

The Mobile Economy Caribbean 2026



GSMA

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Contents

Executive summary	2
1. The economic impact of the mobile industry	6
1.1 Macroeconomic outlook	7
1.2 Mobile's contribution to the economy	9
2. Trends shaping the mobile industry	13
2.1 Advancing AI adoption and creating an ecosystem	14
2.2 Strengthening cybersecurity and fraud resilience in networks	16
2.3 Satellite connectivity and D2D gain momentum	18
3. Mobile industry impact	19
3.1 Supporting digital inclusion and community access	20
3.2 Enabling sustainability and reducing climate emissions	21
4. Policies for innovation and growth	22
4.1 The need for regulatory modernisation	23
4.2 Harmonising spectrum for mobile evolution	26

Executive summary



Building the foundation for digital transformation

The Caribbean is entering a pivotal phase in its digital development, with widespread connectivity translating into broader digital transformation. The demand for mobile data, digital services and financial platforms is rising, supported by expanding 4G coverage and the early rollout of 5G networks.

In 2025, mobile technologies and services generated 8.1% of GDP in the Caribbean, equivalent to \$21 billion in economic value added. Most of this impact came from productivity gains, which accounted for \$14 billion, underlining the role of mobile in improving efficiency across sectors. The direct contribution of the mobile ecosystem accounted for a further \$6 billion. The mobile ecosystem also plays an important role in employment, supporting around 170,000 jobs in the Caribbean in 2025.

Beyond connectivity, the mobile industry is increasingly enabling digital transformation, through the integration of technologies such as 5G, IoT and AI into business processes and public services. While the region has made significant progress in expanding access to connectivity, the transition to deeper digital transformation is still at an early stage, constrained by limited investment, uneven adoption and broader structural challenges.

Expanding their role beyond connectivity, operators in the region are supporting digital inclusion, sustainability and climate resilience efforts. They are helping to close digital divides through community access and skills programmes while also investing in cleaner, more resilient energy systems. Alongside these efforts, mobile networks are increasingly being recognised as a critical platform for early warning systems and broader disaster preparedness across island nations.

\$21bn



In 2025, mobile technologies and services contributed 8.1% to the region's GDP

170,000



In 2025, mobile technologies and services supported 170,000 jobs

Key trends shaping the mobile ecosystem

AI

35% of operators are using AI agents for customer care services

AI is transforming customer service and network automation, with nearly 35% of operators in the Caribbean using AI agents. As AI becomes integral to the Caribbean's digital transformation, policymakers and regional organisations are prioritising governance, readiness and ecosystem development.

Cybersecurity

Operator investment and regional coordination are crucial

Cybersecurity has become a core pillar of digital trust as operators embed security into cloud-native networks and AI-driven operations. With cyberthreats and online fraud increasingly undermining confidence in digital services, operator investment and regional coordination are critical to sustaining digital adoption and resilience.

Satellite connectivity

Satellite solutions are complementing mobile networks

Satellite and direct-to-device connectivity are emerging as critical resilience layers for the Caribbean's geographically fragmented markets. As 5G rollout remains uneven, satellite solutions are complementing mobile networks to extend coverage, support disaster response and strengthen network continuity.



Policies for growth

Regulatory modernisation is central to unlocking the Caribbean's digital transformation, as legacy telecoms frameworks are still supporting next-generation networks, digital services and inclusive growth. While market liberalisation reforms of the early 2000s enabled competition, today's policy priorities extend beyond connectivity to encompass affordability, digital skills, resilience and investment sustainability. At the same time, there is a significant investment gap in next-generation mobile infrastructure, particularly for 5G. Under current market conditions, projected returns are insufficient to support widespread 5G deployment across many Caribbean markets, reinforcing the need for regulatory frameworks that improve investment certainty, reduce deployment costs and enable infrastructure sharing.

Effective regulatory modernisation will require coherent approaches that recognise the structural realities of small island states. Measures such as spectrum policy reform, streamlined permitting, infrastructure sharing and public-private partnerships will be essential to support sustainable investment, close the 5G gap and avoid widening digital divides within the region.

Effective regulatory modernisation will require coherent approaches that recognise the structural realities of small island states



The Mobile Economy Caribbean



State of mobile internet connectivity

2024

At 49% of the population, the usage gap is significantly larger than the coverage gap. Network availability is no longer the primary barrier – affordability, digital skills and relevant content are the factors limiting widespread and meaningful internet use.

Coverage gap

10%

Usage gap

49%



Connected

41%



5G as a share of total connections

Percentage of total connections (2030)

2030

23%

Total 5G connections (2030)

5.5bn

By 2030, 23% of all mobile connections in the Caribbean will be on 5G, up from 10% in 2025.

Growth will be uneven across markets. The three largest markets (Puerto Rico, Jamaica and Trinidad and Tobago) are expected to account for more than 65% of total 5G connections by 2030. Puerto Rico will lead in the region, reaching 85% 5G adoption, significantly ahead of other markets.

2025

2030

Global

57%

North America

89%

464m

Latin America

50%

404m

Caribbean

23%

5.9m

Puerto Rico

85%

3.2m

Jamaica

21%

0.7m

Trinidad and Tobago

28%

0.6m



Operator revenues and investment

Revenues

Investment

2025

\$5.9 billion

\$4 billion

2030

\$6.1 billion

Capex for the period 2025–2030

01

The economic impact of the mobile industry



1.1

Macroeconomic outlook

Economic growth in the Caribbean was sluggish in 2025, with regional GDP flat, compared to the global economy growing by 3.1%. Following a brief post-pandemic rebound, growth slowed due to ongoing reliance on tourism, imports and external demand. This has made the region vulnerable to global trends, financial tightening and climate disruptions, limiting the pace of recovery and constraining long-term growth.

Recent growth has been supported by the recovery of tourism and services, which remain central to many Caribbean economies. However, the region's narrow economic base, dependence on external demand and high exposure to commodity price movements and climate-related shocks continue to constrain performance. Structural challenges further reinforce this pattern, including persistently low productivity growth, elevated public debt levels, high rates of labour informality and limited investment in innovation and infrastructure. The Caribbean is particularly vulnerable to extreme weather events,

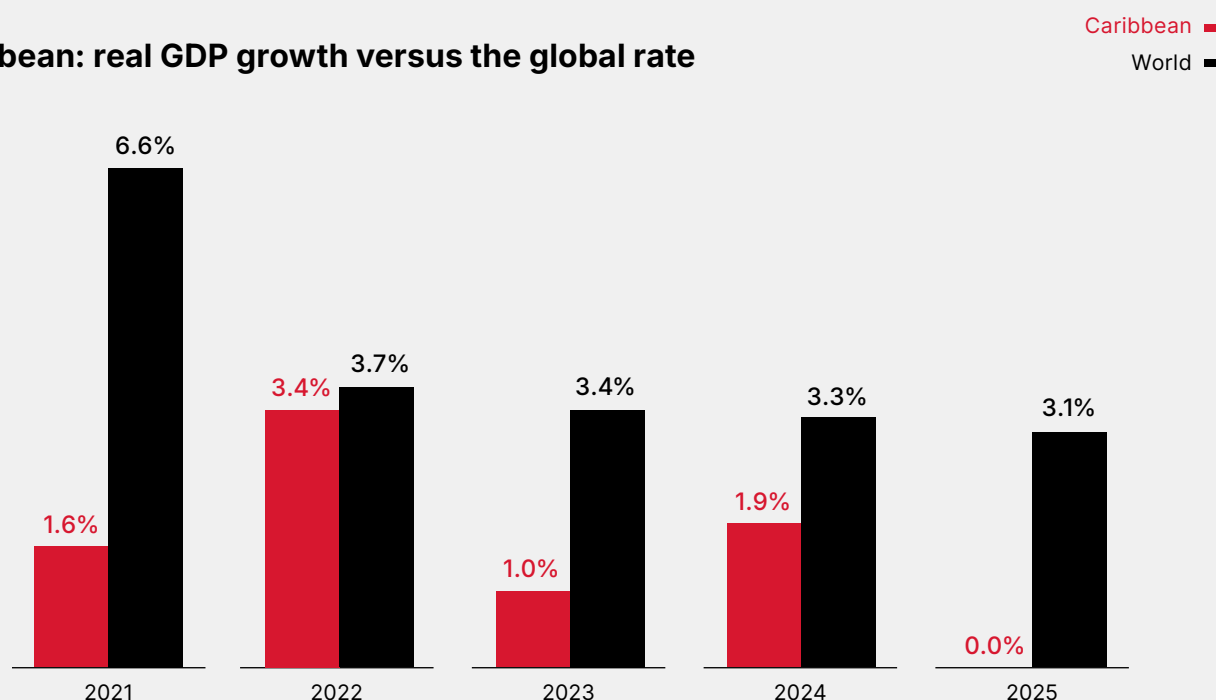
while limited fiscal space reduces governments' ability to respond to shocks and invest in long-term development.

The Caribbean faces structural challenges, with modest growth and stagnant productivity. Structural reforms, including expanding the digital economy, can boost efficiency and innovation. Improving productivity will depend on quality investment, stronger institutions and policies that foster private-sector growth, resilience and diversification.

The region has clear opportunities to build a more resilient and diversified growth model. Targeted investments in tourism linkages, renewable energy, sustainable transport and digital transformation can help raise productivity, reduce vulnerability and create new sources of growth. Digital infrastructure and mobile connectivity will be particularly important, enabling firms and governments to improve efficiency, expand access to services and support new business models across small and highly dispersed island economies.

Figure 1

Caribbean: real GDP growth versus the global rate



Source: GSMA Intelligence using WEO-IMF October 2025 data

Technology investments underpin economic growth

Technology investments have become essential for sustained long-term economic growth, with digitalisation reshaping how value is created, traded and captured across economies. In the Caribbean, investment in digital infrastructure and connectivity is increasingly recognised as a key enabler of productivity growth, economic diversification and resilience.

Digitalisation is crucial for island economies, as it boosts competitiveness and addresses their unique structural challenges. It helps these economies connect despite being geographically fragmented, lowers transaction costs and eases access to markets and services. To foster tourism, trade and financial inclusion, governments are focusing on expanding broadband, enhancing digital public services and improving connectivity across the region.

Private-sector investment is also reinforcing this shift, with regional operators expanding fibre and mobile broadband coverage to support businesses and households. At the same time, digital payment platforms and mobile financial services are becoming more important for improving efficiency and supporting more formal and traceable economic activity, particularly for small and medium-sized enterprises and informal workers. This is supported by investment in digital infrastructure. For example, Google has invested in subsea cable infrastructure across the Caribbean to improve international connectivity and reduce dependence on limited legacy networks.



1.2

Mobile's contribution to the economy

Mobile technologies contributed \$21 billion of economic value in 2025

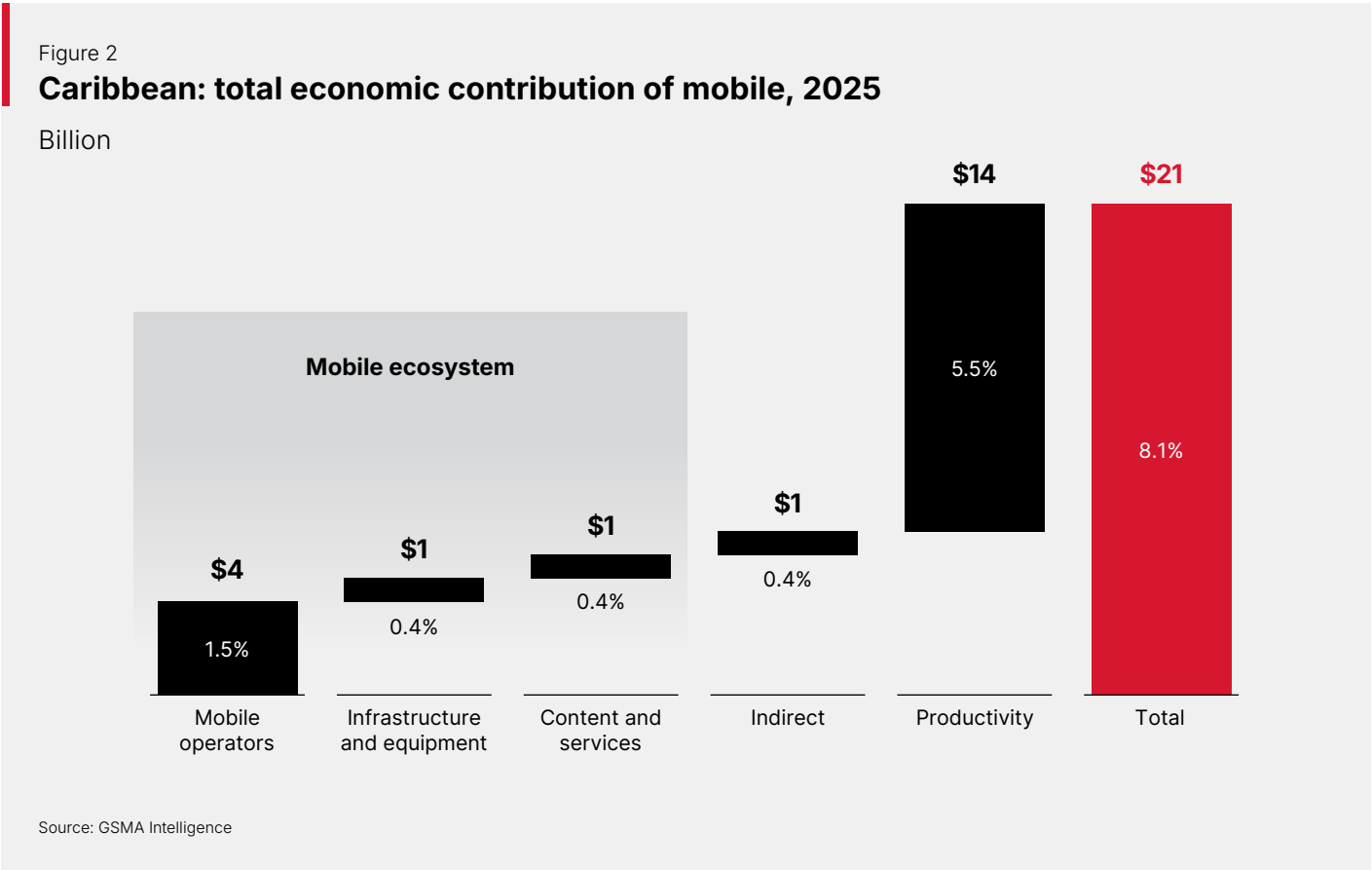
In 2025, mobile technologies and services generated 8.1 % of GDP in the Caribbean, a contribution that amounted to \$21 billion of economic value added. The greatest benefits came from the productivity effects reaching \$14 billion, followed by the direct contribution of the mobile ecosystem generating \$6 billion.

The impacts of mobile technologies include connectivity and digital transformation. The former refers to the use of mobile technologies, while the latter involves the integration by enterprises of advanced mobile technologies such as 5G, IoT and AI.

By 2030, mobile's contribution to the Caribbean economy will reach \$23 billion, driven by the improvements in productivity and efficiency brought about by the continued expansion of mobile services and the growing adoption of digital technologies, including 5G, IoT and AI. By 2030, mobile's contribution is expected to grow at a CAGR of 1.7%, slightly above overall GDP growth (CAGR of 1.3%).

In this context, mobile technologies play an increasingly important role in supporting economic resilience and competitiveness. By enabling digitalisation across industries, they help firms improve efficiency, optimise costs and adapt to a more challenging economic environment while also supporting innovation and productivity gains over the medium term.

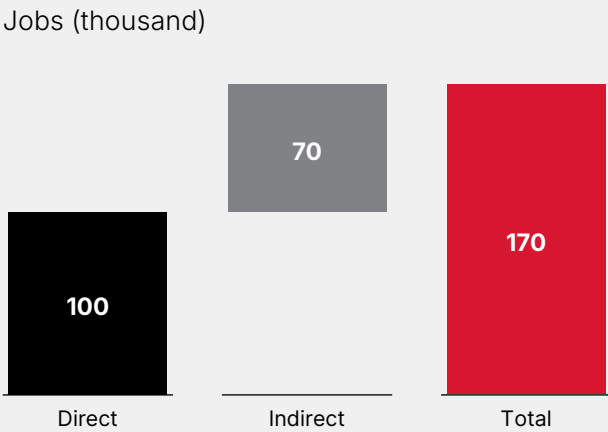
The mobile ecosystem is formed of three categories: mobile operators; infrastructure and equipment; and content and services. The infrastructure and equipment category encompasses tower companies, network equipment providers, device manufacturers and IoT suppliers. Meanwhile, the content and services category encompasses content, mobile application and service providers, distributors and retailers, and mobile cloud services.



The mobile ecosystem supported 170,000 jobs in 2025

Mobile operators and the wider mobile ecosystem provided direct employment to 100,000 people in the Caribbean in 2025. In addition, the economic activity in the ecosystem generated 70,000 jobs in other sectors, meaning that 170,000 jobs were directly or indirectly supported.

Figure 3
Caribbean: employment impact of mobile, 2025



Source: GSMA Intelligence



The fiscal contribution of the mobile ecosystem reached \$3 billion in 2025

Taxes constitute the major share of government revenues around the world. In 2025, tax revenue in the Caribbean reached \$50 billion, or 19% of the regional GDP, similar to the previous year.

The mobile sector in the Caribbean made a substantial contribution to the funding of the public sector, with \$2.6 billion raised through taxes on the sector in 2025. A large contribution was driven by corporate taxes on profits and employment taxes (\$1.5 billion). The fiscal contribution of the mobile ecosystem represented around 5% of the total tax revenue.

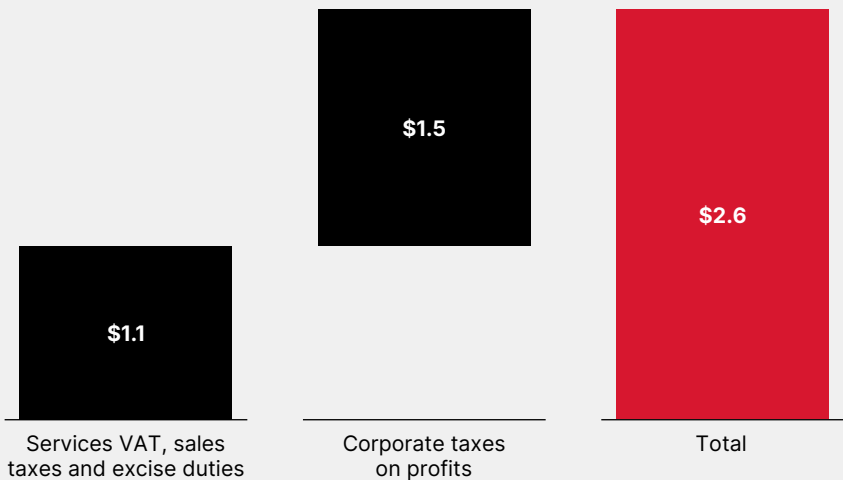
Beyond its direct fiscal contribution, the mobile sector plays an important role in strengthening public finances across the Caribbean by improving the efficiency and accessibility of tax systems. In many Caribbean economies, where small businesses and informal activity remain significant, mobile

connectivity and digital payments help increase transaction traceability and support broader tax compliance, particularly in service-based sectors such as tourism, retail and cross-border trade.

Mobile-enabled platforms also support the digitalisation of public services, including tax filing, payments and interactions with government agencies. By reducing administrative burdens and lowering compliance costs, these tools improve revenue collection efficiency and help broaden the tax base. As digital payments, e-commerce and mobile financial services continue to expand, the mobile ecosystem can help support more stable and predictable public revenues. For small island economies with limited fiscal space and high exposure to external shocks, stronger domestic revenue mobilisation is essential to improving resilience and supporting long-term fiscal sustainability.

Figure 4
Caribbean: fiscal contribution of mobile, 2025

Billion



Source: GSMA Intelligence

The contribution of 5G and its ecosystem

As 5G networks expand and complementary technologies such as AI mature, the scale of impact will be shaped by infrastructure availability and investment in digital skills, innovation capacity and the integration of advanced technologies into production processes. The economic value of digital transformation will come from two main channels:

- **External value creation:** The creation of new revenue streams and business models that expand markets and stimulate additional demand.
- **Internal value enhancement:** Measurable gains in productivity, cost efficiency and operational performance within firms.

The balance between these channels will vary across sectors, reflecting differences in digital readiness, capital intensity and the ability to adopt and scale up advanced technologies.

By 2030, services are projected to account for over one third of the economic impact attributable to 5G and its ecosystem in the Caribbean. This reflects the central role of services in the region's economic structure, particularly tourism, retail, transport and financial services, where mobile connectivity

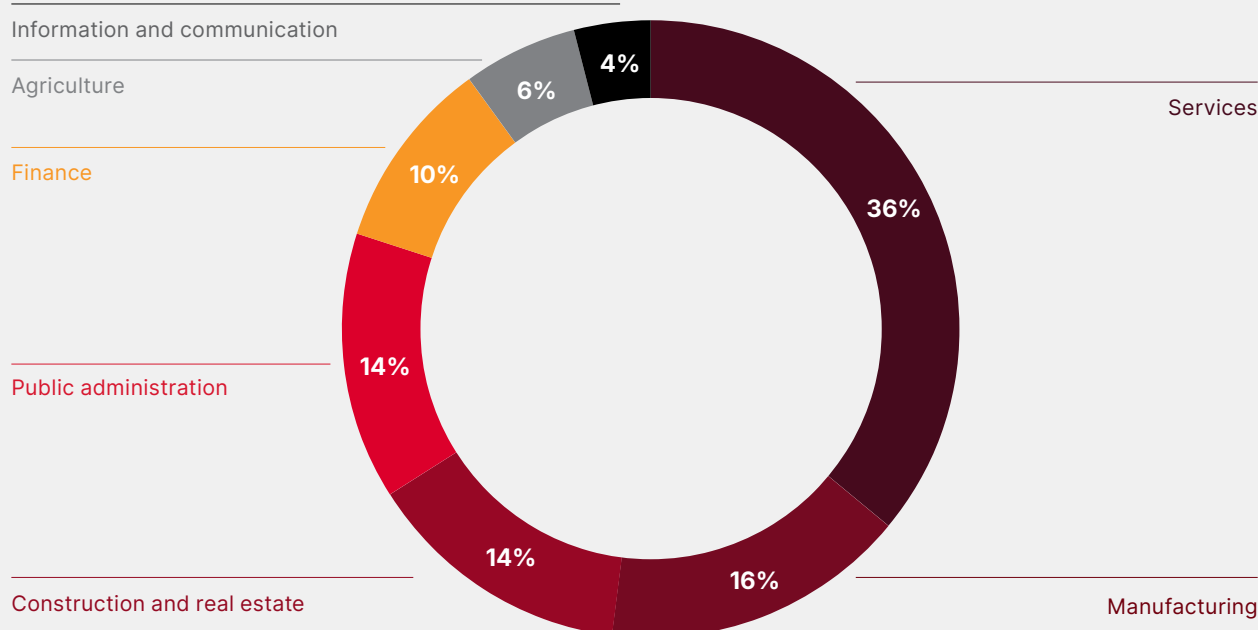
supports productivity gains, better customer experiences and more efficient business operations. As digital transformation accelerates, 5G can help strengthen these sectors through smarter logistics, digital payments, cloud-based services and improved connectivity for businesses and consumers.

Manufacturing, construction and real estate, and public administration will also make meaningful contributions, highlighting the broad diffusion of mobile-enabled technologies across the wider economy. In particular, digitalisation can improve infrastructure development, government service delivery and operational efficiency in sectors that are critical for long-term resilience and competitiveness across small island economies.

The comparatively modest anticipated contribution from the information and communication sector underscores that the value of 5G reaches far beyond the core digital industries. Its most significant impact will be realised through enhanced productivity across conventional sectors and by fostering a more diversified, resilient and innovation-oriented growth framework for the Caribbean.

Figure 5

Caribbean: mobile's contribution to GDP by industry, 2025–2030



Source: GSMA Intelligence

02

Trends shaping the mobile industry



2.1

Advancing AI adoption and creating an ecosystem

AI has emerged as a strategic priority across the Caribbean digital ecosystem, moving from experimentation towards early operational deployment. While adoption remains at an earlier stage than in larger global markets, AI is increasingly shaping telecoms operations, customer engagement,

digital policy and national development strategies across the region. This mirrors broader global telecom trends: by 2025, more than 80% of telecoms operators globally were testing generative AI applications, with a growing focus on operational deployment.

From customer care to network automation

Operators are leveraging AI in customer care and digital engagement, which is currently the largest area of telecoms AI deployment globally. GSMA Intelligence estimates that customer care accounts for nearly half of telecoms AI deployments worldwide, primarily driven by automation and operational-efficiency objectives. In the Caribbean, customer care has similarly emerged as the primary area of AI adoption among operators. According to GSMA Intelligence data, 23 mobile operators in the region (38%) have launched at least one AI tool: 35% of operators have deployed a chatbot, while just 3% of operators are using other AI tools, underlining the strong focus on customer engagement.

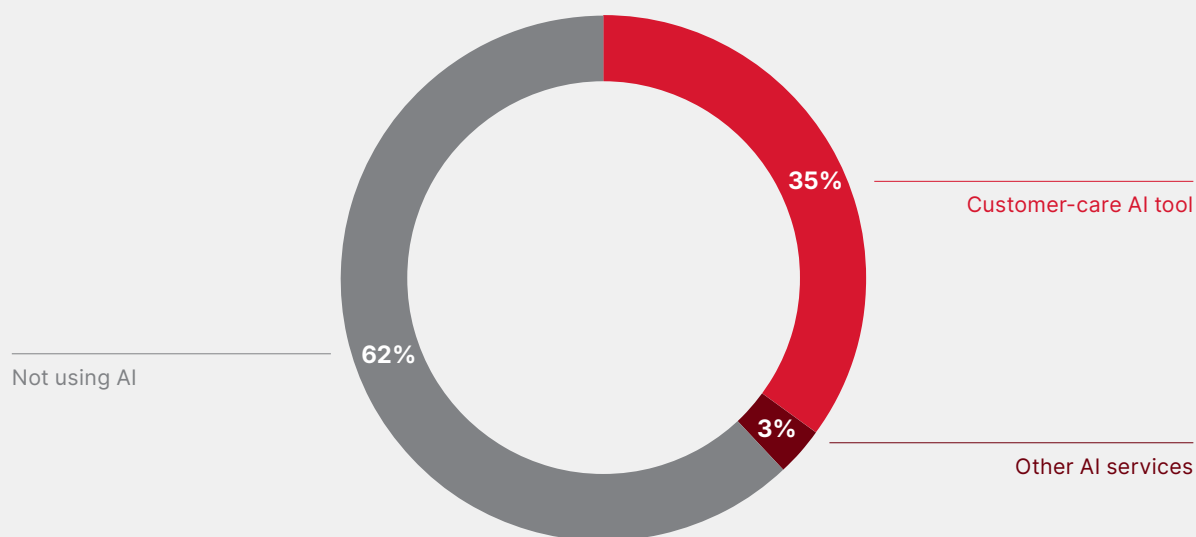
For instance, Digicel has expanded the use of AI-enabled customer service tools by deploying conversational AI agents, such as Ruby. Ruby enables 24/7 multilingual support, reduces pressure on call centres and supports the shift towards digital self-service channels.

AI is also becoming increasingly relevant in network operations. Caribbean operators are leveraging AI to support predictive maintenance, automated network optimisation, fraud management and operational efficiency. These technologies are particularly important in the Caribbean, where operators face high infrastructure costs, geographically fragmented markets and limited economies of scale. In 2025, Digicel deployed AI-driven, real-time traffic monitoring systems across international voice operations.

Figure 6

Customer care leads among AI deployment use cases in the Caribbean

Percentage of operators



Source: GSMA Intelligence

AI governance and readiness become regional priorities

As AI becomes a growing component of the Caribbean's wider digital transformation agenda, policymakers and regional organisations are focusing more on governance, readiness and ecosystem development. In 2025, the Caribbean Telecommunications Union (CTU) launched the Caribbean AI Task Force to coordinate regional approaches to AI governance, capacity building and policy development in 2025.¹ The initiative reflects increasing recognition that Caribbean markets may struggle to independently develop AI ecosystems due to their relatively small scale and fragmented regulatory environments.

The CTU subsequently advanced discussions on a harmonised regional AI governance framework, focusing on issues such as ethical AI use, data governance, digital infrastructure and regulatory coordination. It also reflects growing concerns that fragmented policy approaches could limit investment, innovation and regional competitiveness in emerging digital technologies.

Building capacity and understanding is equally important. Through its Capacity Building programme, the GSMA offers a wide range of training courses for policymakers and regulators in both face-to-face and online formats. In-person courses are delivered globally through strategic partnerships, while online courses are available year-round, allowing participants to learn at their own pace from anywhere.

To incorporate AI into the public sector, governments are also beginning to modernise strategies. Trinidad and Tobago developed an AI policy through the establishment of a Minister of Public Administration and Artificial Intelligence, alongside supporting regional AI innovation initiatives linked to the University of the West Indies. Across the Caribbean, AI is increasingly being incorporated into broader digital transformation agendas alongside cybersecurity, cloud services and digital inclusion.

Several Caribbean jurisdictions have begun exploring AI governance and regulatory oversight mechanisms. Discussions have focused on data protection, public-sector AI use, accountability and ethical deployment. The Cayman Islands, for example, has started developing formal AI policy recommendations and public-sector AI governance standards.²

At a regional level, international organisations and development institutions are shaping the AI agenda. The Unesco Caribbean AI Policy Roadmap has gained prominence as a reference framework for Caribbean policymakers, particularly in relation to governance, education, sustainability and resilience for small island developing states (SIDS).³ At the same time, organisations such as the Development Bank of Latin America and the Caribbean, the CTU and the UNDP have expanded efforts to improve AI readiness, workforce skills and institutional capacity, recognising that infrastructure limitations, investment gaps and shortages of specialised talent could otherwise constrain AI adoption.

The opportunity for operators

AI presents an opportunity for operators to improve efficiency, automate customer care and optimise network operations in markets where high infrastructure costs and limited scale continue to put pressure on margins. Over time, AI could also support new enterprise and public-sector services in areas such as tourism, fintech, cybersecurity and digital government. However, broader AI adoption will depend on addressing structural challenges, including the region's mobile investment gap and

persistent digital inclusion issues, with almost half of the population still not using mobile internet despite being covered by networks.

As operators continue expanding 4G and early 5G deployments, AI is expected to increasingly complement wider digital transformation efforts, including satellite connectivity and other technologies aimed at improving resilience and coverage across geographically fragmented island markets.

1. "CTU Caribbean AI Task Force Launched to Guide Ethical and Inclusive Artificial Intelligence Development in the Region", CTU, July 2025

2. "AI regulatory recommendations under consideration by taskforce", The Cayman Independent, March 2026

3. Caribbean Artificial Intelligence Policy Roadmap, Unesco, 2024



2.2

Strengthening cybersecurity and fraud resilience in networks

While cybersecurity is an important consideration globally, for Caribbean operators specifically, cyber risk is closely tied to the region's wider digital transformation agenda. As governments and businesses expand digital payments, online public services and cloud-based systems, confidence in digital channels becomes essential for adoption. Concerns around online fraud and cybercrime have increasingly been cited as barriers to digital trust. As a result, cybersecurity is being seen as not only a technical requirement, but also as a foundational enabler of digital adoption and digital inclusion. Globally, more than 90% of operators classify cyberthreats as high or very high.⁴

In the Caribbean, there is also a growing link between cyber resilience and wider network resilience, particularly as operators depend on cloud infrastructure, international gateways and submarine cable systems that support both communications and economic activity. At the same time, the growing use of AI is reshaping the threat landscape, as it enables more sophisticated phishing and fraud attacks while simultaneously supporting more advanced fraud detection and network monitoring capabilities.

4. GSMA Intelligence Telco Security Survey 2025

Operator-led investments for AI-driven fraud detection

Operators in the region are strengthening security by embedding advanced monitoring and analytics into core network operations. In 2025, Digicel deployed AI-driven fraud detection and proactive threat-mitigation solutions across multiple Caribbean markets. It is doing this to target risks such as SIM fraud and the manipulation of international voice traffic, threats that continue to affect international telecoms networks. While primarily focused on wholesale voice services, the partnership reflects a broader trend within parts of the telecoms sector

towards integrating cybersecurity directly within network management rather than treating security as a standalone or reactive function.⁵

Cybersecurity has become a key pillar of telecoms operations as networks shift to cloud-native and software-defined architectures. With the rapid expansion of digital services, cloud infrastructure and connected devices, operators face a progressively more complex attack surface.

Growing regional coordination

Operator initiatives are complemented by expanding regional and national efforts to strengthen cyber resilience. In 2025, the Caribbean Community (Caricom) continued implementation of the Caricom Cyber Security and Cybercrime Action Plan, which provides a regional framework to improve incident response coordination, legislative alignment, public awareness and cyber resilience capacity across member states. The framework recognises the importance of collaboration with critical-infrastructure operators, including telecoms providers.⁶

However, implementation at the national level remains uneven. Jamaica has continued strengthening the role of its Jamaica Cyber Incident Response Team, while Trinidad and Tobago's Cyber Security Incident Response Team supports coordination across critical sectors, including telecoms and government services. Other Caribbean markets remain at earlier stages of cybersecurity institutional development, with

limited technical and financial resources constraining standalone national approaches. To address these gaps, the Organisation of Eastern Caribbean States and regional partners have advanced initiatives focused on shared cyber resilience, digital governance and regional cooperation. This includes support for regional incident-response planning and digital resilience programmes under broader digital transformation initiatives.

Regional telecoms industry organisations are also putting a spotlight on cybersecurity collaboration. In recent years, CANTO – the Caribbean's leading telecoms trade association – has expanded discussions on telecoms cybersecurity, fraud prevention, ransomware preparedness and digital trust through regional conferences and operator-led forums. With growing digitalisation in the region, operators are expected to play a key role in securing digital infrastructure and maintaining trust in digital ecosystems.

5. "e& and Digicel Group Announce Strategic Partnership", e&, May 2025

6. "Updated CARICOM Cyber Security and Cybercrime Action Plan (CCSCAP) Launched", Caricom, November 2025

2.3

Satellite connectivity and D2D gain momentum

Satellite connectivity is taking on a larger role in the Caribbean telecoms ecosystem as operators and policymakers look to improve network resilience, extend coverage and address connectivity gaps across geographically fragmented markets of the region. Direct-to-device (D2D) satellite services are

emerging as a complementary connectivity layer, which is particularly relevant in contexts where terrestrial mobile deployment remains constrained by geography, investment requirements and disaster exposure.

Building network resilience and satellite infrastructure

D2D satellite connectivity in the region has begun to demonstrate its potential role in strengthening network resilience. In 2025, Liberty Caribbean, part of Liberty Latin America, collaborated with Starlink Direct to Cell to provide emergency connectivity in Jamaica following Hurricane Melissa. The initiative enabled basic SMS and text messaging services via satellite for Flow mobile customers in areas where terrestrial mobile infrastructure was severely disrupted. While limited in scope and primarily focused on emergency use, the trial highlighted growing interest in D2D satellite connectivity as a resilience tool in hurricane-prone Caribbean markets.

Alongside D2D, investment in low Earth orbit (LEO) satellite infrastructure is also rising across the region. Orange and Eutelsat inaugurated a teleport in Lamentin, Martinique, hosting a OneWeb satellite gateway. The site, built and operated by the operator, includes 14 LEO antennas to extend low-latency satellite connectivity across the Caribbean, particularly in hard-to-access areas. The facility will support residents, enterprises and maritime and military users by strengthening regional coverage.

Satellite broadband services for underserved areas

Satellite broadband is also being used to complement existing fixed and mobile infrastructure in underserved markets. In April 2026, Co-op Cable partnered with Eutelsat to expand satellite-based television and broadband services across Caribbean territories using the Eutelsat 65 West A satellite platform. This reflects the increasing convergence between satellite and terrestrial connectivity ecosystems in the region.

These developments are taking place against a backdrop of investment challenges. The share of 5G connections across the Caribbean is expected to reach almost a quarter of total mobile connections by 2030. In this context, satellite connectivity and emerging D2D services are seen as complementary solutions that can help extend coverage and strengthen network resilience.

Alongside D2D, investment in LEO satellite infrastructure is also rising across the Caribbean

03

Mobile industry impact





Mobile operators in the Caribbean are playing a critical role in supporting digital inclusion, climate resilience and sustainability across the region. As Caribbean markets continue expanding digital

infrastructure and services, operators are investing in renewable energy, digital skills programmes and community access initiatives.

3.1

Supporting digital inclusion and community access

Operators are facilitating affordability, digital skills and safe spaces to boost digital inclusion, supporting efforts that expand access beyond just connectivity.

The Digicel Foundation – which has a presence across a number of markets, including Haiti, Jamaica and Trinidad and Tobago – have continued to support community ICT access and digital skills initiatives. Programmes have focused on education, employability and basic digital confidence, reflecting the growing importance of digital participation beyond network availability.

In Trinidad and Tobago, the Digicel Foundation partnered with the Adult Literacy Tutors Association (ALTA) to establish the ALTA Online Student Hub, providing computer and internet access to support adult literacy and digital learning. Launched in 2025, the hub enables ALTA students, volunteers and community members to access online literacy programmes and build basic digital confidence, particularly among underserved populations in Belmont.

Building on this model, the Digicel Foundation significantly scaled up its community-based digital access approach in 2026 through the launch of eight new Technology-in-Education (TIE) Centres located in panyards and community spaces across Trinidad and Tobago, including the Roxborough Police Youth Club. Equipped with computers, internet connectivity and digital tools, the centres are embedded within cultural and youth organisations that already play a mentoring role in their communities. The initiative aims to strengthen links between cultural participation, education and digital skills development, particularly for young people.

These initiatives are taking place against a backdrop of persistent digital inclusion challenges across the Caribbean, where a significant share of the population remain offline or do not have meaningful connectivity despite mobile network coverage being available.

3.2

Enabling sustainability and reducing climate emissions

Sustainability and energy resilience are growing priorities for Caribbean operators as networks expand and energy costs remain high across island markets. The region's exposure to hurricanes and climate-related disruptions is making renewable energy deployments more crucial, with operators increasingly looking to reduce reliance on diesel generation while strengthening service continuity.

One example is Digicel's partnership with Caban Energy in Jamaica, under which solar power and lithium-iron-phosphate battery systems have been deployed at mobile sites. The initiative aims to transition around 40% of Digicel's Jamaican cell sites to renewable energy, reducing diesel dependence and enhancing resilience during prolonged power outages following extreme weather events. The deployment is projected to cut 38,674 tonnes of CO₂e annually (with lifetime emissions reductions exceeding 580,000 tonnes) while improving network reliability in hurricane-prone areas.

Operator actions are taking place alongside broader efforts to decarbonise island energy systems. Multilateral development banks and climate finance institutions are playing a growing role in supporting renewable energy deployment and grid resilience across the Caribbean. Programmes backed by the Caribbean Development Bank and the Green Climate Fund have mobilised around \$26.7 million for renewable energy and grid modernisation projects in Barbados, Belize and Jamaica, helping to lower electricity costs and improve supply reliability for large energy users, including telecoms operators.

At a national level, several Caribbean governments have set ambitious clean energy targets. Barbados, for example, has committed to achieving 100% renewable electricity by 2035, which, if realised, would materially reduce Scope 2 emissions for mobile operators while improving long term energy security.

Mobile-enabled early warning systems for island nations

Early warning systems (EWS) are a vital tool in disaster-prone environments, as they can significantly reduce the loss of life and the economic toll of climate hazards by providing timely, actionable emergency alerts to impacted communities. However, just 39% of SIDS report having a multi-hazard EWS in place. To address this, solutions that are both scalable and accessible across these geographically dispersed island communities are needed. As such, mobile connectivity stands out as a powerful and existing asset that reaches across SIDS.

The GSMA has built partnerships through CANTO to advance EWS collaboration between mobile operators and governments, including discussions with several Caribbean countries to develop and implement a national EWS.

This work sits alongside the Climate Risk Early Warning Systems Caribbean project,⁷ a flagship three-year programme under the Global Facility for Disaster Reduction and Recovery, covering 15 Caricom nations. The programme brings together the World Bank, the World Meteorological Organisation and the United Nations Office for Disaster Risk Reduction to strengthen the region's multi-hazard, people-centred EWS.

7. <https://www.gfdr.org/en/crews-caribbean>

04

Policies for innovation and growth





4.1

The need for regulatory modernisation

Telecoms reform and regulatory modernisation in the Caribbean remain an ongoing process as governments update legacy legal frameworks and adapt regulatory institutions to support a rapidly evolving digital economy. Many existing telecoms laws were designed during the 1990s and early 2000s, which established independent regulators and enabled the transition to competitive telecoms markets.

Today's priorities include broadband expansion, digital resilience and enabling investment in next-generation mobile technologies (e.g. 5G), satellite, AI-enabled services and AI governance.⁸ There are also significant demand-side challenges. Despite widespread network availability, almost half of the population in the region remains offline despite having coverage. This usage gap reflects structural constraints across device affordability, capability development (e.g. digital skills) and the broader digital ecosystem, including access to locally relevant

content and services. Recent regional evidence points to the usage gap and digital inclusion, not just coverage, as a central policy concern. For SIDS – where limited scale, high deployment costs and exposure to natural disasters shape network economics – policy coherence and regulatory execution are critical.

The need for modernisation is also increasingly linked to investment sustainability. According to GSMA Intelligence research,⁹ the Caribbean islands face a substantial investment gap in next-generation mobile infrastructure. While operators continue to invest in network expansion, projected returns under current market conditions are insufficient to fully support widespread 5G deployment across the region. This has reinforced the importance of regulatory frameworks that improve investment certainty, reduce deployment costs and encourage infrastructure sharing and spectrum efficiency.

8. "From Dialogue to Action: Advancing Digital Transformation in the Caribbean", Caricom, June 2025

9. [Mobile Investment Gaps: Caribbean islands](#), GSMA, 2024

Towards digital transformation

Several countries in the Caribbean have made progress by embedding telecoms reform within broader digital transformation agendas. The Telecommunications Authority of Trinidad and Tobago, which was established under the 2001 Telecommunications Act, introduced pro-competitive measures such as number portability and universal service mechanisms. The creation of the Ministry of Digital Transformation in 2021 signalled a shift towards a whole-of-government approach to digital policy, linking telecoms regulation with e-government delivery, cybersecurity and digital inclusion objectives.¹⁰

The Bahamas has continued to modernise its framework through the Utilities Regulation and Competition Authority Act, including recent initiatives to support 5G rollout, develop a regulatory framework for satellite services and introduce investment incentives such as licence fee adjustments to expand coverage in underserved areas.¹¹ However, challenges remain in extending affordable connectivity to the Family Islands.

Other markets are at different stages of reform. Belize's Public Utilities Commission is revisiting its regulatory framework to facilitate next-generation mobile networks and improve investment certainty. In Guyana, while the Telecommunications Act 2016 formally ended monopoly control, implementation is still underway, with interconnection rules and competition safeguards being phased in.

In the Eastern Caribbean, regulatory harmonisation remains a defining feature. The five member states of the Eastern Caribbean Telecommunications Authority (ECTEL) are transitioning to the Electronic Communications Bill, which aims to replace legacy legislation with a harmonised framework covering universal service, quality-of-service obligations, dispute resolution and access to submarine cables and satellite connectivity. Progress is ongoing, supported by regional initiatives such as the Caribbean Digital Transformation Project, alongside a growing focus on digital inclusion and consumer protection in the context of emerging technologies.¹² ECTEL's 2026 Digital Inclusion Survey also highlights persistent usage barriers related to device and data affordability and digital literacy and skills, highlighting that demand-side barriers continue to be a major constraint despite improvements in network coverage.

In the Caribbean, regulatory reform is increasingly about strengthening implementation, coordination and investment incentives. Frameworks must accommodate technological change while recognising the structural realities of small, geographically fragmented markets.

Several countries in the Caribbean have made progress by embedding telecoms reform within broader digital transformation agendas

10. Digital Transformation for 21st Century Government, The Caribbean Telecommunications Union

11. Draft URCA Annual Plan 2026, The Utilities Regulation and Competition Authority, December 2025

12. "Digital Transformation trends across the Eastern Caribbean", SearchLight, February 2026



Addressing the 5G investment gap

The deployment of 5G represents a milestone in Caribbean's broader digital transformation agenda. Although rollout in the region is in the early stages, the outlook to 2030 indicates the risk of a significant delay in 5G deployment across many markets in the region. 5G coverage is expected to barely exceed half of the total population by then, and the projected adoption of 5G by 2030 is around 23%. This reflects structural investment challenges that markets in the region face. GSMA Intelligence research estimates that for all Caribbean markets to achieve 5G coverage levels comparable to the leading Caribbean markets, this would require close to \$1 billion in total investment. However, under current market conditions, only around half of this investment is expected to be commercially recoverable through operator revenues.

This estimated 5G investment gap for the Caribbean islands needs to be addressed. The gap reflects the difference between the level of 5G deployment

that is commercially feasible under existing market conditions and the higher levels of coverage and adoption needed for all Caribbean markets to reach similar levels to the leading Caribbean markets by 2030. The GSMA Intelligence research underlines the importance of regulatory modernisation, targeted policy support and investment incentives to accelerate deployment and reduce the risk of a widening digital divide between markets within the region.

The smaller market size, fragmented geography, high infrastructure costs and relatively low revenue potential of the Caribbean continue to constrain investment economics. In this context, measures such as spectrum policy reform, incentives for voluntary infrastructure sharing, streamlined permitting processes and public-private partnerships will be increasingly important to support sustainable 5G expansion across the Caribbean.

4.2

Harmonising spectrum for mobile evolution

Securing additional spectrum in the Caribbean will support the wider, contiguous channel blocks required for high-quality mobile services. Larger contiguous channels allow operators to deploy more efficient network technologies that deliver higher data speeds, improved capacity and better user experience, particularly as demand for mobile broadband continues to rise.

Without access to sufficient spectrum, networks risk becoming fragmented across smaller blocks, reducing spectral efficiency and increasing the cost of delivering services. By planning early to secure future spectrum, particularly in harmonised bands, Caribbean countries can ensure operators have the spectrum needed to scale up networks effectively and meet growing connectivity needs.

Timely and adequate access to mid-band spectrum helps the development of networks that can provide high capacity for a variety of applications. These include an expansion of high-resolution video streaming, extended reality wearables, enterprise

digitalisation and AI.

Prominent mid-bands include the 3.5 GHz range, which is being used today to power 5G launches, while the 6 GHz band has also been harmonised internationally. Following identification for IMT at the World Radiocommunication Conference 2023 (WRC-23), 6 GHz is now the harmonised home for the expansion of mobile. It is the largest remaining single block of mid-band spectrum for mobile services and supports greater capacity for mobile. It will also be crucial for the launch of future 6G networks.

Future networks will also need low-band spectrum (e.g. 600 MHz). Low bands support wide coverage and help lower the digital divide between urban and rural areas. While significant attention has recently been given to D2D, this will only provide a low-bandwidth coverage layer. Only countries with effective spectrum policies will be able to unlock the transformative potential of new technologies and position themselves as leaders in the evolving digital economy.

Spectrum roadmaps

Spectrum decisions made today will shape the next phase of digital growth. A spectrum roadmap can help countries meet growing demand for mobile services by forecasting future trends and identifying planned assignments. For mobile operators, roadmaps encourage investment by offering increased certainty, based on the government's future allocation, renewal plans and radio spectrum management.

The main elements of a spectrum roadmap include:

- spotting new opportunities and potential problems with spectrum policy 3–5 years ahead, including understanding future capacity needs
- understanding future technology trends and what they will mean for how spectrum is used and managed
- designing programmes to manage spectrum effectively and make the most of new opportunities
- setting up a regular process to review and update the roadmap (ideally once a year).

Aligning regional and global harmonisation

Harmonising mobile spectrum across the Caribbean will improve affordability and accelerate the development of digital services. Aligning national frequency allocations with internationally harmonised bands enables economies of scale across the global mobile ecosystem, reducing the cost of devices and network equipment and, ultimately, lowering the price of services for consumers. Harmonisation provides part of the support needed to close the usage gap.

For markets such as those in the Caribbean, these benefits are particularly important: a common approach to spectrum use helps avoid costly market fragmentation, improves interoperability and roaming and minimises cross-border interference across neighbouring islands. By pursuing alignment with globally harmonised bands, Caribbean countries can optimise their networks and support more affordable, high-quality connectivity.

While some mobile bands that were under discussion at WRC-23 may take time to be implemented, work to

define harmonised bands is already underway and remains vital for long-term planning. WRC-27 presents an opportunity for the Caribbean to shape the next evolution of mobile connectivity. The conference can harmonise additional mid-band spectrum, including 4.5 and 7 GHz, which can support future mobile evolution in Caribbean countries.

Active engagement in the WRC process allows countries to shape these outcomes and prepare early for emerging technologies, ensuring timely access to harmonised spectrum as it becomes available. For Caribbean administrations, participation in this global process also strengthens regional coordination and helps ensure that national policies are aligned with international developments. This, in turn, will better position Caribbean economies to invest in next-generation networks, expand digital inclusion and support sustainable digital transformation in the years ahead.

Enabling D2D

D2D describes connectivity between satellites and mobile handsets. It can supplement coverage for people who already have a mobile connection. It can also offer connectivity to those who live outside terrestrial mobile coverage and can afford a device and service plan.

D2D can also expand resilience, especially during emergencies when there are terrestrial network outages. Because of D2D's weaker signal and lower spectrum efficiency, it cannot provide meaningful

connectivity in populated areas such as cities and towns. Its use will therefore be limited to rural areas with very low or no populations. In populated rural areas, low-band terrestrial mobile will remain the more efficient way of delivering mobile broadband.

WRC-27 will consider the development of D2D. A critical part of the conversation will focus on enabling D2D while ensuring that there is no harmful interference to the terrestrial mobile services that so many people rely on.

A common approach to spectrum use helps avoid costly market fragmentation, improves interoperability and roaming and minimises cross-border interference across neighbouring islands

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