

experience success

simplify experience | harness data | stay ahead | be efficient

Caribbean and Latin America CALA

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President, CALA

Analyst & Investor Day - December 5, 2012



amdocs

Agenda

Market forces

Focus on the controlling hills

Strategy results

Growth trajectory

Success stories

Summary



CALA macro-economic and market structure

Population Growth:
140m expected by 2050

Only **190m** with
a bank account

Mega Events
World Cup and
Olympics

Growing **middle class**:
50m increase

500% increase in number
of accesses between
2000 to 2010

“Galaxy” ownership
structure

Young and Urban:
150m are <14 years old

Internet Access:
From **65m** in 2010
to **400m** in 2016

Consolidation continues

Increasingly Sophisticated Systems Requirements

CALA market forces

**Simplify
experience**



**Harness
data**



**Stay
ahead**



**Be
efficient**



- 100%+ mobile penetration
- Growth in postpaid
- Smartphones grow 700% by 2016
- Fierce competition drives focus from acquisition to retention

CALA market forces

**Simplify
experience**



**Harness
data**



**Stay
ahead**



**Be
efficient**



- Middle class hungry for broadband and advanced services
- 2013 is the “Year of LTE”
- World’s highest mobile data revenue growth
- IP traffic to multiply 700% by 2015

CALA market forces

**Simplify
experience**



**Harness
data**



**Stay
ahead**



**Be
efficient**



- Quad-Play and Pay TV on the rise
- Connected economy: 5 of world's top 10 social network markets
- Focus on emerging lines of business
 - Connected Home, M2M, mobile payments

CALA market forces

Simplify
experience



Harness
data



Stay
ahead



Be
efficient



- Infrastructure / Fiber build to fill increasing broadband gap
- Wave of IT transformation coupled with skills shortage
- Drive to achieve Galaxy consolidation economies of scale
- Low ARPU ~ \$13 requires efficient operations

Focus on the controlling hills

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89M subs
3 countries
\$15B rev



230M subs
17 countries
\$33B rev

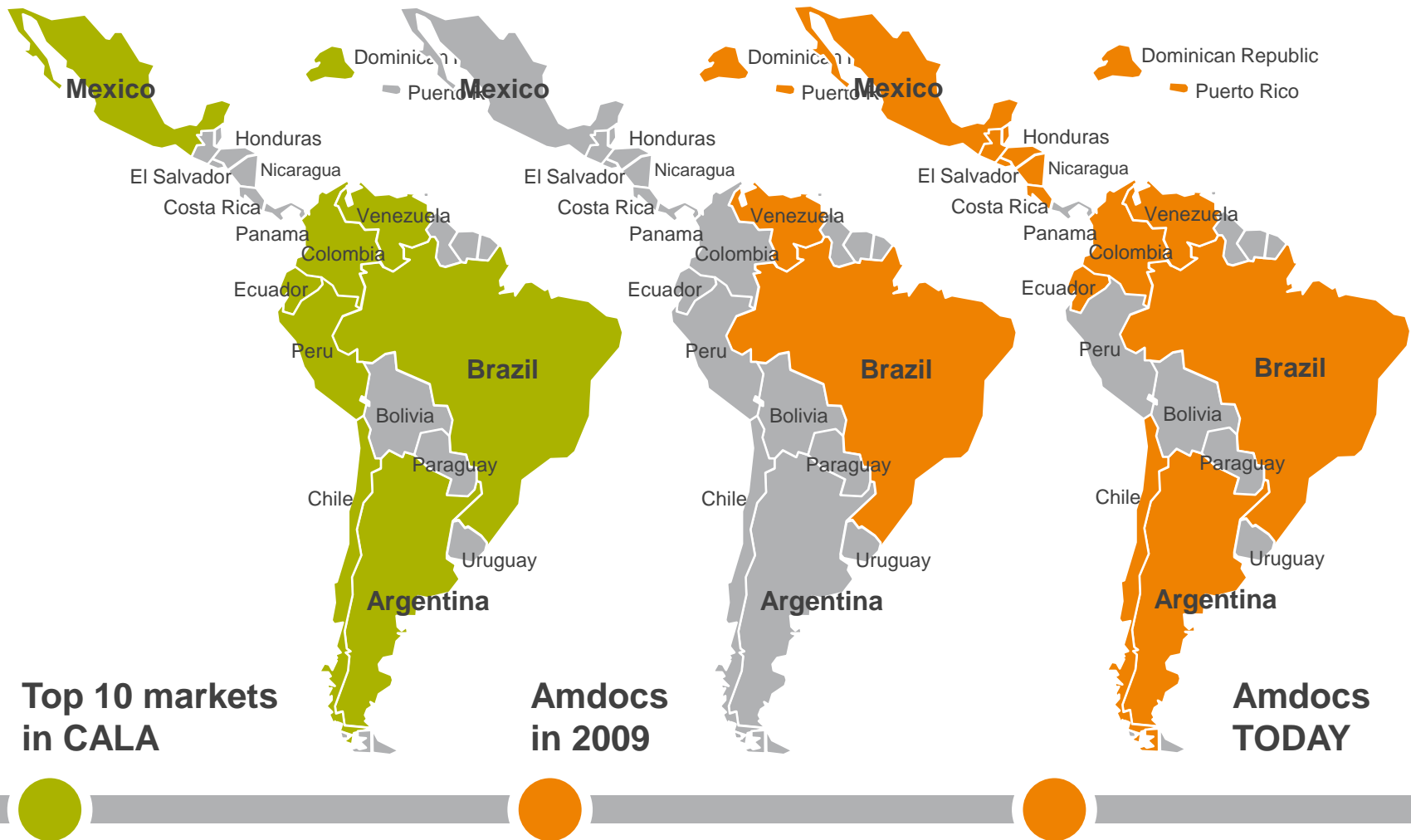
Telefónica

122M subs
14 countries
\$27B rev

Three Galaxies control **75%+**
of wireless subscribers

Leading operator
in most markets

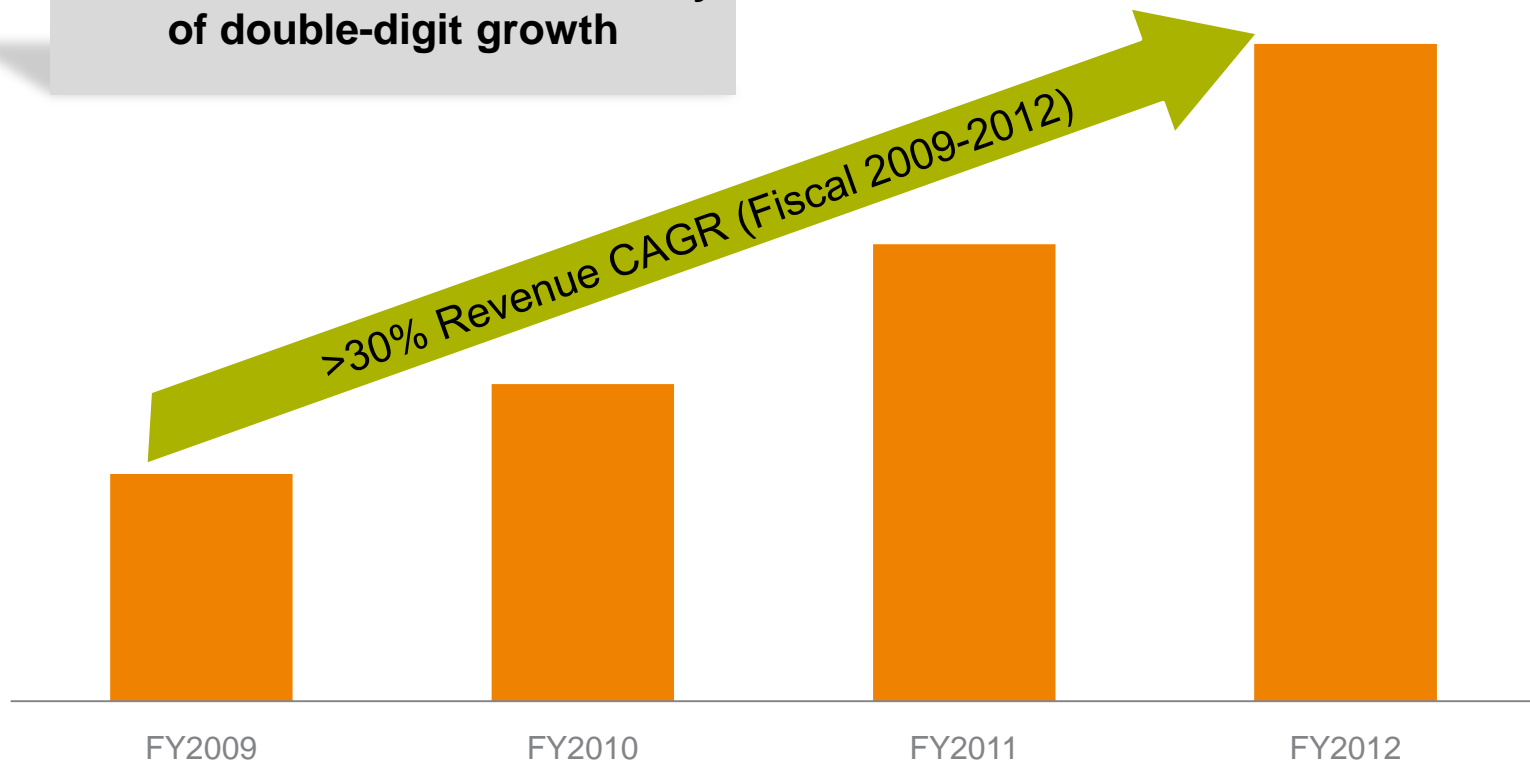
Strategic focus paying off



The results in CALA

Strong growth due to our focused strategy

Recent bookings trends give us confidence in the sustainability of double-digit growth



Success stories

**Simplify
experience**



**Single view of
corporate accounts
and 20% reduction in
provisioning time**

**Harness
data**



**Enabling the 1st
independent carrier in
the LATAM region to
launch LTE**

**Stay
ahead**



**Launched in record
time with 454%
services growth**

**Be
efficient**



**Business
transformation
program to drive
consistent multi-
channel experience**

Looking ahead

CES portfolio to drive customer experience

Focus on OSS to support infrastructure / Fiber build-out

Multi-play

Managed Services

Scalable cross-Galaxy solutions

Summary



We are at **best-positioned** to take advantage of **opportunity** in the region



We have the blue chip **experience** and **business model** to serve our customers' **growing** needs



We have **strong momentum** and a **clear strategy** for continued **growth**



LIVE^{TIM}

Rogerio Takayanagi

CEO, TIM Live



LIVE TIM

Oferta por tempo limitado

35 MEGA

PROMOÇÃO
PRORROGADA

Pague apenas

R\$ **35** /mês

até os jogos de 2014

APROVEITE E COMPRA AGORA.



Thank you