

Accelerating Broadband Development in the Caribbean



CANTO/IDB Forum; Hyatt Regency, Miami; Nov 7th 2011

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Digicel
The Bigger, Better Network.

Accelerating Broadband Development in the Caribbean

- Macroeconomics - benefits of Broadband
- Digicel Overview
- Jamaica Success story
- Spectrum Harmonisation
- ICT Enrichment Program – Beyond Broadband
- Conclusions

Macroeconomics – benefits of Broadband

New Study

- Doubling the broadband speed for an economy increases GDP by 0.3% (Ericsson, Arthur D. Little and Chambers University of Technology)
- Study is the first of its kind – quantifies the economic impact of increases in broadband speed in a comprehensive scientific method
- 33 OECD countries
- 0.3% GDP Growth in the OECD region equivalent to USD 126 billion
- Quadrupling of speed equals 0.6% GDP growth

New Study

- Both Broadband 'availability' and 'speed' are strong drivers in an economy
- Estimated 1 billion people with broadband access to about 5 billion in 2016 – most will have **mobile** broadband
- The results of this study support governmental policies that recognise and promote the importance of broadband
- Another study by the same researchers concluded that for every 10% increase in broadband penetration GDP increases by 1%

Economic, Social and Educational benefits

Economic benefits:

“Bringing mobile broadband levels in emerging markets up to those of more mature markets—could add between US\$300 and US\$420 billion to the world’s GDP and 10 to 14 million direct and indirect jobs in areas such as equipment manufacturing and outsourcing/offshoring services” - McKinsey

Social benefits:

“In the 21st century, affordable broadband access to the Internet is becoming as vital to social and economic development as networks like transport, water and power” – Dr Hamadoun Touré, ITU Secretary-General

Educational benefits:

“Broadband can be an important tool to help educators, parents and students meet major challenges in education...broadband-enabled solutions hold tremendous promise to help reverse patterns of low achievement.” – US National Broadband plan

Digicel Overview

- Caribbean's largest mobile operator
- Operations in 32 countries;
- Over US\$3.5 billion invested over 12 million subscribers;
- Launched 4G in Bermuda, Cayman, the Dutch Caribbean (Aruba, Bonaire and Curacao) and French West Indies – further rollout planned
- Launched 4G Broadband (based on WiMAX) in Cayman and Jamaica
- Launched Cloud telephony and Cloud Computing from our Tier 3 datacenter
- Developing as leading “Full Services” communications company.

Jamaica WiMAX Success

- Successful rollout of Digicel 4G Broadband (based on WiMAX technology) across Jamaica.
- Internet penetration in 2010 in Jamaica was at a very low 26% with only 4% penetration of broadband
- Digicel 4G Broadband covers 60% population (all fourteen parishes) – that translates to 410,000 households or 1.2 million people who can take advantage of the multiple benefits of superfast broadband
- Investment of US\$22.7 million – leveraging our existing network and investments in Jamaica of over US\$850 million

Jamaica WiMAX Success

- delivering speeds up to ten times faster than 3G
- Benefits are an Enabled ECONOMY, facilitated EDUCATION and New business possibilities
- One year on from the launch of Digicel 4G Broadband, internet penetration has shown significant growth
- We are making it happen...!



Digicel Supports the CTU's Spectrum Harmonisation Project

- There is no consistent, coordinated approach to spectrum across the Caribbean;
- Caribbean Telecoms Union's (CTUs) Spectrum Management Task Force needs to be supported to harmonise our spectrum across the Caribbean to encourage ICT Broadband development;
- Low spectrum fees to encourage growth of ICT Broadband development.

What is the Cloud?

Attributes

- On demand
- Self service
- Measured usage
- Elastic supply
- Network delivered

Pooled Resources,
Delivered as a Service

The Cloud

Public
Cloud

Private
Cloud

Cloud Changes Scope of What is Possible

- 1 Cloud enables new revenues and business models
- 2 Cloud accelerates innovation and speeds deployment
- 3 Cloud enhances IT/Content efficiency and flexibility
- 4 Cloud reduces and balances CapEx and OpEx needs

**Cloud services change the
fundamental economics of IT/content**

Digicel Cloud Services



Cloud Email/ Blackberry

Solutions

- Microsoft Exchange
- Mdaemon

End-user Price Range

- From \$2 to \$20 per mailbox depending on solution



Cloud Telephony

Solution

- Broadsoft
- Cisco

End-User Price Range

- From US6 per seat



IaaS / SaaS

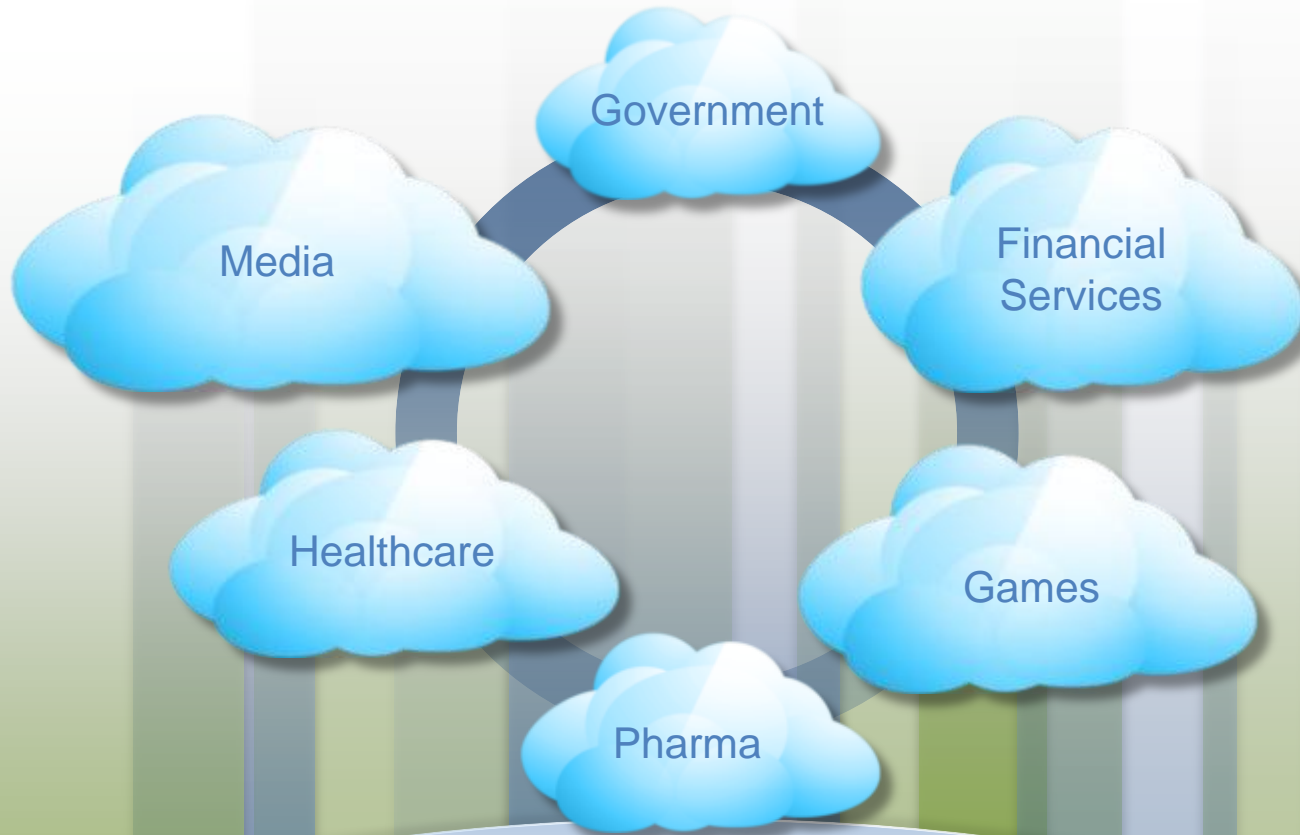
Solutions

- Virtual Server
- Online Back-up
- Microsoft applications
- Oracle App's
- OS

Digicel

The Bigger, Better Network.

A World of Many Clouds



Network as the Platform
Seamlessly and Securely Connected

Conclusions

- We are making investments to develop world class networks that enable new business INNOVATION and GROWTH
- The global findings MUST influence governments and other decision makers to make correct tradeoffs and policy choices: Open access = Local Innovation and Growth
- Governments and regulators play a key role with Spectrum policies and in turn ignite OR limit ICT development and availability

Thank you for your attention....!