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Vanuatu Statistical Framework – An Overview

ITU Asia-Pacific Regional Workshop on
ICT Indicators, Ha Noi, Vietnam
2019



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OVERVIEW OF PRESENTATION

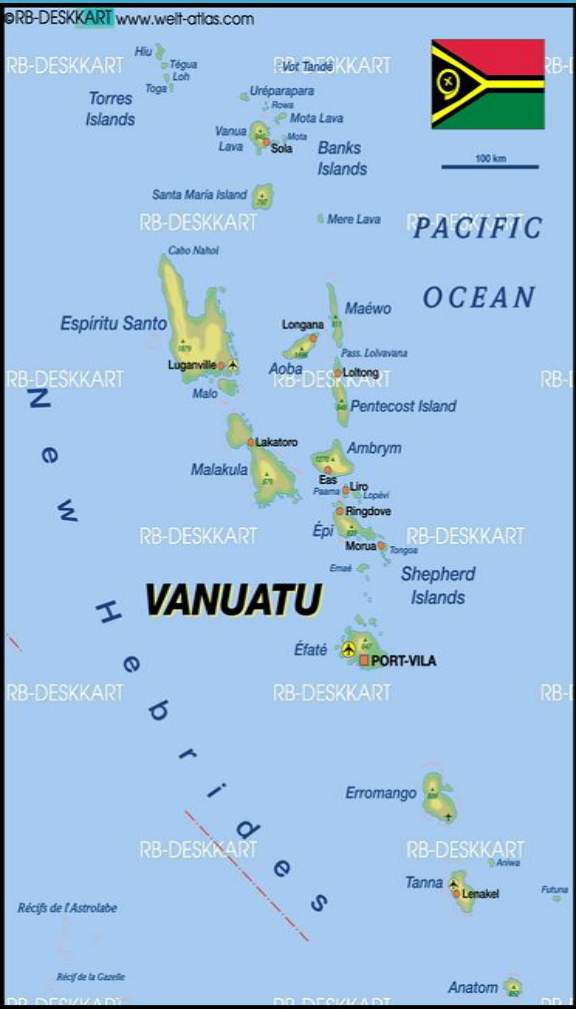
- ❑ Vanuatu – A Geopolitical Overview
- ❑ Vanuatu Market Overview
- ❑ Current Statistical Framework
- ❑ Framework Output
 - General Market Trends
 - Data Use Trends
 - Pricing Trends
- ❑ Challenges
- ❑ TRBR Outlook



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VANUATU – GEOPOLITICAL OVERVIEW



- ❑ Archipelago consisting of 83 Islands of which 63 are inhabited
- ❑ Population of approximately 272, 459 (2016 Mini Census) with the annual growth rate of 2.3%
 - 65% of the population is under 29 years
 - 75% of the population live in rural areas
- ❑ GDP at current prices is estimated at VUV94,887 million (\$871.1 billion) in 2017
- ❑ Largest Contributor to GDP is Tourism followed by Agriculture
- ❑ Telecom Services
 - Cheapest Unlimited Internet Service is U\$22 per month (advertised speed of 512Kbps)
- ❑ Political System
 - Democratic republic, Multiparty, Single Chamber
- ❑ Challenges
 - Political Stability, Natural Disasters, etc



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VANUATU – MARKET OVERVIEW

- ❑ Independent Regulator –TRBR
 - Established under the Telecommunications, Radiocommunications Regulation Act No.30 of 2009 as amended by Amendment no.22 of 2018
- ❑ 2018 Market Revenue slightly dropped by 8% hitting VUV4.9 billion (USD41 million) in 2018. Long run trend still showing positive growth
- ❑ Two full service carriers (Telecom Vanuatu Limited & Digicel (Vanuatu) Limited)
 - TVL dominant in Fixed Line
 - Both TVL & Digicel in mobile
- ❑ Other Internet Service Providers (ISP)
 - Telsat & Wantok (Cover Port Vila) – Pacific Link Limited & SPIM (Few hotels only in Port Vila & Luganville)
- ❑ International Connectivity
 - Single Submarine Cable (Interchange Cable Limited) – Connecting Vanuatu through Fiji
 - Kacific Broadband satellite provides broadband internet across the islands via Ku band



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CURRENT STATISTICAL FRAMEWORK

- ❑ Under the TRBR Act, The Regulator has the power to request any Market Statistics he believes to be relevant to exercise his powers or functions
- ❑ Original Statistical Framework was introduced in 2010
- ❑ The Framework was then updated in 2015, where additional statistical elements were added.
- ❑ Continuous changes in the market and new ITU standards/framework has led to a further review of our framework in 2018. This is to align ourselves to the ITU standards and improve our data collection by removing outdated elements and adding more relevant.
- ❑ The new Framework has been gazette on 28th November 2018 under Order No.1 2018 where all licensees shall submit their data to the Regulator on an bi-annual basis.
 - 1st January to 30th of June submitted by 20th of July of each year.
 - 1st July to 31st December submitted by 30th January of each year.



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MARKET INDICATORS

Mobile

- Subscriber growth Postpaid & Prepaid fixed services
- On-net Minutes & Revenue
- Off-net Minutes & Revenue
- On-net & Off-net SMS Sent & Revenue
- On-net & Off-net Call Minutes & Revenue
- Mobile Data downloads & Revenue
- International inbound roaming Calls Minutes, SMS, Data & Revenues
- International outbound roaming Call Minutes, SMS, Data & Revenues
- Value-added Services such as Credit Transfers service transactions, Subscribers and Revenue



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MARKET INDICATORS – CONTINUES.....

Fixed Internet

- Fibre to the Home subscription & Revenue
- Fixed Wireless Subscription & Revenue
- Satellite/Other Internet Subscriptions & Revenue
- Retail leased Line subscription & Revenue
- Fixed Subscriptions with speed of;
 - 0.256 Kbits to < 2Mbits,
 - 2 to < 4Mbits
 - 4 to < 10Mbits
 - \geq 10Mbits

Fixed Telephony

- Fixed Telephony Subscriptions & Revenue
- Fixed On-net Call Minutes & Revenue
- Fixed Off-net Call Minutes & Revenue
- Line Rental Revenue
- Outbound international Call Minutes & Revenue
- Incoming International Call Minutes & Revenue



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MARKET TRENDS

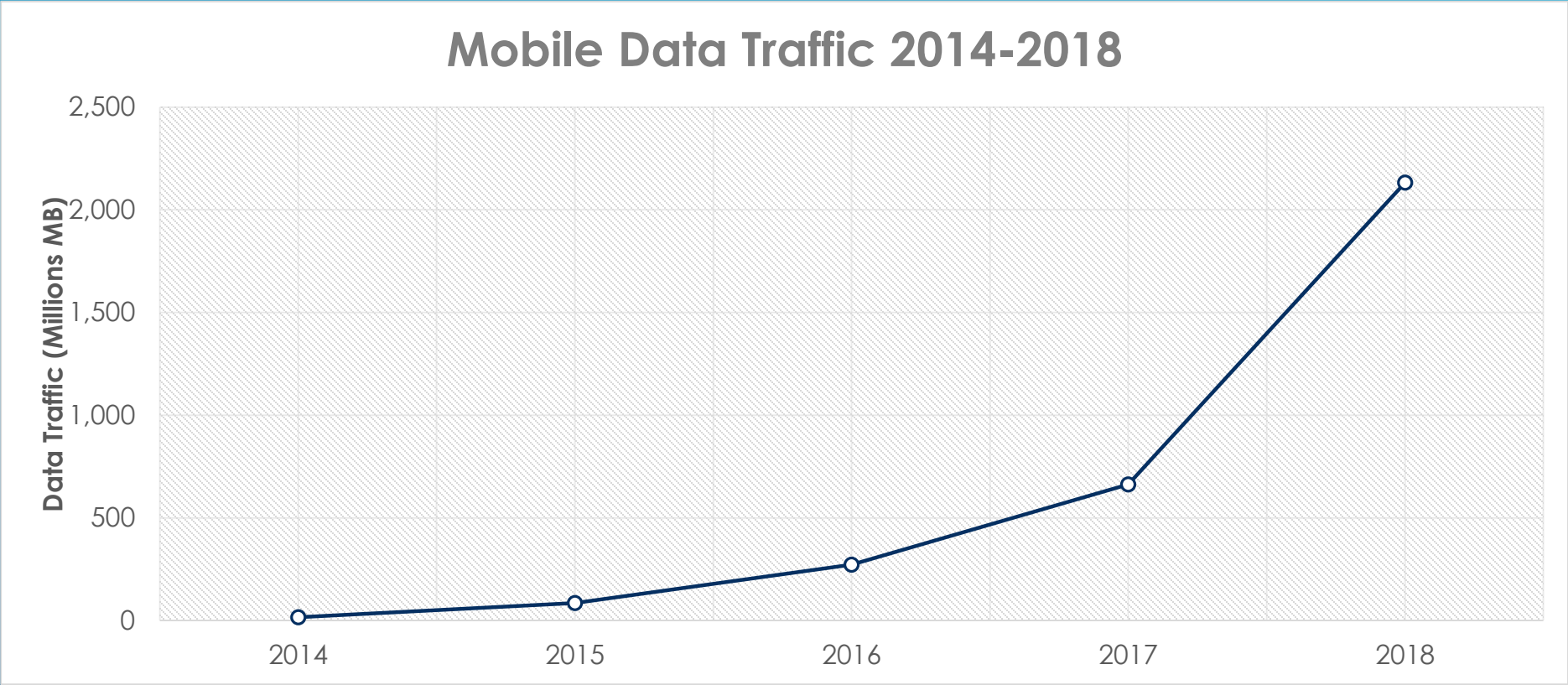
- ❑ Mobile Penetration has increased to 89% in 2018. This represents an annual growth rate of 8% from a penetration of 82% in 2017
- ❑ Mobile coverage analysis in 2017 shows that 98.8% of our population are covered. However, this figure has been affected by the movement of people due to natural disasters, therefore our QOS report is yet to confirm our current mobile coverage.
- ❑ Mobile data usage/downloads has grown rapidly by 222% in 2018 to record its highest point of 2,132.9TB.
- ❑ Fixed line Telephony continues its downward trend. (both Subscription & Revenue declined by 8% and 9% respectively).
- ❑ Fixed Internet Subscription continue to rise recording a total of over 4,000 subscribers in 2018+
- ❑ Voice and SMS also declining as OTT services is becoming a primary means of communications
- ❑ Mobile data bundling has drive unit cost down to only USD0.01 per MB.
- ❑ Access to online streaming services such as Netflix, YouTube, Facebook live is leading to greater demand and improving quality of experience, particularly in urban areas.



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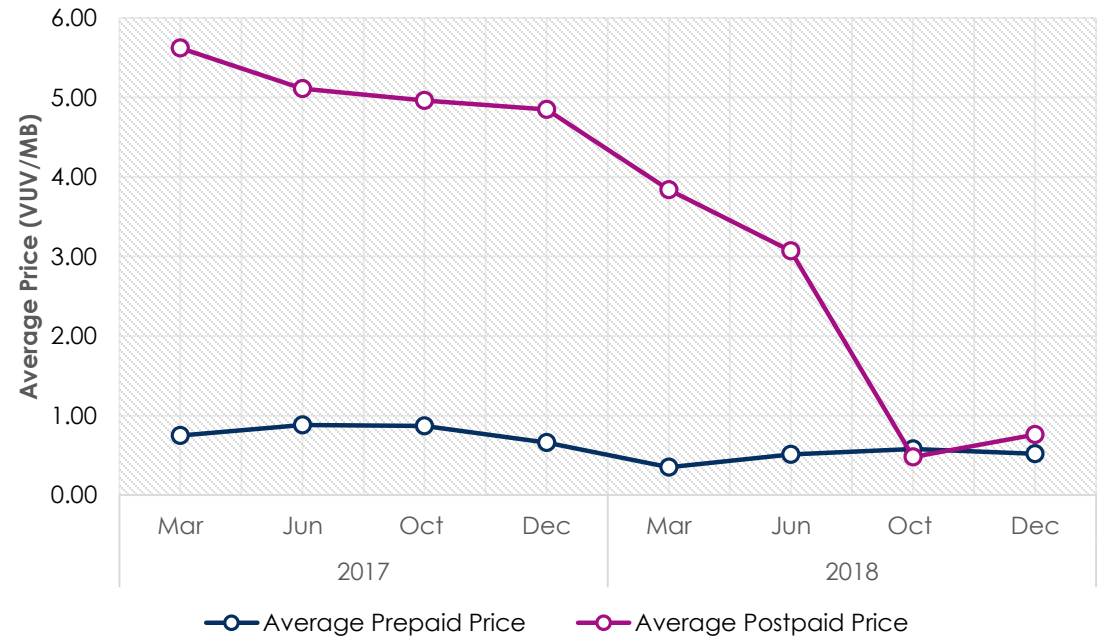
DATA TREND



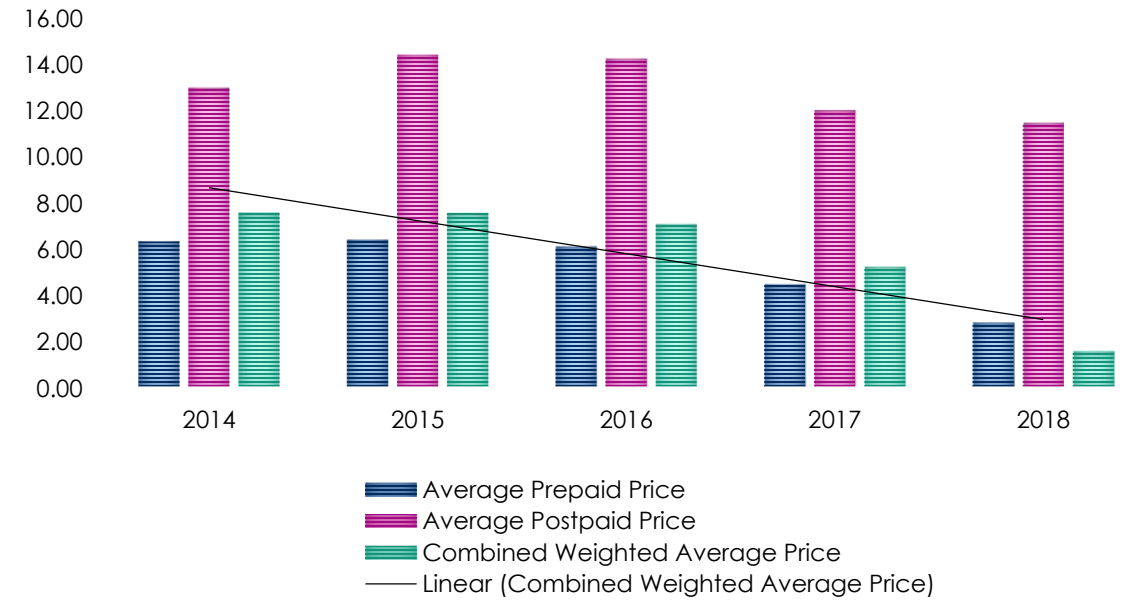


PRICING TREND

MOBILE DATA AVERAGE PRICING



AVERAGE MOBILE CALL PRICING



VUV1 : USD0.009



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ISSUES & CHALLENGES

- ❑ Delays of data submissions reflects,
 - Lack of understanding by the operators on information required (updated framework)
 - Need more time or reluctant to submit on time

- ❑ Mobile subscription figure is overrated due to high use of dual SIM handset where a single handset can be active on both networks in the same month therefore inflating number of subscribers

- ❑ Mobile data traffic is increasing very rapidly with new challenges of providing more meaningful online content for the maximum benefit for the users.

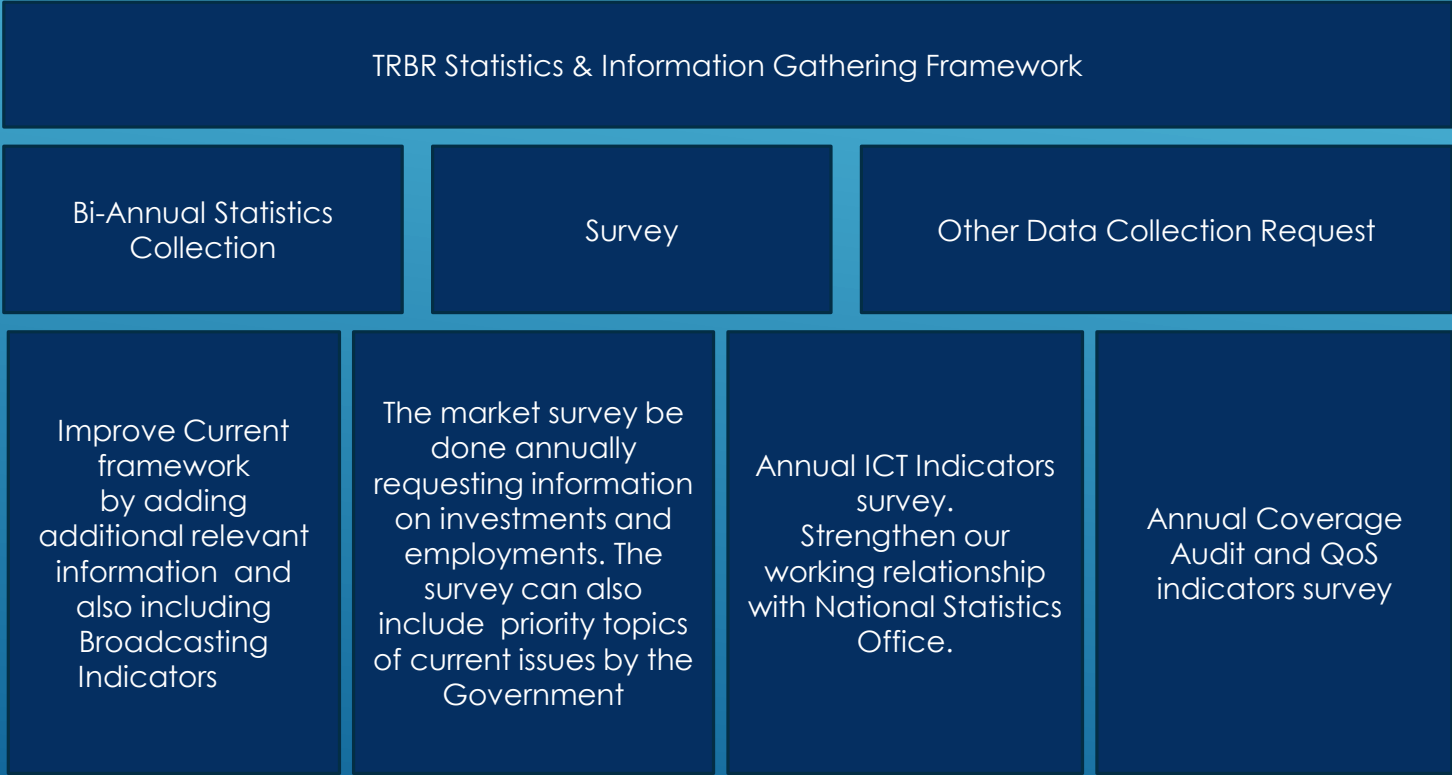
- ❑ Lack of Collaboration between stakeholders
 - Service Providers, National Statistics Office etc



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CURRENT WAY FORWARD





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WHAT WE WANT TO ACHIEVE

- ❑ To establish a workable regulatory framework and environment that is fair, transparent and importantly promotes good representation of the market through reliable and accurate data submissions.
 - Work collaboratively with all operators to ensure transparency and appropriate reporting
 - TRBR pipeline project to update the current framework
 - Work collaboratively with National Statistics Office to carry out an ICT indicator surveys
- ❑ Amendment of our current TRBR Act to fully catered for Broadcasting in order to implement the broadcasting data collection framework
- ❑ For operators who are not complying with their obligations under their license to do so via a written order by the Regulator. If not then start penalizing.



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TANKYU TUMAS

