



Impact of Internet Platforms on the Caribbean ICT Eco-System

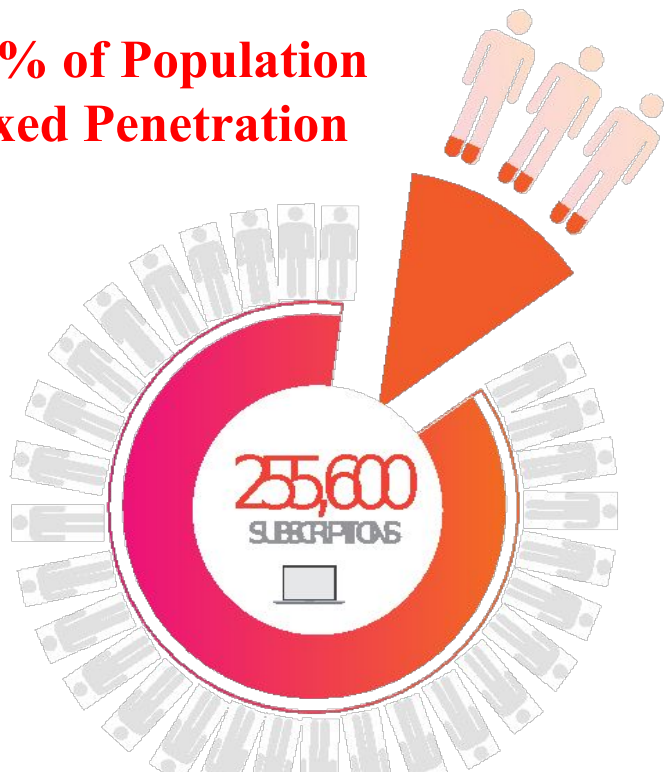
A Trinidad and Tobago Perspective

A Quick Look at the Ecosystem

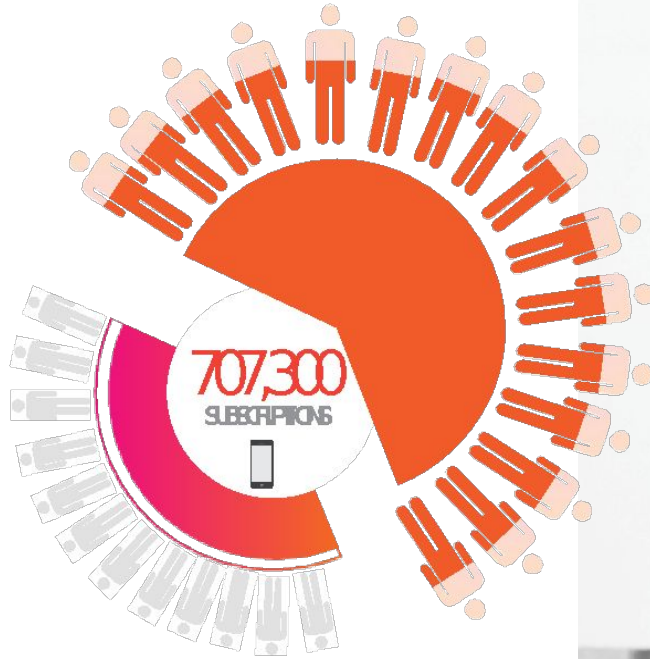


Key Indicators for the Internet Market (2016)

**19% of Population
Fixed Penetration**



Key Indicators for the Internet Market (2016)



**52% of Population
Fixed Penetration**





36.4%
decrease over 2015

\$982m

Broadcast MARKET REVENUES



\$167.0M
REVENUES
16.4% Decrease

FREEtoAIR
RADIO

\$718.4M
REVENUES
1.6% Decrease

**PAY
TV**

\$98.2M
REVENUES
36.4% Decrease

FREEtoAIR
TV

ICT and Development/ Technology Adoption

Smart Cities – Slow Adoption

E-Health – Limited to Non-Existent

E-Education; E-Security....

Trinidad and Tobago in 2017

ICT Development Index Rankings **68**

Ease of Doing Business Rankings **102**

Happiness Index **#1**

What's the LIGHTNING BOLT?

Over the Top
Voice and
Media and
Messaging!



The exponential growth of digital technologies?

Where will we be in:

5, 10, 20, or 30 years

Still running behind the technology?

We Need to Change our Business Model!

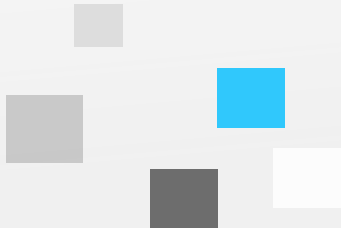
INNOVATION is the
only way to **WIN!**

Steve Jobs



WE ARE THE PAST

OF TOMORROW'S
FUTURE



What should we be doing
TO SET THINGS RIGHT



**You can't connect the dots
looking forward; you can
only connect them looking
backwards.**

Steve Jobs



TRUST

that the DOTS will somehow connect



YOU HAVE TO TRUST IN SOMETHING

OR BE DESTINED TO FAIL

We are in the EXPERIENCE AGE

WE have to look at **OUR INDUSTRY** and
visualise how the technology will impact your industry
TOMORROW and plan for it **TODAY!**

MOBILE SUBSCRIPTIONS in TnT grew

575%

IN 3 YEARS

FREE WiFi

**Every
Customer
Wants it!**



MORE!

What has TATT been Doing?



Creating New Dots!

... We are trying to

Change our Business Model a Little!

What has TATT been Doing?



1. Net Neutrality and OTT
2. In Infamous Android Box Issue – OTT Media and IPR
Conversation
3. Working to Create a new Future by
 - a. Working with our colleagues to develop our Generation X and *i*Generation in Artificial Intelligence and Robotics etc and at every opportunity what is lawful and what is not...

Net Neutrality – Guiding Principles

**1 allow
reasonable
traffic
management**

**3 promote
investment**

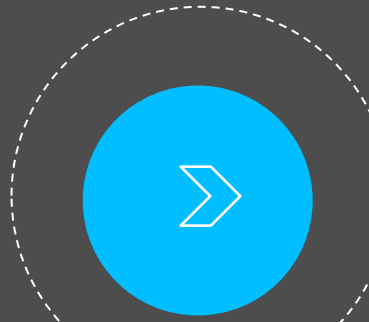
4 transparency

**2 no
unreasonable
discrimination**

**5 promoting local
innovation and
entrepreneurship**

Net Neutrality Recommendations

1. No blocking and throttling or intentionally restricting of lawful content, services and applications
2. Relaxed our position on paid prioritisation and zero-rated pricing (cases evaluated on merit with punishment of actual harmful and proven offences)



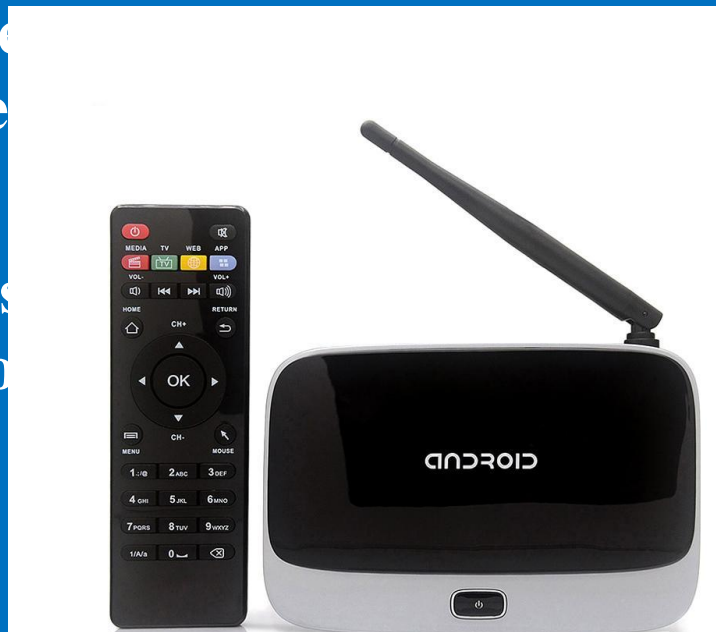
OTT Recommendations

1. CLASSIFICATION 1: Functionally Equivalent OTT Services - a case for regulation can be made we may need some amendments to the legislative framework to ensure efficient sector regulation
2. CLASSIFICATION 2: Other OTT Services
Regulation may take other forms specifically in areas of cyber security, data protection, child pornography, intellectual property rights, national security and privacy and other public interest matters.



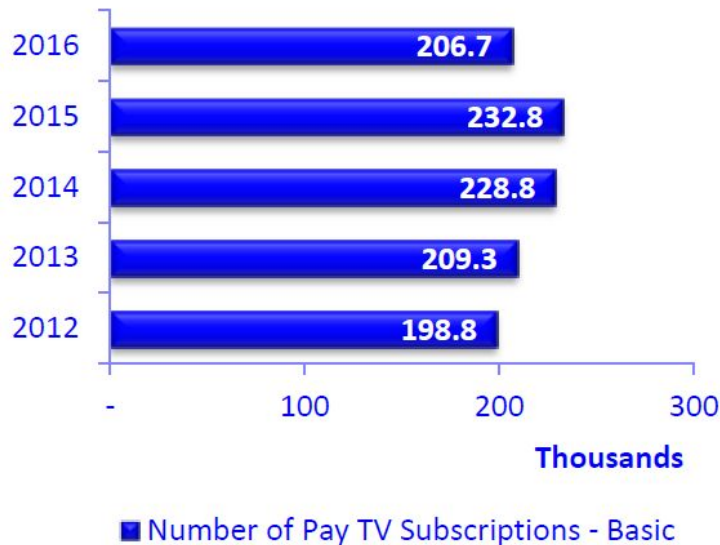
And That Android Box Issue...

- The Android Box itself is not illegal
- What we do with it is....
- Its the same thing we do with our phones laptops tablets gaming consoles etc when we stream unlawful content
- We use third-party add-ons and plugins that allow easy unencumbered access to pirated content.



And That Android Box Issue...

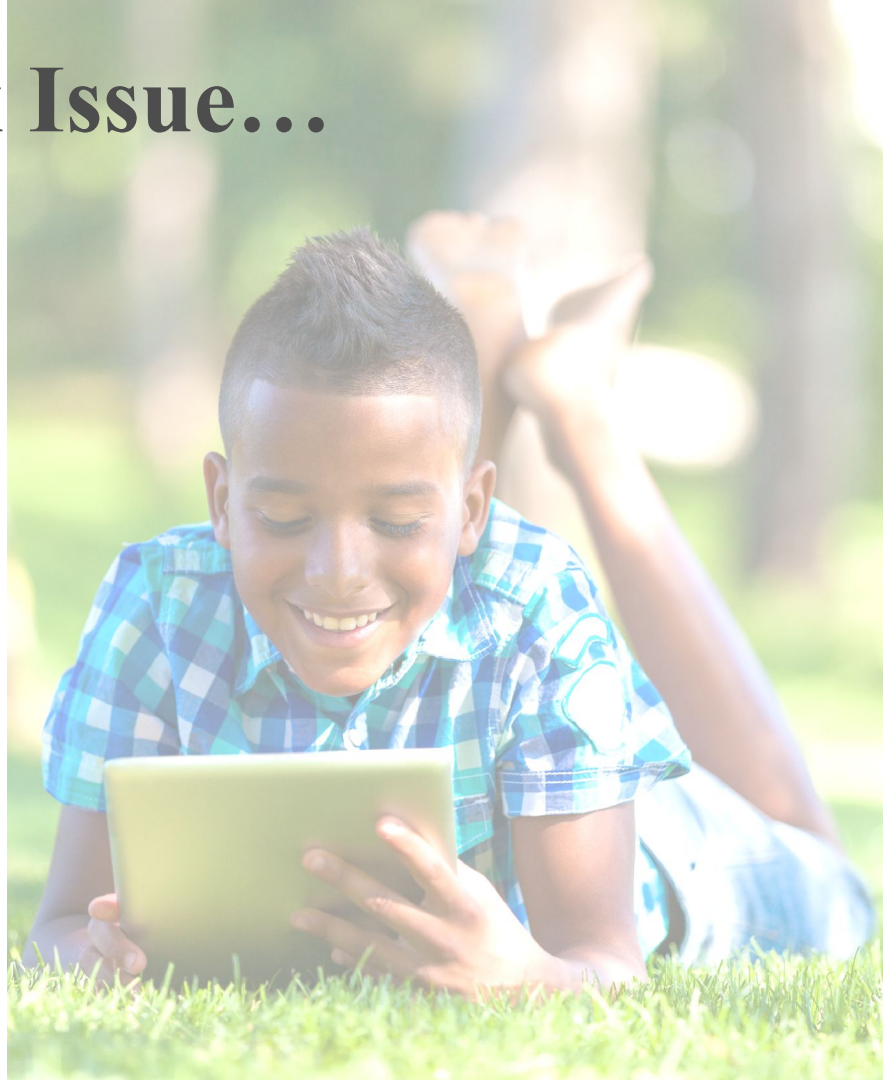
- **Operators perspective**
 - **Concession Condition D 13**
 - **Pay TV subscriptions fell by approximately 11% (26,000) as of December 2016, with revenues dipping by 1.6% (\$11.8m);**



And That Android Box Issue...

■ Consumer perspective

- Consumers have easily available content from operators
- Easily enticed by taglines
 - “no more cable bills”,
 - “no dish to install”
 - “one-time fee”
 - “Watch it anywhere”





**WE NEED TO
BUILD A NEW
REALITY**

Start the **conversation** between state and private sector



On what we can do to **create** the **right future**
for Trinidad and Tobago and the rest of the region

May the
CONVERSATION
Begin Today!



THANK YOU!