

Caribbean - Telecoms, Mobile, Broadband and Digital Media – Key Statistics, In Depth Analysis and Forecast to 2022

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<u>Caribbean - Telecoms, Mobile, Broadband and Digital Media 2017</u>

Caribbean operators ramp up investments in LTE and GPON fibre servicesThe telecoms sector is one of the Caribbean region's major growth sectors, particularly in the mobile telephony and data segments. Although there are a number of smaller players operating, the sector is dominated by Digicel group and by Liberty Global, which acquired the long-time operator Cable & Wireless Communications and with it the network operator Columbus Communications. As a result, both actively compete against in other in a large number of countries in the region, and their fixed-line and mobile infrastructure assets allow them to provide bundled packages to customers.



Digicel's key offering, Digicel Play, is available in a growing number of markets. The company has concentrated investments in fibre networks and in LTE. In May 2017 it launched LTE services across Bermuda, the latest island to benefit from these investment efforts.

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The region's economy has largely recovered from the downturn experienced after the 2008 GFC. The recovery of economies in the US and Europe was crucial for the recovery of the tourism sector, on which many countries rely for a good proportion of revenue. Trinidad & Tobago has a particularly vulnerable economy, since it is the region's largest oil and gas exporter. The country has also become a major financial centre in the Caribbean. It is one of two countries in the region which is not part of Venezuela's Petro-Caribe scheme that provides preferential or deferred payment options for buying oil.

There have been ongoing changes in telecoms regulations across the region, with national regulators focussed on efforts to improve competition and to facilitate investment. In the Bahamas the regulator, the PUC, activated Mobile Number Portability in April 2017, allowing mobile subscribers to port their numbers between BTC and Cable Bahamas' newly formed mobile unit Aliv within two hours of a request being made. Cable Bahamas expected that with MNP in place Aliv could capture a 30% share of the mobile market by the end of 2017. In the Cayman Islands, which has the highest teledensity in the region, the regulator ICTA which was set up in 2002 was replaced by a new regulatory body, the Utility Regulation and Competition Office (OfReg), in January 2017. This new body combined ICTA with the Electricity Regulatory Authority and the Cayman Petroleum Inspectorate.

Key developments:

Digicel Bermuda launches island-wide LTE services;

Bahamas regulator introduces MNP;

Digicel showcases 100Gb/s technology on its Barbados network;

Bahamas seen launch of Cable Bahamas' mobile unit Activ;

Digicel expands Digicel Play to new markets;

New telecom regulator formed for Cayman Islands;

Dominican Republic's government delays adopting full digital terrestrial TV until 2021;

Digicel Group launches 'Digicel 2030' transformation program;

ECTEL continues to promote net neutrality rules;

Sprint and Open Wireless combine their businesses in Puerto Rico and US Virgin

Islands.Companies mentioned in this report:

Cable & Wireless, LIME, Flow, Liberty Global, Digicel Group, Orange Caraïbes, United Telecommunications Services (UTS), KeyTech.

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