



# ANNUAL ELECTRONIC COMMUNICATIONS SECTOR REVIEW

## Liberalisation to Digital Transformation

### HIGHLIGHTS

- Sector Investments was **\$117 million**
- Mobile Penetration reached **93%**
- Fixed Broadband Penetration **24.2%**
- Local Calling Minutes **721**



**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 2020 to March 2021 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 September 15, 2022, 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**

|   | 2017   | 2018   | 2019  | 2020  | 2021  |
|---|--------|--------|-------|-------|-------|
| <b>Provider Revenues (EC\$M)</b>                        | \$726  | \$694  | \$690 | \$670 | \$607 |
| <b>Investment (EC\$M)</b>                               | \$100  | \$136  | \$190 | \$146 | \$117 |
| <b>Employment</b>                                       | 857    | 806    | 740   | 784   | 785   |
| <b>Fixed line Penetration</b>                           | 21.6%  | 20.3%  | 15.2% | 14.1% | 14.3% |
| <b>Mobile penetration</b>                               | 107.1% | 108.1% | 95.9% | 95.9% | 92.8% |
| <b>Fixed broadband penetration</b>                      | 20.7%  | 18.6%  | 23.0% | 25.3% | 24.2% |
| <b>Mobile broadband penetration</b>                     | 58.4%  | 63.7%  | 72.9% | 69.9% | 72.6% |
| <b>Local fixed traffic (million minutes)</b>            | 319    | 333    | 308   | 255   | 216   |
| <b>Local mobile traffic (million minutes)</b>           | 518    | 544    | 556   | 509   | 505   |
| <b>International incoming traffic (million minutes)</b> | 46     | 46     | 41    | 37    | 35    |
| <b>International outgoing traffic (million minutes)</b> | 61     | 61     | 52    | 35    | 32    |

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 2021 are:

- **Sector investment was approximately \$117 million:** Service providers invested in the upgrading and maintenance of networks, expanded fibre to the home networks, replaced critical equipment and created virtual enterprises during the year under review. However, investment spending was 20 per cent less than in the previous period.
- **Fixed broadband penetration shrunk slightly by 1.1 percentage points to 24.2 per cent:** Fixed broadband subscriptions was 127,600 subscriptions compared to 132,700 subscriptions in the prior year. This 4 per cent reduction in subscriptions resulted in a fixed broadband penetration rate of 24.2 per cent from 25.3 per cent during the same period last year.
- **Mobile broadband subscriptions expanded by 7 per cent:** Following a 4 per cent decline in the previous year, mobile broadband subscriptions grew by 5 per cent to 383,400 subscriptions. Consequently, the mobile broadband penetration rate climbed by 4 per cent to 72.7 per cent.
- **Call volumes from fixed and mobile networks declined 5 per cent:** During the review period, over 721 million local calling minutes were generated from fixed and mobile networks. Local calling minutes from mobile networks decreased slightly by under 1 per cent to approximately 505 million minutes and fixed originated local calling minutes dropped by 15 per cent to 216 million minutes.

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# 1

## 1.1 Overview

# ECTEL MEMBER STATES

### Summary of Findings – ECTEL Member States

In 2020, the Eastern Caribbean Central Bank (ECCB) estimated that economic activity in the ECCU economies contracted to a historic low of 14 per cent in contrast to a growth of 2.7 per cent in 2019, predominantly as a result of the measures imposed by the Governments of the region to contain the spread of the Covid-19 virus. Value added for the hotels and restaurants sector for the ECCU Member States declined by 63.2 per cent, transport, storage and communications by 25.7 per cent and construction by 17.1 per cent.

Following increased economic activity in 2019, all the ECTEL Member States all recorded negative economic activity in 2020. St. Vincent and the Grenadines recorded the lowest contraction of 2.7 per cent while Saint Lucia recorded the largest contraction of 23.8 per cent.

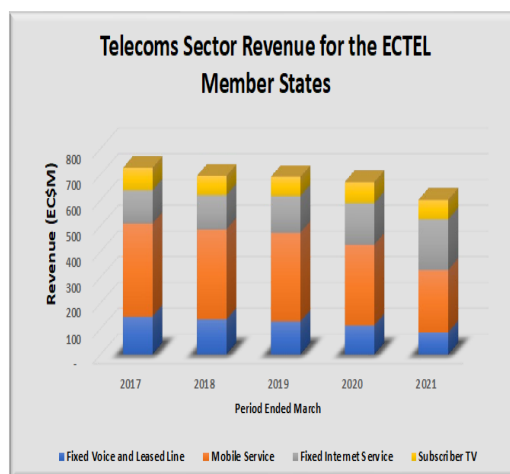
The performance of the electronic communications sector was consistent with the economic performance of the ECTEL Member States. The overall revenue generated by the sector fell by 9 per cent to \$607 million despite a positive performance in the fixed broadband sector while investment in the sector slumped by 20 per cent. Employment in the sector remained relatively stable during the review period improving modestly by 0.13 per cent.

## 1.2 – Revenue

Total revenues generated by the electronic communications sector in the ECTEL Member States continued its declining trend. The sector reported revenue of approximately \$607 million at the end of March 2021, a contraction of 9 per cent from the previous period (Figure 1.1). Reductions in revenue from the mobile voice (23 per cent), fixed voice (19 per cent) and subscriber television (6 per cent) services was responsible for this overall decline. Revenues from fixed broadband services recorded the sixth year of continuous growth, climbing by 21 per cent to \$198 million.

Mobile service contributed the largest share (40 per cent) to total revenue notwithstanding the 7 percentage drop when compared to the previous period. Fixed broadband share of revenue continues to climb annually. This year, fixed broadband revenue accounted for 33 per cent of overall revenue compared to 24 per cent in the previous period.

Figure 1.1: Operator Reported Revenue in the ECTEL Member States



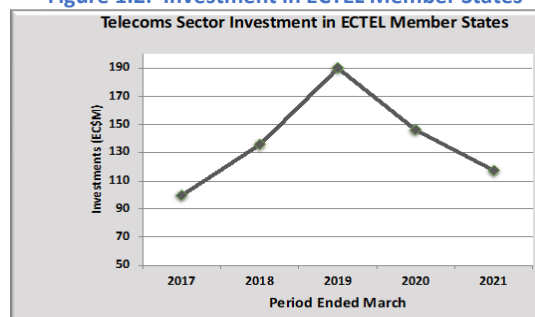
Source: ECTEL/operators

## 1.3 – Investment

Investment spending in the ECTEL Member States was approximately \$117 million, 20 per cent lower than the \$146 million recorded in the previous period (Figure 1.2). Consequently, the investment rate fell by 3 percentage points to 19 per cent compared to 22 per cent in the previous period.

The major spends included maintenance and upgrading of networks, expansion of fibre to the home networks, replacement of critical equipment and creation of virtual enterprise.

Figure 1.2: Investment in ECTEL Member States



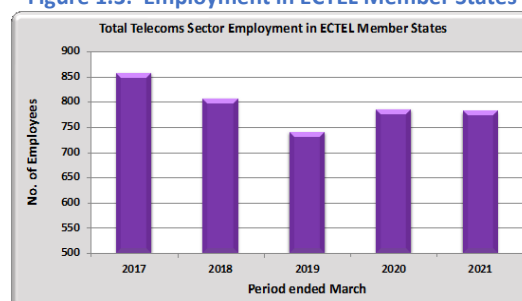
Source: ECTEL/operators

## 1.4 – Direct Employment

Employment in the electronic communications sector of the ECTEL Member States remained relatively steady during the period under review. At the end of March 2021, full-time staff employed in the sector was 785 only 1 employee or 0.13 per cent more than the 784 recorded in the previous period. (Figure 1.3).

Two ECTEL Member States recorded increases in employment while the other three recorded modest declines in employment levels.

Figure 1.3: Employment in ECTEL Member States



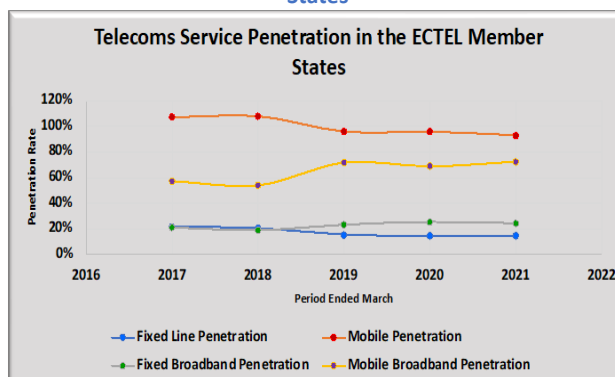
Source: ECTEL/operators

## 1.5 – Telecoms Service Penetration

During the period under review:

- Mobile broadband penetration grew by 2.7 percentage points to 72.7 per cent from 69.9 per cent in the previous period (Figure 1.4).
- Mobile penetration was 93 per cent compared to 95.9 per cent in the last review period.
- Fixed broadband penetration moved from 25.3 per cent to 24.2 per cent, 1.1 percentage points lower than the previous period.
- Fixed voice penetration increased by a mere 0.2 percentage points to 14.3 per cent.

Figure 1.4: Telecoms Service Penetration in ECTEL Member States



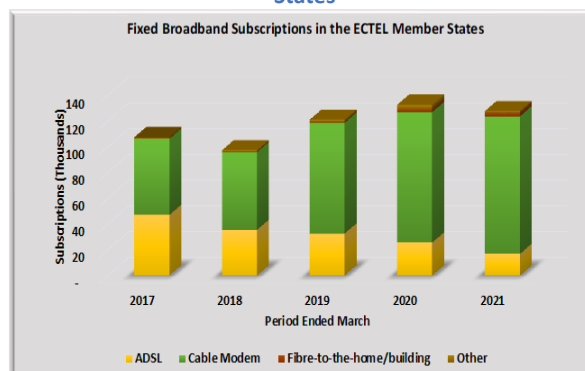
Source: ECTEL/operators

## 1.6 – BROADBAND SERVICES

### 1.6.1 – Fixed Broadband Service

Following a growth of 10 per cent in the previous period, the total number of fixed broadband subscriptions fell by 4 per cent to approximately 127,600 subscriptions at the end of March 2021. (Figure 1.5). This was as a result of reductions in ADSL and fixed wireless subscriptions by 34 per cent and 59 per cent respectively. However, cable modem broadband subscriptions, which accounted for the greatest share of total subscriptions (83 per cent), grew by 5 per cent. Fibre-to-the-Home/Building subscriptions continue to rise annually, increasing by 46 per cent and accounted for 2.4 per cent of total subscriptions compared to only 1.6 per cent in the previous period.

Figure 1.5: Fixed Broadband Subscriptions in ECTEL Member States



Source: ECTEL/operators

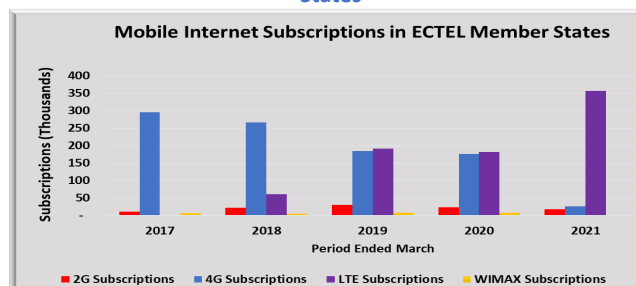
### 1.6.2 – Mobile Broadband Service

Total mobile data connections for the period under review increased by 3 per cent, recording approximately 401,200 connections (Figure 1.6). Of these connections 96 per cent (383,400 subscriptions) were mobile broadband connections which grew by 5 per cent when compared to the previous period.

Mobile LTE connections accounted for the majority of connections (93 per cent) followed by 3G/4G (6.6 per cent) and WiMax (under 1 per cent).

Prepaid subscriptions accounted for 87 per cent of total mobile broadband connections.

Figure 1.6: Mobile Internet Subscriptions in ECTEL Member States



Source: ECTEL/operators

## 1.7 – VOICE SERVICES

### 1.7.1 – Subscriptions

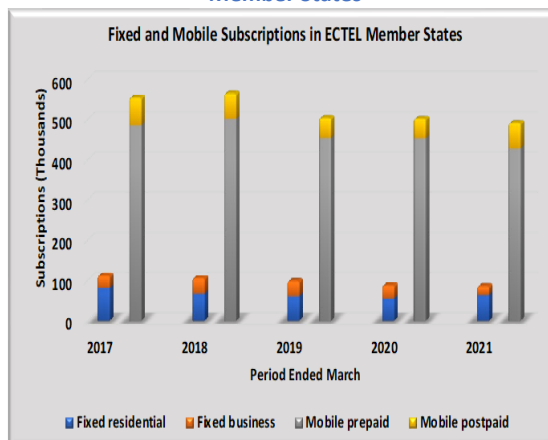
#### Mobile Voice Subscriptions

Mobile voice subscriptions dipped slightly by 2 per cent to approximately 490,000 subscriptions across the ECTEL Member States (Figure 1.7). Postpaid and prepaid subscriptions fell by 6 per cent and 29 per cent, respectively. Eight-seven (87) per cent of all mobile subscriptions were prepaid while 13 per cent were postpaid subscriptions.

#### Fixed Voice Subscriptions

Following 6 years of repeated reductions fixed voice subscriptions registered growth of 2 per cent at the end of March 2021. During the year under review, there were approximately 75,600 lines in service, of which approximately 81 per cent were residential lines and 19 per cent were business lines.

Figure 1.7: Fixed and Mobile Subscriptions in ECTEL Member States



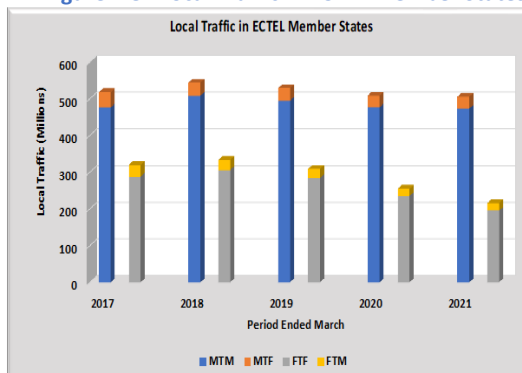
Source: ECTEL/operators

### 1.7.2 – Network Traffic

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

- Total calling minutes from the fixed and mobile networks was 721 million minutes, 5 per cent less than previous period (Figure 1.8).
- Mobile originated calling fell slightly by under 1 per cent to 505 million minutes.
- Local call traffic from fixed networks also declined by 15 per cent to 216 million minutes.
- The proportion of local calling minutes that originated from mobile networks was 70 per cent, 3 percentage points higher than the previous period.

Figure 1.8: Local Traffic in ECTEL Member States

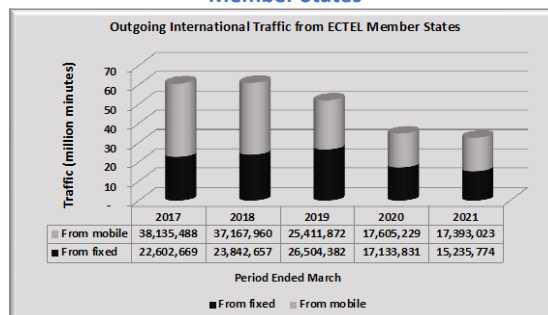


Source: ECTEL/operators

### 1.7.3 – International Outgoing Traffic

International outgoing traffic continues to fall annually. During the period under review, international outgoing traffic sank by 9 per cent to approximately 32 million minutes (Figure 1.9). Forty-eight per cent of overall minutes were generated from the fixed network while 52 per cent were generated from the mobile network. Traffic from mobile and fixed networks declined by 6 per cent and 11 per cent, respectively.

Figure 1.9: Outgoing International Traffic from ECTEL Member States



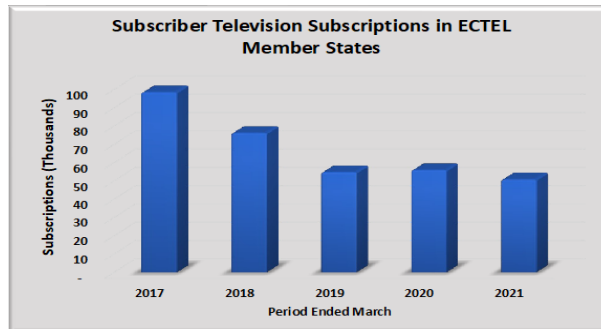
Source: ECTEL/operators

## 1.8 – Subscriber Television

Subscriber television connections in the ECTEL Member States contracted by 9 per cent to approximately 50,700 connections during the period under review. This is in contrast to the 55,900 connections recorded in the previous period (Figure 1.10).

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

**Figure 1.10: Subscriber Television Subscriptions in the ECTEL Member States**



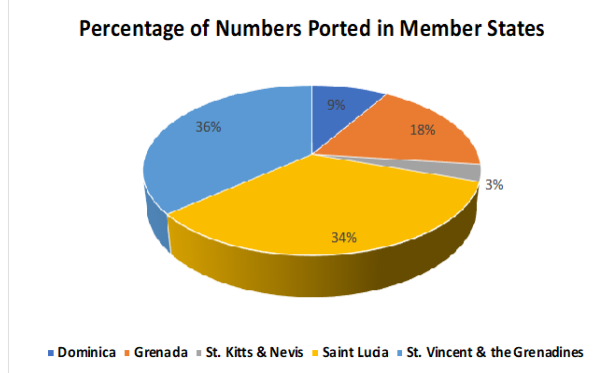
Source: ECTEL/operators

## 1.9 – Mobile Numbers Ported

During the period April to September 2020 an estimated 19,000 numbers were successfully ported in the ECTEL Member States. St. Vincent and the Grenadines accounted for the largest number of ports (36 per cent) followed by Saint Lucia (34 per cent) while St. Kitts and Nevis registered the lowest number of ports (3 per cent).

The month of August recorded the highest quantity of numbers ported while April recorded the lowest number of ports. The average monthly ports for the review period were 3,160 ports.

**Figure 1.11: Employment in ECTEL Member States**



Source: ECTEL/operators

## From Liberalisation to Digital Transformation

The telecommunications sector of the five (5) Member States of the Eastern Caribbean Telecommunications Authority (ECTEL) have come a long way since its liberalisation on 4<sup>th</sup> May 2000. The formulation of a regulatory framework to support liberalisation had become necessary to create a competitive environment to provide affordable, modern, efficient, competitive, and universally available telecommunications services to the people of the ECTEL Member States. The ECTEL Member States utilised a harmonised and coordinated approach to achieve a liberalised and competitive telecommunications sector.

Prior to the liberalisation of the telecommunications sector, the market had a single service provider with exclusive long-term licensing arrangements between each government and the provider. The barriers for other telecommunications providers to enter the market was extremely high and customers were plagued high tariffs for limited services. Access to telecommunications services were also a major issue and the absence of competition resulted in a lack of choices for consumers. Additionally, no regulation meant customers had little recourse in dealing with complaints and issues.

Liberalisation and regulation of the sector brought about many notable positive changes to the people of the region which include but is not limited to the following:

- The entry of other telecommunications providers such as Digicel, AT&T and Carib-Globe.
- The reduction in prices and an improvement in the services being offered to consumers.
- Improved telecommunication penetration rates. For example, the mobile penetration rate in 2002 was 7.8 per cent and is close to 100 per cent in 2022.
- Increased access to telecommunication services by a broad section of society.
- Improved quality of services and experiences provided by telecommunications providers.

Some positive changes which the people of the region have experienced due to liberalisation.

- The entry of other telecommunications providers such as Digicel, AT&T and Carib-Globe.
- The reduction in prices and an improvement in the services being offered to consumers.
- Improved telecommunication penetration rates. For example, the mobile penetration rate in 2002 was 7.8 per cent and is now close to 100 per cent in 2022.
- Increased access to telecommunication services by a broad section of society.
- Improved quality of services and experiences provided by telecommunications providers.

More specifically in the last few years, ECTEL's regulatory leadership has led to a number of significant achievements in the sector. In 2007, ECTEL recommended a framework for Universal Service Funds in all the Member States and has worked with the five (5) National Telecommunications Regulatory Commissions (NTRCs) to develop a Universal Service Fund in each Member State. The USF, as it is called, allows for fees collected from service providers to be used to fund projects aimed at expanding affordable access to electronic communications

services and devices. Since the launch of the USFs, a number of low-income households, persons with disabilities, schools, community access points, and health centres, have benefited from free or low-cost, high-quality internet access. The continuing need for the USF was emphasised during the COVID-19 pandemic, and several students were able to participate in remote learning using devices and subsidised services provided by the USF.

In 2019, Mobile Number Portability was implemented in all the ECTEL Member States. This was a significant milestone in the development of the sector, as number portability provides benefits to service providers and consumers alike. Consumers are now free to change service provider and keep their mobile number, relieving them of the difficulty of having to notify family, friends, and clients that their number has changed. Mobile number portability also lowers the barriers to market entry, as a new service provider may find it easier to attract customers if they can keep their numbers.

ECTEL is committed to ensuring that affordable electronic communications services are provided to all members of society. As such, it has developed recommendations for reductions in the price of fixed services and the slowing of potential increases in mobile and broadband services. In 2022, ECTEL recommended new mobile safeguards, which require all mobile service providers to inform customers when they are using a service out of plan, to reduce the likelihood of a customer unknowingly depleting their prepaid credit.

As we move to regulating in the era of the digital economy and digital transformation the challenges are different and ever changing and regulation must seek to keep abreast with technical advancements and emerging and evolving technologies such as Artificial Intelligence, Big Data, IOT, Cloud Computing, Blockchain, autonomous vehicles and 5G. Thus, our regulatory framework must be amended to address these challenges.

The process of replacing the Telecommunications Act currently in force in four (4) of the Member States with the new Electronic Communications Bill (EC Bill) began in 2009. The EC Bill includes, among other things, provisions to broaden the scope of regulations from telecommunications to Electronic Communications, and to address matters including but not limited to: mergers and acquisitions within the ECTEL Contracting States, preservation of an open Internet with the adoption of Net Neutrality provisions, the establishment of the NTRCs as body corporates, the setting up of a tribunal independent of the NTRC, to hear unresolved disputes between telecommunications providers and customers, and the inclusion of more penalties for breach of the legislation.

On 18<sup>th</sup> February 2021, the Government of the Federation of St. Kitts and Nevis was the first ECTEL Member State to pass the Electronic Communications Act (EC Act). In the coming year the ECTEL Directorate looks forward to the promulgation of the EC Act in the other Member States of the Commonwealth of Dominica, Grenada, Saint Lucia and St. Vincent and the Grenadines, as a matter of urgency, so that the ECTEL regulatory system can have a more robust mechanism for regulating the activities of electronic communications providers and ensuring protection of consumers' rights.

# 2

# Commonwealth of Dominica



## 2.1 Overview

According to the Eastern Caribbean Central Bank (ECCB), economic activity in the Commonwealth of Dominica is estimated to have contracted by approximately 17.1 per cent in 2020 compared to a growth of 3.5 per cent in 2019, due to the adverse impact of the Covid-19 pandemic. Value added in the hotels and restaurants sectors constricted considerably by 61.1 per cent and construction by 56.6 per cent. Transport, storage and communications declined by 31.7 per cent in contrast to an expansion of 6.3 per cent in the previous period. However, several sectors recorded positive performances. Value added for the manufacturing sector grew by 4.6 per cent and agriculture, livestock and forestry sector by 5.5 per cent. The consumer price index increased by 1.7 per cent in 2020 with growth in the prices of the food and non-alcoholic beverages (1.9 per cent) and housing, utilities, gas and fuels (3.0 per cent).

The electronic communications sector experienced a mixed performance during the period under review. Revenue from the sector declined by approximately 18 per cent while employment and investment grew by 4 per cent and 72 per cent respectively.

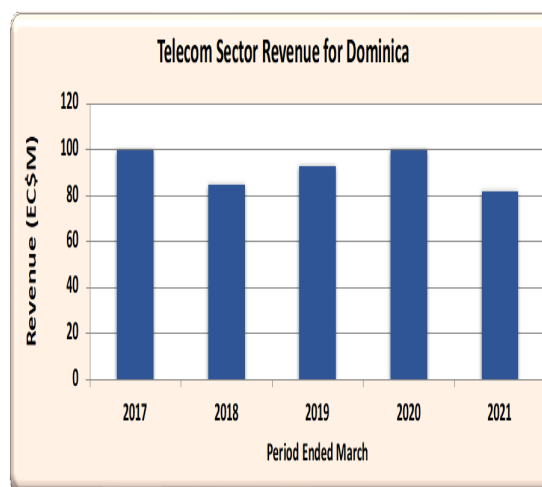
## 2.2 - Operator Related Revenue

Electronic communications service providers in the Commonwealth of Dominica reported \$82 million in total revenue for the period ending March 2021, a reduction of 18 per cent in contrast to the previous period (Figure 2.1).

Shrinkage in revenues from fixed voice, mobile, and subscriber television services by 32 per cent, 30 per cent and 9 per cent respectively contributed to the overall decline in revenue. However, revenue from fixed broadband service continued its upward trajectory and grew substantially by 52 per cent to pre-Hurricane Marie levels to approximately \$15 million.

Mobile services maintained its position as the dominant contributor to total revenue at 46 per cent, followed by subscriber TV at 24 per cent, fixed broadband at 18 per cent and fixed voice services at 12 per cent.

Figure 2.1: Operator Related Revenue in Dominica

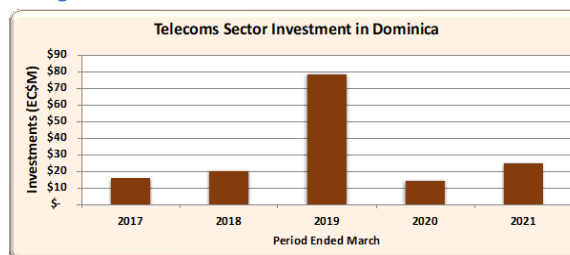


Source: ECTEL/operators

## 2.2 – Investment

During the period under review investments by the electronic communications service providers in the Commonwealth Dominica surged by 75 per cent to approximately \$25 million in contrast to \$15 million in the previous period (Figure 2.2). Eighty-three per cent of investments were made in the public mobile telecommunications and subscriber TV networks, 10 per cent in internet network/services and 7 per cent in fixed public telecommunications network.

Figure 2.2: Telecoms Sector Investment in Grenada

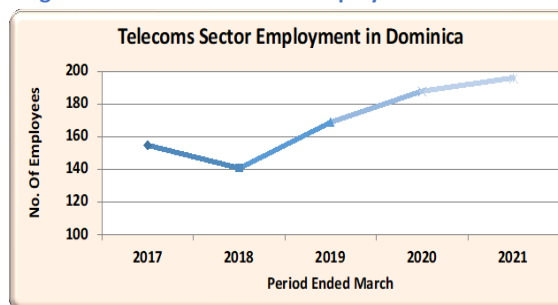


Source: ECTEL/operators

## 2.3 – Direct Employment

At the end of March 2021, approximately 196 persons were employed in the electronic communications sector in the Commonwealth of Dominica as compared to 188 at the end of March 2020 (Figure 2.3). This is an increase of 4 per cent over the previous period.

Figure 2.3: Telecoms Sector Employment in Dominica



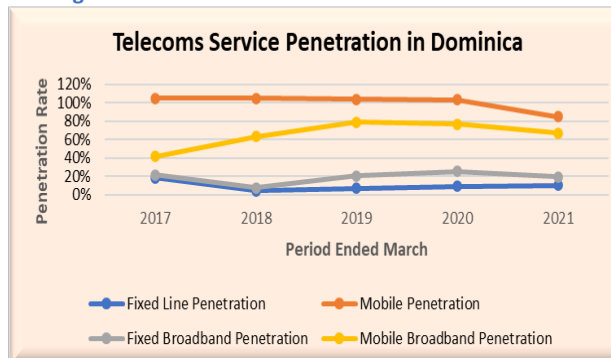
Source: ECTEL/operators

## 2.4 – Telecoms Service Penetration

For the period under review the following penetration rates were realised:

- Fixed broadband penetration declined by 6 percentage points to 19.2 per cent (Figure 2.4).
- Fixed line penetration increased by 1 percentage point to 10 per cent.
- Mobile penetration rate was 85 per cent compared to 103 per cent in the previous period.
- Mobile broadband penetration was 66.9 per cent, or approximately 10 percentage points lower than the previous period.

Figure 2.4: Telecoms Service Penetration in Dominica



Source: ECTEL/operators

## 2.5 – BROADBAND SERVICES

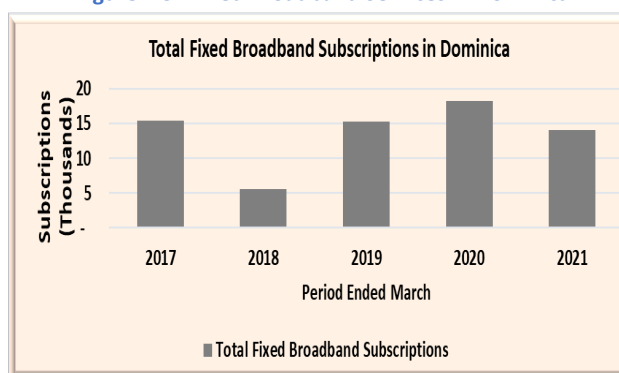
### 2.5.1 – Fixed Broadband Services

Following growth of 20 per cent in the previous period, total fixed broadband connections slumped by 23 per cent to 14,080 subscriptions at the end of March 2021 (Figure 2.5).

Like in previous periods cable modem subscriptions accounted for majority of the total fixed broadband subscriptions, at 80 per cent. However, cable modem subscriptions declined by 11 per cent when compared to the previous period. ADSL's subscriptions continue to decline recording a 36 per cent reduction when compared to the previous period and accounted for 20 per cent of all subscriptions.

Correspondingly, the fixed broadband penetration rate also experienced a 6-percentage point reduction because of the regression in the total number of subscriptions.

Figure 2.5: Fixed Broadband Services in Dominica

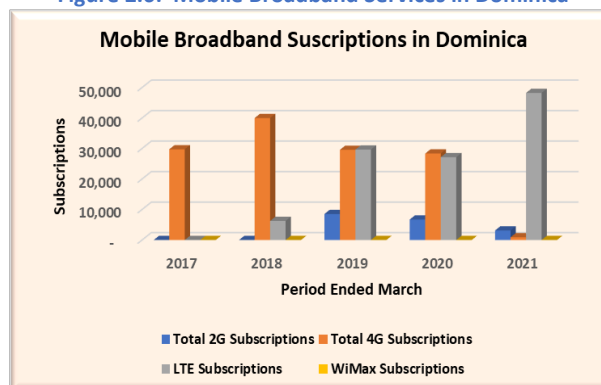


Source: ECTEL/operators

### 2.5.2 – Mobile Broadband Services

Total mobile broadband subscriptions declined by 11 per cent to an estimated 49,100 subscriptions during the period under review (Figure 2.6). Two per cent of total mobile broadband connections were made over the 3G/4G network while 98 per cent of these connections were made over the LTE network. Of the 49,100 connections, prepaid subscriptions accounted for 87 per cent.

Figure 2.6: Mobile Broadband Services in Dominica



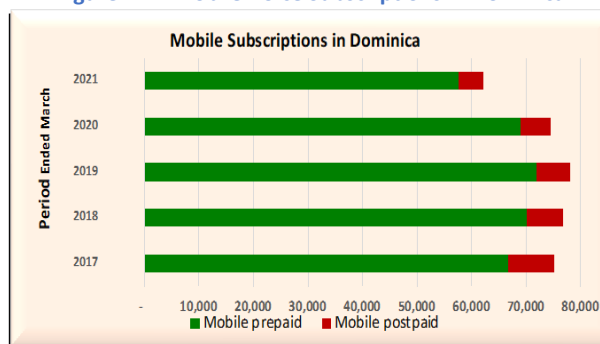
Source: ECTEL/operators

## 2.6 – MOBILE VOICE SERVICES

### 2.6.1 – Mobile Voice Subscriptions

At the end of March 2021, mobile voice subscriptions shrunk by 17 per cent to 62,200 subscriptions (Figure 2.7). Declines of 17 per cent in both prepaid and postpaid mobile subscriptions accounted for the reduction in mobile voice subscriptions for the period under review. Prepaid subscriptions continue to account for most of the mobile voice subscriptions and remained unchanged at 93 per cent while postpaid subscriptions again accounted for 7 per cent of total mobile voice subscriptions.

Figure 2.7: Mobile Voice Subscriptions in Dominica



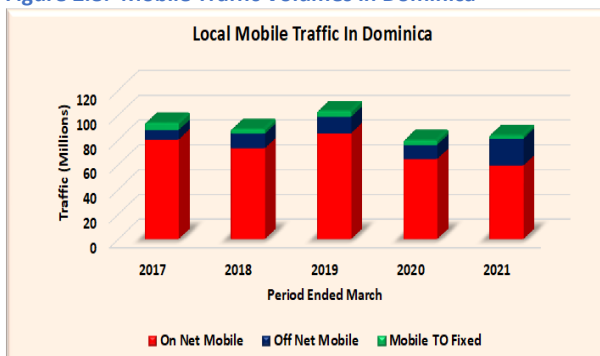
Source: ECTEL/operators

### 2.6.2 – Mobile Traffic Volumes

Local mobile calling minutes rose by 5 per cent to 84 million minutes in the Commonwealth of Dominica during the period under review (Figure 2.8). This growth was as a result of an 87 per cent escalation in off-net calls. However, on-net calls and calls to fixed networks declined by 8 per cent, and 24 per cent respectively. Mobile to mobile calling accounted for the largest share, 97 per cent, of all local mobile traffic.

Outgoing international minutes originating from the mobile networks contracted by almost 6 per cent to 2.8 million minutes compared to 2.9 million in the previous period.

Figure 2.8: Mobile Traffic Volumes in Dominica



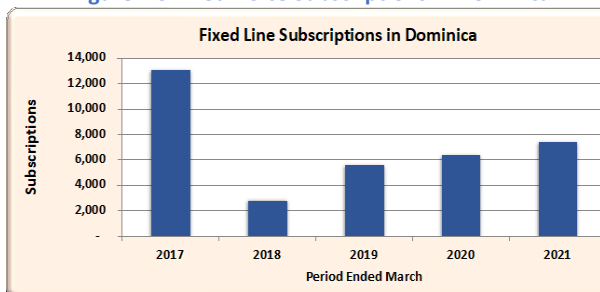
Source: ECTEL/operators

## 2.7 – FIXED VOICE SERVICES

### 2.7.1 – Fixed Voice Subscriptions

Growth in the total number of subscriptions to fixed voice services persisted in the Commonwealth of Dominica. At the end of March 2021, fixed voice subscriptions were approximately 7,500, 17 per cent higher than the 6,400 subscriptions recorded in the previous period (Figure 2.9). This progression was driven by a 34 per cent rise in fixed voice residential subscriptions. The decrease of 4 per cent in business fixed voice subscriptions dampened the overall increase in total subscriptions.

Figure 2.9 Fixed Voice Subscriptions in Dominica



Source: ECTEL/operators

### 2.7.2 – Fixed Traffic Volumes

Despite the overall growth in fixed voice subscriptions, calls originating from the fixed networks in Dominica declined during the period under review (Table 2.1). Total calls originating from the fixed networks were 17 per cent less than in the previous period. Total local fixed voice minutes was approximately 8 million minutes in contrast to 9 million minutes in the previous period.

International outgoing calls from fixed networks accounted for 34 per cent of total outgoing international calls. Electronic communications service providers reported approximately 1.4 million international outgoing minutes originating from fixed networks, almost 50 per cent less when compared to the 2.8 million minutes in the previous period.

**Table 2.1: Fixed Traffic Volumes in Dominica (million minutes)**

|             | <i>Fixed to Fixed</i> | <i>Fixed to Mobile</i> | <i>Fixed to International</i> |
|-------------|-----------------------|------------------------|-------------------------------|
| <b>2017</b> | 9                     | 5                      | 3                             |
| <b>2018</b> | 9                     | 3                      | 6                             |
| <b>2019</b> | 8                     | 2                      | 7                             |
| <b>2020</b> | 7                     | 2                      | 3                             |
| <b>2021</b> | 5                     | 2                      | 1                             |

Source: ECTEL/operators

### 2.8 – Subscriber Television

The total number of connections to subscriber television service was 10,500 subscriptions, 25 per cent fewer than the 14,000 subscriptions recorded in 2020. This service is provided by the two main electronic communications service providers operating in the Commonwealth of Dominica. Subscriber television providers, offer basic packages comprising 110 channels at a price of \$78.19 and 87 channels at a price of \$115 per month respectively (Table 2.2).

**Table 2.2: Basic Subscriber Television Packages in Dominica**

| <i>Operator</i>  | <i>Monthly Rate</i> | <i>Total Channels</i> | <i>Local Channels</i> |
|------------------|---------------------|-----------------------|-----------------------|
| Cable & Wireless | \$78.19             | 110                   | 10                    |
| Digicel +        | \$115               | 87                    | 12                    |

Source: ECTEL/operators

# 3

# Grenada

## 3.1 Overview

The ECCB estimated that the Grenadian economy experienced the deepest recession recorded in its history in 2020 after having recorded seven years of consecutive growth. The economy contracted by 11.7 per cent in 2020 following an expansion of 3.1 per cent in the previous period due to the negative impact of the Covid-19 pandemic. The value added for the largest contributor to GDP, education declined by 1.2 per cent, hotels and restaurants sector dropped significantly by 66.4 per cent, construction by 13 per cent and manufacturing by 20 per cent. In 2020, the transport, storage and communication sector shrunk by 16.2 per cent compared to 6.97 per cent in 2019. More specifically, the communication sector's contribution to GDP decreased by 10 per cent compared to an expansion of 2 per cent in the previous period.

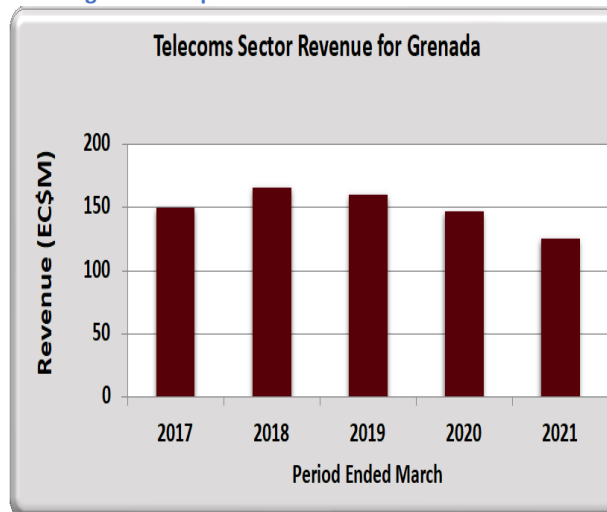
The performance of the electronic communications sector in Grenada mirrored the negative performance of the Grenadian economy. During the year under review, the sector experienced a 15 per cent contraction in revenue while investment in the sector dipped by approximately 7 per cent and employment by 3 per cent.

### 3.2 – Revenue

The electronic communications sector in Grenada generated an estimated \$125 million in revenue during the year ended March 2021, 15 per cent lower than the \$147 million generated in the previous period (Figure 3.1). Despite the overall decline in revenue fixed internet service revenue continued to grow, increasing by 12 per cent when compared to the previous period.

Similar to preceding years, mobile services accounted for the largest share of revenue and contributed 40 per cent to overall revenue. Fixed internet services accounted for 31 per cent of total revenue, 7 percentage points higher than the period before while fixed voice and subscriber television services contributed 20 per cent and 9 per cent respectively to overall revenue.

Figure 3.1: Operator Related Revenue in Grenada

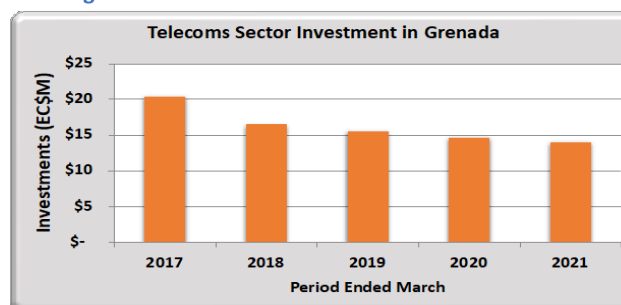


Source: ECTEL/operators

### 3.3 – Investment

Investment in the electronic communications sector in Grenada continues to trend downward. During the period under review electronic service providers in Grenada invested approximately \$14 million in their facilities, purchasing and servicing of equipment and in their internet, mobile and subscriber television networks (Figure 3.2). This was 7 per cent less than the \$15 million invested in the sector in the previous period.

Figure 3.2: Telecoms Sector Investment in Grenada

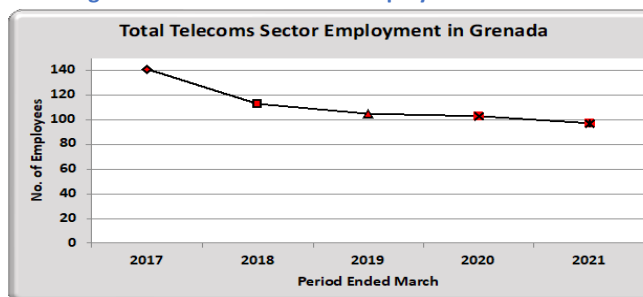


Source: ECTEL/operators

### 3.4 – Direct Employment

Employment generated by electronic communications service providers in Grenada has been on the decline in the last 4 years. At the end of March 2021, the sector employed 100 full time employees versus 103 employed in the previous period (Figure 3.3). Additionally, the sector employed a total of 9 parttime staff during the period under review.

Figure 3.3: Telecoms Sector Employment in Grenada



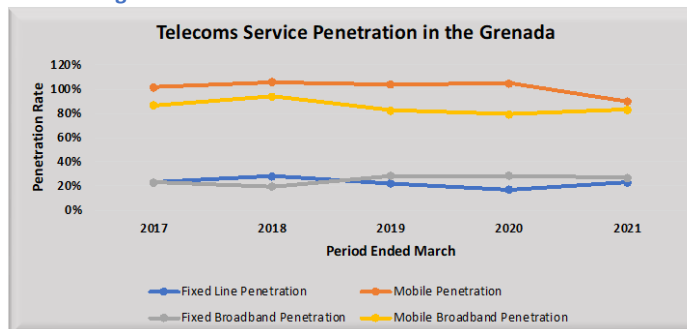
Source: ECTEL/operators

### 3.5 – Telecoms Service Penetration

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

- Mobile broadband penetration grew by 4.7 percentage points to 84.2 per cent (Figure 3.4).
- Mobile penetration was down by 16 percentage points to 89 per cent.
- Fixed broadband penetration changed slightly, declining by 1.5 percentage points to 26.9 per cent.
- Fixed voice penetration expanded by 6 percentage points to 23 per cent.

Figure 3.4: Telecoms Service Penetration in Grenada



Source: ECTEL/operators

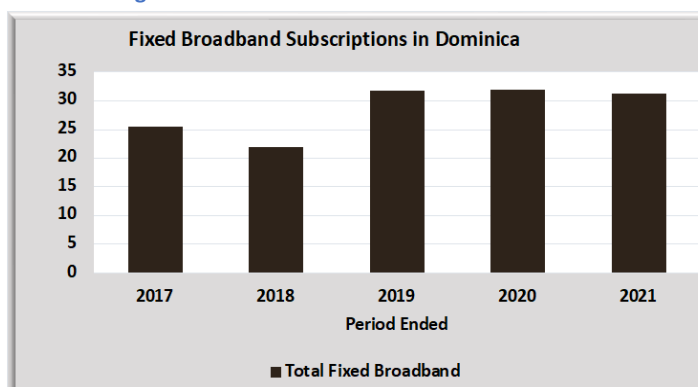
### 3.6 – BROADBAND SERVICES

#### 3.6.1 – Fixed Broadband Services

For the period under review, there were approximately 30,500 subscriptions to fixed broadband services in Grenada, 5 per cent lower than the 32,000 subscriptions recorded in the previous period (Figure 3.5). This reduction resulted from a 53 per cent decline in ADSL connections. However, cable modem connections which accounts for the largest share of total connections (84 per cent) grew by 6 per cent.

The fixed broadband penetration rate declined by 1.5 percentage points to 26.9 per cent due to the reduction in fixed broadband subscriptions.

Figure 3.5: Fixed Broadband Services in Grenada

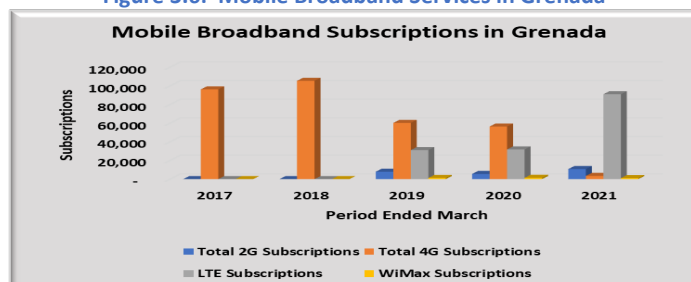


Source: ECTEL/operators

#### 3.6.2 – Mobile Broadband Service

During the period under review, mobile broadband subscriptions in Grenada grew by 7 per cent to approximately 95,500 subscriptions (Figure 3.6). Eighty-nine (89) per cent of all mobile broadband subscriptions were prepaid while 11 per cent were postpaid. LTE connections accounted for a substantial proportion of total subscriptions (95 per cent) while 3G/4G and WiMax connections accounted for 4 per cent and 1 per cent of total subscriptions respectively.

Figure 3.6: Mobile Broadband Services in Grenada



Source: ECTEL/operators

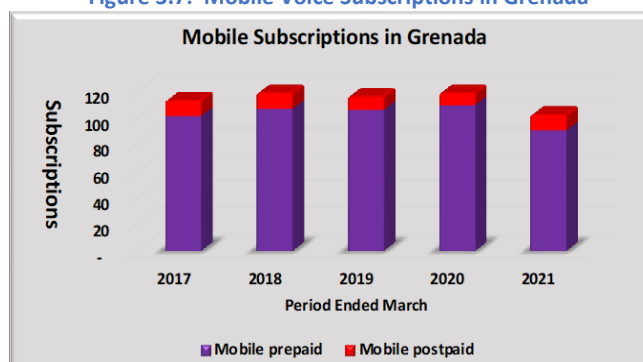
### 3.7 – MOBILE VOICE SERVICES

#### 3.7.1 – Mobile Voice Subscriptions

In Grenada, mobile voice subscriptions dwindled by 15 per cent to approximately 101,000 subscriptions at the end of March 2021 compared to 118,800 subscriptions in the previous period (Figure 3.7). An 18 per cent fall in prepaid subscriptions contributed to the overall contraction in mobile voice subscriptions. However, postpaid subscriptions rose by 28 per cent to 11,600 subscriptions.

Prepaid subscriptions continue to account for the majority of total subscriptions, 89 per cent while postpaid subscriptions accounted for 11 per cent.

Figure 3.7: Mobile Voice Subscriptions in Grenada



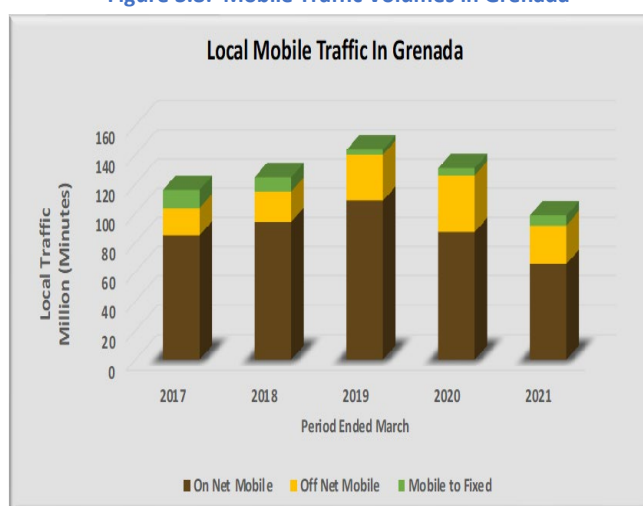
Source: ECTEL/operators

#### 3.7.2 – Mobile Traffic Volumes

Local traffic originating from mobile networks also dropped when compared to the previous period (Figure 3.8). Total local traffic originating from mobile networks contracted by 25 per cent to approximately 98 million minutes, on account of reductions in on-net and off-net mobile voice traffic of 25 per cent and 32 per cent respectively. However, mobile to fixed traffic grew by 40 per cent. On-net mobile traffic accounted for 66 per cent of total mobile voice traffic while off-net mobile and mobile to fixed accounted for 27 per cent and 7 per cent of total mobile voice traffic respectively.

International outgoing traffic originating from mobile networks also declined by 13 per cent to an estimated 4.6 million minutes.

Figure 3.8: Mobile Traffic Volumes in Grenada



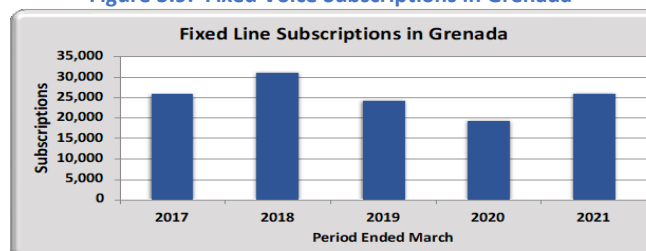
Source: ECTEL/operators

### 3.8 – FIXED VOICE SERVICES

#### 3.8.1 – Fixed Voice Subscriptions

Following a contraction of 21 per cent in the previous period, total fixed voice subscriptions climbed by 35 per cent to approximately 26,000 subscriptions at the end of March 2021 (Figure 3.9). Residential and business subscriptions rose by 34 per cent and 36 per cent respectively.

Figure 3.9: Fixed Voice Subscriptions in Grenada



Source: ECTEL/operators

### 3.8.2 – Fixed Traffic Volumes

At the end of March 2021, a total of approximately 124 million fixed network originated minutes were recorded in Grenada. This was 28 per cent less than the 172 million minutes recorded during the previous period (Table 3.1). The contraction in minutes resulted from reductions in all categories of fixed network originated traffic.

International outgoing calls from fixed networks which accounted for 43 per cent of total outgoing international calls expanded by 64 per cent moving from 2.1 million in the prior year to 3.5 million minutes in the period under review.

**Table 3.1: Fixed Traffic Volumes in Grenada**

| Fixed Traffic Volume in Grenada (million minutes) |      |      |      |      |      |
|---|------|------|------|------|------|
|   | 2015 | 2018 | 2019 | 2020 | 2021 |
| Fixed to Fixed                                    | 126  | 143  | 205  | 167  | 120  |
| Fixed to Mobile                                   | 8    | 7    | 6    | 5    | 4    |
| Fixed to International                            | 4    | 3    | 6    | 2    | 3.5  |

Source: ECTEL/operators

### 3.9 – Subscriber Television

For the first time since 2016 subscriptions to subscriber/pay television services recorded an upturn. During the period under review subscriptions increased by 1 per cent to approximately 12,700 subscriptions compared to 12,500 in the previous period. The main subscriber television provider offers a basic package comprising 76 channels at a price of \$69.99 per month (Table 3.2)

**Table 3.2: Basic Subscriber Television Packages in Grenada**

| Operator                       | Monthly Rate | Total channels | Local Channels |
|--------------------------------|--------------|----------------|----------------|
| Columbus Communications (FLOW) | \$69.99      | 76             | 6              |

Source: ECTEL/operators

# 4 St. Kitts and Nevis

## 4.1 Overview

Economic activity in the Federation of St. Kitts and Nevis is estimated to have declined by 10.7 per cent in 2020 following an expansion of 2.1 per cent in 2019 due to the Covid-19 pandemic and the associated lockdowns and other containment measures. This contraction was reflected in most of the twin island's major sectors. Value added contributions from hotels and restaurants shrank by 74.1 per cent, construction by 16 per cent and manufacturing by 6 per cent. The value added in the transport, storage and communications sector fell by 27.6 per cent in 2020 compared to growth of 3 per cent in 2019.

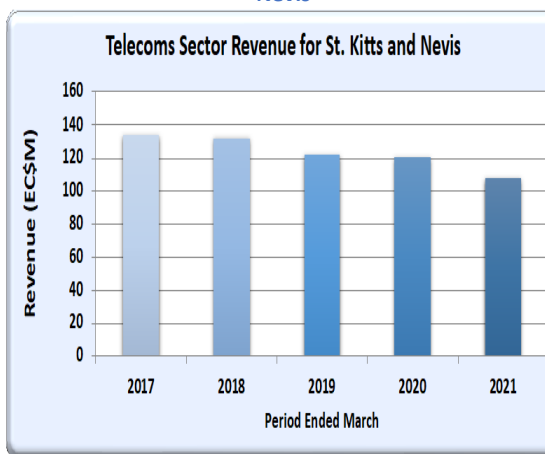
The electronic communications sector was not immune to the economic downturn as electronic communications service providers reported contractions in revenue (11 per cent), investments (59 per cent) and employment (10 per cent) when compared to the previous period.

## 4.2 – Operator Related Revenue

For the period ending March 2021, the electronic communications sector in St. Kitts and Nevis generated an estimated \$108 million in revenue, 11 per cent lower than the previous period (Figure 4.1). This decline resulted mainly from reductions in revenue from fixed voice (34 per cent) and mobile service (24 per cent). Despite the overall reduction, fixed broadband service and subscriber television revenue grew by 18 per cent and 27 per cent respectively.

For the first time fixed broadband accounted for the largest component of revenue (40 per cent) having grown by 9 percentage points relative to the previous period. This was followed by mobile service which accounted for 38 per cent. Revenues from fixed voice and subscriber television accounted for 12 per cent and 5 per cent of overall revenue respectively.

Figure 4.1: Operator Related Revenue in St. Kitts and Nevis



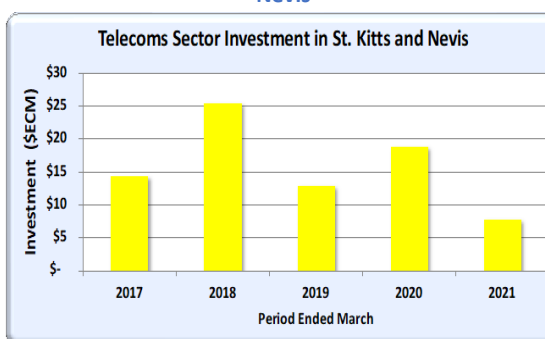
Source: ECTEL/operators

## 4.3 – Investment

During the period under review, total investment in the electronic communications sector in the Federation of St. Kitts and Nevis was just under \$8 million, a reduction of 59 per cent when compared to the \$19 million invested in the previous period (Figure 4.2).

Electronic communications service providers expanded the Fiber to the Home (FTTH) and internet networks, created virtual enterprises and undertook network maintenance works during the period under review.

Figure 4.2: Telecoms Sector Investment in St. Kitts and Nevis

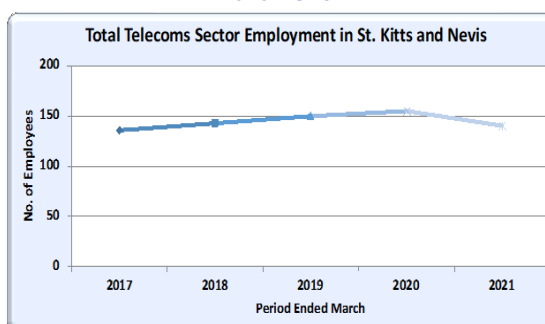


Source: ECTEL/operators

## 4.4 – Direct Employment

One hundred and forty (140) persons were directly employed in the electronic communications sector at the end of March 2021. This was 15 fewer employees or 10 per cent lower than total employed in the previous period (Figure 4.3).

Figure 4.3: Telecoms Sector Employment in St. Kitts and Nevis



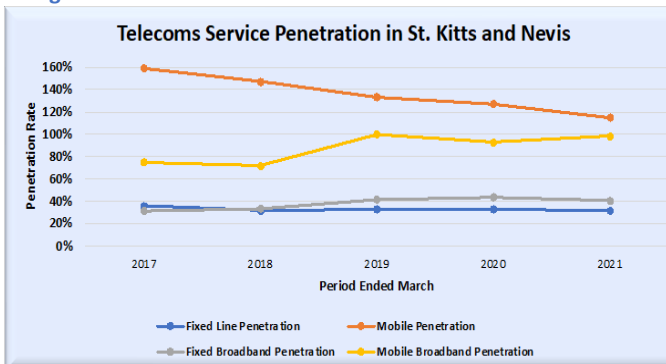
Source: ECTEL/operators

#### 4.5 – Telecoms Service Penetration

At the end of March 2021:

- Mobile broadband penetration was 98 per cent, a decrease of approximately 8 percentage points from the previous period (Figure 4.4).
- Mobile penetration was 115 per cent, 12 percentage points lower than the previous period.
- Fixed broadband penetration fell by 3 percentage points to 40.8 per cent.
- There was a slight change in fixed voice penetration which moved from 33 per cent in 2019/2020 to 32 per cent in 2020/2021.

Figure 4.4: Telecoms Service Penetration in St. Kitts and Nevis



Source: ECTEL/operators

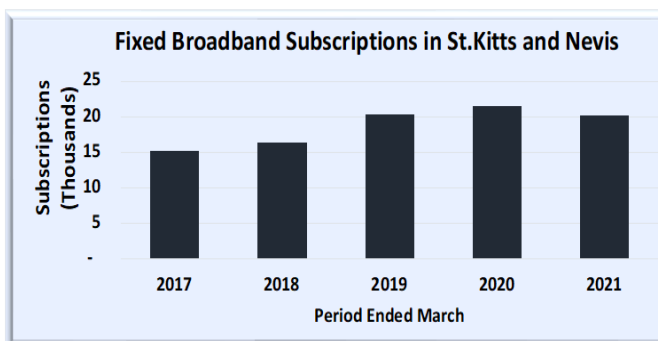
#### 4.6 – BROADBAND SERVICES

##### 4.6.1 – Fixed Broadband Services

Subscriptions to fixed broadband services fell by 7 per cent to a total of 20,100 during the period under review (Figure 4.5). Correspondingly, the fixed broadband penetration rate decreased by 3 percentage points from 43.8 per cent in the previous period to 40.8 per cent during the period under review.

ADSL connections grew by 1 per cent and accounted for 46 per cent of total connections while cable modem connections fell by 11 per cent and accounted for 54 per cent of overall connections.

Figure 4.5: Total Fixed Broadband Subscriptions in St. Kitts and Nevis

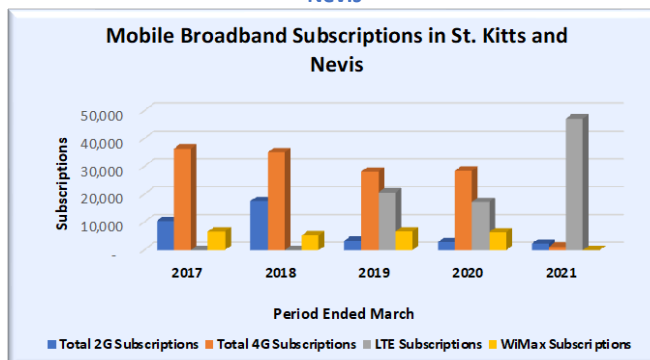


Source: ECTEL/operators

##### 4.6.2 – Mobile Broadband Service

Mobile broadband subscriptions decreased by 7 per cent during the period under review. An estimated 48,400 mobile broadband subscriptions were recorded compared to 52,200 in the previous period (Figure 4.6). Prepaid subscriptions accounted for 84 per cent of total subscriptions while postpaid subscriptions accounted for 16 per cent. Ninety per cent of total subscriptions comprised LTE connections compared to only 62 per cent in the previous year. Only 2 per cent of total subscriptions were 3G/4G (HSPA/UMTS/EV-DO) connections.

Figure 4.6: Total Mobile Broadband Subscriptions in St. Kitts and Nevis



Source: ECTEL/operators

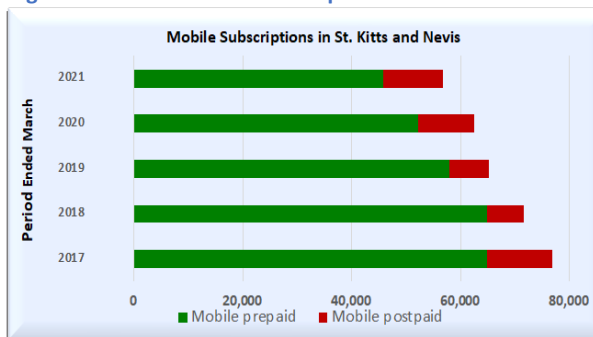
## 4.7 – MOBILE VOICE SERVICES

### 4.7.1 – Mobile Voice Subscriptions

At the end of March 2021 mobile voice subscriptions in St. Kitts and Nevis totaled approximately 56,700 subscriptions, 9 per cent less than the 62,500 subscriptions recorded in the previous period (Figure 4.7).

Prepaid mobile subscriptions accounted for 81 per cent of total subscriptions but declined by 12 per cent when compared to the previous period. Postpaid subscriptions accounted for 19 per cent of total subscriptions and grew by 5 per cent when compared to the previous period.

Figure 4.7: Mobile Voice Subscriptions in St. Kitts and Nevis



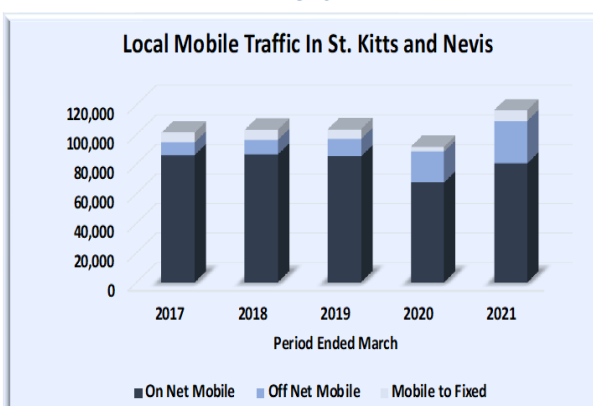
Source: ECTEL/operators

### 4.7.2 – Mobile Traffic Volumes

Local mobile traffic jumped by approximately 27 per cent to 116 million minutes during the review period (Figure 4.8). On-net mobile traffic increased by 19 per cent and accounted for 69 per cent of total local mobile traffic. Off-net traffic also grew by 38 per cent and accounted for 25 per cent of total traffic. Mobile to fixed traffic recorded the most significant growth rising by 118 per cent and accounting for 6 per cent of traffic.

Mobile originated outgoing international calling minutes declined by 17 per cent to approximately 3 million minutes and accounted for 40 per cent of total international outgoing calling minutes.

Figure 4.8: Local Mobile Traffic Volumes in St. Kitts and Nevis



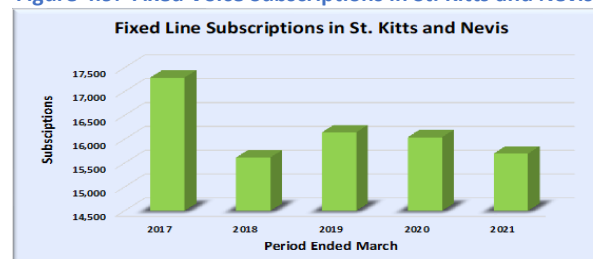
Source: ECTEL/operators

## 4.8 – Fixed Voice Services

### 4.8.1 – Fixed Voice Subscriptions

For the period ended March 2021, total fixed lines subscriptions registered a 2 per cent reduction when compared to the previous period (Figure 4.9). Approximately 15,700 subscriptions were recorded during the period under review with residential and business subscriptions falling by 1 per cent and 4 per cent respectively. Fixed voice penetration also declined slightly by 1 percentage point to 32 per cent.

Figure 4.9: Fixed Voice Subscriptions in St. Kitts and Nevis



Source: ECTEL/operators

#### 4.8.2 – Fixed Traffic Volumes

During the period under review an estimated 19 million local fixed calling minutes were recorded in St. Kitts and Nevis, 33 per cent more than in the previous period (Table 4.1). On-net calling grew by 21 per cent and accounted for 82 per cent of the overall local fixed traffic. Fixed to mobile traffic also climbed by 140 per cent and accounted for 18 per cent of total local fixed traffic.

However, international outgoing minutes from the fixed network declined by 16 per cent when compared to the previous period.

**Table 4.1: Fixed Traffic Volumes in St. Kitts and Nevis**

| Fixed Traffic Volume in St. Kitts and Nevis (million minutes) |      |      |      |      |      |
|---|------|------|------|------|------|
|   | 2017 | 2018 | 2019 | 2020 | 2021 |
| Fixed to Fixed  | 17   | 17   | 15   | 13   | 16   |
| Fixed to Mobile   | 3    | 3    | 3    | 2    | 3    |
| Fixed to International  | 6    | 6    | 7    | 5    | 4.6  |

Source: ECTEL/operators

#### 4.9 – Subscriber Television

The total number of subscriber television subscriptions in St. Kitts and Nevis dropped by 15 per cent to approximately 9,500 during the period under review. Cable TV subscriptions (analog and digital) accounted for 89 per cent of total subscriptions while IPTV accounted for 11 per cent. The cheapest entry level package offers customers 75 channels at a cost of \$60 (Table 4.2).

**Table 4.2: Basic Subscriber Television Packages in St. Kitts and Nevis**

| Operator         | Monthly Rate | Total channels | Local Channels |
|------------------|--------------|----------------|----------------|
| Cable & Wireless | \$65         | 33             | 2              |
| The Cable        | \$60         | 75             | -              |

Source: ECTEL/operators



# **5 Saint Lucia**

## **5.1 Overview**

The Eastern Caribbean Central Bank (ECCB) estimates that the Saint Lucian economy contracted by 23.4 per cent in 2020 from a growth of 1.7 per cent in the previous period. The slowdown in the economy was as a result of measures imposed by the government to contain the spread of the Covid-19 virus. The ECCB reported that the Covid-19 pandemic severely impacted the main foreign exchange earner, the tourism sector which had significant knock-on effect on many other sectors in the economy. Specifically, value added in the accommodation and food services sector shrunk substantially by 67 per cent in 2020, transport and storage declined by 57.2 per cent, wholesale and retail by 10.5 per cent and communication and information services by 8.6 per cent.

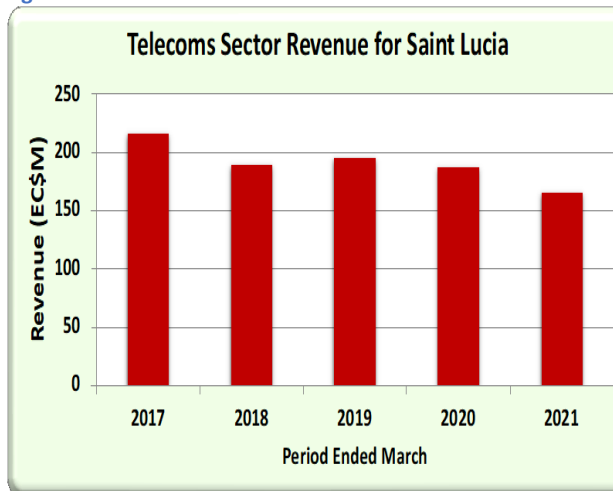
The performance of the electronic communications sector was somewhat mixed. Revenue generated by the electronic communications providers declined by 12 per cent to \$166 million and investment in the sector fell by 50 per cent to approximately \$41 million. However, direct employment in the sector climbed by 10 per cent to 192 persons employed full-time.

## 5.2 – Operator Related Revenue

Total revenue from the electronic communications sector of Saint Lucia shrunk by 12 per cent to \$166 million (Figure 5.1). All the market segments except for fixed broadband services recorded declines when compared to the previous period. Revenue from fixed broadband rose by 17 per cent.

The leading contributor to overall revenue continued to be mobile services with a share of 44 per cent of total revenue. Fixed voice and subscriber television shares of revenue remained unchanged at 12 per cent and 13 per cent respectively while fixed broadband's share grew by 7 percentage points to 30 per cent.

Figure 5.1: Telecoms Sector Revenue in Saint Lucia



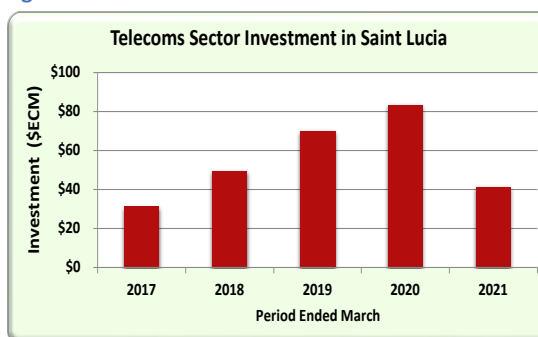
Source: ECTEL/operators

## 5.3 – Investment

Electronic communications service providers in Saint Lucia invested approximately \$41 million in their networks at the end of March 2021. This represented a 54 per cent contraction from the \$83 spent in the previous period (Figure 5.2).

Capital spending during the period under review was composed as follows: fixed public telecommunications networks (34 per cent), internet networks and services (25 per cent), mobile networks and services (24 per cent) and subscriber television networks (17 per cent).

Figure 5.2: Telecoms Sector Investment in Saint Lucia

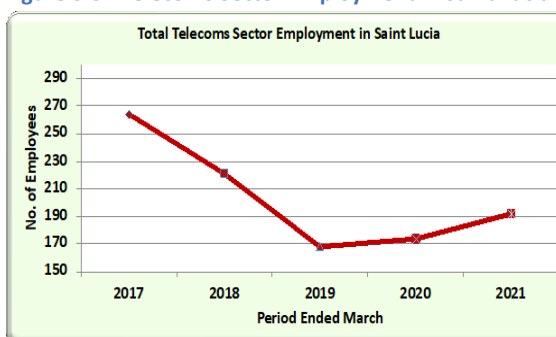


Source: ECTEL/operators

## 5.4 – Direct Employment

At the end of March 2021, total employment in the electronic communications sector in Saint Lucia grew by 10 per cent from 174 full-time employees in the previous period to 192 full-time employees in the period under review (Figure 5.3). During this period there were also 31 part-time staff employed in the sector.

Figure 5.3: Telecoms Sector Employment in Saint Lucia



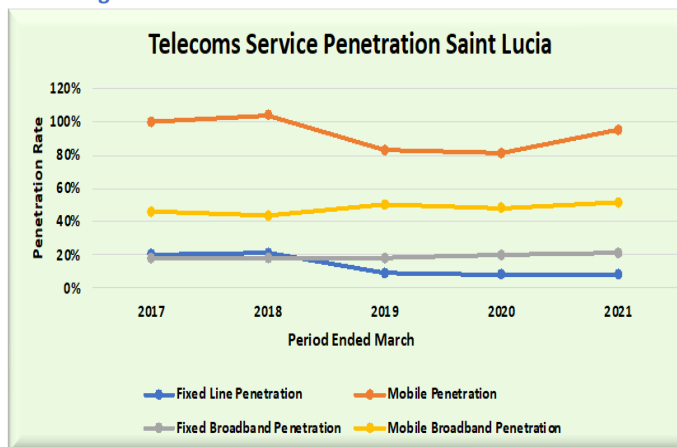
Source: ECTEL/operators

## 5.5 – Telecoms Service Penetration

For the period under review:

- Fixed broadband penetration increased by 1.1 percentage point to 21.0 per cent (Figure 5.4).
- Mobile penetration grew from 81 to 95 subscriptions per 100 inhabitants, an expansion of 14 percentage points.
- Fixed voice penetration remained constant at 8 per cent.
- Mobile broadband penetration was 51.4 per cent, 3.3 percentage points greater than in the previous year.

Figure 5.4: Telecoms Service Penetration in Saint Lucia



Source: ECTEL/operators

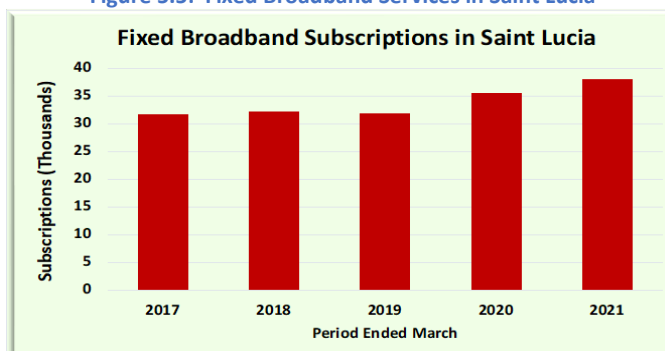
## 5.6 – BROADBAND SERVICES

### 5.6.1 – Fixed Broadband Services

The total number of fixed broadband subscriptions increased by 7 per cent to approximately 38,100 subscriptions during the period under review (Figure 5.5). As a result, fixed broadband penetration also expanded by 1.1 percentage points to 21 per cent.

Cable mobile connections represented the majority of connections, 96 per cent of total fixed broadband subscriptions followed by Fibre to the Home (4 per cent).

Figure 5.5: Fixed Broadband Services in Saint Lucia

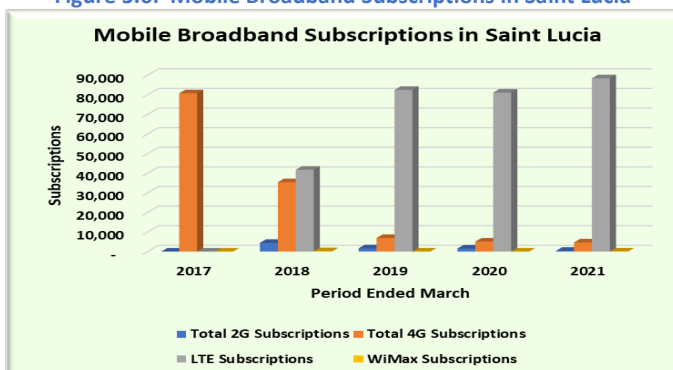


Source: ECTEL/operators

### 5.6.2 – Mobile Broadband Service

For the period ending March 2021, the total number of subscriptions climbed by 8 per cent to 93,100 subscriptions in contrast to 86,200 subscriptions in the previous period (Figure 5.6). Prepaid subscriptions accounted for 82 per cent of total mobile broadband subscriptions while postpaid subscriptions accounted for 18 per cent. Ninety-five (95) per cent of these connections were made over the LTE network, while 5 per cent were 3G/4G connections.

Figure 5.6: Mobile Broadband Subscriptions in Saint Lucia



Source: ECTEL/operators

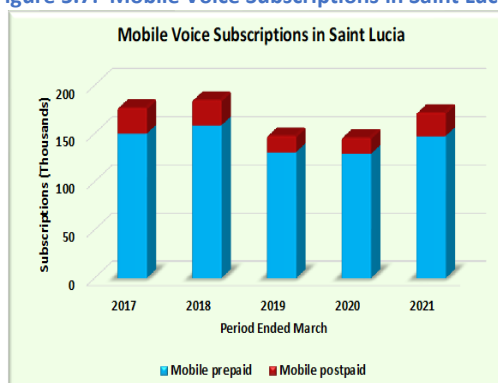
## 5.7 – MOBILE VOICE SERVICES

### 5.7.1 – Mobile Voice Subscriptions

At the end of March 2021, the total number of mobile voice subscriptions was 171,800 (Figure 5.7), an 18 per cent expansion from the 145,900 subscriptions recorded in the previous period. This increase in subscriptions follows two consecutive periods of decline.

Prepaid mobile subscriptions accounted for the largest share of total subscriptions at 86 per cent and grew by 14 per cent when compared to the previous period. Postpaid subscriptions rose significantly by 43 per cent and accounted for 14 per cent of total subscriptions during the period under review.

Figure 5.7: Mobile Voice Subscriptions in Saint Lucia



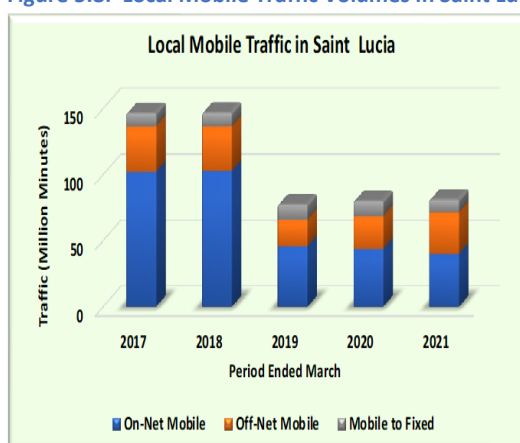
Source: ECTEL/operators

### 5.7.2 – Mobile Traffic Volumes

Mobile networks recorded local calling minutes of 81 million at the end of March 2021, a minimal increment of 1 per cent from the previous period (Figure 5.8). This was largely due to a 27 per cent expansion in off-net calling minutes. The overall growth was dampened by contractions of 9 per cent and 16 per cent respectively in on-net mobile and mobile to fixed calling minutes.

Minutes from the mobile network accounted for 55 per cent of outgoing international minutes, 3 percentage points lower than the previous period. Mobile originated international call volumes also declined by 3 per cent to approximately 3.4 million minutes.

Figure 5.8: Local Mobile Traffic Volumes in Saint Lucia



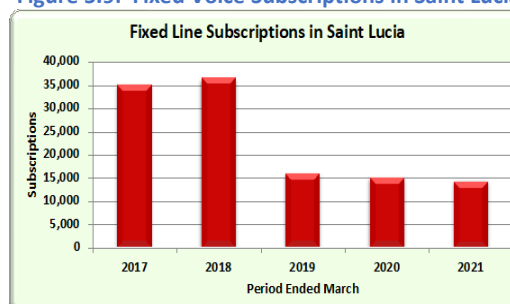
Source: ECTEL/operators

## 5.8 – FIXED VOICE SERVICES

### 5.8.1 – Fixed Voice Subscriptions

Total fixed voice subscriptions fell by 5 per cent when compared to the previous period. During the period under review an estimated 14,200 subscriptions were recorded compared to 15,000 subscriptions in the previous period (Figure 5.9).

Figure 5.9: Fixed Voice Subscriptions in Saint Lucia



Source: ECTEL/operators

### 5.8.2 – Fixed Traffic Volumes

The downward trend in local fixed call volumes continued during the period under review (Table 5.1). At the end of March 2021, local call volumes from the fixed networks plunged by 24 per cent to just over 31 million minutes.

An estimated 8.4 out of every 10 fixed local call minutes were terminated on the fixed network. Fixed to fixed calls also dropped by 23 per cent while fixed to mobile calls plummeted by 27 per cent for the period under review.

Approximately 45 per cent of all outgoing international calls originated from the fixed network during the period under review. Outgoing international minutes from the fixed network grew by 6 per cent to an estimated 2.8 million minutes during the period under review.

**Table 5.1: Fixed Traffic Volumes in Saint Lucia**  
Fixed Traffic Volume in Saint Lucia (million minutes)

|                        | 2017 | 2018 | 2019 | 2020 | 2021 |
|------------------------|------|------|------|------|------|
| Fixed to Fixed         | 122  | 123  | 41   | 34   | 26   |
| Fixed to Mobile        | 8    | 8    | 8    | 7    | 5    |
| Fixed to International | 4    | 5    | 3    | 2.6  | 2.8  |

Source: ECTEL/operators

### 5.9 – Subscriber Television

For the review period, subscriber television subscriptions remained unchanged at 9,400 subscriptions. All the subscriptions were digital connections.

The main subscriber television operator offers a basic package comprising 91 channels including 15 local channels at a price of \$106.32 per month (Table 5.2).

**Table 5.2: Basic Subscriber Television Packages in Saint Lucia**

| Operator                       | Monthly Rate | Total channels | Local Channels |
|--------------------------------|--------------|----------------|----------------|
| Columbus Communications (FLOW) | \$106        | 91             | 15             |

Source: ECTEL/operators

# **6 St. Vincent and the Grenadines**

## **6.1 Overview**

The Eastern Caribbean Central Bank (ECCB) in its 2020 Annual Economic and Financial Review reported that economic activity in St. Vincent and the Grenadines contracted by 2.7 per cent relative to the growth of 0.5 per cent in 2019, due to the impact of the Covid-19 pandemic. The majority of the island's sectors recorded reductions in value added for the period. Gross value added for hotels and restaurants fell by 55 per cent, agriculture, forestry and fishing by 12.6 per cent, manufacturing by 9.5 per cent and construction by 1.7 per cent. The contribution of the communications sector to gross value-added fell by 1 per cent in 2020 in contrast to growth of 1 per cent in 2019.

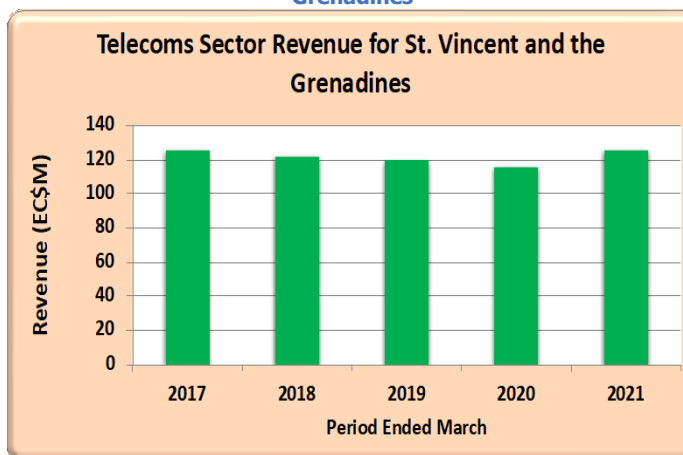
Despite the depressed economic activity, the electronic communications sector performed admirably during the period under review. Investments in the sector almost doubled and revenue generated by electronic service providers climbed by 9 per cent. Inversely, employment in the sector declined by 4 per cent.

## 6.1 – Operator Related Revenue

The electronic communications sector in St. Vincent and the Grenadines generated approximately \$125 million at the end of March 2021, an increase of 9 per cent when compared to the previous period (Figure 6.1). This is first upswing in overall revenue since 2017.

Revenue from fixed broadband service continue to grow annually recorded a 31 per cent increase and contributed 40 per cent, the largest share to total sector revenue. Revenue from mobile voice services fell by 9 per cent during the period and accounted for 32 per cent of total sector revenue. Revenue from fixed voice grew by 14 per cent while subscriber TV revenue declined by 7 per cent.

**Figure 6.1: Telecoms Sector Revenue in St. Vincent and the Grenadines**



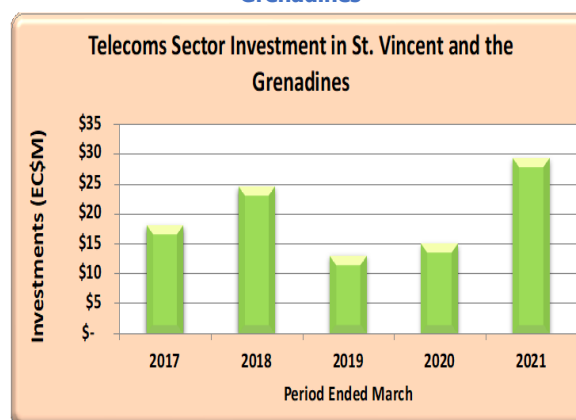
Source: ECTEL/operators

## 6.2 – Investment

In St. Vincent and the Grenadines total investments in the electronic communications sector almost doubled to \$29 million at the end of March 2021 compared to \$15 million in the previous period (Figure 6.2). Sixty-five per cent of capital was expended on internet networks and services, 27 per cent on the public mobile networks, 4 per cent on the subscriber television networks and 3 per cent on the fixed public networks.

More specifically, the electronic communications service providers reported undertaking investments in upgrades to their networks and replacement of critical equipment.

**Figure 6.2: Telecoms Sector Investment in St. Vincent and the Grenadines**

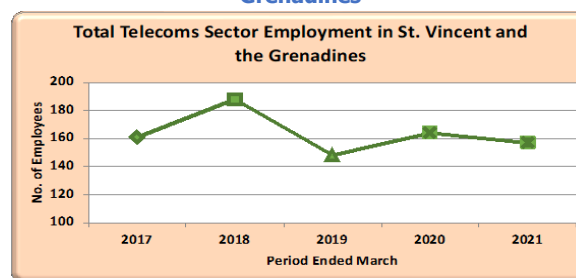


Source: ECTEL/operators

## 6.3 – Direct Employment

Employment in the sector continue to fluctuate annually. Following an increase of 11 per cent in 2019, full time employment in the electronic communications sector in St. Vincent and the Grenadines contracted by 4 per to 157 employees at the end of March 2021 compared to 164 in the previous period (Figure 6.3). During the period under review, electronic communications service providers also employed 5 part-time staff.

**Figure 6.3: Telecoms Sector Employment in St. Vincent and the Grenadines**



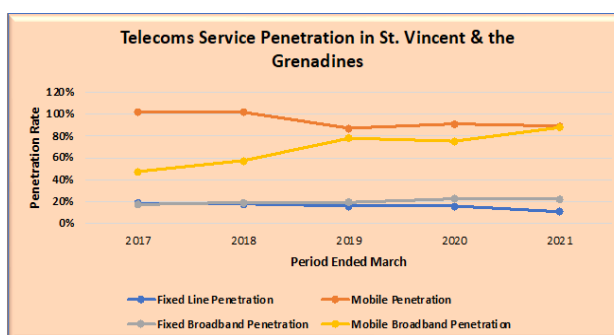
Source: ECTEL/operators

## 6.4 – Telecoms Service Penetration

During the period under review:

- Fixed broadband penetration remained relatively stable at 22.5 per cent (Figure 6.4).
- Mobile penetration was recorded at 89 per cent, 2 percentage points more than in 2020.
- Fixed voice penetration dropped by 5 percentage points to 11 per cent.
- Mobile broadband penetration was 87.9 per cent 13 percentage points greater than in the previous period.

**Figure 6.4: Telecoms Service Penetration in St. Vincent and the Grenadines**



Source: ECTEL/operators

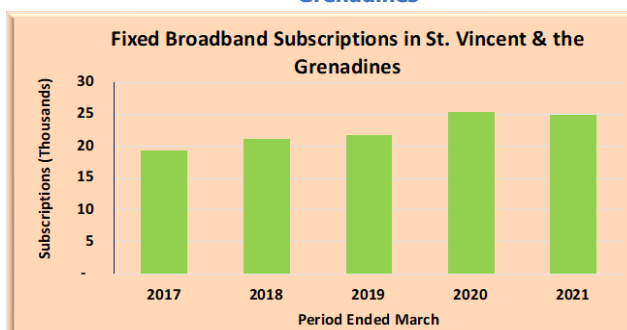
## 6.5 – BROADBAND SERVICES

### 6.5.1 – Fixed Broadband Service

The number of fixed broadband connections declined marginally by 2 per cent to 24,900 subscriptions at the end of March 2021 (Figure 6.5). This reduction resulted from decreases in the number of ADSL and fixed wireless access connections by (55 per cent and 65 per cent respectively) despite an increase of 12 per cent in cable modem connections.

ADSL connections accounted for 8 per cent of total connections while fixed wireless access accounted for 1 per cent and cable modem accounted for the majority (92 per cent) of total fixed broadband connections.

**Figure 6.5: Fixed Broadband Services in St. Vincent and the Grenadines**



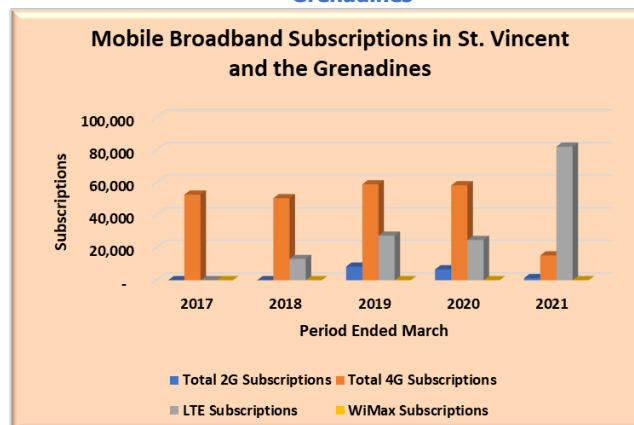
Source: ECTEL/operators

### 6.5.2 – Mobile Broadband Service

Subscriptions to mobile broadband services rose by 17 per cent with a total of 97,300 mobile data subscriptions recorded during period under review (Figure 6.6).

Total 3G/4G subscriptions represented 16 per cent of total mobile broadband connections, a fall of 74 per cent from the previous period while LTE subscriptions accounted for 84 per cent and expanded by 232 per cent from the previous period.

**Figure 6.6: Mobile Broadband Services in St. Vincent and the Grenadines**



Source: ECTEL/operators

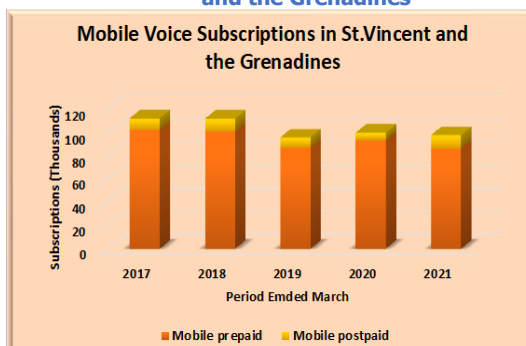
## 6.6 – MOBILE VOICE SERVICES

### 6.6.1 – Mobile Voice Subscriptions

Total mobile subscriptions fell by 2 per cent to 98,200 subscriptions at the end of March 2021 compared to 100,400 subscriptions in the previous period (Figure 6.7).

Prepaid subscriptions to mobile voice services declined by 7 per cent and accounted for 88 per cent of total subscriptions. Post-paid mobile voice services subscriptions grew by 72 per cent and accounted for 12 per cent of total subscriptions.

**Figure 6.7: Mobile Voice Subscriptions in St. Vincent and the Grenadines**



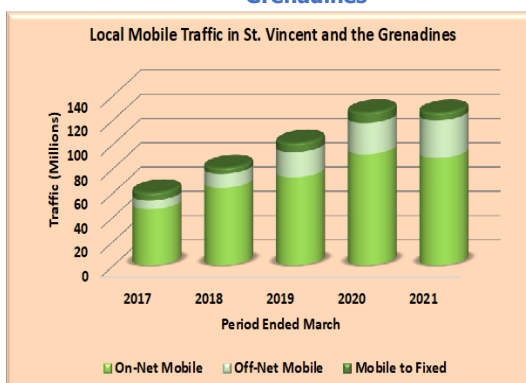
Source: ECTEL/operators

### 6.6.2 – Mobile Traffic Volumes

At the end of March 2021, local mobile traffic volumes registered a minimal increase (less than 1 per cent) to approximately 126 million minutes (Figure 6.8). This was as a result of declines in on-net and mobile to fixed traffic (3 per cent and 28 per cent respectively). However, off-net traffic recorded double-digit growth of 20 per cent.

There was a 25 per cent expansion in outgoing international calls from the mobile network during the period under review. Service providers recorded 2.7 million minutes compared to 2.1 million minutes in the previous period.

**Figure 6.8: Local Mobile Traffic in St. Vincent and the Grenadines**



Source: ECTEL/operators

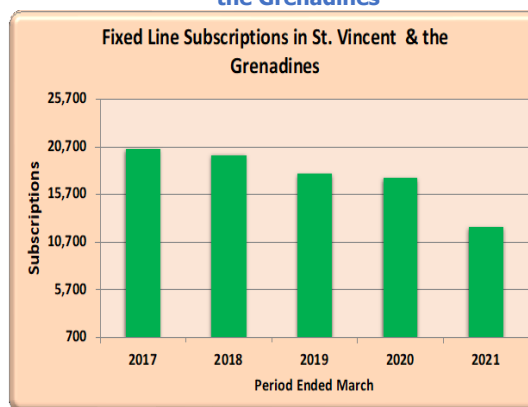
## 6.8 – Fixed Voice Services

### 6.8.1 – Fixed Voice Subscriptions

The total number of fixed line subscriptions contracted by 30 per cent to 12,300 at the end of March 2021 (Figure 6.9).

The decline in fixed voice subscriptions resulted from decreases of 7 per cent and 75 per cent in the number of residential and business subscriptions respectively. As in previous periods, residential subscriptions accounted for most of subscriptions (88 per cent) and grew by 22 percentage points when compared to previous period (66 per cent). Business subscriptions accounted for 12 per cents of total subscriptions as compared to 24 per cent in the previous period.

**Figure 6.9: Fixed Voice Subscriptions in St. Vincent and the Grenadines**



Source: ECTEL/operators

### 6.8.2 – Fixed Traffic Volumes

Despite the reduction in fixed voice subscriptions, there was an upsurge of 90 per cent in local calling minutes from fixed networks to 34 million minutes at the end of March 2021 (Table 6.1). All categories of fixed voice traffic recorded an improvement in traffic volumes.

However, international outgoing traffic from fixed networks slumped by 29 per cent during the period under review.

**Table 6.1: Fixed Traffic Volumes in St. Vincent and the Grenadines**

**Fixed Traffic Volume in St. Vincent and the Grenadines  
(million minutes)**

|                               | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------------------|------|------|------|------|------|
| <b>Fixed to Fixed</b>         | 14   | 13   | 15   | 13   | 28   |
| <b>Fixed to Mobile</b>        | 8    | 6    | 5    | 4    | 6    |
| <b>Fixed to International</b> | 5    | 5    | 4    | 4    | 3    |

Source: ECTEL/operators

### 6.9 – Subscriber Television

At the end of March 2021, subscriber television subscriptions in St. Vincent and the Grenadines remained relatively unchanged with the service provider reporting approximately 8,700 subscriptions, 0.7 per cent or 6 subscribers more than in the prior year. All the connections were Digital Cable TV connections.

The lone subscriber television service provider offers consumers a basic package comprising 33 channels including 4 local channels at a price of \$69 per month (Table 6.2).

**Table 6.2: Basic Subscriber Television Packages in St. Vincent and the Grenadines**

| <i>Operator</i>                | <i>Monthly Rate</i> | <i>Total channels</i> | <i>Local Channels</i> |
|--------------------------------|---------------------|-----------------------|-----------------------|
| Columbus Communications (FLOW) | \$69                | 31                    | 4                     |

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 electronic communications 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. Electronic communications 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. Electronic communications 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>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Provider Revenues (EC\$M)</b>                        | \$726       | \$694       | \$690       | \$670       | \$607       |
| <b>Investment (EC\$M)</b>                               | \$100       | \$136       | \$190       | \$146       | \$117       |
| <b>Employment</b>                                       | 857         | 806         | 740         | 784         | 785         |
| <b>Fixed line Penetration</b>                           | 21.6%       | 20.3%       | 15.2%       | 14.1%       | 14.3%       |
| <b>Mobile penetration</b>                               | 107.1%      | 108.1%      | 95.9%       | 95.9%       | 92.8%       |
| <b>Fixed broadband penetration</b>                      | 20.7%       | 18.6%       | 23.0%       | 25.3%       | 24.2%       |
| <b>Mobile broadband penetration</b>                     | 58.4%       | 63.7%       | 72.9%       | 69.9%       | 72.6%       |
| <b>Local fixed traffic (million minutes)</b>            | 319         | 333         | 308         | 255         | 216         |
| <b>Local mobile traffic (million minutes)</b>           | 518         | 544         | 556         | 509         | 505         |
| <b>International incoming traffic (million minutes)</b> | 46          | 46          | 41          | 37          | 35          |
| <b>International outgoing traffic (million minutes)</b> | 61          | 61          | 52          | 35          | 32          |

Source: ECTEL/operators

## Selected telecommunications indicators - Dominica

|   | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Provider Revenues (EC\$M)</b>                        | \$100       | \$85        | \$93        | \$100       | \$82        |
| <b>Investment (EC\$M)</b>                               | \$16        | \$20        | \$79        | \$15        | \$25        |
| <b>Employment</b>                                       | 155         | 141         | 169         | 188         | 196         |
| <b>Fixed line penetration</b>                           | 18%         | 4%          | 7%          | 9%          | 10%         |
| <b>Mobile penetration</b>                               | 105%        | 105%        | 104%        | 103%        | 85%         |
| <b>Fixed broadband penetration</b>                      | 21.4%       | 7.5%        | 20.3%       | 25.3%       | 19.2%       |
| <b>Mobile broadband penetration</b>                     | 41.3%       | 62.9%       | 79.1%       | 76.8%       | 66.9%       |
| <b>Local fixed traffic (million minutes)</b>            | 13          | 12          | 10          | 9           | 8           |
| <b>Local mobile traffic (million minutes)</b>           | 94          | 89          | 103         | 80          | 84          |
| <b>International incoming traffic (million minutes)</b> | 9           | 8           | 8           | 8           | 6           |
| <b>International outgoing traffic (million minutes)</b> | 11          | 14          | 11          | 6           | 4           |

Source: ECTEL/operators

**Selected telecommunications indicators - Grenada**

|   | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Provider Revenues (EC\$M)</b>                        | \$150       | \$166       | \$160       | \$147       | \$125       |
| <b>Investment (EC\$M)</b>                               | \$20        | \$17        | \$16        | \$15        | \$14        |
| <b>Employment</b>                                       | 141         | 113         | 105         | 103         | 100         |
| <b>Fixed line penetration</b>                           | 23%         | 28%         | 22%         | 17%         | 23%         |
| <b>Mobile penetration</b>                               | 102%        | 106%        | 104%        | 105%        | 89%         |
| <b>Fixed broadband penetration</b>                      | 23.0%       | 19.6%       | 28.3%       | 28.4%       | 26.9%       |
| <b>Mobile broadband penetration</b>                     | 86.7%       | 94.3%       | 82.6%       | 79.5%       | 84.2%       |
| <b>Local fixed traffic (million minutes)</b>            | 134         | 151         | 211         | 172         | 124         |
| <b>Local mobile traffic (million minutes)</b>           | 116         | 125         | 143         | 131         | 98          |
| <b>International incoming traffic (million minutes)</b> | 8           | 10          | 8           | 5           | 4           |
| <b>International outgoing traffic (million minutes)</b> | 10          | 8           | 12          | 7           | 8           |

Source: ECTEL/operators

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

|   | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Provider Revenues (EC\$M)</b>                        | \$134       | \$132       | \$122       | \$120       | \$108       |
| <b>Investment (EC\$M)</b>                               | \$14        | \$25        | \$13        | \$19        | \$8         |
| <b>Employment</b>                                       | 136         | 143         | 150         | 155         | 140         |
| <b>Fixed line penetration</b>                           | 36%         | 32%         | 33%         | 33%         | 32%         |
| <b>Mobile penetration</b>                               | 159%        | 147%        | 133%        | 127%        | 115%        |
| <b>Fixed broadband penetration</b>                      | 31.5%       | 33.6%       | 41.6%       | 43.8%       | 40.8%       |
| <b>Mobile broadband penetration</b>                     | 88.8%       | 82.9%       | 113.4%      | 106.0%      | 98.1%       |
| <b>Local fixed traffic (million minutes)</b>            | 21          | 20          | 18          | 15          | 19          |
| <b>Local mobile traffic (million minutes)</b>           | 101         | 103         | 103         | 92          | 116         |
| <b>International incoming traffic (million minutes)</b> | 6           | 6           | 4           | 5           | 4           |
| <b>International outgoing traffic (million minutes)</b> | 12          | 12          | 11          | 9           | 8           |

Source: ECTEL/operators

**Selected telecommunications indicators – Saint Lucia**

|   | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Provider Revenue (EC\$M)</b>                         | \$216       | \$189       | \$195       | \$187       | \$166       |
| <b>Investment (EC\$M)</b>                               | \$31        | \$49        | \$70        | \$83        | \$41        |
| <b>Employment</b>                                       | 264         | 221         | 168         | 174         | 192         |
| <b>Fixed line penetration</b>                           | 20%         | 21%         | 9%          | 8%          | 8%          |
| <b>Mobile penetration</b>                               | 100%        | 104%        | 83%         | 81%         | 95%         |
| <b>Fixed broadband penetration</b>                      | 18.1%       | 18.1%       | 17.9%       | 19.9%       | 21.0%       |
| <b>Mobile broadband penetration</b>                     | 45.8%       | 43.5%       | 50.0%       | 48.1%       | 51.4%       |
| <b>Local fixed traffic (million minutes)</b>            | 130         | 131         | 49          | 41          | 31          |
| <b>Local mobile traffic (million minutes)</b>           | 147         | 147         | 78          | 80          | 81          |
| <b>International incoming traffic (million minutes)</b> | 7           | 6           | 5           | 9           | 7           |
| <b>International outgoing traffic (million minutes)</b> | 17          | 18          | 8           | 6           | 6           |

Source: ECTEL/operators

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

|   | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2020</i> | <i>2021</i> |
|---|-------------|-------------|-------------|-------------|-------------|
| <b>Revenues (EC\$M)</b>                                 | \$126       | \$122       | \$120       | \$115       | \$125       |
| <b>Investment (EC\$M)</b>                               | \$18        | \$24        | \$13        | \$15        | \$29        |
| <b>Employment</b>                                       | 161         | 188         | 148         | 164         | 157         |
| <b>Fixed line penetration</b>                           | 19%         | 18%         | 16%         | 16%         | 11%         |
| <b>Mobile penetration</b>                               | 102%        | 102%        | 87%         | 91%         | 89%         |
| <b>Fixed broadband penetration</b>                      | 17.5%       | 19.2%       | 19.6%       | 22.9%       | 22.5%       |
| <b>Mobile broadband penetration</b>                     | 47.7%       | 57.5%       | 78.1%       | 75.1%       | 87.9%       |
| <b>Local fixed traffic (million minutes)</b>            | 21          | 19          | 21          | 18          | 34          |
| <b>Local mobile traffic (million minutes)</b>           | 60          | 81          | 128         | 126         | 126         |
| <b>International incoming traffic (million minutes)</b> | 15          | 17          | 17          | 10          | 14          |
| <b>International outgoing traffic (million minutes)</b> | 11          | 9           | 10          | 6           | 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<br><br>SAT Telecommunications (Digicel +)              | Cable & Wireless<br><br>Digicel  | Cable & Wireless<br><br>SAT Telecommunications (Digicel +)  | Cable & Wireless<br><br>SAT Telecommunications (Digicel +)                | Cable & Wireless<br><br>Middle Caribbean Network                          |
| <b>Grenada</b>                        | Cable & Wireless<br><br>Columbus Communications (FLOW)                  | Cable & Wireless<br><br>Digicel<br><br>Affordable Aisle Communications Inc. (AISLECOM) | Cable & Wireless<br><br>Columbus Communications (FLOW)<br><br>Affordable Aisle Communications Inc. (AISLECOM) | Columbus Communications (FLOW)  | Cable & Wireless<br><br>Southern Caribbean Fiber                          |
| <b>St. Kitts and Nevis</b>            | Cable & Wireless<br><br>The Cable<br><br>Caribbean Cable Communications | Cable & Wireless<br><br>Wireless Ventures (Digicel)                                    | Cable & Wireless<br><br>The Cable<br><br>Caribbean Cable Communications                                       | The Cable<br><br>Caribbean Cable Communications                           | Cable & Wireless<br><br>Southern Caribbean Fiber                          |
| <b>Saint Lucia</b>                    | Cable & Wireless<br><br>Columbus Communications (FLOW)                  | Cable & Wireless<br><br>Digicel  | Cable & Wireless<br><br>Columbus Communications (FLOW)<br><br>Spectra Inc.<br><br>Seva Communications Inc.    | Cable & Wireless<br><br>Columbus Communications (FLOW)                    | Cable & Wireless<br><br>Antilles Crossing<br><br>Southern Caribbean Fiber |
| <b>St. Vincent and the Grenadines</b> | Cable & Wireless<br><br>Columbus Communications (FLOW)                  | Cable & Wireless<br><br>Digicel  | Cable & Wireless<br><br>Columbus Communications (FLOW)  | Cable & Wireless<br><br>Columbus Communications (FLOW)<br><br>Digicel SVD | Cable & Wireless<br><br>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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