



ELECTRONIC COMMUNICATIONS SECTOR REVIEW

ECTEL CONTRACTING STATES

APRIL 2023 – MARCH 2024

-  COMMONWEALTH OF DOMINICA
-  GRENADA
-  THE FEDERATION OF ST. CHRISTOPHER (ST. KITTS) AND NEVIS
-  SAINT LUCIA
-  ST. VINCENT AND THE GRENADINES



ECTEL CONTRACTING STATES

Commonwealth of Dominica

Grenada

The Federation of St. Christopher (St. Kitts) and Nevis

Saint Lucia

St. Vincent and the Grenadines

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Preface

The Eastern Caribbean Telecommunications Authority (ECTEL) produces this annual review of the electronic communications sector to provide insight into the performance, trends, and economic contribution of the sector in the ECTEL Contracting States of the Commonwealth of Dominica, Grenada, St. Kitts and Nevis, Saint Lucia and St. Vincent and the Grenadines. The report highlights the deployment, availability, and use of electronic communications infrastructure, as well as key developments, market outcomes and policy-relevant indicators across the Contracting States.

This 17th edition covers the period **April 2023 to March 2024** and examines sector performance using a range of economic and statistical indicators, including revenue, investment, employment, traffic and service penetration. Where relevant, the report includes revisions to previously published figures based on updated information received from service providers.

The statistical indicators presented in this publication are based on the International Telecommunication Union's (ITU) core Information and Communications Technology (ICT) indicators for infrastructure and access. Data was collected through ECTEL's Online Data Collection Portal and supplemented by information submitted by licensed electronic communications service providers, as well as publicly available sources including the ITU, GSMA, the United Nations Broadband Commission and the World Bank.

ECTEL extends its appreciation to all service providers, the Eastern Caribbean Central Bank (ECCB), and partner institutions for their continued cooperation in supplying essential data. ECTEL also acknowledges the invaluable contribution of the National Telecommunications Regulatory Commissions (NTRCs) in coordinating the data collection process across the Contracting States.

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EXECUTIVE SUMMARY

Global trends in rising broadband demand, declining fixed-voice usage, and the continued dominance of mobile networks shaped the performance of electronic communications markets worldwide in 2023. These developments were also reflected across the ECTEL Contracting States during the review period **April 2023 to March 2024**, where mobile and broadband services continued to drive sector growth amid shifting consumer communication behaviours.

The electronic communications sector in the ECTEL Contracting States experienced moderate, broad-based growth over the review period, with all Contracting States recording increases in total sector revenue. Overall sector revenue increased by 5 per cent to EC\$694 million, supported primarily by sustained expansion in fixed and mobile broadband services. Fixed broadband revenue rose by 11 per cent, marking the ninth consecutive year of growth.

In contrast, sector investment declined by 14 per cent to EC\$132.5 million, following two consecutive years of growth. As a result, the investment-to-revenue ratio fell from 23 per cent to 19 per cent. Employment also contracted, declining by 5 per cent to 741 full-time employees.

Total subscriptions across all services grew by 5 per cent to 1.33 million, with mobile services remaining the dominant category and accounting for 78 per cent of all connections. Fixed voice and subscriber television services continued to hold the smallest shares of the market.

Broadband connectivity remained the primary driver of sector expansion. Mobile broadband subscriptions increased by 5 per cent, while fixed broadband subscriptions rose by 2 per cent. This resulted in fixed broadband penetration rate of 29.2 per cent and mobile broadband penetration rate of 89 per cent.

The ongoing transition from fixed to mobile platforms was evident. Fixed voice subscriptions declined by 1 per cent, while mobile cellular voice subscriptions increased by 9 per cent, marking the fourth consecutive year of growth. As a result, mobile voice penetration rose to 107 per cent. Local call volumes, however, fell by 4 per cent, while international outgoing traffic increased by 9 per cent.

Subscriber television services continued to contract, with subscriptions declining by 3 per cent and revenue decreasing by 5 per cent, reflecting consumers' increasing preference for various streaming platforms.

Affordability remains a significant challenge. Advertised entry-level broadband prices in four of the five Contracting States exceeded the UN Broadband Commission's 2 per cent of GNI per capita affordability benchmark. Only St. Kitts and Nevis met this target for mobile broadband and closely approached it for fixed broadband services.

Overall, the sector continues to show resilience and growth, driven by strong broadband and mobile services adoption. However, persistent challenges including broadband affordability, fluctuating investment, declining legacy voice services, and evolving communication behaviours highlight critical areas in the sector.

KEY FINDINGS

KEY FINDINGS



Revenue Growth

Sector revenue increased by 5% to EC\$694 million



Investment Decline

Investment in the sector fell by 14% to EC\$132.5 million



Broadband Penetration

Fixed broadband penetration at 29.2% and mobile broadband at 89%



Affordability

Four out of five Contracting States did not meet the UN Broadband Target of 2% of GNI p.c.
Only St. Kitts and Nevis met the mobile broadband affordability target of 2%



Total Subscriptions

Total subscriptions grew by 5% to 1.33 million



Traffic

Local call volume decreased by 4%, international outboud traffic increased by 9%

OVERVIEW OF ELECTRONIC COMMUNICATIONS SECTOR

Global Overview

The global economic environment in 2023 continued to influence the performance and development of key productive sectors, including electronic communications. According to the International Monetary Fund (IMF), the global recovery from the COVID-19 pandemic and the economic effects of Russia's invasion of Ukraine remained slow and uneven. Economic activity continued to fall short of its pre-pandemic trajectory, particularly in emerging market and developing economies, with widening divergences across regions. Recovery was constrained by several structural and cyclical factors, including the prolonged impacts of the pandemic, geopolitical tensions, increasing geoeconomic fragmentation, monetary policy tightening to curb inflation, the withdrawal of fiscal support amid high public debt levels, and the growing frequency of extreme weather events.

Global growth was estimated to have slowed from 3.5 per cent in 2022 to 3.0 per cent in 2023, with a further deceleration to 2.9 per cent projected for 2024. These growth rates remain well below the historical average of 3.8 per cent recorded between 2000 and 2019. Advanced economies including the United States, the Euro Area, and Japan experienced a marked slowdown, with growth declining from 2.6 per cent in 2022 to 1.5 per cent in 2023 and 1.4 per cent in 2024. Growth in emerging market and developing economies, including Latin America and the Caribbean, was projected to modestly decline from 4.1 per cent in 2022 to 4.0 per cent in both 2023 and 2024, influenced in part by challenges in China's property sector. Specifically, economic growth in Latin America and the Caribbean was estimated to have slowed to approximately 2.2 per cent in 2023 from 4.1 per cent in the previous year. Over the medium term, global growth prospects remain subdued, with forecasts of approximately 3.1 per cent among the lowest levels recorded in recent decades limiting opportunities for income convergence and improvements in living standards.

Inflationary pressures, while easing, remained an important macroeconomic concern. Global headline inflation declined from a peak of 8.7 per cent in 2022 to an estimated 6.9 per cent in 2023, with a further reduction to 5.8 per cent projected for 2024. Nearly three-quarters of economies were expected to record lower headline inflation in 2023, with disinflation occurring more rapidly in advanced economies than in developing regions.

Against this broader economic backdrop, the global electronic communications sector continued to demonstrate resilience and long-term growth. According to the International Telecommunication Union (ITU) Facts and Figures 2023 Report, global Internet use continued to expand, with an estimated 67 per cent of the world's population, or about 5.4 billion people, online in 2023. This represented a 4.7 per cent

increase from 2022, while approximately 2.6 billion people remain offline, highlighting persistent connectivity gaps across regions.

Mobile connectivity continued to dominate global telecommunications access. In 2023, there were approximately 111 mobile-cellular subscriptions and 87 mobile-broadband subscriptions per 100 inhabitants worldwide. Over the past five years, mobile-broadband subscriptions increased by 27 per cent, significantly outpacing growth in mobile-cellular subscriptions (7 per cent). Fixed-broadband subscriptions also continued to expand steadily at an average annual rate of approximately 6.7 per cent, while fixed-telephone subscriptions continued its long-term decline as users transition to mobile and broadband-based communication services.

Connectivity and affordability also improved globally during the year. Approximately 90 per cent of the world's population is now covered by 4G networks, while the cost of broadband services continued to decline. The global median price of mobile-broadband services fell to 1.3 per cent of Gross National Income (GNI) per capita, and fixed-broadband prices declined to 2.9 per cent of GNI per capita, improving access to digital services across many regions.

These global developments underscore the growing importance of broadband connectivity as a key driver of digital transformation and economic development. Similar patterns are evident in the ECTEL Contracting States, where demand for mobile and fixed broadband services continues to expand, while traditional fixed-voice services continue to decline as consumers increasingly adopt data-driven communication platforms.

Regional Overview

Economic activity in the Eastern Caribbean Currency Union (ECCU), which includes the ECTEL Contracting States, continued to expand in 2023 albeit at a more moderate pace. Real Gross Domestic Product (GDP) for the ECCU grew by an estimated 3.6 per cent, compared to 11.4 per cent in 2022. Economic growth was recorded across all ECTEL Contracting States, with the highest in St. Vincent and the Grenadines and the lowest in St Kitts and Nevis:

- Commonwealth of Dominica 3.7 per cent
- Grenada 4.5 per cent
- St. Kitts and Nevis 3.0 per cent
- Saint Lucia 3.3 per cent
- St. Vincent and the Grenadines 5.3 per cent

Table 1: Growth Rate of GDP at Market Prices across Contracting States (per cent)

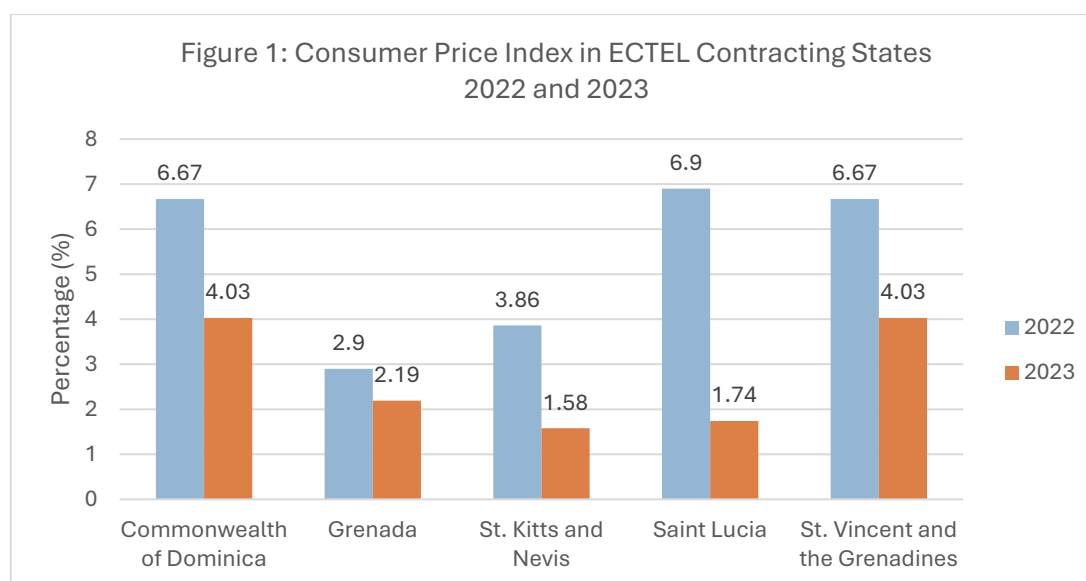
	Commonwealth of Dominica	Grenada	St. Kitts and Nevis	Saint Lucia	St. Vincent and the Grenadines	ECCU
2019	3.95%	0.68%	2.94%	-0.70%	0.67%	3.85%
2020	-15.71%	-13.76%	-15.30%	-23.77%	-4.27%	-16.61%
2021	5.38%	4.70%	0.37%	11.30%	2.09%	5.53%
2022	10.4%	7.31%	10.48%	20.57%	3.11%	11.42%
2023	3.65%	4.53%	3.02%	3.27%	5.33%	3.65%

Source: Eastern Caribbean Central Bank, *Economic and Financial Review and ECCB Statistics Database* (accessed March 2026)

Economic activity in the ECCU economy has now surpassed pre-pandemic levels in real terms, reflecting the region's continued recovery from the economic disruptions caused by the COVID-19 pandemic. Most major economic sectors in the region also expanded in 2023. Value-added in the Hotels and Restaurants sector increased by 12.44 per cent, while its ancillary sectors including Wholesale and Retail Trade and Transport, Storage and Communication, also contributed strongly to growth, increasing by 4.63 and 7.99 per cent respectively.

Despite the overall positive performance, a few sectors experienced contractions during the year. Construction declined marginally by 0.03 per cent, and Financial Intermediation, contracted by 3.21 per cent. The Agriculture, Livestock and Forestry sector also declined by 9.5 per cent, reflecting the alternating effects of drought and heavy rainfall, which negatively impacted agricultural output in several Member States.

Inflation in the ECCU moderated significantly at the end of 2023, declining to 2.32 per cent compared with 9.2 per cent at the end of December 2022. The surge in inflation during 2022 was largely driven by increases in global energy and food prices, reflecting international supply chain disruptions and geopolitical developments. The easing of these pressures contributed to the decline in inflation during the reporting period.



Overall, economic activity across the region began to normalise following the strong post-pandemic rebound in 2022. Saint Lucia experienced particularly strong growth in 2022 due to the rapid recovery in tourism, while St. Vincent and the Grenadines experienced weaker performance in 2021 following the La Soufrière volcanic eruption.

Against this macroeconomic backdrop, the electronic communications sector in the ECTEL Contracting States also experienced moderate growth during the review period (April 2023 to March 2024). Key sector indicators showed notable changes compared with the previous year including:

- Revenue grew by 5 per cent, supported by strong performance in broadband services.
- Total subscriptions increased by 5 per cent, leading to higher penetration rates for mobile cellular voice and fixed and mobile broadband services.

However, the sector also recorded several areas of contraction during the review period. Employment declined by 5 per cent while overall Investment fell by 14 per cent, following two consecutive years of growth of 5 per cent and 11 per cent, respectively. Additionally, local call volume traffic decreased by 4 per cent, consistent with global trends as consumers increasingly substitute traditional voice services with other digital communication platforms and applications.

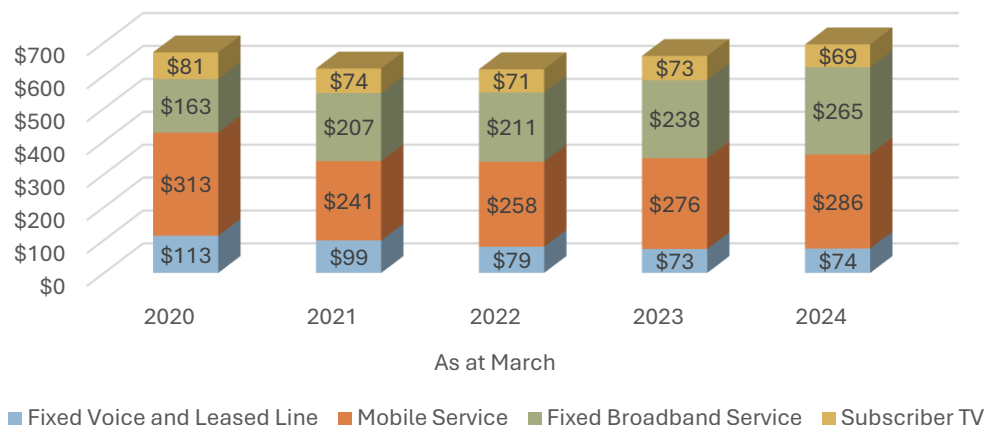
ECONOMIC PERFORMANCE

Revenue

For the reporting period ended March 2024, the electronic communications sector in the ECTEL Contracting States generated approximately \$694 million in revenue. This represents a 5 per cent increase in total revenue, driven by growth across all major service categories, with the exception of subscriber television services, which declined by 5 per cent. Fixed broadband revenue recorded its ninth consecutive year of growth, rising by 11 per cent to reach \$265 million.

Mobile services remained the largest contributor to overall sector revenue, accounting for approximately 41 per cent of total revenue. Fixed broadband continued to expand its market share, increasing to 38 per cent, compared to 36 per cent in the previous year. Fixed voice and subscriber television services accounted for the smallest shares of revenue, at 11 and 10 per cent respectively.

Figure 2: Electronic Communications Sector Revenue for the ECTEL Contracting States (EC\$ Million) 2020 - 2024 (as at March)



Consistent with the overall sector trend, all Contracting States recorded increases in revenue during the review period. Saint Lucia recorded the strongest growth at 11 per cent, while Grenada recorded the smallest increase at 0.2 per cent. Revenue growth in the remaining Contracting States was as follows:

- Commonwealth of Dominica 2.1 per cent
- St Kitts and Nevis 8.7 per cent
- St. Vincent and the Grenadines 1.2 per cent

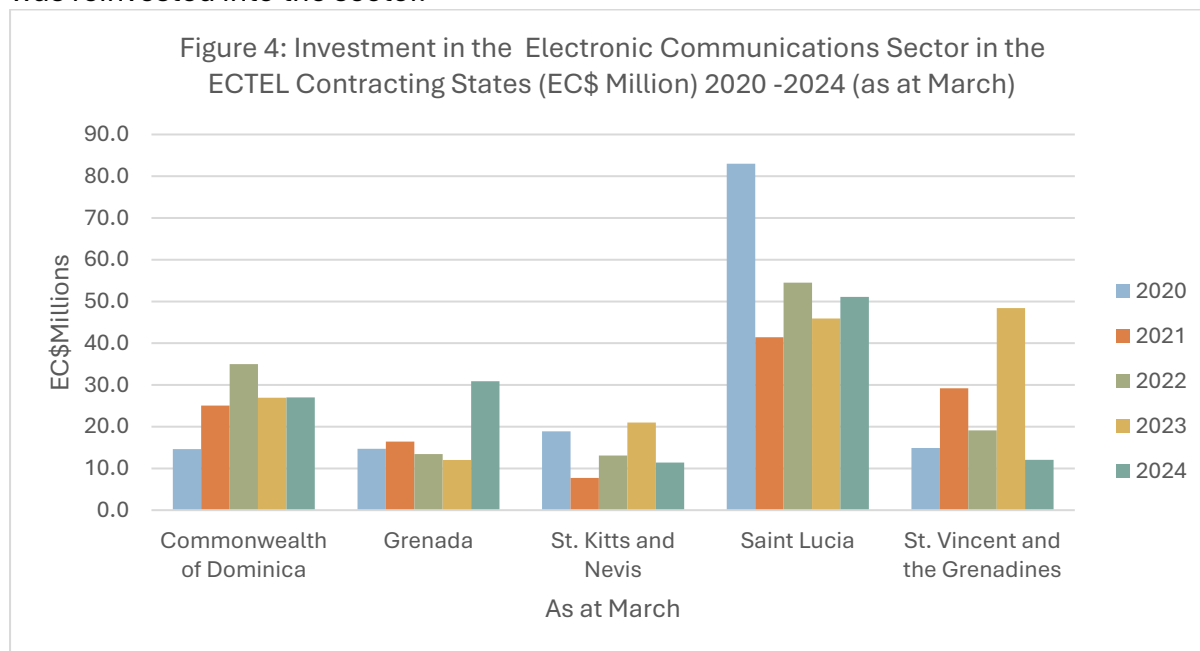
Figure 3: Revenue in ECTEL Contracting States (\$EC Million) 2020 to 2024 (as at March)



	Commonwealth of Dominica	Grenada	St. Kitts and Nevis	Saint Lucia	St. Vincent and the Grenadines
2024	\$75.3	\$149.6	\$120.3	\$219.8	\$129.3
2023	\$73.7	\$149.3	\$110.7	\$197.9	\$127.7
2022	\$73.4	\$140.6	\$99.4	\$186.2	\$119.2
2021	\$80.2	\$141.2	\$108.3	\$165.8	\$125.5
2020	\$99.8	\$147.1	\$120.5	\$187.4	\$115.4

Investment

Electronic communications service providers invested approximately EC\$132.5 million in network infrastructure and related technologies and services during the review period. This represents a 14 per cent decline compared with the EC\$154 million invested in the previous year. Consequently, the investment rate defined as the ratio of investment to revenue, fell by 4 percentage points, decreasing from 23 per cent in 2022/ 2023 to 19 per cent in 2023/2024. This indicates that just under one-fifth (23 per cent) of sector revenue was reinvested into the sector.



During the review period, service providers reported investments across a range of initiatives including:

- **Commonwealth of Dominica:** Investments in public mobile and subscriber television networks.
- **Grenada:** Network upgrades and infrastructure improvements.
- **St. Kitts and Nevis:** Upgrades to towers, power systems, routing infrastructure and fibre-to-the-home (FTTH) networks to support fixed broadband and television services. Providers also procured customer premises equipment (CPE) and advanced transition to IPTV services.
- **Saint Lucia:** Capital expenditure focused on technical network refresh, critical maintenance activities, development and planning of a data centre, expansion of the FTTX core network, and IPTV service development.
- **St. Vincent and the Grenadines:** Network upgrades and infrastructure expansion to support services.

Employment

For the second consecutive year, the number of full-time employees in the electronic communications sector declined across the Contracting States. Total employment fell by 5 per cent, decreasing from 781 employees in the previous year to 741 employees in the review period. Four of the five Contracting States recorded declines in employment, ranging from 2 per cent in the Commonwealth of Dominica to 11 per cent in Saint Lucia. In Grenada, employment remained unchanged at 107.

Table 2: Employment in the Electronic Communications Sector in the Contracting States 2020 – 2024 (as at March)

	2020	2021	2022	2023	2024
Commonwealth of Dominica	188	196	202	170	166
Grenada	103	97	108	107	107
St. Kitts and Nevis	155	140	154	159	156
Saint Lucia	174	214	213	211	188
St. Vincent and the Grenadines	163	157	132	134	124
Total	783	804	809	781	741

CONNECTIVITY

BROADBAND CONNECTIVITY

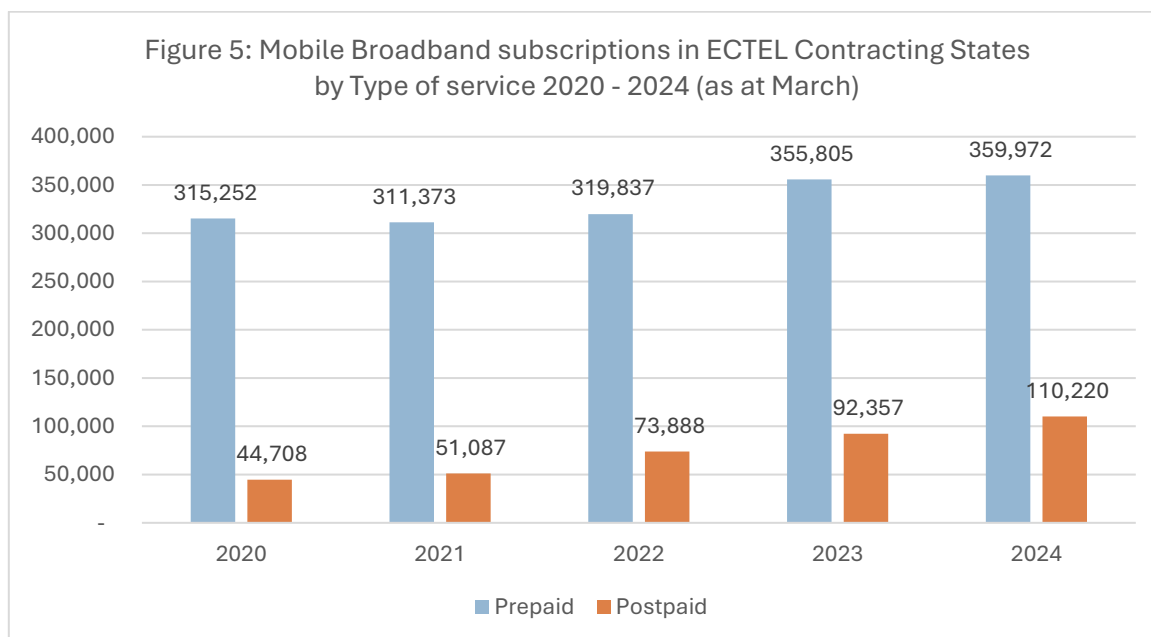
Globally, broadband connectivity continues to expand, with mobile networks remaining the primary means of Internet access. According to the ITU, there were approximately 111 mobile-cellular subscriptions and 87 mobile-broadband subscriptions per 100 inhabitants worldwide in 2023. Over the past five years, mobile-broadband subscriptions increased by 27 per cent, growing four times faster than mobile-cellular subscriptions, which expanded by 7 per cent during the same period.

Fixed-broadband subscriptions have also grown steadily worldwide, increasing at an average annual rate of 6.7 per cent, reflecting the sustained demand for high-capacity connectivity to support digital services.

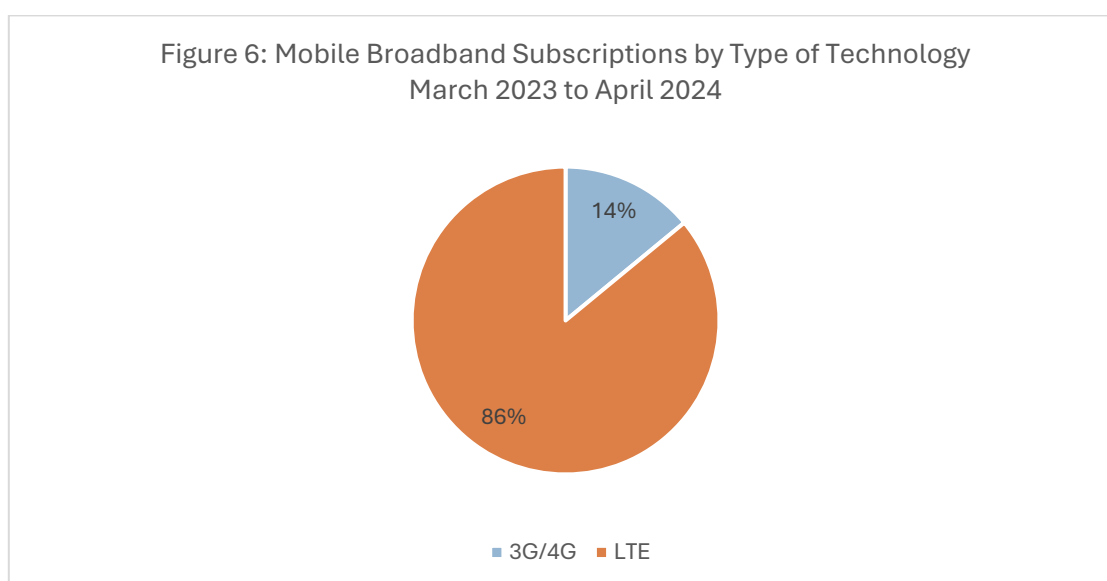
Mobile Broadband Subscriptions

The ECTEL Contracting States recorded moderate growth in mobile broadband subscriptions during the review period. Total subscriptions increased by 5 per cent, rising to approximately 470,192 from 448,162 subscriptions in the previous year.

Growth in mobile broadband subscriptions was largely driven by a 19 per cent increase in postpaid subscriptions, while prepaid subscriptions increased modestly by 1 per cent. Prepaid subscriptions continued to dominate the market, accounting for 77 per cent of total mobile broadband subscriptions, while postpaid services represented 23 per cent. With the exception of the Commonwealth of Dominica, which recorded a slight decline, all other Contracting States reported growth in mobile broadband subscriptions.

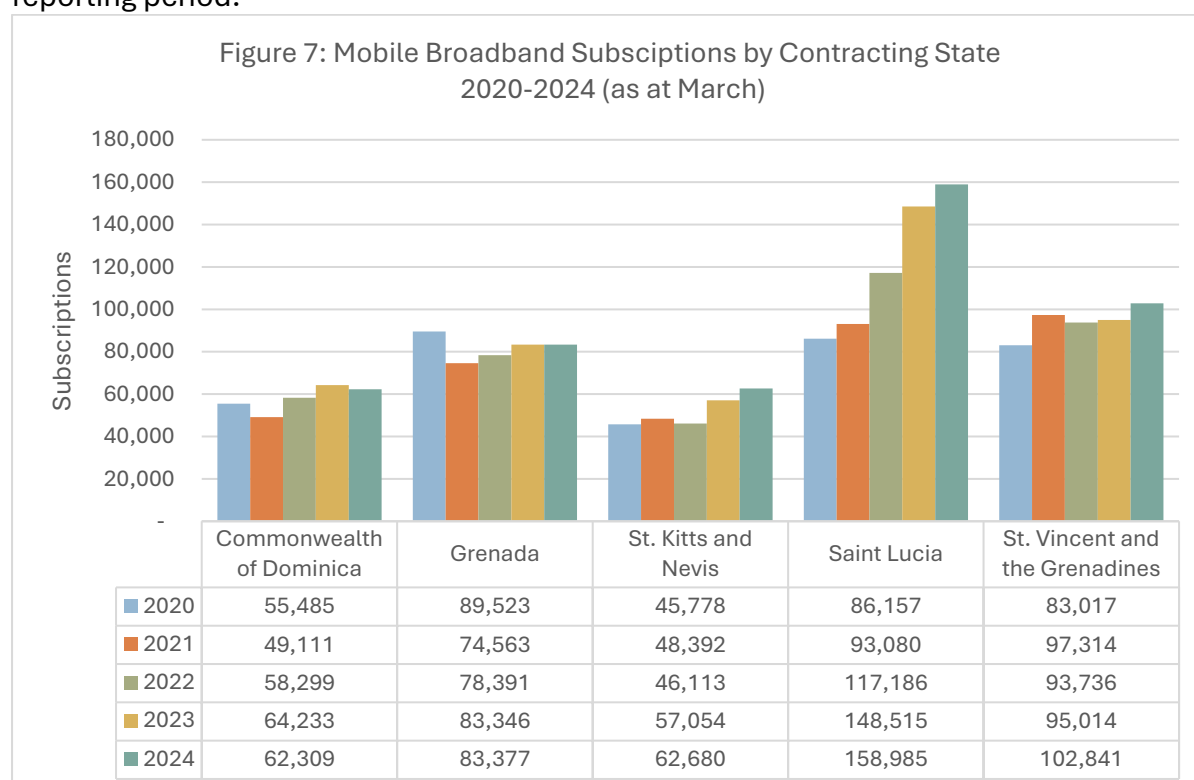


In terms of network technology, 86 per cent of mobile broadband subscriptions were delivered over LTE networks, while 14 per cent were provided over 3G/4G networks. Additionally, a small number of 2G subscriptions (64) remained active during the reporting period.



Growth across the Contracting States varied during the year. St. Kitts and Nevis recorded the largest increase in mobile broadband subscriptions, with growth of 10 per cent. This was followed by St. Vincent and the Grenadines and Saint Lucia, which each recorded increases of approximately 7 per cent. Grenada experienced marginal growth of less than 1 per cent during the period.

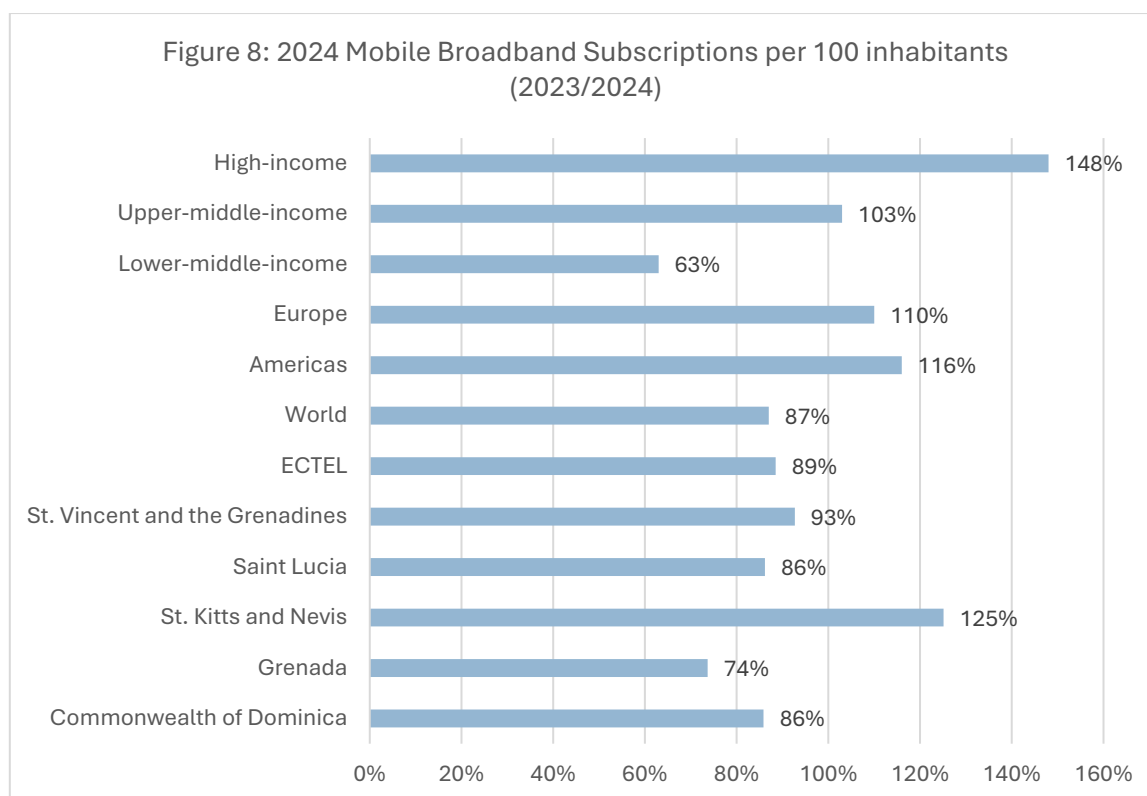
In contrast, the Commonwealth of Dominica recorded a 3 per cent decline in mobile broadband subscriptions, falling from 64,233 in the previous year to 62,309 in the reporting period.



Mobile Broadband Penetration

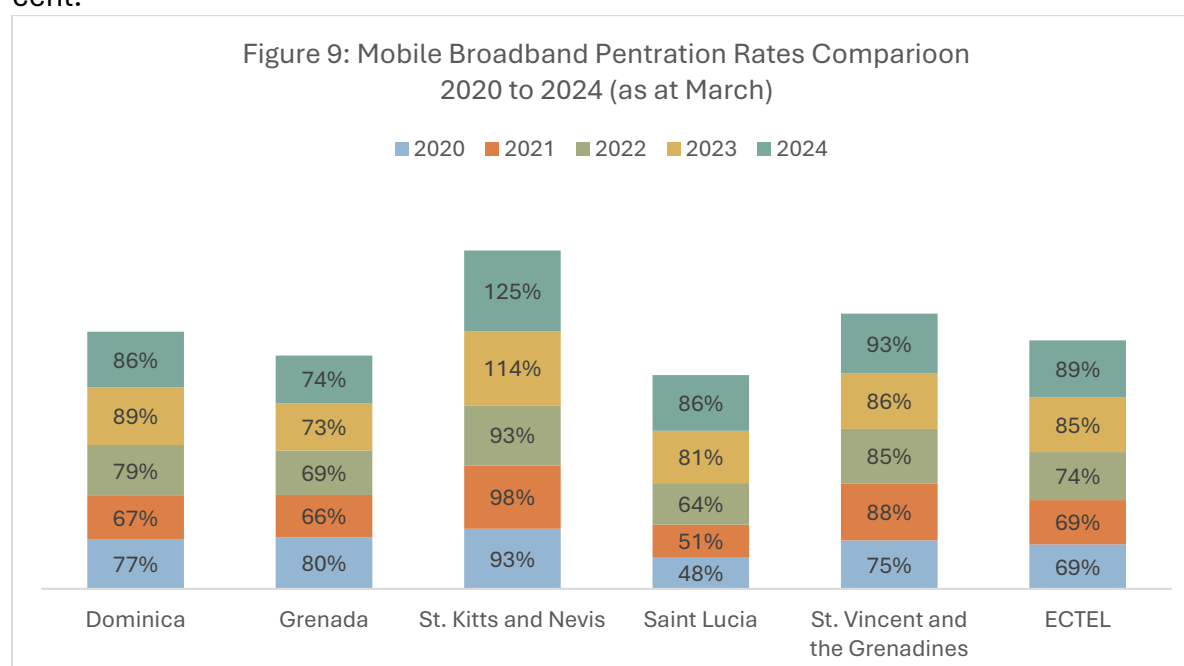
The mobile broadband penetration rate in the Contracting States increased by 4 percentage points, reaching 89 per cent during the review period. This indicates that approximately 89 out of every 100 individuals (or nearly 9 out of 10 persons) had a mobile broadband subscription.

The ITU reported that the world average in 2023 was 87 mobile broadband subscriptions per 100 inhabitants. In comparison, the ECTEL Contracting States slightly exceeded the global average, but remained below the levels observed in the Americas (116 per 100 inhabitants) and upper middle-income countries (103 per 100 inhabitants).



At the country level, St. Kitts and Nevis recorded a significantly higher penetration rate, exceeding both the Americas region and upper middle-income country averages, and approaching levels observed in high-income countries.

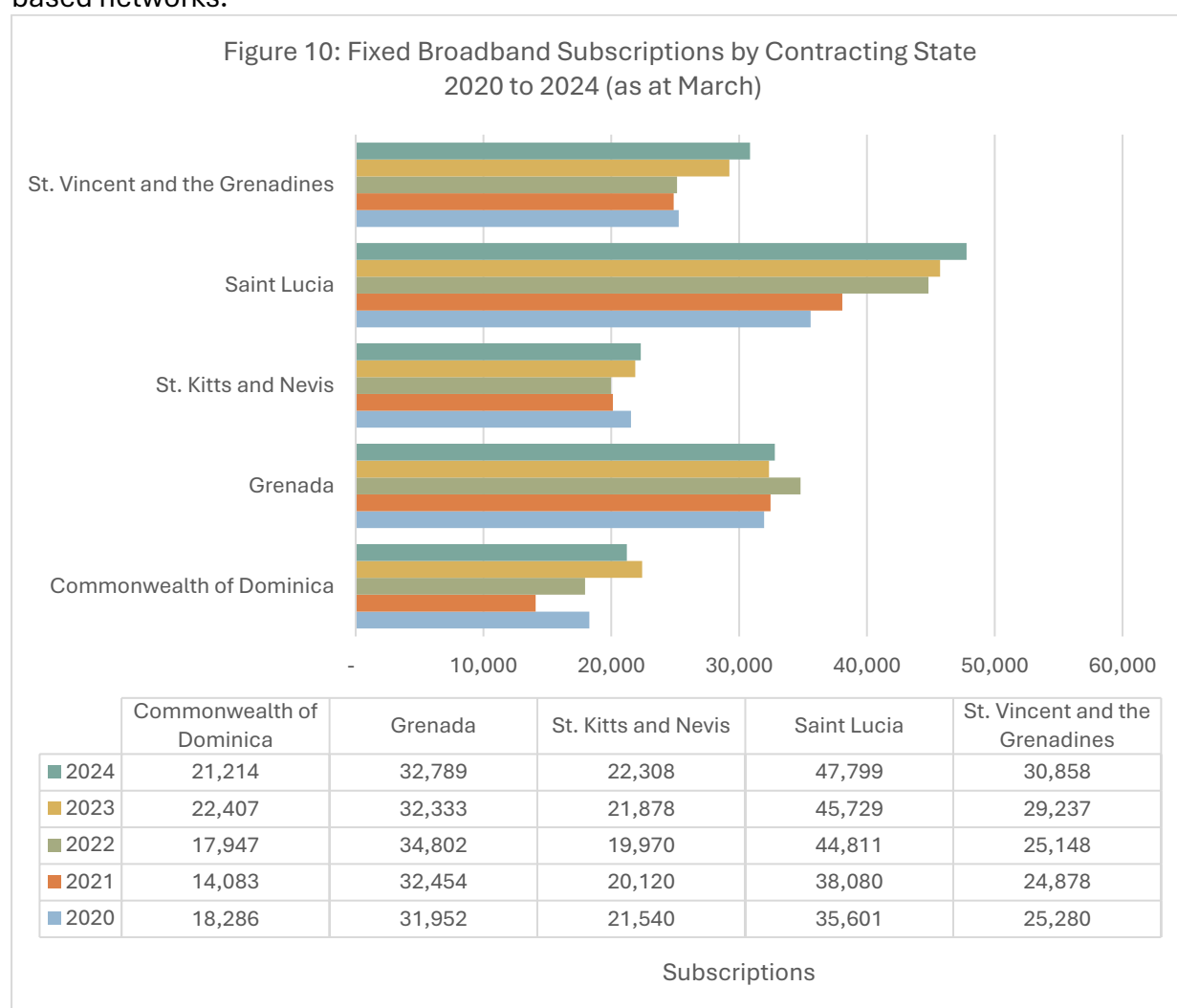
In contrast, Grenada recorded the lowest penetration rate at 74 per 100 inhabitants, well below the global average of 87. Saint Lucia and the Commonwealth of Dominica also recorded penetration rates slightly below the global average, at approximately 86 per cent.



Overall, the relatively high penetration rates across the ECTEL Contracting States reflect strong adoption of mobile broadband services.

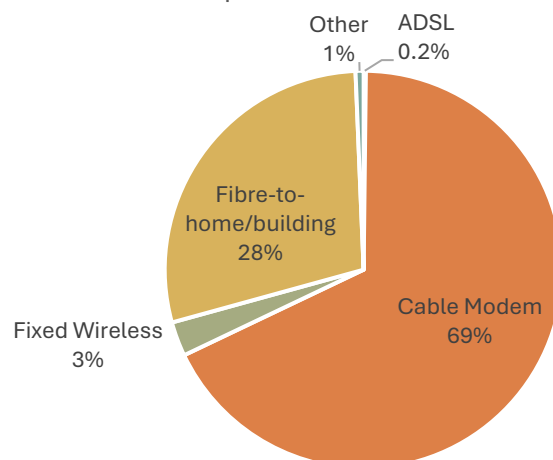
Fixed Broadband Subscriptions

Similar to mobile broadband services, the ECTEL Contracting States recorded overall growth in fixed broadband subscriptions during the review period, with the exception of the Commonwealth of Dominica, which registered a 5 per cent decline. Total fixed broadband subscriptions increased by 2 per cent, climbing to 154,968 subscriptions. Growth in fixed broadband subscriptions could be attributed to a 2 per cent increase on cable modem connections, 107 per cent in fixed wireless, 1 per cent in Fibre-to-the-home/building and 18 per cent to other connections. In contrast, ADSL subscriptions declined by 40 per cent, reflecting the continued migration away from legacy copper-based networks.



Cable modem connections continued to account for the largest share of fixed broadband subscriptions, representing 69 per cent of total connections. Fibre-to-the-home/building services represented the second largest share at 30 per cent and continued to expand.

Figure 11: Fixed Broadband Subscriptions by Technology
April 2023 to March 2024



At the Contracting State level, St. Vincent and the Grenadines recorded the largest increase in fixed broadband subscriptions, with growth of 6 per cent followed by Saint Lucia with 5 per cent, St. Kitts and Nevis with 2 per cent, and Grenada with 1 per cent. In contrast, the Commonwealth of Dominica recorded a 5 per cent decline during the reporting period.

Revenue from fixed broadband services grew by 11 per cent to approximately \$265 million. Consequently, the Average Revenue Per User (ARPU) rose by 9 per cent, from \$1,567.35 in the previous year to \$1,709.26 per subscription annually.

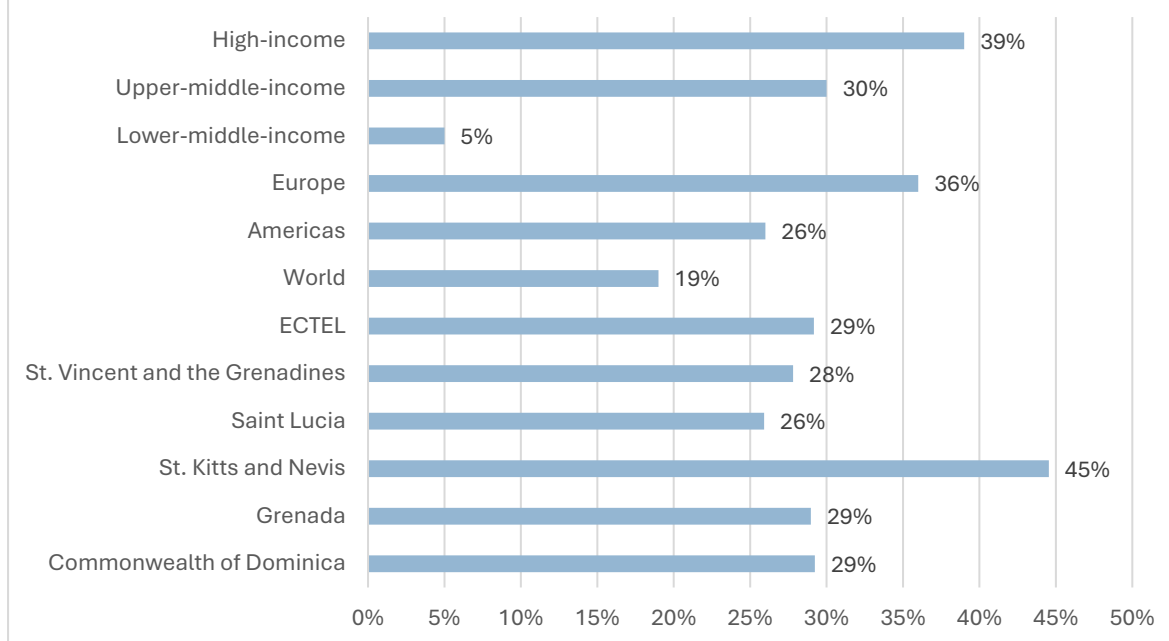
Fixed Broadband Penetration

The growth in fixed broadband subscriptions contributed to a higher overall penetration rate across the ECTEL Contracting States. The fixed broadband penetration rate increased marginally by 0.6 percentage points, rising to 29.2 per cent. This indicates that there were approximately 29 fixed broadband subscriptions for every 100 individuals across all ECTEL Contracting States.

According to the ITU, fixed broadband penetration rates are generally lower than mobile broadband rates, as fixed connections are typically shared among multiple users within households. In 2023, the global average stood at 19 fixed broadband subscriptions per 100 inhabitants.

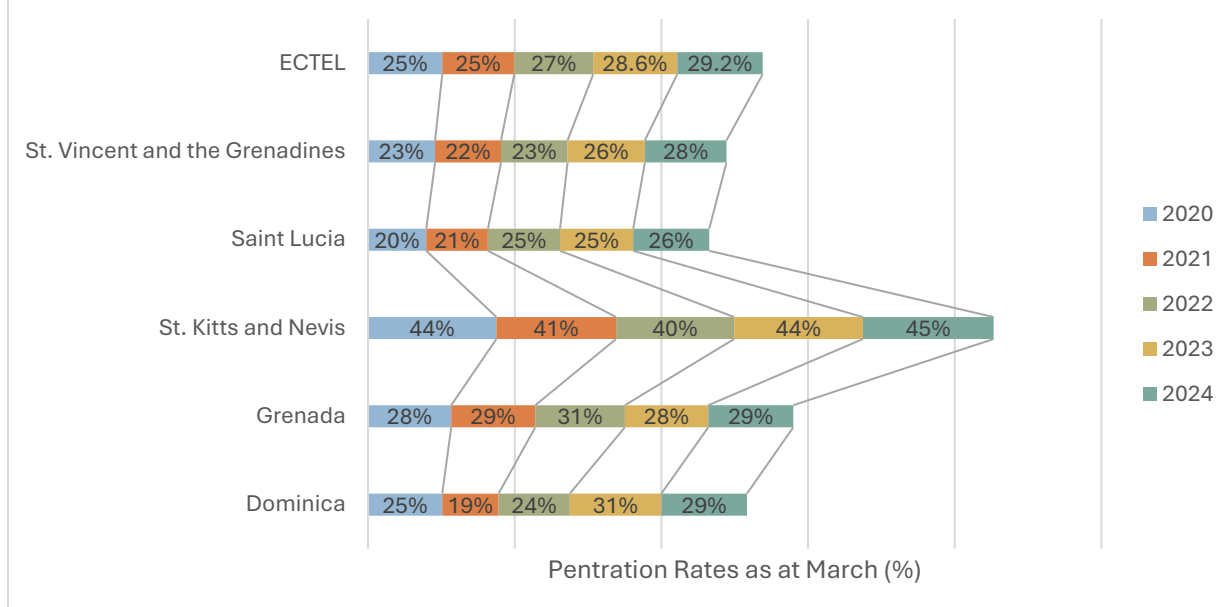
In comparison, the ECTEL Contracting States collectively exceeded the global average, recording above the Americas region (26 per 100 inhabitants) and approaching levels observed in upper middle-income countries (30 per 100 inhabitants).

Figure 12: Fixed Broadband Subscriptions per 100 Inhabitants
(2023/2024)



At the country level, St. Kitts and Nevis recorded the highest fixed broadband penetration rate at 45 per cent, exceeding levels observed in Europe and high-income countries. In contrast, Saint Lucia recorded the lowest penetration rate among the Contracting States, at 26 per cent.

Figure 13: Fixed Broadband Penetration Rates 2020 - 2024 (as at March)



VOICE CONNECTIVITY

According to the *ITU Facts and Figures 2023*, global voice connectivity continues to shift towards mobile services. As of 2023, there were 111 mobile-cellular subscriptions per 100 inhabitants, reflecting 7 per cent growth over the past five years.

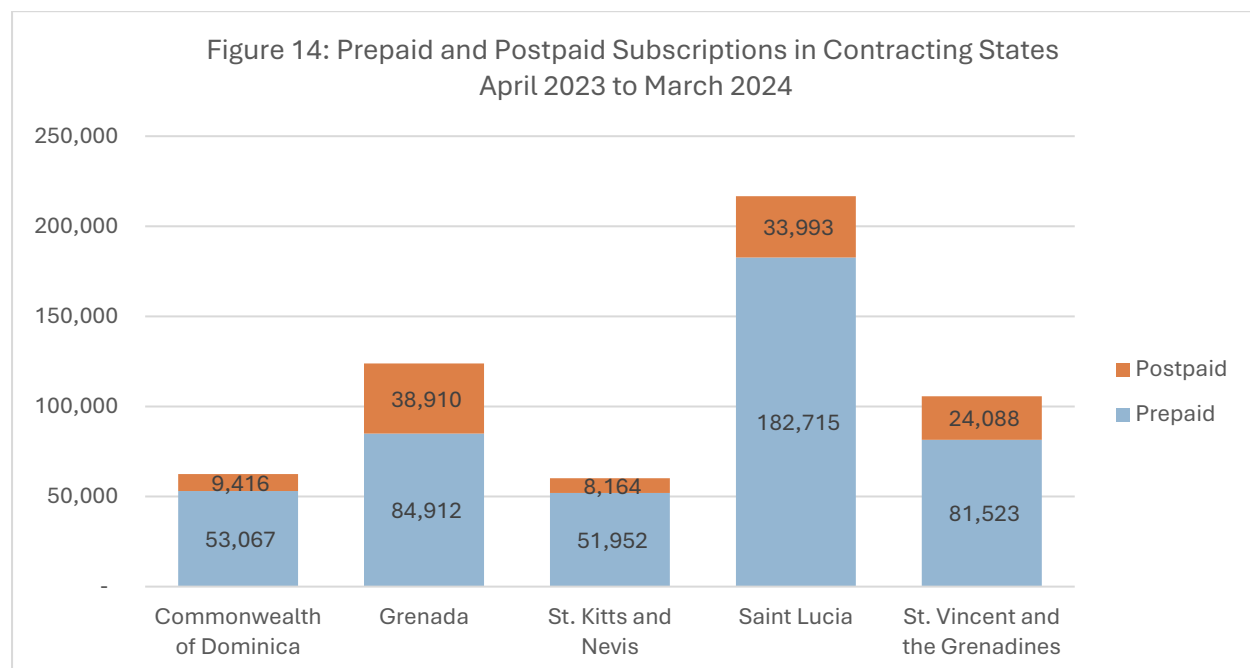
Conversely, fixed-telephone subscriptions have continued their steady long-term decline. Since 2005, fixed-telephone penetration has fallen by half, declining from 20 to 11 subscriptions per 100 inhabitants as consumers increasingly rely on mobile and broadband-based communication services.

Mobile Cellular Voice Subscriptions

Mobile cellular voice services continued to expand across the ECTEL Contracting States in the review period ended March 2024. For the fourth consecutive year, total mobile cellular voice subscriptions increased, rising by 9 per cent to 568,740 subscriptions. Growth was recorded in four of the five Contracting States, with the largest expansion occurring in Saint Lucia.

Growth across the ECEL Contracting States varied by Contracting State:

- Saint Lucia recorded the strongest growth at +19 per cent, continuing its upward trajectory.
- Grenada also demonstrated strong expansion at +9 per cent.
- St. Vincent and the Grenadines experienced moderate growth of +2 per cent.
- St. Kitts and Nevis recorded marginal growth of +0.3 per cent.
- The Commonwealth of Dominica was the only Contracting State to decline, though the decrease was minor at less than 1 per cent.



The market continued to be dominated by prepaid mobile subscriptions, which accounted for 80 per cent of all mobile cellular voice connections in the review period. Postpaid subscriptions made up the remaining 20 per cent. Both categories experienced growth over the period:

- Postpaid subscriptions increased by 9 per cent.
- Prepaid subscriptions increased by 6 per cent.

Mobile Cellular Voice Penetration

The mobile cellular voice penetration rate for the ECTEL Contracting States increased by 9 percentage points, rising from 99 per cent in 2022/ 2023 to 107 per cent in 2023/2024. This equates to approximately 107 mobile subscriptions per 100 residents which indicates that on average residents held more than one active mobile cellular voice subscription.

Changes by Contracting States included:

- Grenada (+ 9 percentage points), Saint Lucia (+18 percentage points), and St. Vincent and the Grenadines (+2 percentage points) all recorded penetration increases.
- St. Kitts and Nevis remained unchanged at 120 per cent, maintaining the highest penetration rate among the Contracting States.
- The Commonwealth of Dominica declined by 2 percentage points to 86 per cent.

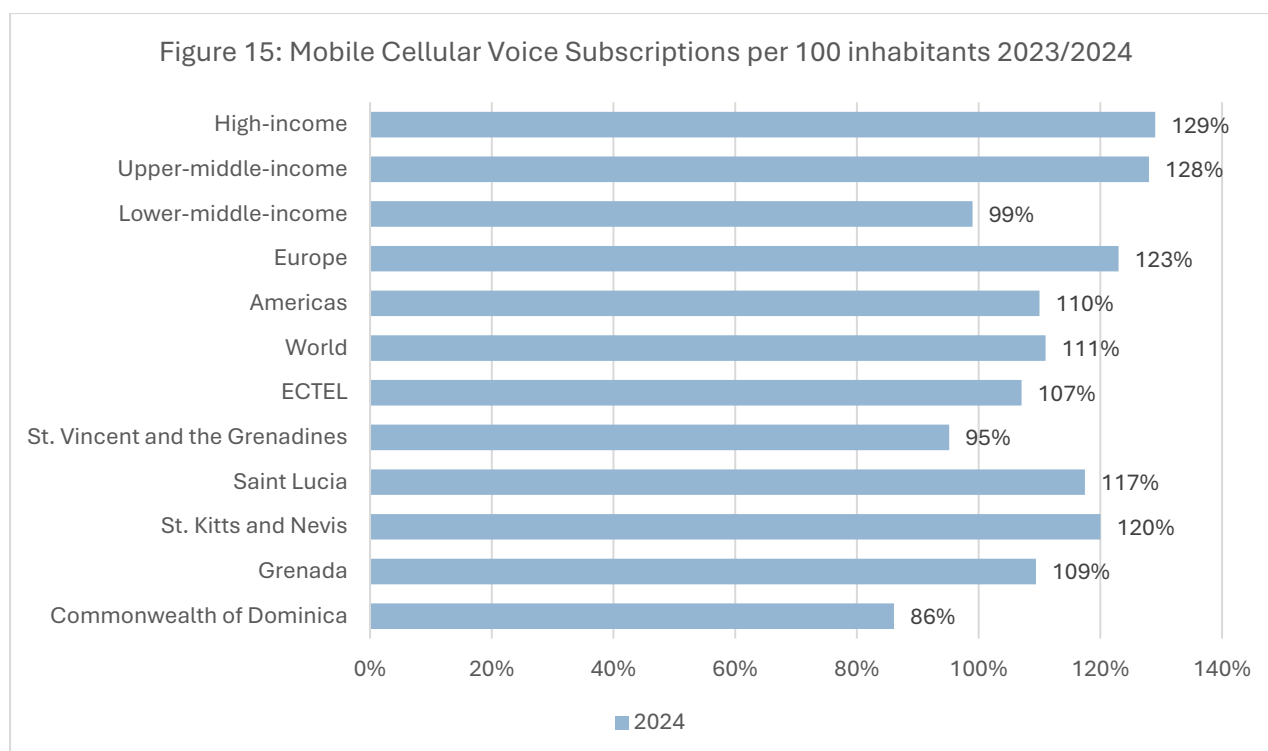
In 2023/2024, the ECTEL Contracting States fell below key international and regional mobile cellular voice penetration averages:

- Global average: 111 per cent
- Americas: 110 per cent
- Upper-middle-income countries: 128 per cent

Despite this, two Contracting States exceeded international averages:

- St. Kitts and Nevis with a penetration rate of 120 per cent
- Saint Lucia with a penetration rate of 117 per cent

The remaining Contracting States fell below these international averages.



Fixed Voice Subscriptions

In 2023/2024, fixed telephone voice subscriptions across the ECTEL Contracting States declined by 1 per cent, mirroring the downward trajectory observed internationally. This decrease was largely influenced by reductions in three Contracting States:

- Commonwealth of Dominica: –5 per cent
- Saint Lucia: –5 per cent
- St. Vincent and the Grenadines: –10 per cent

Despite the overall decline, two Contracting States reported notable growth in fixed voice subscriptions:

- Grenada: +9 per cent
- St. Kitts and Nevis: +5 per cent

Table 3: Fixed Voice Subscriptions 2020 to 2024 (as at March)

Contracting State	2020	2021	2022	2023	2024
Commonwealth of Dominica	6,361	743	6,718	6,558	6,215
Grenada	19,315	18,541	16,991	12,392	13,452
St. Kitts and Nevis	16,044	15,700	15,602	16,689	17,489
Saint Lucia	33,162	32,218	30,640	29,613	28,227
St. Vincent and the Grenadines	17,439	12,263	11,628	12,954	11,718
ECTEL (Total)	92,321	79,465	81,579	78,206	77,101

Fixed Voice Penetration

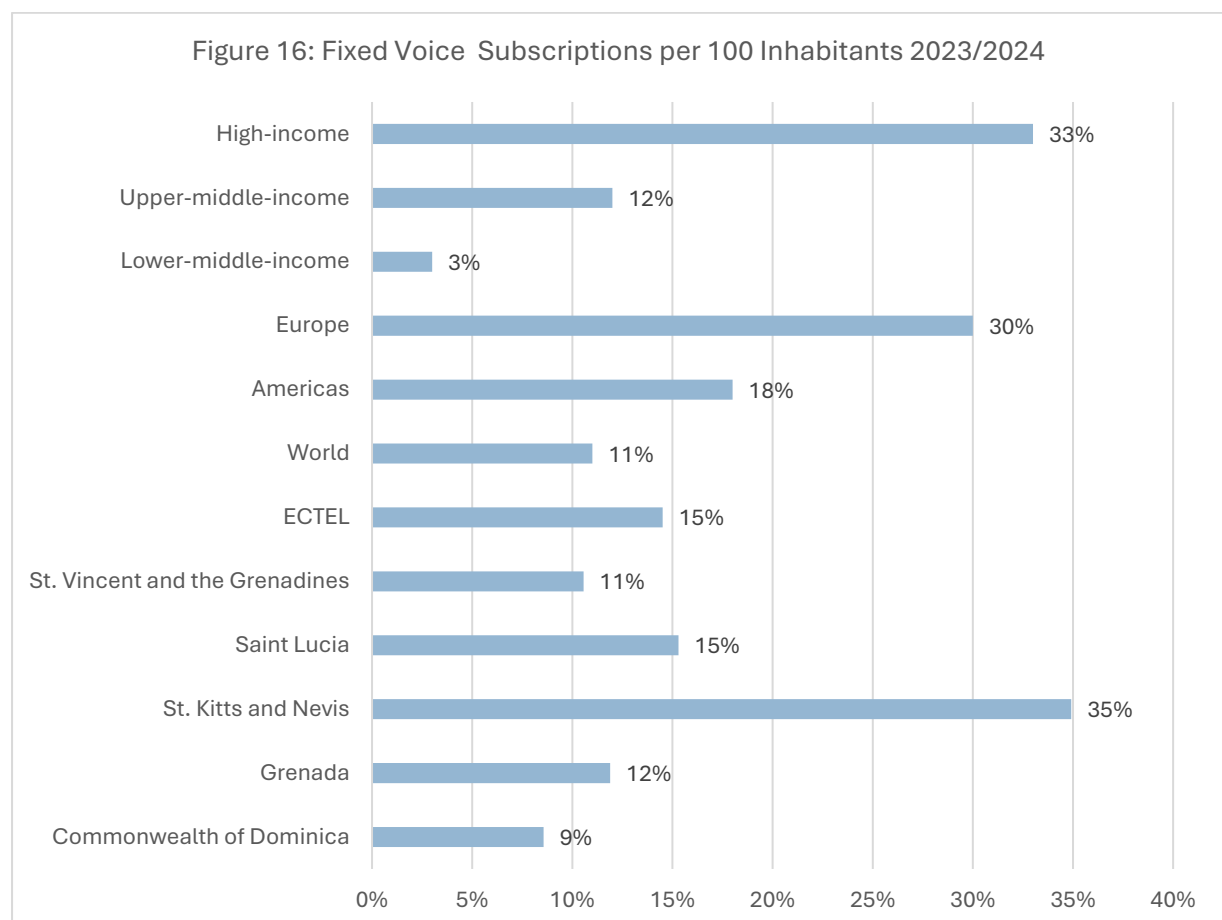
The fixed telephone voice penetration rate for the ECTEL Contracting States declined slightly, falling by 0.2 percentage points to 14.5 per cent during the review period. This translates to approximately 15 fixed telephone voice subscriptions per 100 residents.

When compared internationally and regionally:

- The ECTEL Contracting States remains above the global average of 11 per cent.
- The ECTEL Contracting States also exceeds penetration levels observed in upper-middle-income countries (12 per cent).
- However, the ECTEL Contracting States are below the Americas average of 18 per cent.

Notably, St. Kitts and Nevis continues to significantly outperform regional and international averages, with a fixed voice penetration rate of 35 per cent, exceeding the averages for the Americas and even above high-income countries.

Residential lines accounted for 63 per cent of all fixed voice subscriptions, while business lines represented the remaining 37 per cent.



SUBSCRIBER TV

Subscriptions to subscriber television services across the ECTEL Contracting States declined during the review period, falling by 3 per cent to 63,620 subscriptions. Correspondingly, revenue from the subscriber television services also decreased, recording a 5 per cent reduction to approximately \$69 million. As a result of this decline in both subscriptions and revenue, the Average Revenue Per User (ARPU) fell from EC\$1,118.67 in the previous year to EC\$1,090.83 in the review period.

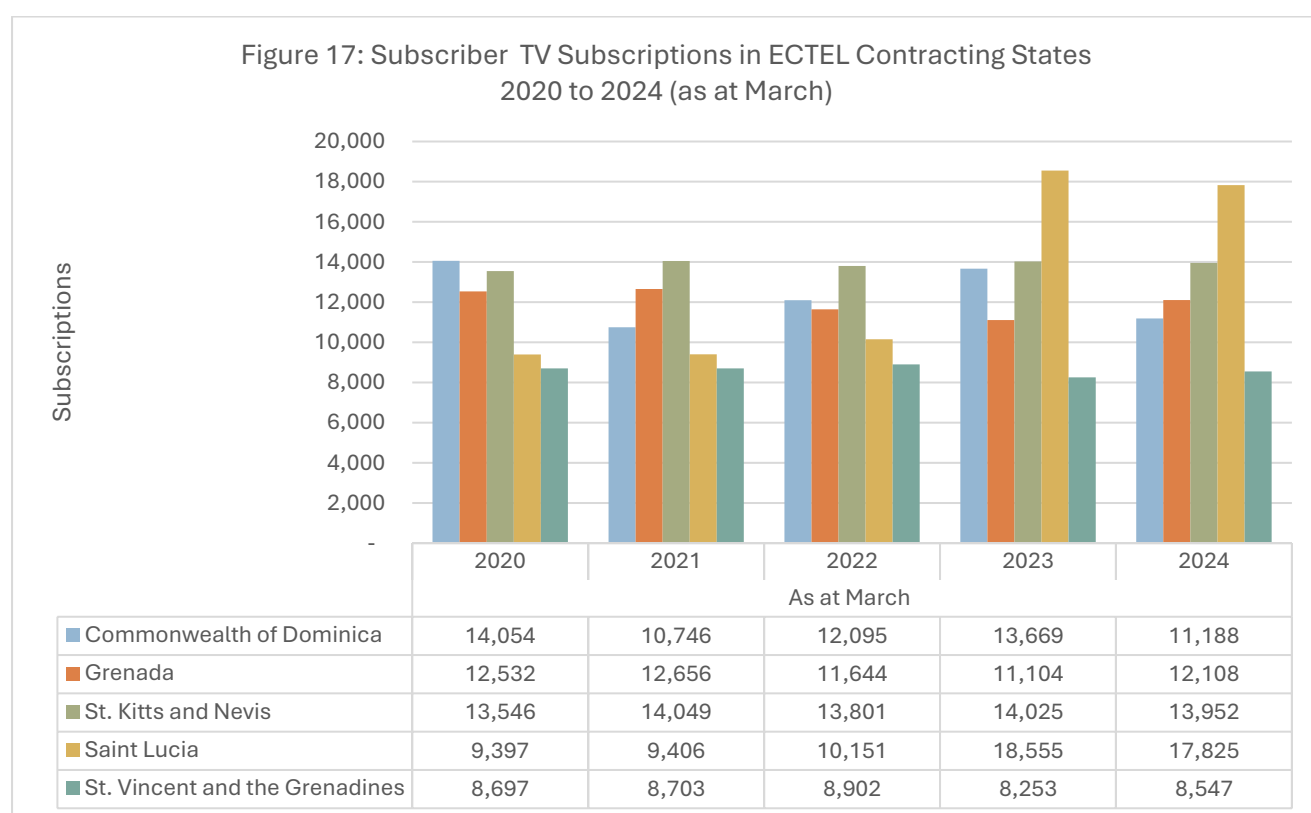
The overall decline in subscriptions was driven by reductions in three Contracting States:

- Commonwealth of Dominica: –18 per cent
- St. Kitts and Nevis: –1 per cent
- Saint Lucia: –4 per cent

Despite the regional downward trend, two Contracting States recorded growth in subscriber television services:

- St. Vincent and the Grenadines: +4 per cent
- Grenada: +9 per cent

The contraction in subscriber television is likely influenced by the continued shift toward online streaming and other digital platforms versus traditional subscription television.



TOTAL SUBSCRIPTIONS

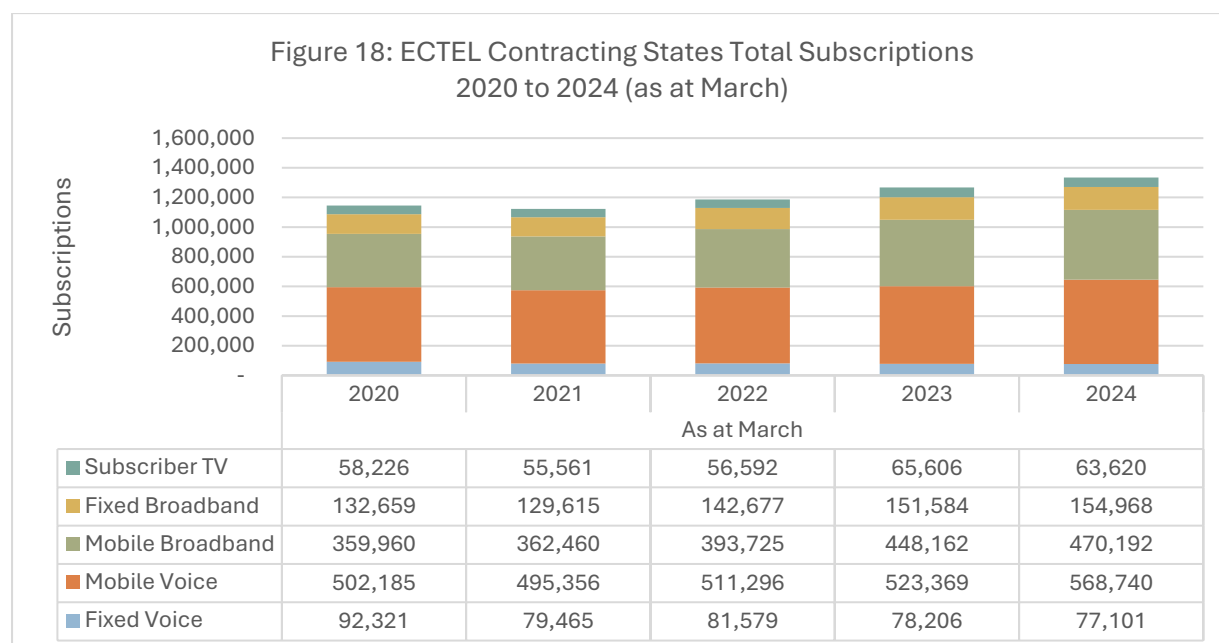
Total subscriptions across mobile cellular services, fixed voice, fixed broadband, mobile broadband and subscriber television services increased by 5 per cent during the review period, reaching approximately 1,334,621 subscriptions. This overall growth was primarily driven by:

- Mobile cellular service: +9 per cent
- Mobile broadband: +5 per cent
- Fixed broadband: +2 per cent

However, these increases were partially offset by declines in:

- Fixed voice: –1 per cent
- Subscriber television: –3 per cent

Although these declines moderated the overall rate of growth, the electronic communications sector continued to expand, with mobile services remaining the primary contributor to overall subscription growth.



Mobile services collectively accounted for 78 per cent of all subscriptions:

- Mobile cellular voice: 43 per cent
- Mobile broadband: 35 per cent

In comparison, fixed telephone voice and subscriber television services accounted for smaller shares:

- Fixed telephone voice: 6 per cent
- Subscriber television: 5 per cent

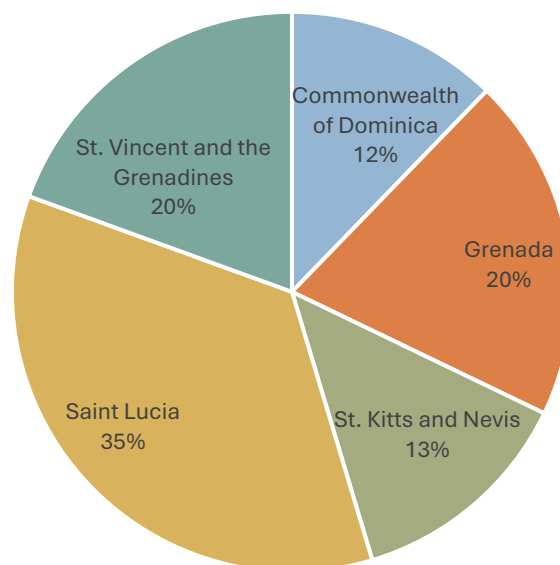
Among the ECTEL Contracting States, Saint Lucia accounted for the largest share of total subscriptions at 35 per cent. The remaining distribution was as follows:

- Commonwealth of Dominica: 12 per cent

- Grenada: 20 per cent
- St. Kitts and Nevis: 13 per cent
- St. Vincent and the Grenadines: 20 per cent

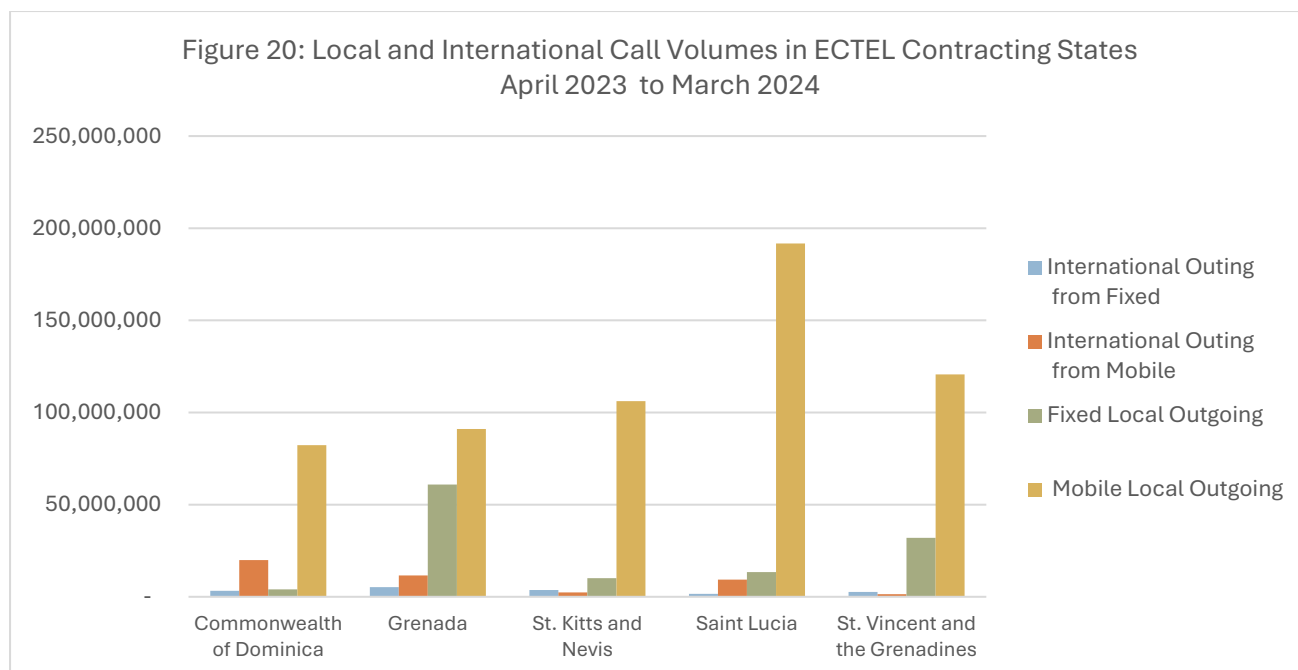
This breakdown reflects variations mainly in population size and market dynamics across the Contracting States.

Figure 19: Contracting States Proportion of Total Subscriptions
March 2023 - April 2024



TRAFFIC

During the review period, total call volumes originating from fixed telephone and mobile cellular networks across the Contracting States declined by 4 per cent, falling from 743 million to 712 million local calling minutes. This reduction was primarily driven by an 8 per cent decrease in call volumes from fixed networks and a 3 per cent decline from mobile networks.



Only Grenada recorded an increase in total local calling minutes, rising from 140 million to approximately 152 million minutes, representing a 9 per cent increase compared to the previous year. All other Contracting States experienced declines in local traffic:

- Commonwealth of Dominica: –1 per cent
- St. Kitts and Nevis: –2 per cent
- Saint Lucia: –15 per cent
- St. Vincent and the Grenadines: –4 per cent

Similar to the previous year, mobile networks continued to dominate local voice traffic, accounting for 83 per cent of total local calling minutes, while fixed networks contributed the remaining 17 per cent.

In contrast to the decline in local calling activity, international outgoing call traffic from fixed and mobile networks increased by 9 per cent, rising from 56 million to 61 million minutes. This growth was driven by increases in four of the five Contracting States, with only St. Kitts and Nevis recording a decline. The changes in outgoing international traffic were as follows:

- Commonwealth of Dominica: +17 per cent
- Grenada: +3 per cent
- St. Kitts and Nevis: –2 per cent
- Saint Lucia: +15 per cent
- St. Vincent and the Grenadines: +3 per cent

Mobile networks also accounted for the majority of international outgoing traffic, contributing 73 per cent, while fixed networks represented 27 per cent. This reinforces the continued preference for mobile communication as the dominant platform for voice services, both domestically and internationally, across the Contracting States.

AFFORDABILITY OF MOBILE AND FIXED BROADBAND SERVICES

According to the State of Broadband 2024 published by the UN Broadband Commission, broadband affordability remains a significant barrier to achieving universal connectivity, particularly in developing countries. The Broadband Commission's affordability target was originally set to less than 5 per cent of average monthly income. However, in 2018 the Commission updated this target to specify that prices for entry-level broadband services should be below 2 per cent of monthly Gross National Income (GNI) per capita by 2025 in developing markets.

The ITU *Facts and Figures 2023* report highlights that broadband services have become more affordable globally. The report stated that both the mobile broadband (data only) basket and fixed broadband basket showed improved affordability across all regions and income groups. The global median price of the mobile broadband basket declined from 1.5 per cent to 1.3 per cent of GNI per capita, while the fixed broadband basket decreased from 3.2 per cent to 2.9 per cent.

Across the ECTEL Contracting States, only St. Kitts and Nevis meets or closely approaches the UN Broadband Commission's 2 per cent affordability benchmark for entry-level mobile broadband plans. The other four Contracting States remain well above the target, with the cheapest mobile broadband plans ranging between 4.4 per cent and 5.3 per cent of monthly GNI per capita.

Fixed broadband plans also remain above the 2 per cent benchmark in all five Contracting States, with costs ranging from 2.7 per cent to 5.3 per cent of monthly GNI per capita.

St. Kitts and Nevis thus continues to offer the most affordable broadband plans among Contracting States, while the Commonwealth of Dominica and St. Vincent and the Grenadines recorded the least affordable options, with all entry-level broadband plans exceeding 5 per cent of monthly GNI per capita as detailed in Table 4.

Commonwealth of Dominica

The Commonwealth of Dominica recorded the **least affordable broadband services** among the Contracting States. All entry-level mobile and fixed broadband plans significantly exceeded the 2 per cent affordability target by an average margin of 3 percentage points. The most affordable entry plan was the 30-day mobile prepaid plan at \$110, costing 4.9 per cent of monthly income.

Grenada

Affordability levels in Grenada remain above the UN target. All entry-level mobile and fixed broadband plans exceeded the benchmark by an average of 2.8 percentage points. The most affordable mobile broadband entry plan was the 30-day prepaid plan at \$105 accounting for 4.6 per cent of GNI per capita, while the most expensive was the 30-day postpaid plan at \$120 or 5.2 per cent of GNI per capita.

Table 4: Affordability of Broadband Plans in the ECTEL Contracting States (EC\$)

Contracting State	Monthly GNI p.c. 2023	Advertised Plans	Main Feature	Price	Price as % of GNI per capita	Movement toward 2% affordable target
Commonwealth of Dominica	\$ 2,261.82	7-day prepaid	12 GB	\$120	5.3%	-3.3%
		30-day prepaid	40 GB	\$110	4.9%	-2.9%
		Monthly Postpaid	50GB	\$115	5.1%	-3.1%
		Monthly Fixed Broadband	250 Mbps DL	\$115	5.1%	-3.1%
Grenada	\$ 2,291.25	7-day prepaid	18GB	108	4.7%	-2.7%
		30-day prepaid	40 GB	\$105	4.6%	-2.6%
		Monthly Postpaid	40 GB	\$120	5.2%	-3.2%
		Monthly Fixed Broadband	250 Mbps DL	\$107	4.7%	-2.7%
St. Kitts and Nevis	\$ 4,944.76	7-day prepaid	10 GB	\$100	2.0%	0.0%
		30-day prepaid	15 GB	\$100	2.0%	0.0%
		Monthly Postpaid	10 GB	\$119	2.4%	-0.4%
		Monthly Fixed Broadband	300 Mbps DL	\$135	2.7%	-0.7%
Saint Lucia	\$ 2,816.52	7-day prepaid	5 GB	\$129.16	4.6%	-2.6%
		30-day prepaid	18 GB	\$125.00	4.4%	-2.4%
		Monthly Postpaid	20 GB	\$125	4.4%	-2.4%
		Monthly Fixed Broadband	400 Mbps	\$117.68	4.2%	-2.2%
St. Vincent and the Grenadines	\$2,350.12	7-day prepaid	12 GB	\$120	5.1%	-3.1%
		30-day prepaid	18 GB	\$105	4.5%	-2.5%
		Monthly Postpaid	20 GB	\$120	5.1%	-3.1%
		Monthly Fixed Broadband	300 Mbps DL	\$125	5.3%	-3.3%

St. Kitts and Nevis

St. Kitts and Nevis continues to offer **the most affordable broadband services** among the Contracting States. Both the 7-day and 30-day prepaid mobile broadband plans, priced at \$100, meet the 2 per cent affordability target. Although, the monthly mobile postpaid mobile plan (2.4 per cent of GNI p.c.) and fixed broadband plan (2.7 per cent of GNI p.c.) remain marginally above the benchmark, they represent the lowest relative costs compared to the other Contracting States.

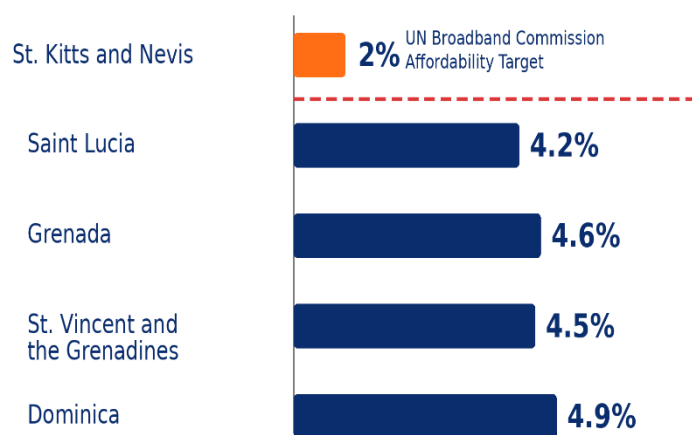
Saint Lucia

All entry-level broadband plans in Saint Lucia remain more than double the UN affordability target, with prices ranging from 4.2 per cent to 4.6 per cent of monthly GNI per capita. The most affordable option is the fixed broadband plan (400 Mbps) priced at EC\$117.68, equivalent to 4.2 per cent of GNI per capita. The most affordable mobile broadband option was the 30-day prepaid plan which cost \$125.

St. Vincent and the Grenadines

St. Vincent and the Grenadines recorded the **least affordable fixed broadband service** among the Contracting States, with the entry-level plan priced at \$125 or 5.3 per cent of monthly GNI per capita. All mobile and fixed broadband entry-level plans exceeded the 2 per cent benchmark by an average of 3 percentage points. The most affordable mobile broadband options were the 30-day prepaid and monthly postpaid plans, each priced at \$105 of 4.5 per cent of GNI per capita.

AFFORDABILITY OF ENTRY-LEVEL BROADBAND PLANS



Price as percentage of GNI per capita

Overall, disparities in the affordability of entry-level broadband plans persist across the ECTEL Contracting States. While St. Kitts and Nevis has effectively achieved the UN Broadband Commission's 2 per cent affordability benchmark for mobile broadband, the remaining Contracting States continue to face significant affordability gaps, with entry-level broadband prices ranging from 4.4 to 5.3 per cent of monthly GNI per capita.

APPENDIX

Appendix A: Selected Electronic Communications Statistics

This appendix presents five-year statistical trends for each ECTEL Contracting State and the ECTEL as a whole.

Table 5: Selected Electronic Communications Indicators - Commonwealth of Dominica

	As at March				
	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$99.8	\$80.2	\$73.4	\$73.7	\$75.3
Investment (EC\$M)	\$14.6	\$25.1	\$35.0	\$26.9	\$27.0
Employment	188	196	202	170	166
Fixed Line Subscriptions	6,361	743	6,718	6,558	6,215
Mobile Subscriptions	74,607	62,171	62,844	63,017	62,483
Mobile Broadband Subscriptions	55,485	49,111	58,299	64,233	62,309
Fixed Broadband Subscriptions	18,286	14,083	17,947	22,407	21,214
Subscriber Television Subscriptions	14,054	10,746	12,095	13,669	11,188
Fixed line penetration	8.8%	1.0%	9.1%	9.1%	8.6%
Mobile penetration	103%	85%	85%	88%	86%
Fixed broadband penetration	25%	19%	24%	31%	29.2%
Mobile broadband penetration	77%	67%	79%	89%	86%
Local fixed traffic (million minutes)	9.10	7.60	4.00	3.10	4.1
Local mobile traffic (million minutes)	79.9	83.7	83.4	84.4	82.3
International outgoing traffic (million minutes)	11	12	19	20	23

Table 6: Selected Electronic Communications Indicators - Grenada

	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$147.1	\$141.2	\$140.6	\$149.3	\$149.6
Investment (EC\$M)	\$14.7	\$16.4	\$ 13.5	\$12.0	\$30.9
Employment	103	97	108	107	107
Fixed Line Subscriptions	19,315	18,541	16,991	12,392	13,452
Mobile Subscriptions	118,760	106,446	111,955	114,063	123,822
Mobile Broadband Subscriptions	89,523	74,563	78,391	83,346	83,377
Fixed Broadband Subscriptions	31,952	32,454	34,802	32,333	32,789
Subscriber Television Subscriptions	12,532	12,656	11,644	11,104	12,108
Fixed line penetration	17.2%	16.3%	14.9%	10.9%	11.9%
Mobile penetration	105%	94%	98%	100%	109%
Fixed broadband penetration	28%	29%	31%	28%	29.0%
Mobile broadband penetration	80%	66%	69%	73%	74%
Local fixed traffic (million minutes)	172.10	180.50	81.80	60.60	60.9
Local mobile traffic (million minutes)	130.60	53.10	77.50	79.30	91.1
International outgoing traffic (million minutes)	7%	17%	17%	16%	16.8

Table 7: Selected Electronic Communications Indicators - St. Kitts and Nevis

	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$ 120.5	\$ 108.3	\$ 99.4	\$ 110.7	\$ 120.3
Investment (EC\$M)	\$ 18.9	\$ 7.7	\$13.1	\$ 21.0	\$ 11.4
Employment	155	140	154	159	156
Fixed Line Subscriptions	16,044	15,700	15,602	16,689	17,489
Mobile Subscriptions	62,525	56,703	62,615	59,953	60,116
Mobile Broadband Subscriptions	45,778	48,392	46,113	57,054	62,680
Fixed Broadband Subscriptions	21,540	20,120	19,970	21,878	22,308
Subscriber Television Subscriptions	13,546	14,049	13,801	14,025	13,952
Fixed line penetration	32.6%	31.8%	31.5%	33.5%	34.9%
Mobile penetration	127%	115%	126%	120%	120%
Fixed broadband penetration	44%	41%	40%	44%	44.5%
Mobile broadband penetration	93%	98%	93%	114%	125%
Local fixed traffic (million minutes)	14.50	19.40	14.70	13.80	10.1
Local mobile traffic (million minutes)	91.70	116.30	105.50	111.30	106.20
International outgoing traffic (million minutes)	9.1	7.6	5.9	6.6	6.1

Table 8: Selected Electronic Communications Indicators - Saint Lucia

	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$187.39	\$165.78	\$186.21	\$197.87	\$219.83
Investment (EC\$M)	\$ 83.01	\$ 41.42	\$54.50	\$ 45.91	\$ 51.10
Employment	174	214	213	211	188
Fixed Line Subscriptions	33,162	32,218	30,640	29,613	28,227
Mobile Subscriptions	145,931	171,805	176,399	182,690	216,708
Mobile Broadband Subscriptions	86,157	93,080	117,186	148,515	158,985
Fixed Broadband Subscriptions	35,601	38,080	44,811	45,729	47,799
Subscriber Television Subscriptions	9,397	9,406	10,151	18,555	17,825
Fixed line penetration	18.5%	17.8%	16.8%	16.1%	15.3%
Mobile penetration	81%	95%	97%	100%	117%
Fixed broadband penetration	20%	21%	25%	25%	25.9%
Mobile broadband penetration	48%	51%	64%	81%	86%
Local fixed traffic (million minutes)	41.00	31.30	27.50	14.30	13.4
Local mobile traffic (million minutes)	153.80	160.90	177.10	195.00	191.7
International outgoing traffic (million minutes)	6.10	6.20	11.30	9.5	10.9

Table 9: Selected Electronic Communications Indicators - St. Vincent and Grenadines

	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$ 115.4	\$ 125.5	\$ 119.2	\$ 127.7	\$ 129.3
Investment (EC\$M)	\$14.9	\$ 29.2	\$ 19.1	\$ 48.4	\$ 12.1
Employment	163	157	132	134	124
Fixed Line Subscriptions	17,439	12,263	11,628	12,954	11,718
Mobile Subscriptions	100,362	98,231	97,483	103,646	105,611
Mobile Broadband Subscriptions	83,017	97,314	93,736	95,014	102,841
Fixed Broadband Subscriptions	25,280	24,878	25,148	29,237	30,858
Subscriber Television Subscriptions	8,697	8,703	8,902	8,253	8,547
Fixed line penetration	15.8%	11.1%	10.5%	11.7%	10.6%
Mobile penetration	91%	89%	88%	93%	95%
Fixed broadband penetration	23%	22%	23%	26%	27.8%
Mobile broadband penetration	75%	88%	85%	86%	93%
Local fixed traffic (million minutes)	17.80	34.30	40.90	38.60	32.00
Local mobile traffic (million minutes)	126.1	127.7	148.3	142.1	120.7
International outgoing traffic (million minutes)	6.30	5.70	4.20	4	4.1

Table 10: Selected Electronic Communications Indicators - ECTEL Contracting States

	2020	2021	2022	2023	2024
Provider Revenues (EC\$M)	\$ 670.1	\$ 620.97	\$ 618.8	\$ 659.3	\$ 694.3
Investment (EC\$M)	\$ 146.1	\$ 119.8	\$ 135.2	\$ 154.3	\$ 132.5
Employment	783	804	809	781	741
Fixed Line Subscriptions	92,321	79,465	81,579	78,206	77,101
Mobile Subscriptions	502,185	495,356	511,296	523,369	568,740
Mobile Broadband Subscriptions	359,960	362,460	393,725	448,162	470,192
Fixed Broadband Subscriptions	132,659	129,615	142,677	151,584	154,968
Subscriber Television Subscriptions	58,226	55,561	56,592	65,606	63,620
Fixed line penetration	17.6%	15.1%	15.4%	14.8%	14.5%
Mobile penetration	96%	94%	96%	99%	107%
Fixed broadband penetration	25%	25%	27%	29%	29%
Mobile broadband penetration	69%	69%	74%	85%	89%
Local fixed traffic (million minutes)	254.60	273.10	168.90	130.40	120.50
Local mobile traffic (million minutes)	582.20	541.80	591.70	612.20	592.00
International outgoing traffic (million minutes)	40.00	48.90	56.60	56.20	61.10

Appendix B: Individual Licensees as at March 2024

Table 11: Active Electronic Communications Service Operators in the ECTEL Contracting States at March 2024

Licence	Fixed Public Network	Public Mobile Telecoms	Broadband Network and Services	Subscriber TV	Submarine Cable
Dominica	Cable & Wireless SAT Telecommunications (Digicel Play)	Cable & Wireless Digicel Epic	Cable & Wireless SAT Telecommunications (Digicel Play)	Digicel Play	Cable & Wireless Middle Caribbean Network
Grenada	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Digicel Aislecom	Cable & Wireless Grencomm Columbus Communications (FLOW)	Columbus Communications (FLOW)	Cable & Wireless Southern Caribbean Fiber
St. Kitts and Nevis	Cable & Wireless The Cable Caribbean Cable Communications	Cable & Wireless Wireless Ventures (Digicel)	Cable & Wireless The Cable Caribbean Cable Communications	The Cable Caribbean Cable Communications	Cable & Wireless Southern Caribbean Fiber
Saint Lucia	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Digicel	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Antilles Crossing Southern Caribbean Fiber
St. Vincent and the Grenadines	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Digicel	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Columbus Communications (FLOW)	Cable & Wireless Southern Caribbean Fiber Digicel Grenada Cable Company

Appendix C: References and Data Sources

Eastern Caribbean Central Bank (ECCB)

- Economic and Financial Review Report: <https://www.eccb-centralbank.org/publications/economic-and-financial-review>
- Statistics Dashboard: <https://www.eccb-centralbank.org/statistics>

International Telecommunication Union (ITU)

- Facts and Figure 2023: <https://www.itu.int/itu-d/reports/statistics/2023/10/10/ff23-subscriptions/>
- Measuring digital development: ICT price trends 2024: https://www.itu.int/hub/publication/D-IND-ICT_PRICES.01-2025/

World Bank

- GNI per capita, Atlas method (current US\$): <https://data.worldbank.org/indicator/NY.GNP.PCAP.CD?locations=GD-DM-KN-LC-VC>
- Work Economic Outlook 2023: <https://www.imf.org/en/publications/weo/issues/2023/10/10/world-economic-outlook-october-2023>

United Nations Broadband Commission

- The State of Broadband 2024: <https://broadbandcommission.org/publication/state-of-broadband-2024/>
- The State of Broadband 2023: <https://broadbandcommission.org/publication/state-of-broadband-2023/>

Digicel

- Commonwealth of Dominica: <https://www.digicelgroup.com/dm/en>
- Grenada: <https://www.digicelgroup.com/gd/en>
- St. Kitts and Nevis: <https://www.digicelgroup.com/kn/en>
- Saint Lucia: <https://www.digicelgroup.com/lc/en>
- St. Vincent and the Grenadines: <https://www.digicelgroup.com/vc/en>

FLOW

- Commonwealth of Dominica: <https://discoverflow.co/web/dominica>
- Grenada: <https://discoverflow.co/web/grenada>
- St. Kitts and Nevis: <https://discoverflow.co/en/web/saint-kitts>
- Saint Lucia : <https://discoverflow.co/web/saint-lucia>
- St. Vincent and the Grenadines: <https://discoverflow.co/en/web/saint-vincent>