

# Caribbean - Telecoms, Mobile and Broadband - Statistics and Analyses

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## Abstracts

Caribbean telecom sector revenue affected by COVID-19

Given the relative lack of economic diversity within the Caribbean, the telecoms sector accounts for a higher proportion of GDP in most markets in the region than is common elsewhere. In the long-term the sector remains one of steady growth, particularly in the mobile telephony and data segments. However, such is the dependence on tourism for many of the islands states that lockdowns associated with the COVID-19 pandemic, both within the Caribbean and among visitor countries, have had a dramatic effect on local economies. This has had a knock-on effect on consumer spending for telecom services and on operator revenue.

Although there are a number of smaller players operating, Digicel Group and Liberty Latin America are the dominant providers, with local business units spanning the region. Their fixed-line and mobile infrastructure assets have cemented their position as full-service providers. Competition between them has encouraged investments to expand the reach of fibre networks and LTE, while there is also growing interest in 5G infrastructure from Liberty's mobile unit Flow.

Digicel has invested widely in fibre infrastructure, though at the expense of Group free-cash flow at a time when the Group has amassed considerable debt. As of mid-2020, the Group's survival rests on its success in renegotiating loans of about \$4.3 billion due by the end of 2022.

There have been ongoing changes in telecoms regulations across the region, with national regulators focussed on efforts to improve competition and facilitate investment.

BuddeComm notes that the outbreak of the Coronavirus in 2020 is having a significant impact on production and supply chains globally. During the coming year the telecoms sector to various degrees is likely to experience a downturn in mobile device production, while it may also be difficult for network operators to manage workflows when maintaining and upgrading existing infrastructure. Overall progress towards 5G may be postponed or slowed down in some countries.

On the consumer side, spending on telecoms services and devices is under pressure from the financial effect of large-scale job losses and the consequent restriction on disposable incomes. However, the crucial nature of telecom services, both for general communication as well as a tool for home-working, will offset such pressures. In many markets the net effect should be a steady though reduced increased in subscriber growth.

Although it is challenging to predict and interpret the long-term impacts of the crisis as it develops, these have been acknowledged in the industry forecasts contained in this report.

The report also covers the responses of the telecom operators as well as government agencies and regulators as they react to the crisis to ensure that citizens can continue to make optimum use of telecom services. This can be reflected in subsidy schemes and the promotion of tele-health and tele-education, among other solutions.

Key developments:

Digicel Group seeking to refinance debts;

Bahamas regulator imposes new wholesale broadband access regime on BTC and Cable Bahamas, issues revised National Spectrum Plan;

Bermudan regulator approves three new telecom licenses;

US government completes second subsea cable, linking Puerto Rico with Guantanamo Bay Naval Base;

Antigua government invests EC\$80 million to improve state-owned telco's market competitiveness;

New telecom regulator formed for Cayman Islands;

Digicel Jamaica launches MyCash m-banking service;

Haiti sets up digital incubator to foster digital economy growth;

Report update includes regulators' annual reports and market updates, operator data to Q1 2020, ITU's market data, Telecom Maturity Index charts and analyses, assessment of the global impact of COVID-19 on the telecoms sector, recent market developments.

Companies mentioned in this report:

Cable & Wireless, LIME, Flow, Liberty Global, Digicel Group, Orange Cara?bes, United Telecommunications Services (UTS), KeyTech, Puerto Rico Telephone Company, Am?rica M?vil, AT&T, Liberty Cablevision; OneLink Communications; T-Mobile; Open Mobile; Sprint PCS; Choice Cable

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