BROADBAND ADOPTION AND INNOVATION IN ECTEL MEMBER STATES

31st Annual CANTO Conference and Exhibition.
Hyatt Regency Miami, USA 29th July 2015

Embert Charles, Managing Director
Eastern Caribbean Telecommunications Authority (ECTEL)
Contextualizing Broadband

- An acceptable definition and entry level – From ITU 256k to ?????
- Measuring adoption and consumption – Households and Mobile subscriptions; Usage; Penetration Rates
- The Market dynamics – strong supplier and weak consumers
- Lagging Regulatory interventions
- Many studies and initiatives in the region
## Broadband Availability – ECTEL States

<table>
<thead>
<tr>
<th>Service</th>
<th>Service Provider</th>
<th>Technology in use</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed broadband</td>
<td>LIME</td>
<td>ADSL</td>
<td>Generally available islandwide with some unserved areas</td>
</tr>
<tr>
<td>Cable operators –</td>
<td>FLOW, Marpin, Digicel Play, The Cable</td>
<td>Cable Modem</td>
<td>Generally available islandwide with some unserved areas</td>
</tr>
<tr>
<td>Mobile broadband</td>
<td>LIME, Digicel</td>
<td>HSPA+</td>
<td>Mainly in population centres</td>
</tr>
</tbody>
</table>

Proportion of respondents who indicated broadband is not available in their area

<table>
<thead>
<tr>
<th>Service area</th>
<th>Dominica</th>
<th>Grenada</th>
<th>St Kitts and Nevis</th>
<th>Saint Lucia</th>
<th>St Vincent and the Grenadines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadband service not available in my area</td>
<td>2.2%</td>
<td>0.7%</td>
<td>1.3%</td>
<td>1.3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: ECTEL Survey
Use and Expansion of Broadband

- E- Government Services – Tax, Customs,
- Social/Commercial Media – Music Industry,
- Public wi-fi spots
- Subsidized services to low income households
- Fledgling initiatives in Education
Fixed broadband price sub-baskets for selected Caribbean States – (2013)

ECTEL 2015
Main Barriers to Adoption

- Affordability
- Household income
- Household education level
- Availability
- Age of head of household/individual
- Relevance

Fixed broadband adoption
Households fixed broadband access

- Cost was consistently main barrier.

- Among respondents who indicated internet was not needed:
  - 25% (lowest user penetration)
  - 11% (highest user penetration)
  - Others less than 10%

Source: ECTEL (multiple responses allowed)
Challenges to Increasing Uptake

- Agreement on purpose and mission for Broadband expansion
- The dilemma of the salaried immigrant and the free wheeling native – Who is the customer
- Include broadband in USF – redefinition of the USF parameters – ECTEL Consultation  What is now universal

And Innovation…..

- Slow uptake on initiatives to establish relevance (responses to incubation and content projects)
Uptake - Potential online activities

Potential local online activities across the ECTEL Member States

- Purchasing goods for home delivery (50%)
- Healthcare or other appointments (40%)
- Participating in online training programs (30%)
- Watching local TV stations (25%)
- Watching local sporting events (20%)
- Submitting job applications (15%)
- Using government services (15%)
- Participate in public consultation or voting (10%)
- Buying or subscribing to local newspaper (5%)

Source: ECTEL Household survey
Issues for Urgent Discussion

- Balancing the Market pillars (Consumers; Producers; Regulators) - constructive engagement on Rate reduction, QoS and Relevance

- Gradual Mainstreaming of Broadband vis. a vis. cultural norms

- Information Symmetry

- Evidence-based responses – Regulators studies and policy advice, guaranteeing spaces for all.

- Cyber-security, online protection, privacy
Reference


- END