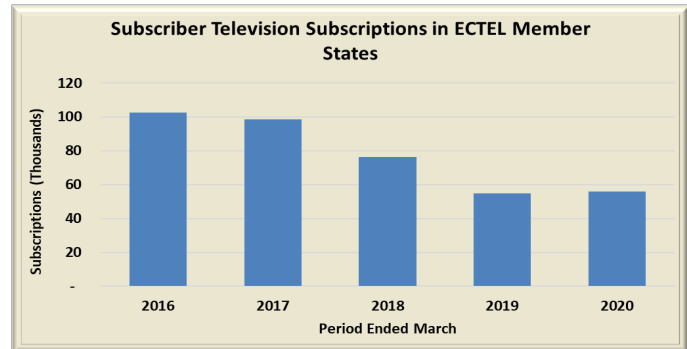
Source: ECTEL/operators

### 2.3.5 Subscriber Television

For the period under review, subscriber television connections in the Member States recorded a slight increase of 2 per cent to 55,900 connections (Figure 2.10).

Subscriber TV operators in the ECTEL Member States were offering primarily Digital and IPTV services to customers.

**Figure 2.10: Subscriber Television Subscriptions in ECTEL Member States**



Source: ECTEL/operators

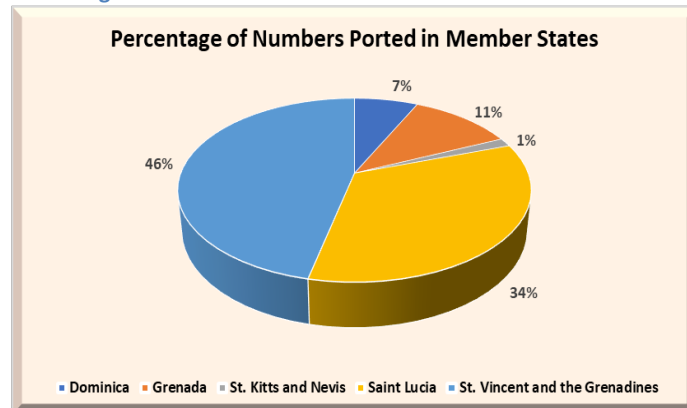
### 2.3.6 Mobile Numbers Ported

The Mobile Number Portability (MNP) service was launched to the public on 3<sup>rd</sup> June 2019 in all five (5) ECTEL Contracting States. The MNP service allows customers to move from one mobile network to another while keeping their mobile telephone number.

During the period under review an estimated 17,000 numbers were successfully ported in the Member States. St. Vincent and the Grenadines accounted for the largest number of ports followed by Saint Lucia.

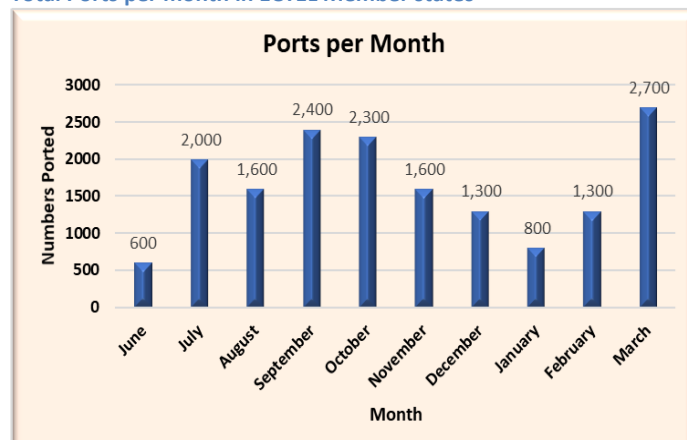
March 2020 recorded the highest quantity of numbers ported while June, the month in which the service was launched, recorded the lowest number of ports. The average monthly ports for the review period were 1,675 ports.

**Percentage of Numbers Ported in Member States**



Source: ECTEL/operators

**Total Ports per month in ECTEL Member states**



Source: ECTEL/operators



## Number Portability in the ECTEL Member States

In compliance with the mandate of the Treaty to create a competitive environment for telecommunications and to provide consumers with greater choice in telecommunications services, the Council of Ministers approved in October 2011, the implementation of local number portability in the ECTEL Member States. Following a robust consultative and preparatory process, local number portability was launched on June 3<sup>rd</sup>, 2019, to both prepaid and postpaid mobile voice service subscribers in the ECTEL Member States. Fixed voice service number portability is expected to be introduced at a later date. **Number portability is the ability of a telephone subscriber to change local service provider, location, or type of service without changing telephone number.**

Currently, mobile voice subscribers are allowed to retain their telephone numbers when changing service providers within the same ECTEL Member State. This means that a mobile voice service subscriber can keep a number regardless of the service provider who provides this service. In essence, a customer with a number assigned by a telecommunications service provider can maintain that number even when a different service provider is used to provide telecommunications service. On full implementation of the local number portability programme, a consumer in an ECTEL Member State will be able to port a fixed number from one provider to another or port a mobile number from one service provider to another. A consumer will however not be allowed to port a fixed number to a mobile number service or a mobile number to a fixed service.

In the absence of number portability, customers would be required to give up their number and to adopt new ones when switching providers. Consequently, number portability is seen as a vehicle for reducing switching costs faced by consumers related to informing persons about changing their number, printing new business cards and missing important calls from persons who do not have the new number. These switching costs typically result in higher prices, lower product and service quality and lower consumer welfare. By allowing consumers the opportunity to retain their numbers when moving between service providers, number portability in the ECTEL Member States will reduce customers' switching costs as an individual or company who changes provider and decides to retain the number will not have the difficulty of informing family, friends, colleagues, customers and clients that the number has changed.

It is also perceived that the reluctance to change service provider if it means a change in telephone number gives an incumbent provider an unfair advantage over a competing service provider. Local number portability will give consumers the flexibility to switch their fixed and mobile voice services to the provider that best meets their needs. This will not only allow consumers to concentrate on other important issues such as service quality and prices but will force service providers to focus on providing services and prices most attractive to consumers. Moreover, the flexibility in subscribing to telecommunications service makes it easier for new providers to compete for customers. For these reasons, regulatory policy focusing on number portability is therefore seen as a vehicle for promoting and enhancing competition in the fixed and mobile sectors across the ECTEL Member States.



## 3 DOMINICA



### 3.1 Overview

Preliminary estimates from the Eastern Caribbean Central Bank (ECCB) indicate that economic activity in the Commonwealth of Dominica expanded by 5.7 per cent in 2019, relative to 2.3 per cent in 2018. Strong performances were recorded in the construction, manufacturing and tourism sectors which positively impacted hotels and restaurants and agriculture and their ancillary sectors including transport, storage and communications. Consumer price inflation increased by 1.0 per cent in 2020 with notable rises in the food and non-alcoholic beverages and hotel and restaurants sectors. The electronic communications sector's contribution to gross value added increased by 6.34 per cent, up from 6.18 per cent in 2018.

The electronic communications sector experienced a relative solid performance during the period under review. Revenue from the sector grew by 7 per cent. Employment also increased by 11 per cent. However, investment in the sector experienced an 81 per cent fall as service providers concluded post Hurricane Maria build out of fixed and mobile networks.

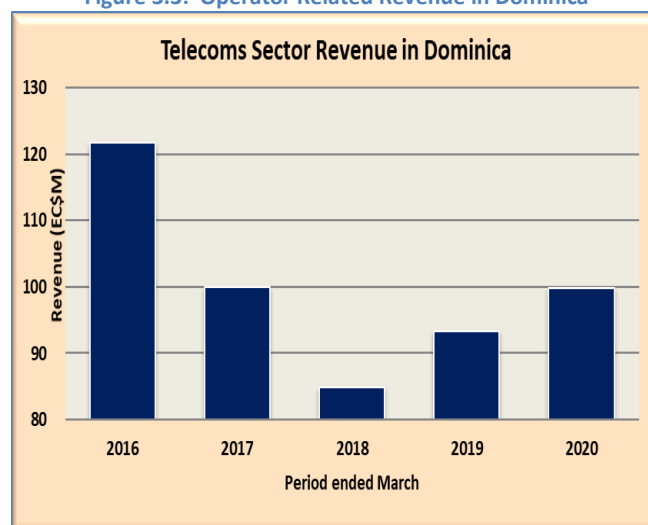
### 3.2 Operator Reported Revenue

For the period ending March 2020, electronic communications service providers in the Commonwealth of Dominica reported growth of 7 per cent to \$100 million in total revenue from the electronic communications sector (Figure 3.1).

Revenues from fixed voice and mobile services contracted by 6 per cent and 17 per cent respectively but were completely offset by exponential increases of 189 per cent in fixed broadband and 131 per cent in subscriber TV services revenues.

Mobile services maintained its position as the dominant contributor to total revenue at 54 per cent, followed by subscriber TV and fixed voice services which contributed 22 per cent and 15 per cent, respectively.

Figure 3.3: Operator Related Revenue in Dominica

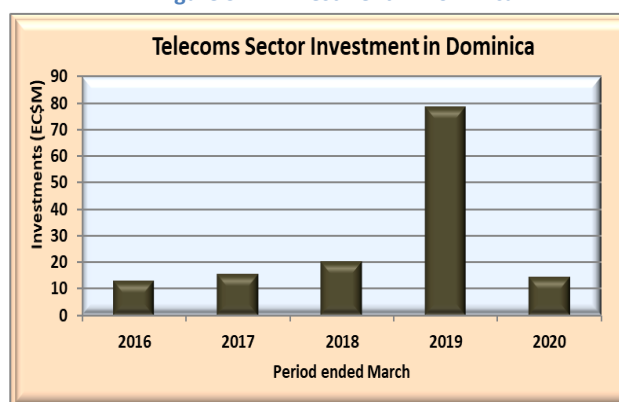


Source: ECTEL/operators

### 3.3 Investment

Total investment in telecommunications infrastructure returned to its pre 2019 level at 15 million, which signaled the end of post Hurricane Maria recovery and expansion of fixed and mobile networks by electronic communications service providers in the Commonwealth of Dominica (Figure 3.2). Consequently, the investment rate plunged by 77 percentage points to 16 per cent.

Figure 3.4: Investment in Dominica

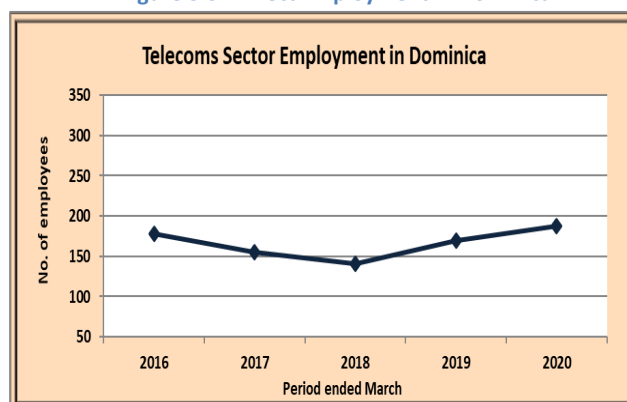


Source: ECTEL/operators

### 3.4 Direct Employment

At the end of March 2020, 188 persons were employed in the electronic communications sector in the Commonwealth of Dominica (Figure 3.3). This is an increase of 11 per cent over the previous period.

Figure 3.3: Direct Employment in Dominica



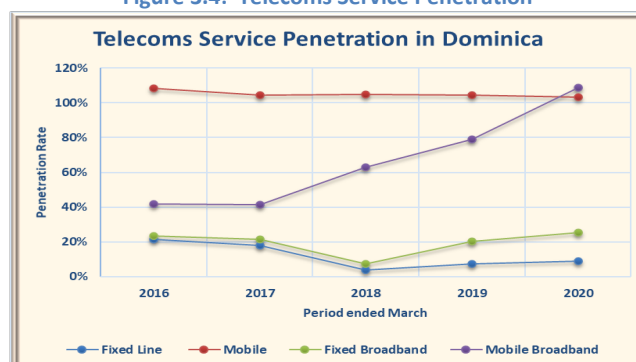
Source: ECTEL/operators

### 3.5 Telecoms Service Penetration

For the period under review:

- Fixed broadband penetration increased by 5 percentage points to 25.3 per cent (Figure 3.4).
- Fixed line was up by 2 percentage point to 9 per cent.
- Mobile penetration rate was 103 per cent, a one percentage point decrease from the previous period.
- Mobile broadband penetration was 108.6 per cent, its highest rate penetration in over five years.

Figure 3.4: Telecoms Service Penetration

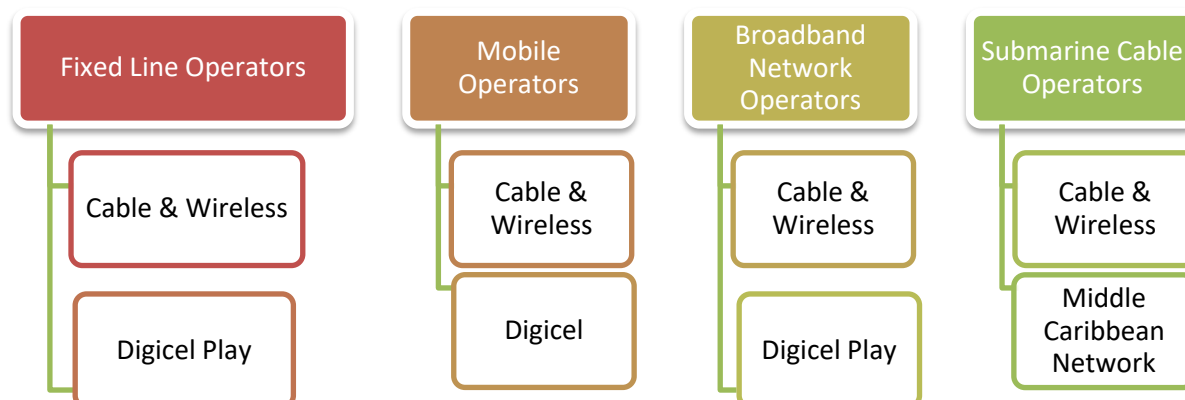


Source: ECTEL/operators

### 3.6 Active Service Providers

At the end of March 2020, there were two (2) active telecommunications service providers in Dominica. FLOW continues to provide the market with fixed line, mobile, internet services and subscriber television while Digicel offers all four (4) services with the acquisition of SAT Telecommunications (Figure 3.5).

Figure 3.5: Active Service Providers in Dominica



Source: ECTEL/operators

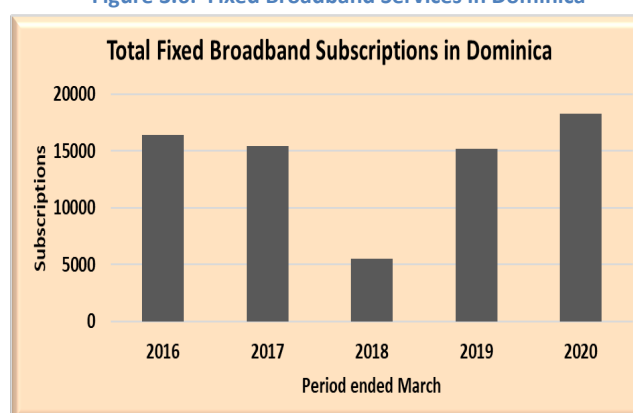
### 3.7 Internet and Broadband

#### 3.7.1 Fixed Broadband Services

Total fixed broadband connections accelerated by 20 per cent to 18,300 subscriptions at the end of March 2020 (Figure 3.6). The increase in the number of connections represents the second period of increased subscriptions since the passage of Hurricane Maria in 2018.

Cable modem continued to account for majority of the total fixed broadband subscriptions, at 69 per cent, whilst ADSL's share of total subscriptions declined by 11 percentage points to 25 per cent. Subscriptions from Fixed Wireless Access and Fibre-to-the-premises have been increasing gradually, registering a 5 per cent and 1 per cent contribution to total subscriptions, respectively. Fixed broadband penetration rate also realized a 5 percentage point increase due to the growth in total subscriptions.

Figure 3.6: Fixed Broadband Services in Dominica

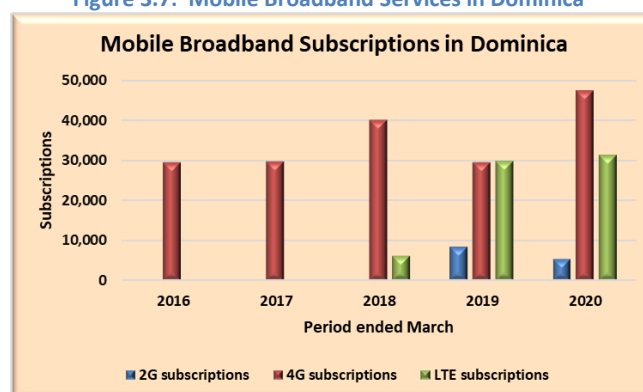


Source: ECTEL/operators

### 3.7.2 Mobile Broadband Services

The growth in mobile broadband subscriptions continued for the second straight year. Subscriptions to the service expanded by 33 per cent to an estimated 78,500 during the period under review (Figure 3.7). 60 per cent of total mobile broadband connections were made over the 3G/4G network while 40 per cent of these connections were made over the LTE network. Of the 78,500 connections, prepaid subscriptions accounted for 92 per cent.

Figure 3.7: Mobile Broadband Services in Dominica



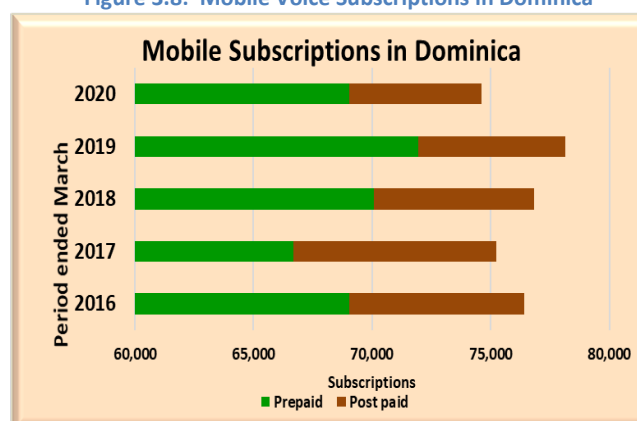
Source: ECTEL/operators

## 3.8 Mobile Voice Services

### 3.8.1 Mobile Voice Subscriptions

At the end of March 2020, subscriptions to mobile voice services declined marginally by 5 per cent to 74,600 subscriptions (Figure 3.8). This reduction resulted from drops in both prepaid and postpaid mobile subscriptions, 4 per cent and 10 per cent, respectively. Despite the reduction, prepaid subscriptions continued to account for most of the subscriptions, 93 per cent. Postpaid subscriptions accounted for 7 per cent of total subscriptions, one per cent less than the previous period.

Figure 3.8: Mobile Voice Subscriptions in Dominica



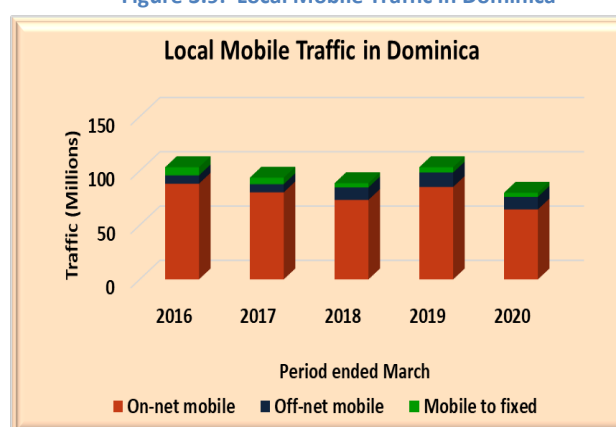
Source: ECTEL/operators

### 3.8.2 Mobile Traffic Volumes

Local mobile calling minutes dipped by 23 per cent to 80 million minutes during the review period (Figure 3.9). On-net calls, off-net calls and calls to fixed networks declined by 24 per cent, 13 per cent and 23 per cent, respectively. Mobile to mobile calling accounted for the largest share, 95 per cent, of all local mobile traffic.

Outgoing international minutes originating from the mobile networks contracted by 34 per cent to 2.2 million minutes compared to 3.4 million in the previous period.

Figure 3.9: Local Mobile Traffic in Dominica



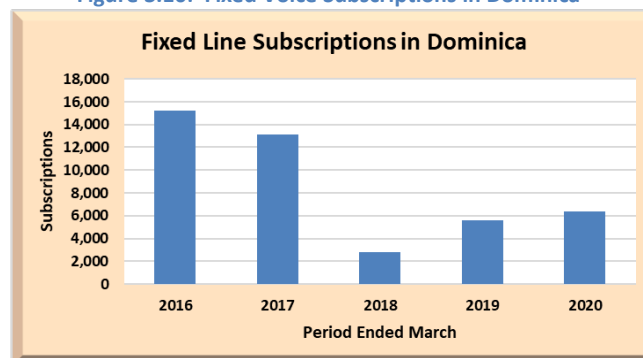
Source: ECTEL/operators

### 3.9 Fixed Voice Services

#### 3.9.1 Fixed Voice Subscriptions

The total number of subscriptions to fixed voice services was estimated at 6,400 at the end of March 2020, an increase of 14 per cent from the previous period (Figure 3.10). This was driven by a 38 per cent rise in fixed residential voice services. The overall increase was partially offset by a 6 per cent decrease in business fixed voice services. The proportion of residential to business subscriptions was 6:4.

Figure 3.10: Fixed Voice Subscriptions in Dominica



Source: ECTEL/operators

#### 3.9.2 Fixed Traffic Volumes

There was a slight decline in calls originating from the fixed networks in the Commonwealth of Dominica during the period under review (Table 3.1). Total calls originating from the fixed networks were 9 million minutes compared to 10 million minutes in the previous period. This represented a downward movement of 6 per cent.

International outgoing calls from fixed networks accounted for 44 per cent of total outgoing international calls. Service providers reported 3 million international outgoing minutes originating from fixed networks, a 57 per cent reduction when compared to the 7 million minutes in the previous period.

Table 3.1: Fixed Traffic Volumes in Dominica (million minutes)

	Fixed to Fixed	Fixed to Mobile	Fixed to International
2016	10	4	5
2017	9	5	3
2018	9	3	6
2019	8	2	7
2020	7	2	3

Source: ECTEL/operators

### 3.10 Subscriber Television

In the Commonwealth of Dominica, the total number of connections to subscriber television was 14,000 subscriptions, 23 per cent higher than subscriptions in 2019. This service is provided by the two main electronic communications service providers operating on the island. Subscriber TV providers, Cable & Wireless and Digicel +, offer basic packages comprising 89 channels at a price of \$65 and 150 channels at a price of \$120 per month respectively (Table 3.2).

Table 3.2: Basic Subscriber Television Packages in Dominica

Operator	Monthly Rate	Total channels	Local Channels
Cable & Wireless	\$65	89	-
Digicel +	\$120	150	-

Source: ECTEL/operators

## 4 GRENADA



### 4.1 Overview

The economy of Grenada continued to experience growth for the seventh consecutive year. The estimates from the ECCB indicate that the Grenadian economy expanded by 3.1 per cent in 2019 albeit at a slower rate than the growth of 4.1 per cent in 2018. This progression was a result of growth in most of the major sectors except for the construction sector. The largest contributor to GDP, education (17.2 per cent) grew by 4.5 per cent while the hotels and restaurants sector grew by 3.1 per cent and agriculture by 20.3 per cent. In 2019, the transport, storage and communication sector expanded by 6.9 per cent compared to 6.4 per cent in 2018.

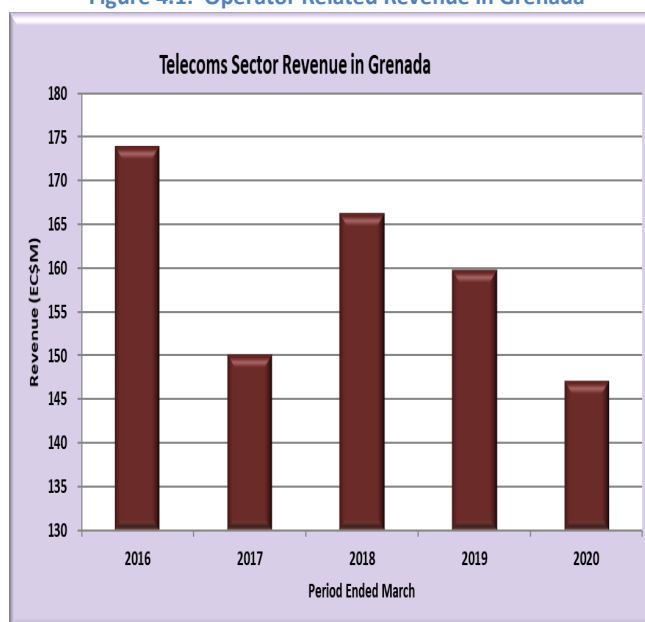
The electronic communications sector did not mirror the positive performance of the Grenadian economy. During the review period, the sector experienced a contraction of 8 per cent and 6 per cent respectively in revenue generated and in investments in the sector. Additionally, employment in the sector declined by 2 per cent.

## 4.2 Operator Related Revenue

The Grenadian electronic communications sector generated an estimated \$147 million in revenue during the period ended March 2020, an 8 per cent contraction from the previous period (Figure 4.1). This reduction resulted from declines in key telecommunications services including fixed line (12 per cent), mobile (12 per cent) and subscriber television (14 per cent). However, fixed internet service revenue increased by 10 per cent and has recorded continuous growth for the past 5 years.

Like previous periods, mobile services accounted for the largest share of revenue contributing 43 per cent to overall revenue. This was followed by fixed internet and fixed voice which both contributed 24 per cent to overall revenue while subscriber television contributed 10 per cent. It should be noted that fixed internet has progressively accounted for a larger contribution of overall sector revenue in the past few reporting periods.

Figure 4.1: Operator Related Revenue in Grenada

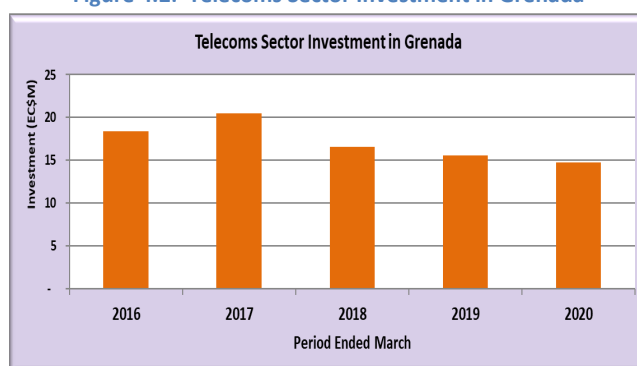


Source: ECTEL/operators

## 4.3 Investment

In Grenada, electronic communications service providers invested \$15 million in their networks at the end of March 2020, a 6 per cent reduction compared to the previous period (Figure 4.2). For the period under review, providers invested in the fixed, internet and subscriber television networks.

Figure 4.2: Telecoms Sector Investment in Grenada

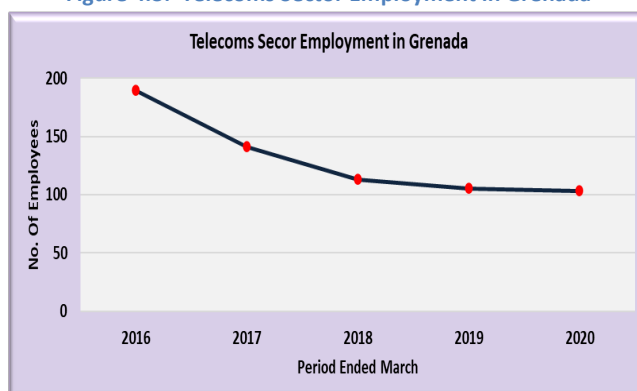


Source: ECTEL/operators

## 4.4 Direct Employment

Employment generated by electronic communications service providers in Grenada remained steady. At the end of March 2020, the sector employed 103 full time employees, 2 employees less than at March 2019 (Figure 4.3).

Figure 4.3: Telecoms Sector Employment in Grenada



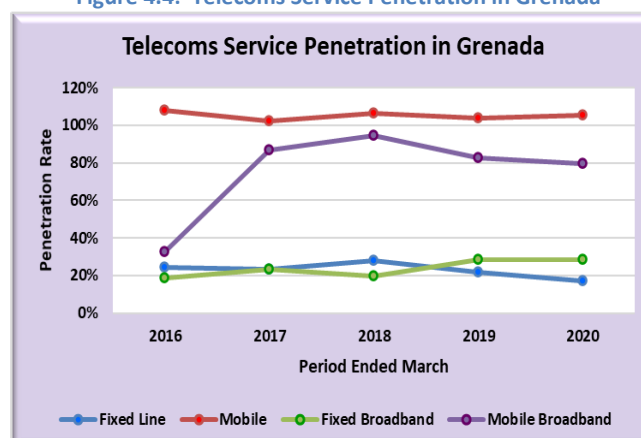
Source: ECTEL/operators

## 4.5 Telecoms Service Penetration

The following penetration rates were realized during the period under review:

- Mobile broadband penetration moved down 3.1 percentage points to 79.5 per cent (Figure 4.4).
- Mobile penetration increased by one percentage point to 105 per cent.
- Fixed broadband penetration remained steady at 28.4 per cent.
- Fixed voice penetration fell by 5 percentage points to 17 per cent due to the reduction in fixed line subscriptions.

Figure 4.4: Telecoms Service Penetration in Grenada

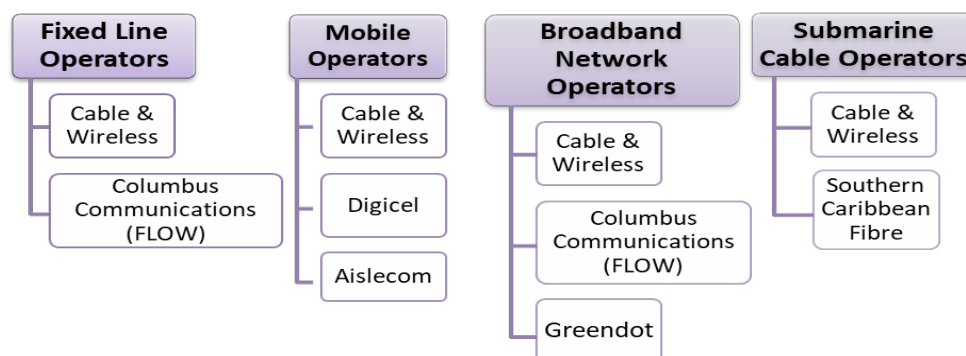


Source: ECTEL/operators

## 4.6 Active Service Providers

At the end of March 2020, the number of active licensed operators in Grenada offering fixed voice and broadband, mobile cellular and broadband, subscriber television and submarine cable services was five (5) (Figure 4.5).

Figure 4.5: Active Service Providers in Grenada



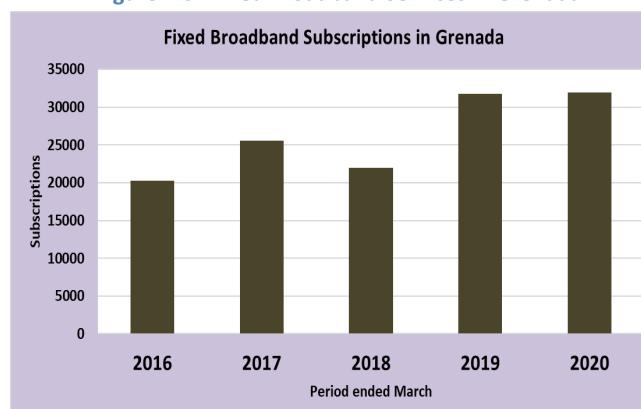
Source: ECTEL/operators

## 4.7 Internet and Broadband

### 4.7.1 Fixed Broadband Services

For the period under review, Grenada registered an estimated 32,000 broadband connections, a mere 1 per cent increase from the previous period (Figure 4.6). Cable modem connections accounted for the largest share of total connections at 76 per cent. As a result of this slow growth, the fixed broadband penetration rate remained steady at 28.4 per cent.

Figure 4.6: Fixed Broadband Services in Grenada



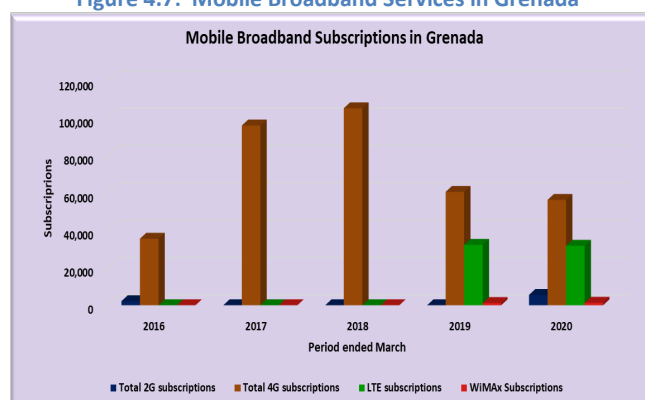
Source: ECTEL/operators



### 4.7.2 Mobile Broadband Services

During the period under review, mobile broadband subscriptions in Grenada was approximately 89,500 subscriptions, 3 per cent lower than in the previous period (Figure 4.7). Ninety-one (91) per cent of all mobile broadband subscriptions were prepaid while 9 per cent were postpaid.

Figure 4.7: Mobile Broadband Services in Grenada



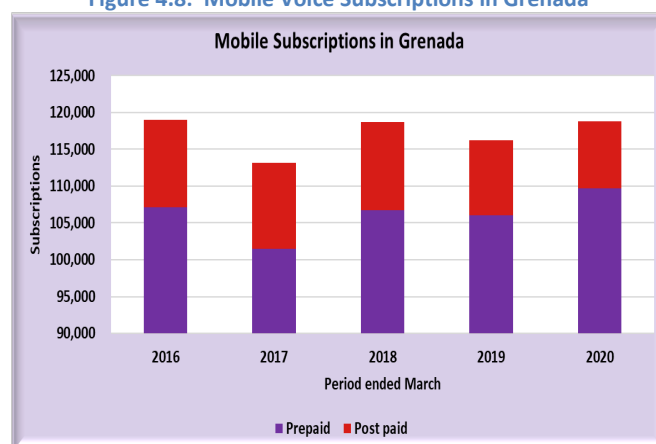
Source: ECTEL/operators

## 4.8 Mobile Voice Services

### 4.8.1 Mobile Voice Subscriptions

Mobile voice subscriptions in Grenada grew by 2 per cent to approximately 118,800 at the end of the review period (Figure 4.8). Like previous periods, prepaid subscriptions accounted for the significant majority, 92 per cent, of total subscriptions and contributed 3 per cent to the overall increase. Postpaid subscriptions however decreased by 11 per cent when compared to the prior review period.

Figure 4.8: Mobile Voice Subscriptions in Grenada



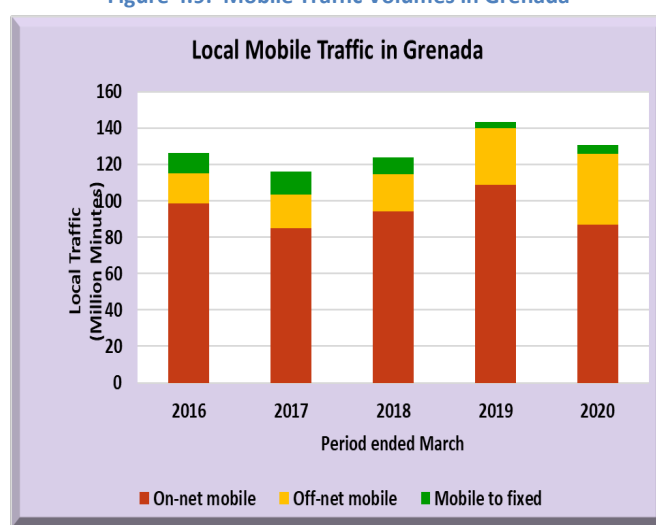
Source: ECTEL/operators

### 4.8.2 Mobile Traffic Volumes

Despite the growth in the total number of mobile subscriptions, local traffic originating from mobile networks fell by 9 per cent to approximately 131 million minutes (Figure 4.9). On-net mobile traffic accounted for 67 per cent of total traffic; off-net mobile traffic 30 per cent and mobile to fixed traffic 4 per cent. The reduction in overall mobile traffic was caused by the 20 per cent drop in on-net minutes. However, off-net mobile and mobile to fixed traffic recorded growth of 24 per cent and 43 per cent, respectively.

International outgoing traffic originating from mobile networks also declined by 12 per cent to an estimated 5 million minutes.

Figure 4.9: Mobile Traffic Volumes in Grenada



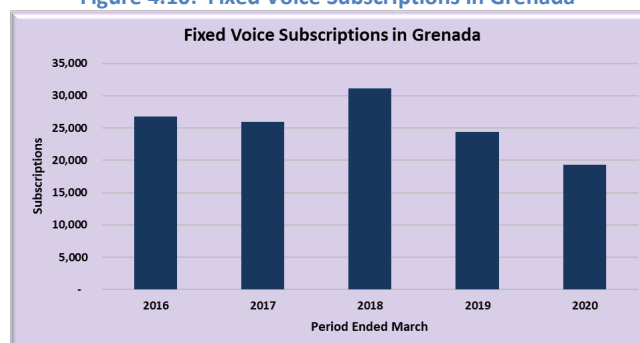
Source: ECTEL/operators

## 4.9 Fixed Voice Services

### 4.9.1 Fixed Voice Subscriptions

Total fixed voice subscriptions continued the downward trend, falling by 21 per cent to approximately 19,300 subscriptions at the end of March 2020 (Figure 4.10). Correspondingly, fixed voice penetration fell by 5 percentage points to 17 per cent.

Figure 4.10: Fixed Voice Subscriptions in Grenada



Source: ECTEL/operators

### 4.9.2 Fixed Traffic Volumes

At the end of March 2020, consumers in Grenada recorded a total of approximately 172 million fixed network originated minutes, an 18 per cent decline from the previous period (Table 4.1). All the categories of traffic contributed to the reduction in local fixed traffic volumes.

On-net fixed to fixed calls volumes declined by 18 per cent, off-net local fixed calls by 22 per cent and fixed to mobile calls by 16 per cent.

International outgoing calls to international numbers declined by 36 per cent to 2 million minutes.

Table 4.1: Fixed Traffic Volumes in Grenada

Fixed Traffic Volume in Grenada (million minutes)

	2016	2017	2018	2019	2020
Fixed to Fixed	156	126	143	205	167
Fixed to Mobile	10	8	7	6	5
Fixed to International	7	4	3	3	2

Source: ECTEL/operators

## 4.10 Subscriber Television

During the period under review, the total number of subscriptions for subscriber television was 12,500. This represented a slight reduction of 1 per cent from the previous period. This marks the fifth year of consecutive decline in the number of subscriber TV subscriptions. The subscriber TV provider offers a basic package comprising 73 channels at a price of \$70 per month (Table 4.2).

Table 4.2: Basic Subscriber Television Packages in Grenada

Operator	Monthly Rate	Total channels	Local Channels
Columbus Communications (FLOW)	\$70	73	-

Source: ECTEL/operators

## 5 ST. KITTS AND NEVIS



### 5.1 Overview

In 2019, the Eastern Caribbean Central Bank (ECCB) reported that economic activity in St. Kitts & Nevis expanded by 2.5 per cent continuing the growth trend of 2018 where a 2.9 per cent increase in real GDP was recorded. This positive performance in 2019 was fueled by higher value-added contributions from the main sectors of the economy including, hotels and restaurants (8 per cent), construction (2 per cent) and agriculture (12.6 per cent). Similarly, value added in the transport, storage and communications sector grew by 3 per cent compared to growth of 4.2 per cent in 2018.

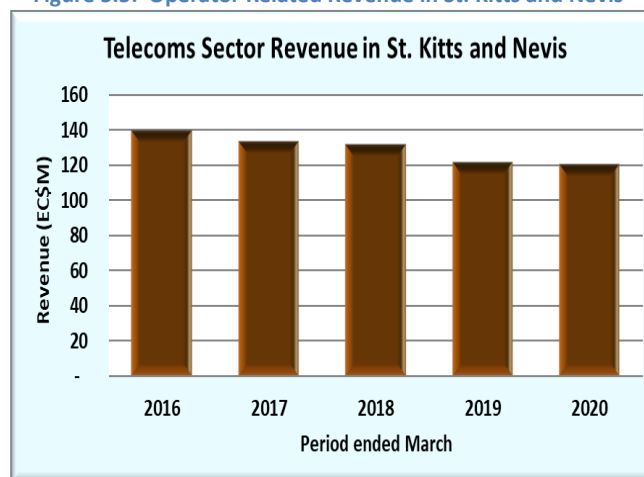
The electronic communications sector performed admirably during the period under review. Despite the marginal dip of 1 per cent in revenue generated by the sector, licensed service providers heavily invested in the sector recording a 44 per cent growth in capital expenditure and a 3 per cent increase in direct employment.

## 5.2 Operator Related Revenue

Total revenue from the electronic communications sector in St. Kitts and Nevis declined slightly by 1 per cent to an estimated \$120 million at the end of March 2020 (Figure 5.1). This reduction resulted from drops in fixed voice (6 per cent), mobile service (4 per cent) and subscriber television (13 per cent). Despite the overall decline, revenue from fixed broadband service continued to grow recording an increase of 13 per cent during the period under review.

Mobile service continued to account for the largest component of total revenue at 46 per cent, while fixed broadband recorded the largest increase accounting for 31 per cent or a 4 percentage point increase from the previous period.

Figure 5.5: Operator Related Revenue in St. Kitts and Nevis

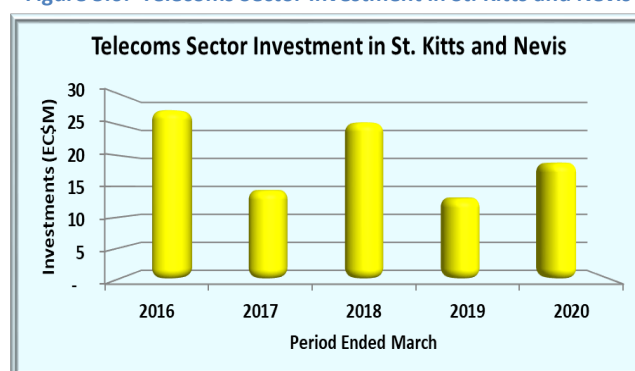


Source: ECTEL/operators

## 5.3 Investment

Total investment in the electronic communications sector in St. Kitts and Nevis recorded a 44 per cent jump to \$19 million at the end of March 2020 (Figure 5.2). The increase featured enhancements to the fixed and mobile networks aimed at facilitating an improvement in customer experience, speeds and coverage. Additionally, investments were made in the Subscriber Television Hybrid Fiber-Coax networks.

Figure 5.6: Telecoms Sector Investment in St. Kitts and Nevis

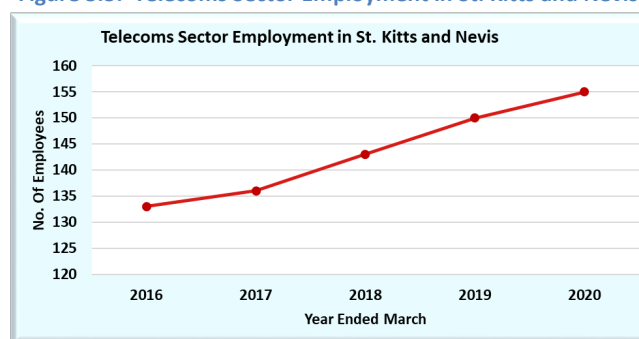


Source: ECTEL/operators

## 5.4 Direct Employment

Full-time employment in the electronic communications sector in St. Kitts and Nevis continued to expand growing by 3 per cent to 155 employees during the period under review (Figure 5.3).

Figure 5.3: Telecoms Sector Employment in St. Kitts and Nevis



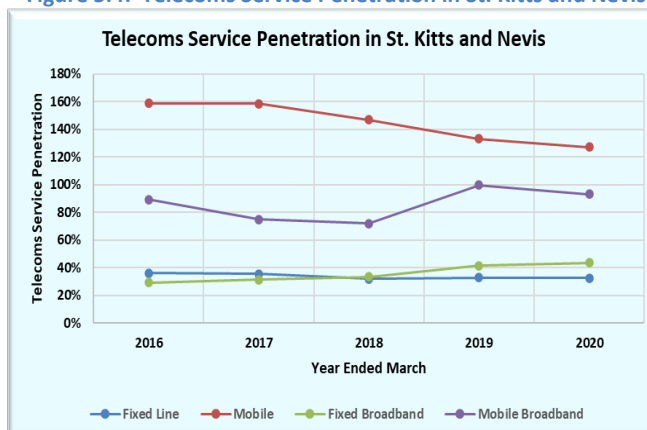
Source: ECTEL/operators

## 5.5 Telecoms Service Penetration

For the period under review:

- Mobile broadband penetration was 93.0 per cent, a 6.8 percentage point contraction from the previous year (Figure 5.4).
- Mobile penetration was estimated at 127.0 per cent, 6.0 percentage points lower than the same period in 2019.
- Fixed broadband penetration grew by 2.2 percentage points to 43.8 per cent.
- Fixed voice penetration remained unchanged at 33.0 per cent.

Figure 5.4: Telecoms Service Penetration in St. Kitts and Nevis

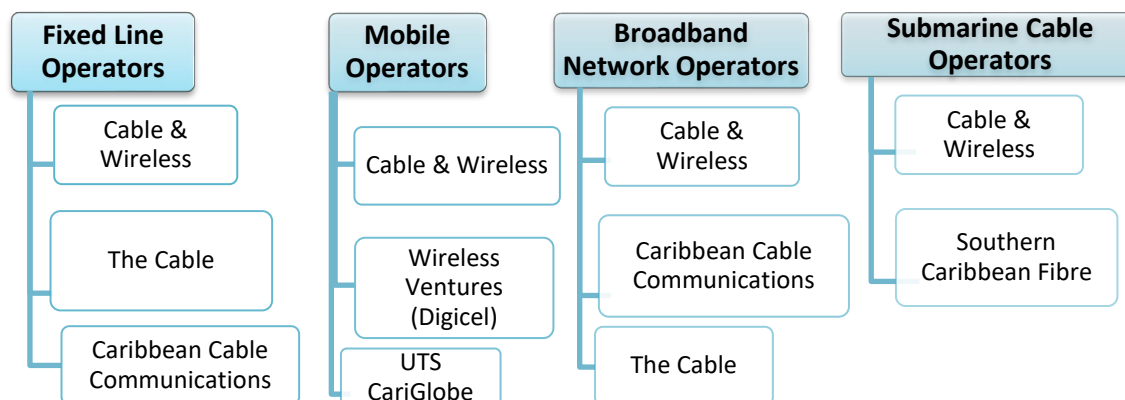


Source: ECTEL/operators

## 5.6 Active Service Providers

The number of active licensed service providers in St. Kitts and Nevis remained unchanged when compared to the previous review period with six (6) operators providing the twin island nation with fixed voice, mobile, broadband, subscriber television and submarine cable services (Figure 5.5).

Figure 5.5: Active Service Providers in St. Kitts and Nevis



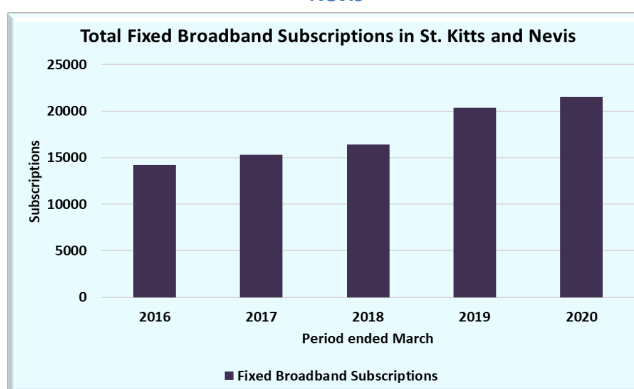
Source: ECTEL/operators

## 5.7 Internet and Broadband

### 5.6.1 Fixed Broadband Services

There was a total of 21,500 fixed broadband subscriptions during the period under review, an increase of 6 per cent from the previous period (Figure 5.6). Increased ADSL (2 per cent) and Cable Modem (9 per cent) connections contributed to the overall growth in fixed broadband subscriptions. This growth also resulted in a 2.2 per cent increase in the fixed broadband penetration rate during the period.

Figure 5.6: Total Fixed Broadband Subscriptions in St. Kitts and Nevis

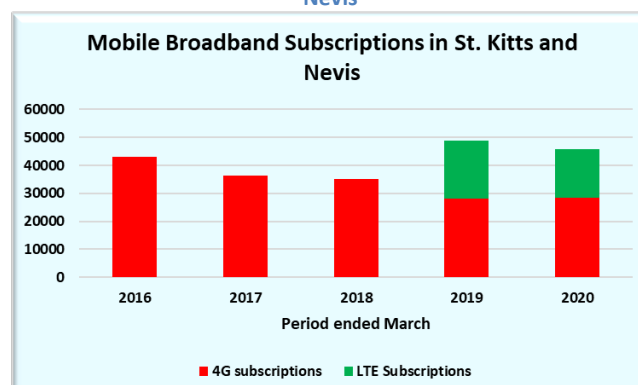


Source: ECTEL/operators

## 5.6.2 Mobile Broadband Services

For the period ended March 2020, an estimated 45,800 mobile broadband subscriptions were recorded in St. Kitts and Nevis, 6 per cent lower than in the previous period (Figure 5.7). Like 2019, prepaid subscriptions accounted for 86 per cent of total subscriptions while postpaid subscriptions accounted for 14 per cent of the total subscriptions for the period. 3G/4G (HSPA/UMTS/EV-DO) subscriptions accounted for 62 per cent of total subscriptions while LTE accounted for 38 per cent of total subscriptions.

Figure 5.7: Total Mobile Broadband Subscriptions in St. Kitts and Nevis



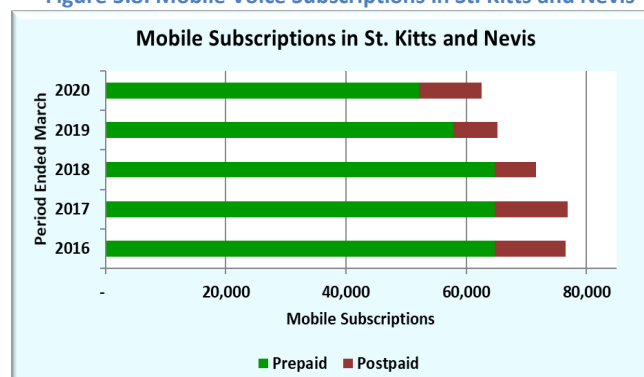
Source: ECTEL/operators

## 5.7 Mobile Voice Services

### 5.7.1 Mobile Voice Subscriptions

Mobile voice subscriptions have been on the decline from 2018 (Figure 5.8). At the end of March 2019, mobile voice subscriptions totaled 65,200 subscriptions, 9 per cent less than in 2018. Similarly, total subscriptions as at March 2020 declined by 4 per cent to 62,500 subscriptions when compared to 2019. Eight-three (83) per cent of total subscriptions were prepaid while 17 per cent were postpaid subscriptions.

Figure 5.8: Mobile Voice Subscriptions in St. Kitts and Nevis



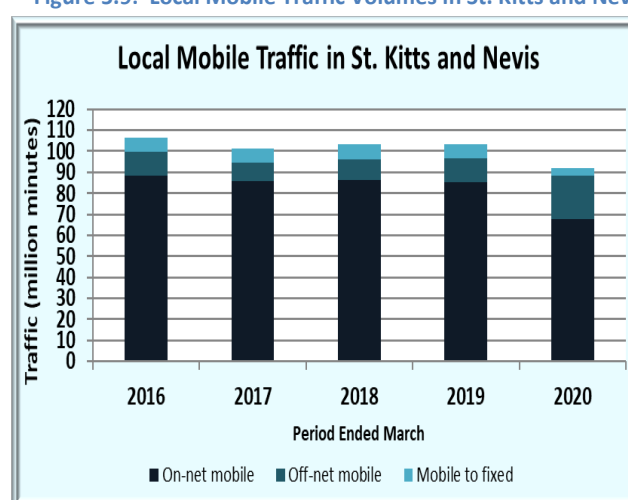
Source: ECTEL/operators

### 5.7.2 Mobile Traffic Volumes

Local mobile traffic contracted by 11 per cent to 92 million minutes during the review period (Figure 5.9). On-net mobile traffic recorded a 21 per cent reduction when compared to the previous year and accounted for 74 per cent of total local mobile traffic. Off-net traffic however grew significantly by 78 per cent and accounted for 23 per cent while mobile to fixed traffic fell by more than half (51 per cent) and accounted for 4 per cent of total traffic.

Mobile originated outgoing international calling minutes declined by 10 per cent to approximately 4 million minutes and accounted for 40 per cent of total international outgoing calling minutes.

Figure 5.9: Local Mobile Traffic Volumes in St. Kitts and Nevis



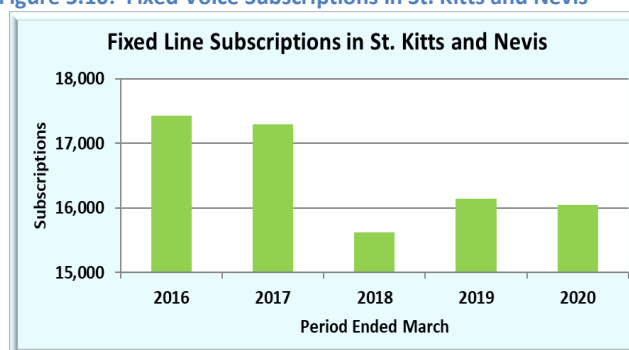
Source: ECTEL/operators

## 5.8 Fixed Voice Services

### 5.8.1 Fixed Voice Subscriptions

At the end of March 2020, total fixed line subscriptions in St. Kitts and Nevis registered a one percent decline when compared to the previous year (Figure 5.10). Approximately, 16,000 subscriptions were reported during the period. Declines of 1 per cent were recorded for both business and residential subscriptions. Fixed voice penetration remained unchanged at 33.0 per cent when compared to the same period last year.

Figure 5.10: Fixed Voice Subscriptions in St. Kitts and Nevis



Source: ECTEL/operators

### 5.8.2 Fixed Traffic Volumes

An estimated 15 million local fixed calling minutes was recorded during the review period, 19 per cent less than in the previous period. On-net calling declined by 11 per cent and accounted for 90 per cent of total local fixed traffic. Fixed to mobile traffic contracted significantly by 56 per cent and accounted for 10 per cent of total traffic.

Sixty (60) per cent of all outgoing international minutes originated from the fixed networks, a 2 percentage point increase from the previous period. International outgoing minutes from the fixed network moved from 7 million calling minutes to 5 million, a decline of 18 per cent.

Table 5.1: Fixed Traffic Volumes in St. Kitts and Nevis

Fixed Traffic Volume in St. Kitts and Nevis (million minutes)					
	2016	2017	2018	2019	2020
Fixed to Fixed	39	17	17	15	13
Fixed to Mobile	4	3	3	3	2
Fixed to International	8	6	6	7	5

Source: ECTEL/operators

### 5.8.3 Subscriber Television

For the period ended March 2020, the total number of subscriptions for subscriber television service in St. Kitts and Nevis declined by 8 per cent to approximately 11,200 subscriptions. The reduction is in line with the 13 per cent reduction in revenue recorded for subscriber television services. The subscriber TV provider offers a basic package comprising 33 channels at a price of \$55 per month (Table 5.2).

Table 5.2: Basic Subscriber Television Packages in St. Kitts and Nevis

Operator	Monthly Rate	Total channels	Local Channels
Columbus Communications (FLOW)	\$55	33	-

Source: ECTEL/operators

## 6 SAINT LUCIA



### 6.1 Overview

The Eastern Caribbean Central Bank estimates that the Saint Lucian economy grew by 1.5 per cent in 2019 from 1.1 per cent in the previous year. The expansion in economic activity was fueled by increases in the hotels and restaurants sector with positive spillover effects in transport, storage and communications, wholesale and retail, real estate, renting and business activities. Consumer prices declined by 0.7 per cent relative to 1.6 per cent in 2018 due to a contraction in the prices of housing, utilities, gas and fuels.

The performance of the electronic communications sector was somewhat subdued. Although investments in the sector recorded a moderate increase of 19 per cent, contractions were recorded in revenue (4 per cent) and employment (26 per cent).

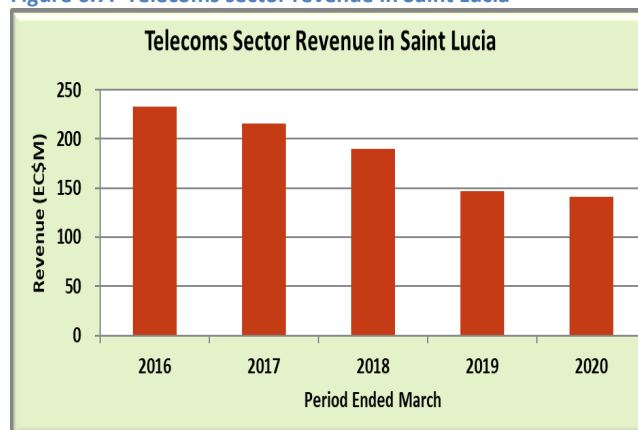


## 6.1 Operator Related Revenue

At the end of March 2020, electronic communications service providers in Saint Lucia reported total revenue of \$141 million, 4 per cent less than the previous period (Figure 6.1). Revenue has experienced steady declines from 2017. All markets segments except fixed broadband recorded decreases during the review period.

Mobile services continued to be the leading contributor at 35 per cent although its share of total revenue has been declining for the past few years. Fixed broadband's share of revenue increased for the fifth consecutive year to 31 per cent. Fixed voice's share fell by 2 percentage points to 17 per cent while the share of subscriber TV to total revenue remained constant at 17 per cent.

Figure 6.7: Telecoms sector revenue in Saint Lucia



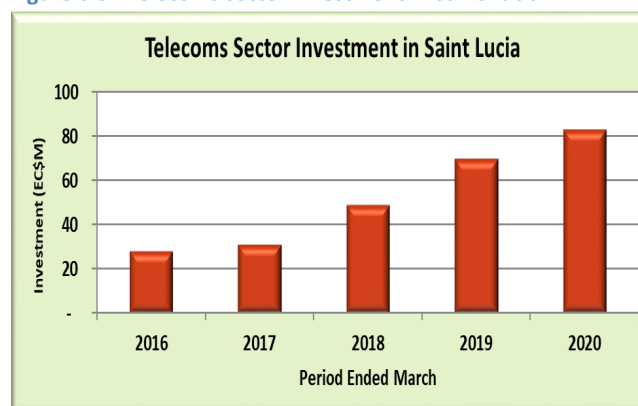
Source: ECTEL/operators

## 6.2 Investment

Total investment in the electronic communications sector in Saint Lucia registered a moderate increase of 19 per cent to \$83 million at the end of March 2020 (Figure 6.2). Electronic communications service providers have invested steadily in the sector in the past few years.

The major spends included upgrades to the mobile network, roll out of the CARCIP fibre internet network and upgrades to the fixed voice and subscriber TV networks.

Figure 6.8: Telecoms sector investment in Saint Lucia

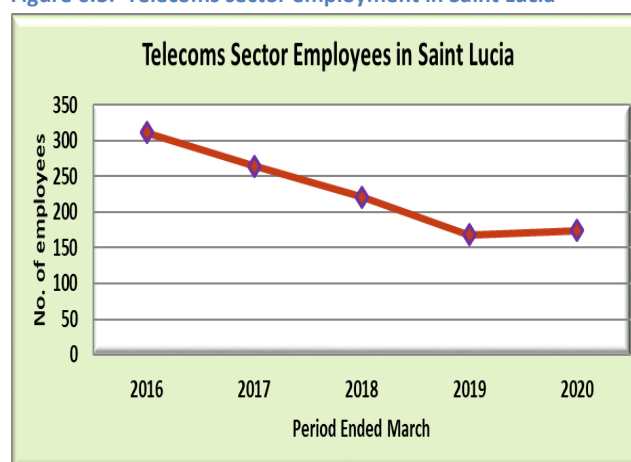


Source: ECTEL/operators

## 6.3 Direct Employment

One hundred and seventy-four (174) persons were directly employed in the electronic communications sector at the end of March 2020. This represented the first increase, 4 per cent, in total employment since 2016 (Figure 6.3).

Figure 6.3: Telecoms sector employment in Saint Lucia



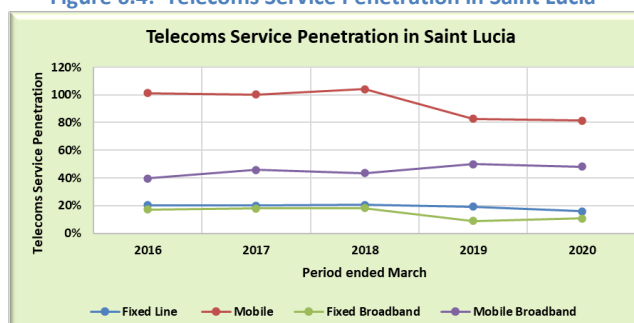
Source: ECTEL/operators

## 6.4 Telecoms Service Penetration

For the period under review:

- Fixed broadband penetration increased by 2.5 percentage point to 11.3 per cent (Figure 6.4).
- Mobile penetration fell from 83 subscriptions to 81 per 100 inhabitants, a reduction of 2 subscriptions per 100 inhabitants.
- Fixed voice penetration decreased by 3.0 percentage points from the previous period to 16 per cent.
- Mobile broadband penetration was 48.1 per cent (figure 6.4).

Figure 6.4: Telecoms Service Penetration in Saint Lucia

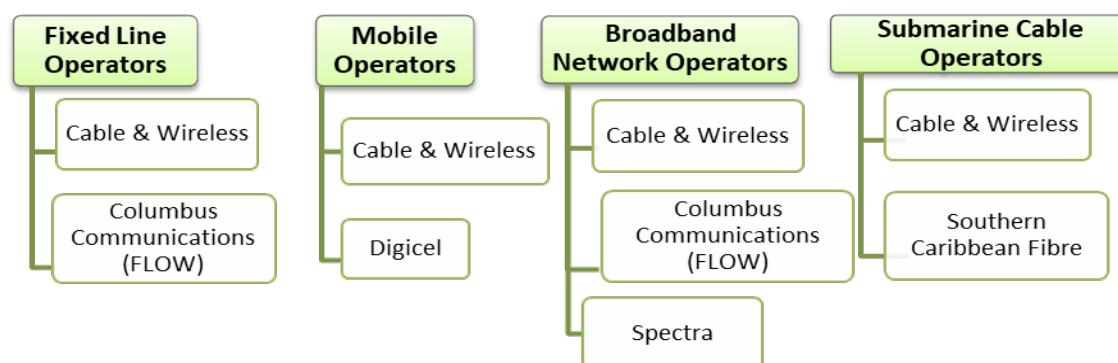


Source: ECTEL/operators

## 6.5 Active Service Providers

There were no significant changes in the telecommunications sector during the period under review (Figure 6.5). The telecommunications sector continues to be serviced by four main licensed operators.

Figure 6.5: Active Service Providers in Saint Lucia



Source: ECTEL/operators

## 6.6 Internet and Broadband

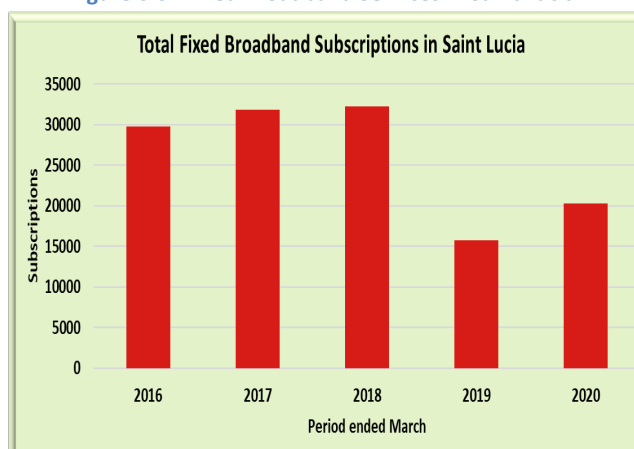
### 6.6.1 Fixed Broadband Services

#### Fixed Broadband Services

The total number of fixed broadband subscriptions rose by 28 per cent to 20,300 during the period under review (Figure 6.6). As a result, fixed broadband penetration increased by two and half (2.5) percentage points to 11.3 per cent.

Cable mobile connections have surpassed ADSL from 2016, representing 92 per cent of total fixed broadband subscriptions.

Figure 6.6: Fixed Broadband Services in Saint Lucia

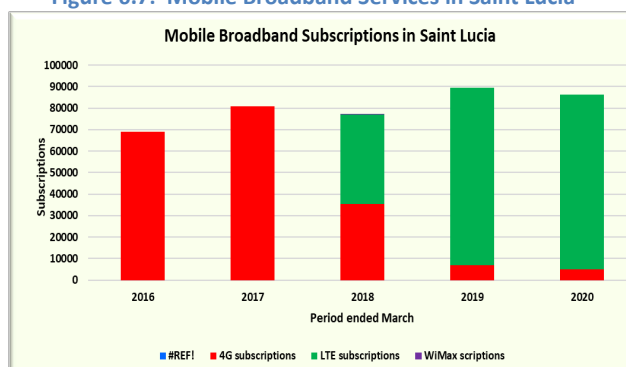


Source: ECTEL/operators

## 6.6.2 Mobile Broadband Services

The fluctuation in subscriptions to mobile broadband services continued during the period under review. For the period ending March 2020, the total number of connections declined by 4 per cent to 86,200 (Figure 6.7). Prepaid subscriptions accounted for 84 per cent of total mobile broadband subscriptions. Ninety-four (94) per cent of these connections were made over the LTE network.

Figure 6.7: Mobile Broadband Services in Saint Lucia



Source: ECTEL/operators

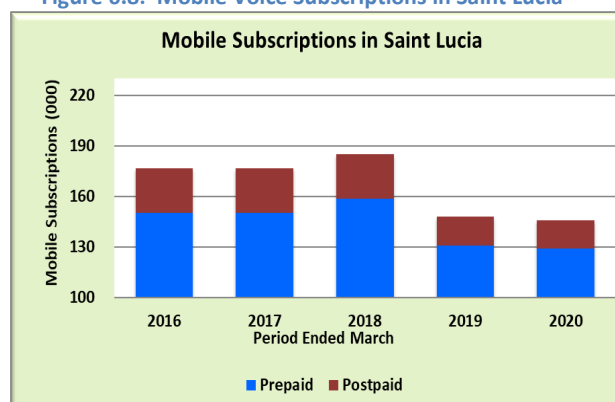
## 6.7 Mobile Voice Services

### 6.7.1 Mobile Voice Subscriptions

At the end of March 2020, the total number of mobile voice subscriptions was 145,900 (Figure 6.8), down 1 per cent from the previous period. Mobile voice subscriptions tend to fluctuate but have been on the decline from 2019.

Prepaid mobile subscriptions accounted for the largest share of total subscriptions at 88 per cent but fell by one per cent. Growth in postpaid subscriptions remained constant during the period under review.

Figure 6.8: Mobile Voice Subscriptions in Saint Lucia



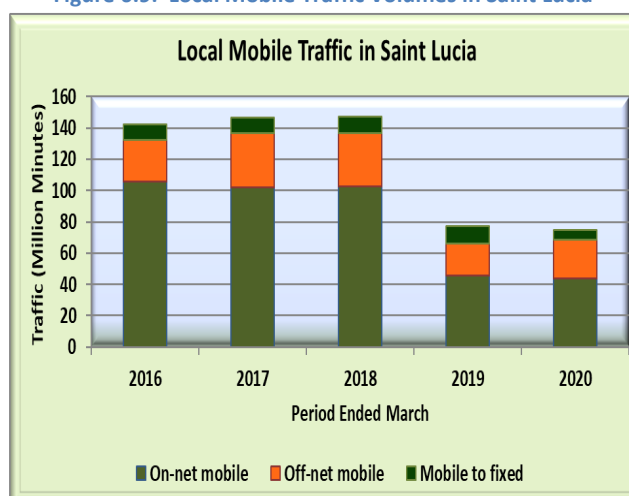
Source: ECTEL/operators

### 6.7.2 Mobile Traffic Volumes

Mobile networks recorded local calling minutes of 75 million at March 2020, a slight decrease of 3 per cent from the previous period (Figure 6.9). Contractions of 4 per cent and 46 per cent respectively were reported for on-net mobile and mobile to fixed calling. Conversely, off-net calling rose by 23 per cent.

Minutes from the mobile network was 22 per cent lower (3.5 million) and accounted for 58 per cent of outgoing international minutes. There was a marked increase of 38 per cent in international incoming call volumes to the mobile networks at the end of March 2020.

Figure 6.9: Local Mobile Traffic Volumes in Saint Lucia



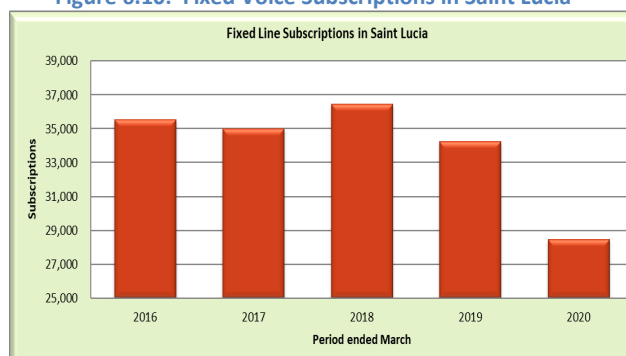
Source: ECTEL/operators

## 6.8 Fixed Voice Services

### 6.8.1 Fixed Voice Subscriptions

There was a total of 28,500 subscriptions to the fixed voice network in Saint Lucia at the end of March 2020, a contraction of 17 per cent from the previous period (Figure 6.10). Both residential and business subscriptions fell by 17 per cent. Residential subscriptions accounted for 49 per cent of total fixed voice connections.

Figure 6.10: Fixed Voice Subscriptions in Saint Lucia



Source: ECTEL/operators

### 6.8.2 Fixed Traffic Volumes

Local fixed call volumes plummeted by 17 per cent to 41 million at the end of March 2020 (Table 6.1). Call volumes from the fixed networks have registered double digit declines from 2019.

Approximately 3.5 out of every 10 local call minutes originated from the fixed network. Both on-net and off-net calling registered contractions of 17 per cent during the review period.

Nearly 42 per cent of all outgoing international calls originated from the fixed network during the period under review. Outgoing international minutes from the fixed network contracted by 19 per cent to an estimated 3 million minutes during the review period.

Table 6.1: Fixed Traffic Volumes in Saint Lucia

Fixed Traffic Volume in Saint Lucia (million minutes)					
	2016	2017	2018	2019	2020
Fixed to Fixed	122	122	123	41	34
Fixed to Mobile	10	8	8	8	7
Fixed to International	5	4	5	3	3

Source: ECTEL/operators

## 6.9 Subscriber Television

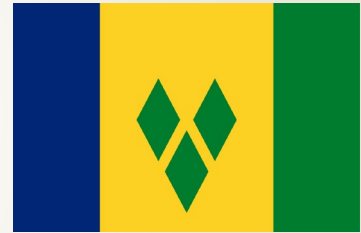
For the review period, subscriber TV connections recorded a marginal increase of 6 per cent, since the dramatic decline of 69 per cent in 2019, to 9,400 subscriptions. The subscriber TV operator offers a basic package comprising 86 channels at a price of \$106 per month (Table 6.2).

Table 6.2: Basic Subscriber Television Packages in Saint Lucia

Operator	Monthly Rate	Total channels	Local Channels
Columbus Communications (FLOW)	\$106	86	-

Source: ECTEL/operators

## 7 ST. VINCENT AND THE GRENADINES



### 7.1 Overview

Economic activity in Saint Vincent and the Grenadines increased by 0.3 per cent relative to 2.2 per cent in 2018, according to the report from the Eastern Caribbean Central Bank. Gross value added in hotel and restaurants was positive which favorably impacted transport, storage and communications, financial intermediation, real estate, renting and business activities. The overall growth in hotel and restaurants was partially mitigated by contractions in construction, manufacturing and agriculture. Consumer prices rose by 0.5 per cent relative to 0.4 per cent in 2018, driven by increases in food and alcoholic beverages, transport, household furnishings, supplies and maintenance. The contribution of electronic communications to gross value-added rose by 4.11 per cent in 2019 compared to 4.05 in 2018.

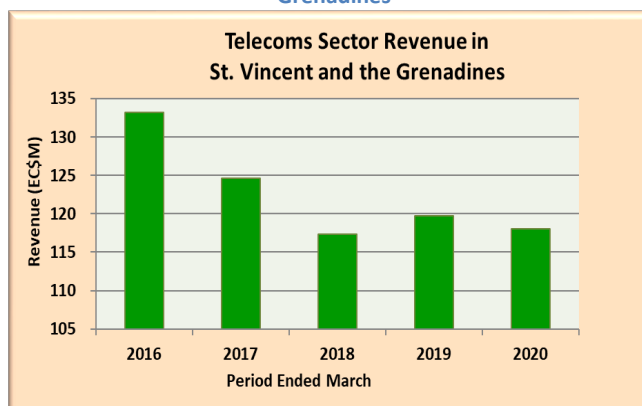
The performance of the electronic communications sector was quite stable during the review period. Despite a 22 per cent drop in revenue, investment and employment in the sector rose by 16 and 11 per cent, respectively.

### 7.1 Operator Related Revenue

At the end of March 2020, total revenue generated from the electronic communications sector in St. Vincent and the Grenadines declined by 1 per cent to \$118 million (Figure 7.1). Declines were recorded in all market segments except fixed broadband service. Revenues trended downwards in 2017 and 2018 but recorded a slight increase in 2019.

Revenue from fixed broadband service recorded a 12 per cent increase and contributed 35 per cent to total sector revenue. Revenue from mobile voice services fell by 3 per cent during the period and accounted for 37 per cent of sector revenue.

Figure 7.1: Telecoms Sector Revenue in St. Vincent and the Grenadines



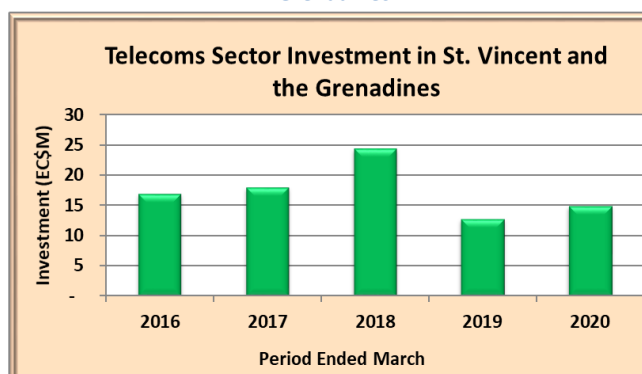
Source: ECTEL/operators

### 7.2 Investment

Total investment in electronic communications in St. Vincent and the Grenadines rose by 16 per cent to \$15 million at the end of March 2020 (Figure 7.2). This followed a 47 per cent contraction in the previous period. Investment in the sector has fluctuated during the five-year period, 2016 to 2020.

The expansion during the period under review represented investments by service providers in network infrastructure upgrades and fiber installations.

Figure 7.2: Telecoms Sector Investment in St. Vincent and the Grenadines

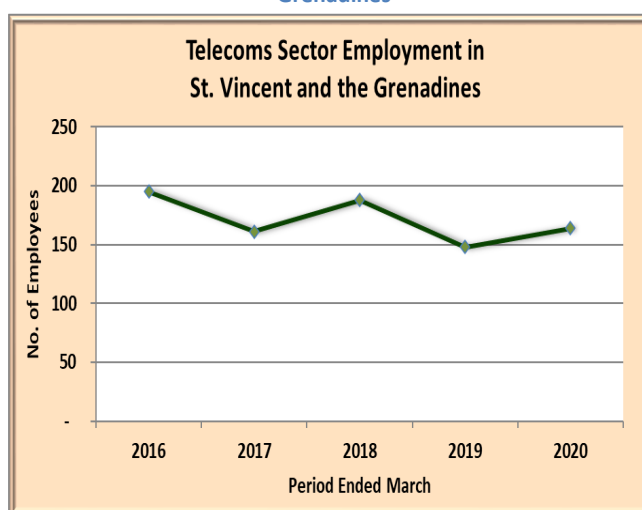


Source: ECTEL/operators

### 7.3 Direct Employment

Full time employment in the electronic communications sector in St. Vincent and Grenadines increased by 11 per cent to 164 at the end of March 2020 (Figure 6.3).

Figure 6.3: Telecoms sector employment in St. Vincent and the Grenadines



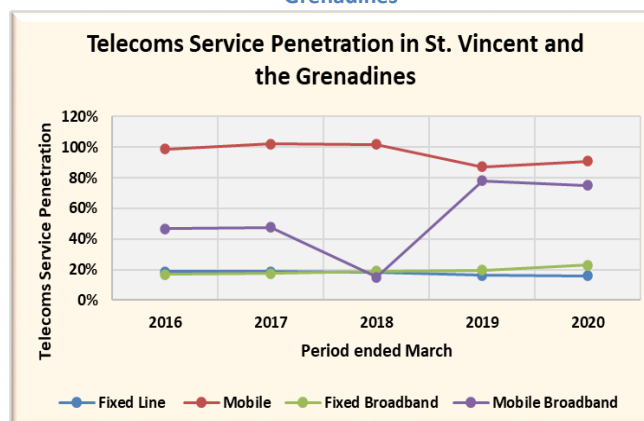
Source: ECTEL/operators

## 7.4 Telecoms Service Penetration

During the period under review:

- Fixed broadband penetration was up by 3.3 percentage points to 22.9 per cent (Figure 7.4).
- Mobile penetration was recorded at 91.0 per cent, 4 percentage points more than in 2019.
- Fixed voice penetration remained steady from the previous period at 16.0 per cent.
- Mobile broadband penetration was 75.1 per cent.

Figure 7.4: Telecoms Service Penetration in St. Vincent and the Grenadines

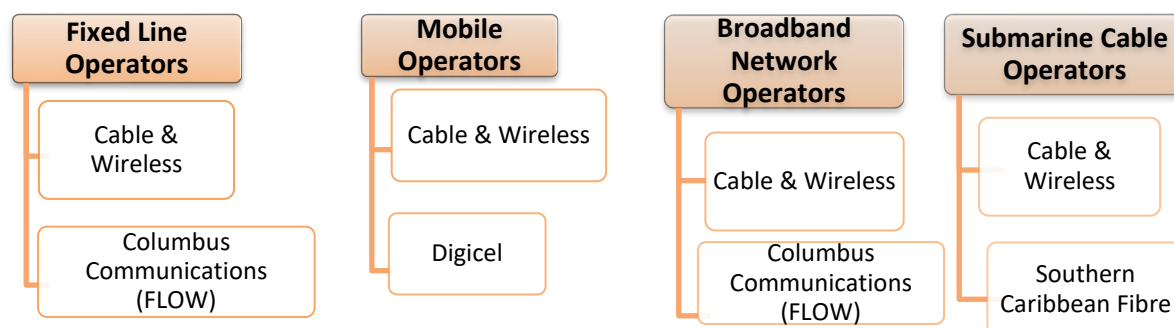


Source: ECTEL/operators

## 7.5 Active Service Providers

There were no immediate changes to the number of active operators in the sector at the end of March 2020 (Figure 7.5).

Figure 7.5: Active Service Providers in St. Vincent and the Grenadines



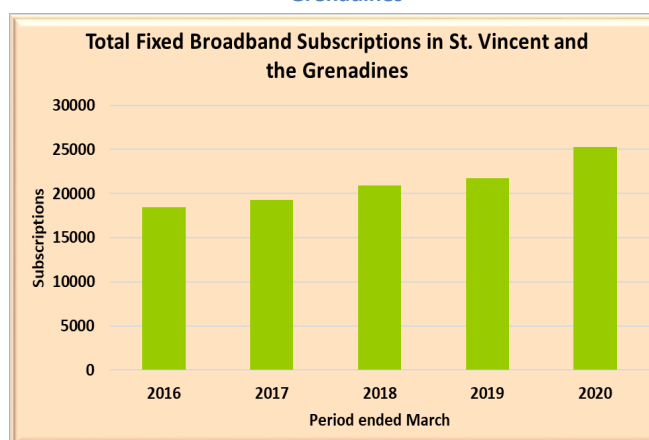
Source: ECTEL/operators

## 7.6 Internet and Broadband

### 7.6.1 Fixed Broadband Services

The number of fixed broadband connections increased by 16 per cent to 25,300 subscriptions at the end of March 2020 (Figure 7.6). The overall growth has been led by a 34 per cent expansion in cable modem broadband services. Fixed broadband connections had been increasing at a slow rate in the four years prior to the period under review.

Figure 7.6: Fixed Broadband Services in St. Vincent and the Grenadines

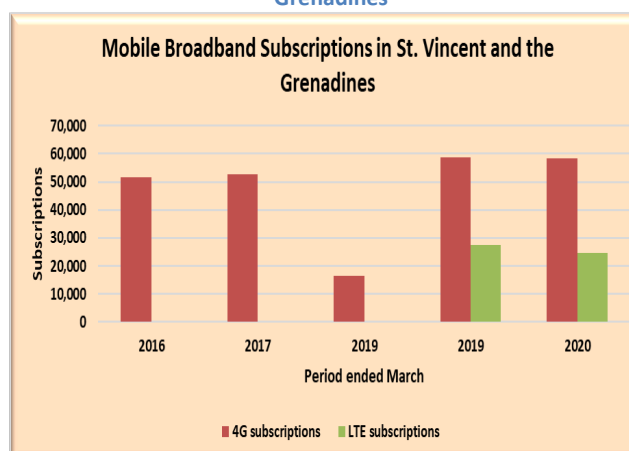


Source: ECTEL/operators

## 7.6.2 Mobile Broadband Services

There was a reduction in subscriptions to mobile broadband services during the period under review. At the end of March 2020, a total of 83,000 mobile data connections were recorded (Figure 7.7). In the previous period, a 423 per cent jump had been recorded. Total 3G/4G subscriptions represented 70 per cent of total mobile broadband connections and decreased by 1 per cent from the previous period while LTE subscriptions accounted for 30 per cent but fell by 10 per cent from the previous period.

Figure 7.7: Mobile Broadband Services in St. Vincent and the Grenadines



Source: ECTEL/operators

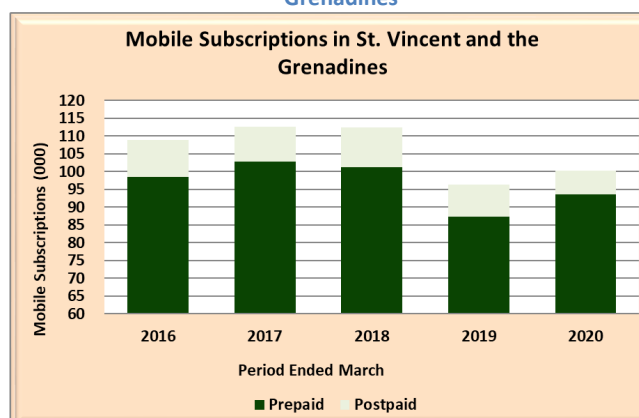
## 7.7 Mobile Voice Services

### 7.7.1 Mobile Voice Subscriptions

Total mobile subscriptions grew by 4 per cent to 100,400 at the end of March 2020 (Figure 7.8). Of the 100,400 mobile subscriptions, 93 per cent were prepaid subscriptions while 7 per cent were post-paid.

Prepaid subscriptions to mobile voice services expanded by 7 per cent after two consecutive periods of decline. Post-paid mobile voice services subscriptions registered its second period of double-digit contraction.

Figure 7.8: Mobile Voice Subscriptions in St. Vincent and the Grenadines



Source: ECTEL/operators

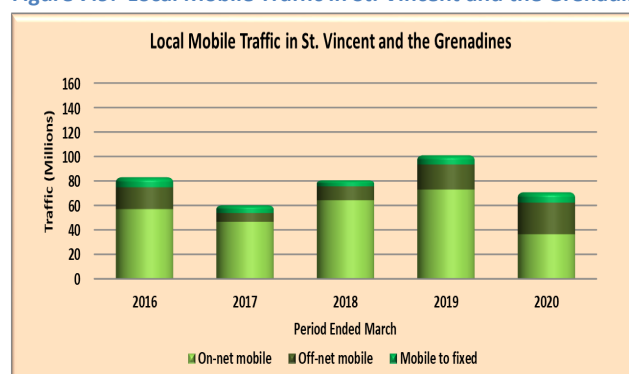
### 7.7.2 Mobile Traffic Volumes

Mobile traffic volumes plummeted by 30 per cent to approximately 71 million during the period under review (Figure 7.9). While mobile traffic volumes have fluctuated in the past, the change witnessed during the period under review represents the largest drop since 2017.

The fall in mobile traffic resulted from a 50 per cent decline in on-net traffic. Off-net traffic and mobile to fixed traffic recorded double-digit growth of 26 and 11 per cent, respectively.

There was a 68 per cent contraction in outgoing international calls from the mobile network during the period under review.

Figure 7.9: Local Mobile Traffic in St. Vincent and the Grenadines



Source: ECTEL/operators



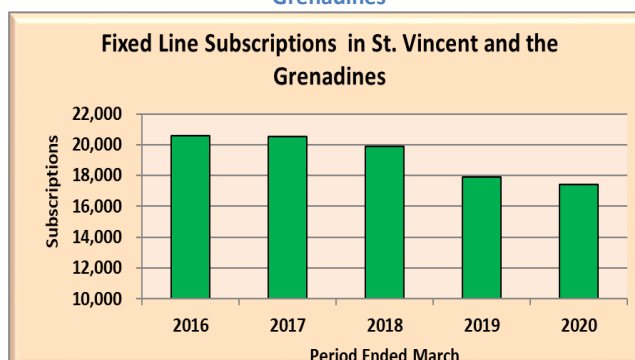
## 7.8 Fixed Voice Services

### 7.8.1 Fixed Voice Subscriptions

During the period under review, the total number of fixed line subscriptions was down by 3 per cent to 17,400, continuing the downward trend witnessed from 2018 (Figure 7.10).

The contraction in fixed voice subscriptions stemmed from 2 per cent and 3 per cent decreases in the number of residential customers and in business subscriptions, respectively. The ratio of residential to business fixed line subscriptions have remained stable at 6.6:3.4 in the past two reporting periods.

Figure 7.10: Fixed Voice Subscriptions in St. Vincent and the Grenadines



Source: ECTEL/operators

### 7.8.2 Fixed Traffic Volumes

Local calling minutes from fixed networks declined by 16 per cent to \$17 million at the end of March 2020 (Table 7.1). All categories of fixed traffic recorded a 16 per cent reduction: on-net, off-net and fixed to mobile call volumes.

International outgoing traffic from fixed networks was down by 7 per cent to 4 million minutes during the review period.

Table 7.1: Fixed Traffic Volumes in St Vincent and the Grenadines  
Fixed Traffic Volume in St. Vincent and the Grenadines (million minutes)

	2016	2017	2018	2019	2020
Fixed to Fixed	16	14	13	15	13
Fixed to Mobile	6	8	6	5	4
Fixed to International	5	5	5	4	4

Source: ECTEL/operators

## 7.9 Subscriber Television

Columbus Communications (FLOW) remains the lone subscriber TV provider in St. Vincent and the Grenadines with the exit of Silvast from the market in 2019. At the end of March 2020, the lone service provider reported a 9 per cent reduction in the total number of subscriber TV subscriptions to 8,700 subscriptions. The subscriber TV operator offers a basic package comprising 31 channels at a price of \$69 per month (Table 7.2).

Table 7.2: Basic Subscriber Television Packages in St. Vincent and the Grenadines

Operator	Monthly Rate	Total channels	Local Channels
Columbus Communications (FLOW)	\$69	31	-

Source: ECTEL/operators

## 8 Notes and Statistical Tables

### 8.1 Notes on Statistical Tables and Data

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 broadband, 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.
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.

## 8.2 Statistical Tables

Selected telecommunications indicators – All ECTEL Member States

	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>2020</i>
<b>Provider Revenues (EC\$M)</b>	\$802	\$724	\$690	\$642	\$626
<b>Investment (EC\$M)</b>	\$104	\$100	\$136	\$190	\$146
<b>Employment</b>	1,006	857	806	740	784
<b>Fixed line Penetration</b>	22.5%	21.6%	20.3%	18.7%	16.7%
<b>Mobile penetration</b>	108.6%	107.1%	108.1%	95.9%	95.9%
<b>Fixed broadband penetration</b>	19.3%	20.7%	18.6%	20.0%	22.4%
<b>Mobile broadband penetration</b>	44.6%	57.1%	53.7%	71.7%	73.1%
<b>Local fixed traffic (million minutes)</b>	376	319	333	308	254
<b>Local mobile traffic (million minutes)</b>	562	518	543	529	448
<b>International incoming traffic (million minutes)</b>	61	46	46	41	36
<b>International outgoing traffic (million minutes)</b>	83	61	61	49	34

Source: ECTEL/operators

Selected telecommunications indicators - Dominica

	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>2020</i>
<b>Provider Revenues (EC\$M)</b>	\$122	\$100	\$85	\$93	\$100
<b>Investment (EC\$M)</b>	\$13	\$16	\$20	\$79	\$15
<b>Employment</b>	178	155	141	169	188
<b>Fixed line penetration</b>	22%	18%	4%	7%	9%
<b>Mobile penetration</b>	108%	105%	105%	104%	103%
<b>Fixed broadband penetration</b>	23.3%	21.4%	7.5%	20.3%	25.3%
<b>Mobile broadband penetration</b>	41.9%	41.3%	62.9%	79.1%	108.6%
<b>Local fixed traffic (million minutes)</b>	14	13	12	10	9
<b>Local mobile traffic (million minutes)</b>	103	94	89	103	80
<b>International incoming traffic (million minutes)</b>	18	9	8	8	8
<b>International outgoing traffic (million minutes)</b>	14	11	14	10	5

Source: ECTEL/operators

**Selected telecommunications indicators - Grenada**

	<i><b>2016</b></i>	<i><b>2017</b></i>	<i><b>2018</b></i>	<i><b>2019</b></i>	<i><b>2020</b></i>
<b>Provider Revenues (EC\$M)</b>	\$174	\$150	\$166	\$160	\$147
<b>Investment (EC\$M)</b>	\$18	\$20	\$17	\$16	\$15
<b>Employment</b>	189	141	113	105	103
<b>Fixed line penetration</b>	24%	23%	28%	22%	17%
<b>Mobile penetration</b>	108%	102%	106%	104%	105%
<b>Fixed broadband penetration</b>	18.4%	23.0%	19.6%	28.3%	28.4%
<b>Mobile broadband penetration</b>	32.3%	86.7%	94.3%	82.6%	79.5%
<b>Local fixed traffic (million minutes)</b>	166	134	150	211	172
<b>Local mobile traffic (million minutes)</b>	126	116	124	143	131
<b>International incoming traffic (million minutes)</b>	9	8	10	8	5
<b>International outgoing traffic (million minutes)</b>	16	10	8	9	7

Source: ECTEL/operators

**Selected telecommunications indicators – St. Kitts and Nevis**

	<i><b>2016</b></i>	<i><b>2017</b></i>	<i><b>2018</b></i>	<i><b>2019</b></i>	<i><b>2020</b></i>
<b>Provider Revenues (EC\$M)</b>	\$140	\$134	\$132	\$122	\$120
<b>Investment (EC\$M)</b>	\$27	\$14	\$25	\$13	\$19
<b>Employment</b>	133	136	143	150	155
<b>Fixed line penetration</b>	36%	36%	32%	33%	33%
<b>Mobile penetration</b>	159%	159%	147%	133%	127%
<b>Fixed broadband penetration</b>	29.4%	31.5%	33.6%	41.6%	43.8%
<b>Mobile broadband penetration</b>	89.4%	75.0%	72.0%	99.8%	93.0%
<b>Local fixed traffic (million minutes)</b>	43	21	20	18	15
<b>Local mobile traffic (million minutes)</b>	107	101	103	103	92
<b>International incoming traffic (million minutes)</b>	7	6	6	4	4
<b>International outgoing traffic (million minutes)</b>	20	12	12	11	9

Source: ECTEL/operators

**Selected telecommunications indicators – Saint Lucia**

	<i><b>2016</b></i>	<i><b>2017</b></i>	<i><b>2018</b></i>	<i><b>2019</b></i>	<i><b>2020</b></i>
<b>Provider Revenue (EC\$M)</b>	\$233	\$216	\$189	\$147	\$141
<b>Investment (EC\$M)</b>	\$28	\$31	\$49	\$70	\$83
<b>Employment</b>	311	264	221	168	174
<b>Fixed line penetration</b>	20%	20%	21%	19%	16%
<b>Mobile penetration</b>	101%	100%	104%	83%	81%
<b>Fixed broadband penetration</b>	17.1%	18.1%	18.1%	8.8%	11.3%
<b>Mobile broadband penetration</b>	39.6%	45.8%	43.4%	50.0%	48.1%
<b>Local fixed traffic (million minutes)</b>	131	130	131	49	41
<b>Local mobile traffic (million minutes)</b>	142	147	147	78	75
<b>International incoming traffic (million minutes)</b>	9	7	6	5	9
<b>International outgoing traffic (million minutes)</b>	19	17	18	8	6

Source: ECTEL/operators

**Selected telecommunications indicators – St. Vincent and the Grenadines**

	<i><b>2016</b></i>	<i><b>2017</b></i>	<i><b>2018</b></i>	<i><b>2019</b></i>	<i><b>2020</b></i>
<b>Revenues (EC\$M)</b>	\$133	\$125	\$117	\$120	\$118
<b>Investment (EC\$M)</b>	\$17	\$18	\$24	\$13	\$15
<b>Employment</b>	195	161	188	148	164
<b>Fixed line penetration</b>	19%	19%	18%	16%	16%
<b>Mobile penetration</b>	99%	102%	102%	87%	91%
<b>Fixed broadband penetration</b>	16.7%	17.5%	18.9%	19.6%	22.9%
<b>Mobile broadband penetration</b>	46.8%	47.7%	14.9%	78.1%	75.1%
<b>Local fixed traffic (million minutes)</b>	22	21	19	21	17
<b>Local mobile traffic (million minutes)</b>	83	60	81	101	71
<b>International incoming traffic (million minutes)</b>	17	15	17	17	10
<b>International outgoing traffic (million minutes)</b>	13	11	9	11	6

Source: ECTEL/operators

## 9 Individual Licensees in the ECTEL Member States

**Table 8: Active Telecoms Service Operators in the ECTEL Member States at March 2020**

Licence	Fixed Public Network	Public Mobile Telecoms	Broadband Network and Services	Subscriber TV	Submarine Cable
<b>Dominica</b>	Cable & Wireless  SAT Telecommunications (Digicel +)	Cable & Wireless  Digicel	Cable & Wireless  SAT Telecommunications (Digicel +)	Cable & Wireless  SAT Telecommunications (Digicel +)	Cable & Wireless  Middle Caribbean Network
<b>Grenada</b>	Cable & Wireless  Columbus Communications (FLOW)	Cable & Wireless  Digicel  Affordable Aisle Communications Inc. (AISLECOM)	Cable & Wireless  Columbus Communications (FLOW)  Affordable Aisle Communications Inc. (AISLECOM)	Columbus Communications (FLOW)	Cable & Wireless  Southern Caribbean Fiber
<b>St. Kitts and Nevis</b>	Cable & Wireless  The Cable  Caribbean Cable Communications	Cable & Wireless  Wireless Ventures (Digicel)	Cable & Wireless  The Cable  Caribbean Cable Communications	The Cable  Caribbean Cable Communications	Cable & Wireless  Southern Caribbean Fiber
<b>Saint Lucia</b>	Cable & Wireless  Columbus Communications (FLOW)	Cable & Wireless  Digicel	Cable & Wireless  Columbus Communications (FLOW)  Spectra Inc.  Seva Communications Inc.	Cable & Wireless  Columbus Communications (FLOW)	Cable & Wireless  Antilles Crossing  Southern Caribbean Fiber
<b>St. Vincent and the Grenadines</b>	Cable & Wireless  Columbus Communications (FLOW)	Cable & Wireless  Digicel	Cable & Wireless  Columbus Communications (FLOW)	Cable & Wireless  Columbus Communications (FLOW)  Digicel SVD	Cable & Wireless  Southern Caribbean Fiber

Source: ECTEL/NTRCs

## EASTERN CARIBBEAN TELECOMMUNICATIONS AUTHORITY

### **ECTEL Mission Statement**

*“To provide transformative regulatory leadership which results in a competitive and innovative electronic communications sector.”*

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** is made up of the Ministers responsible for Telecommunications in the ECTEL states, and 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.

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