Jamaica's Digital Landscape

At a glance...and the changing RF Regulatory space

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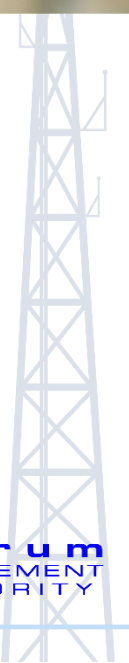
DSA- Global Summit 2023

Global Mobile Traffic Forecast Region 2
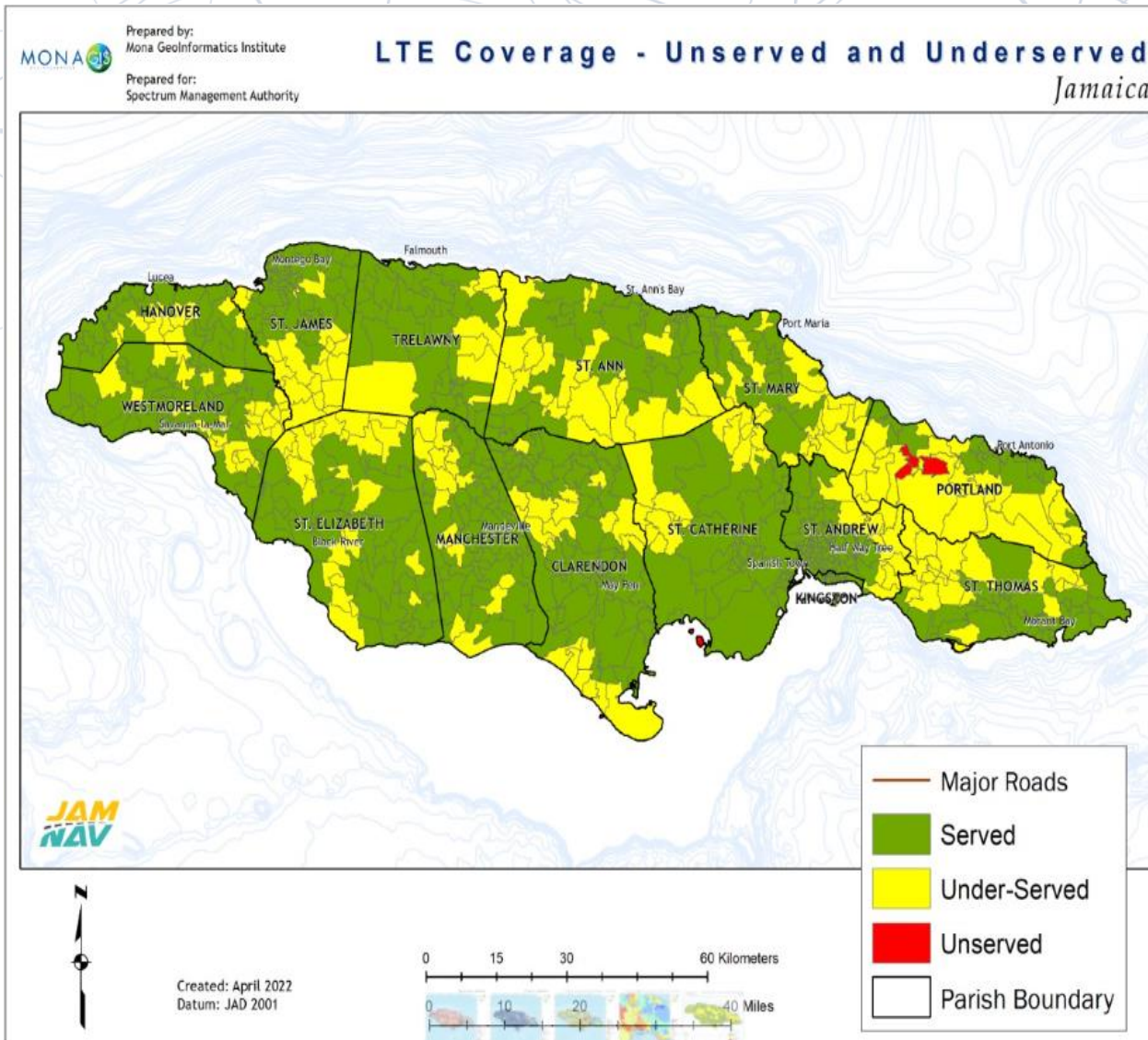**(5x in 5 years)**

NOW

Average data consumption per user per month (Jamaica) is about **5 GB**

FUTURE

Based on the global forecast for the next 5 years, we are looking at about **25 GB**/per user/month

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Map Highlighting Underserved and Unserved - 2022

	Population	Households
Unserved	2901	914
Underserved	398,785	112,462

LTE Coverage - Unserved and Underserved
Jamaica

Prepared by:
Mona GeoInformatics Institute

Prepared for:
Spectrum Management Authority

Legend:
- Major Roads
- Served
- Under-Served
- Unserved
- Parish Boundary

Created: April 2022
Datum: JAD 2001

Jamaica 'S Journey..... Bridging The Digital Divide

GOJ Policy Objectives

Increased competition in the Jamaican mobile market

Bring coverage to underserved areas

Generate Revenue for the Treasury

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Primary Drivers of Broadband Uptake

AFFORDABILITY

AVAILABILITY

ACCESSIBILITY

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Four Pillars of Action

UNIVERSAL BROADBAND ACCESS

Maximize existing assets

Deliver shovel-ready projects

Incentivize investment in broadband and cellular infrastructure

Modernize government to remove barriers

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Mobile Network Operators / Internet Service Providers

ReadyNet, StarLink & Neptune
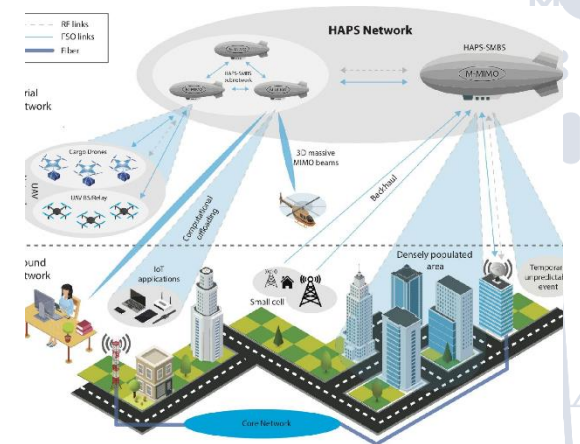
CHALLENGES FACING THE REGION

Global mobile industry contribution to GDP worldwide from 2014 to 2025 (in trillion U.S. $)

Growth of Economic Sectors in the GDP from 2011 to 2021
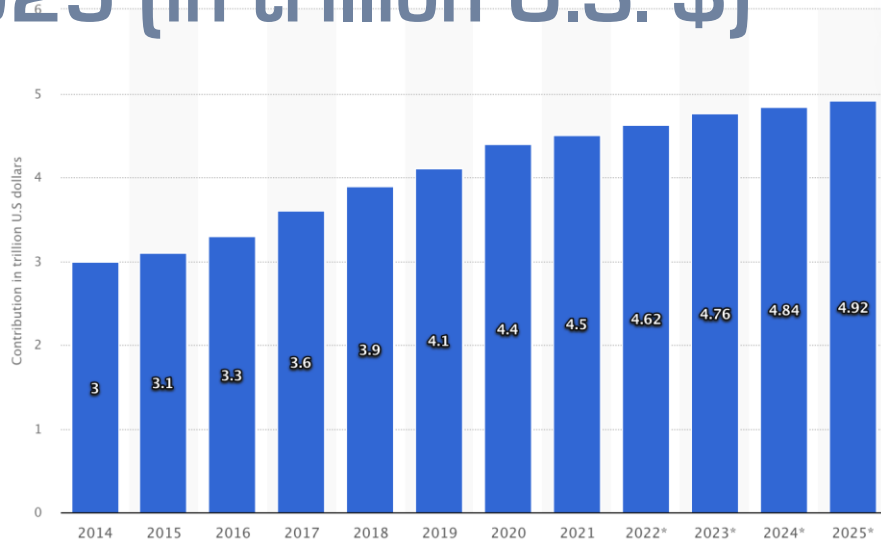
In 2021, the mobile industry contributed 4.5 trillion U.S. dollars to global GDP, which makes up 5 percent of global GDP overall. The source projects that this will increase to 4.9 trillion U.S. dollars by 2025 (Statista - 2023, Taylor)

Year	Agriculture	Industry	Services
2011	3.99	28.12	61.97
2012	4.02	28.11	62.19
2013	4.16	27.78	62.3
2014	4.14	27.54	62.56
2015	4.23	26.83	64.28
2016	4.18	26.28	64.9
2017	4.15	26.76	64.39
2018	3.95	27.22	64.14
2019	4.01	26.7	64.73
2020	4.35	26.16	65.33
2021	4.3	27.59	64.43

● Agriculture ● Industry ● Services

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The Caribbean Region: Challenges

- Not enough data to benchmark

- Countries of reference: Americas/ Europe?

- Caribbean islands have a different national reality

- Telecoms markets with few competitors

- Service providers are licensed separately in each jurisdiction and, therefore, each is a separate market.

- Limited technical human resources – the brain-drain effect
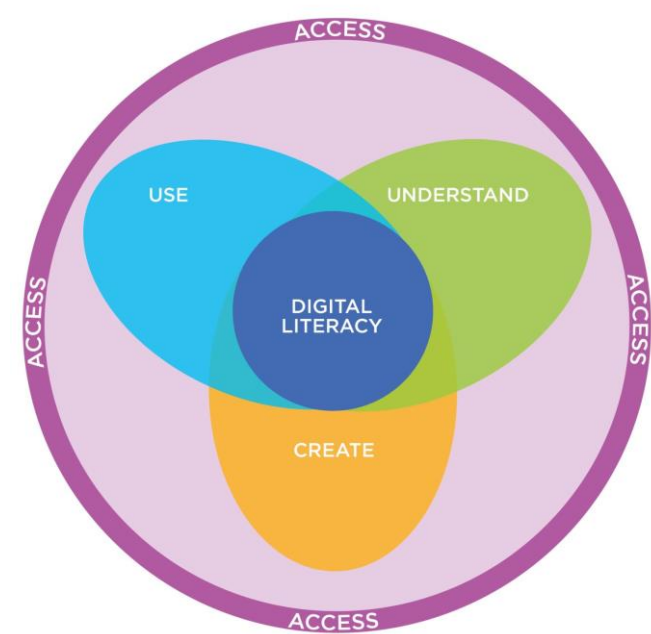
In order to Future Proof the Space... Spectrum Regulators will have to ensure:

Optimize the utilization of radio spectrum

Identifying the spectrum need for new wireless networks

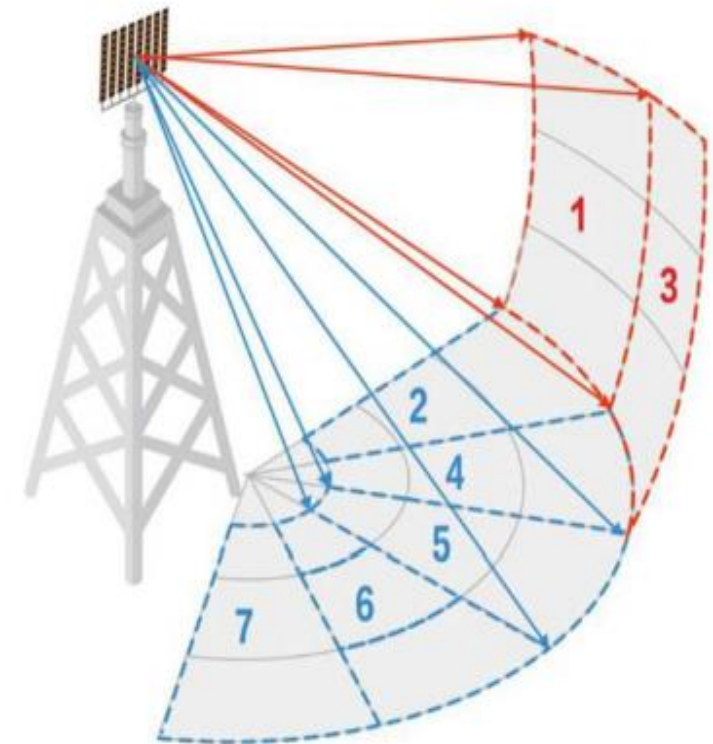Establishing new regulations, technical parameters and standards

Undertaking special coordination work

Maintaining and updating all new information

Utilization and protection of orbit/frequency resources

Example of a 5G cell with 7 SSBs

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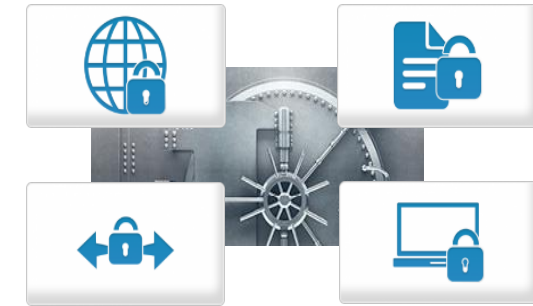# Addressing the Issues – Agenda Items that will ensure

- Economic development – GDP growth

- Mitigate social challenges

- Change in user behavior towards positive outcomes.

- Security aspects – Data and Access

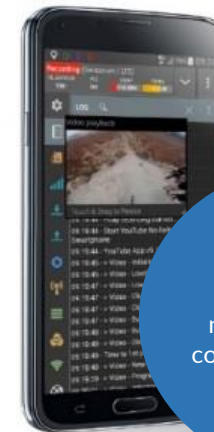- Impact on current regulations – must be relevant

Responsibility

Security

Development

Quality
more important to consumers than price

Quality o Service (QOS)

Increase Capacity....

- Replace older technology with more spectrally efficient technology

- Install more infrastructure (e.g. cell sites)

- Use more spectrum

- Offload data to other networks (e.g. WiFi)

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Comment or Questions

Thank you for you attention