



CAREC Digital Corridor – Regional Market Dynamics & Digital Ecosystem Strategy

July, 2026



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The Digital Ecosystem: Driving Growth, Connectivity, and Infrastructure Demand

Digitalization as a key driver of economic growth and competitiveness

The rapid digital transformation of productive sectors, public services and society is driving a structural increase in data generation and digital service consumption. Technologies such as artificial intelligence, cloud computing, Industry 4.0 and digital government increasingly depend on high-capacity, resilient and internationally connected digital infrastructure, making connectivity a fundamental prerequisite for sustained economic growth, innovation and regional integration.

Artificial Intelligence

- AI workloads
- Model training
- Inference services

+4% labour productivity - EU

Industry 4.0

- AI workloads
- Model training
- Inference services

15–30% increase in workforce productivity

Cloud Computing

- Cloud-native applications
- SaaS
- Enterprise digitalisation

Scalable IT infrastructure & reduced operational costs

Digital Government

- Digital public services
- e-Health
- e-Education

Reduction of administrative costs by up to 20–30%

Digital Economy

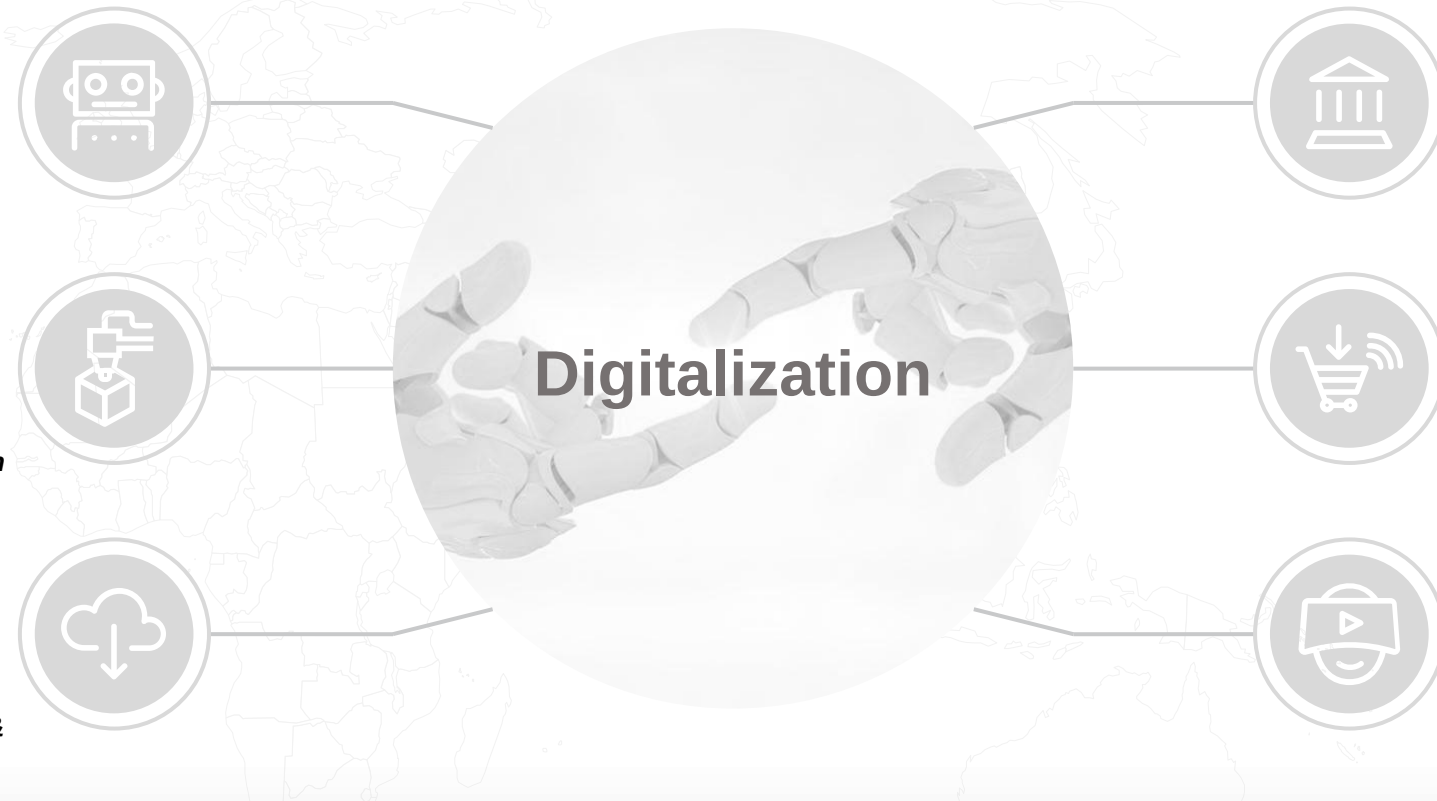
- E-commerce
- Fintech
- Digital platforms

Digital activities exceeding 25% of GDP in leading markets

Connected Society

- Video streaming
- Social platforms
- Remote work

Up to USD 12.5 trillion in annual value globally by 2030



x 2.5

Driven by AI, cloud computing, Industry 4.0 and digital public services, global mobile network traffic is expected to increase by approximately 2.5× by 2031, requiring continuous investment in high-capacity international digital infrastructure.

The Digital Ecosystem: Driving Growth, Connectivity, and Infrastructure Demand

Digitalization is transforming productive sectors across the economy

The digital transformation of productive sectors is reshaping how economies create value. From precision agriculture and smart manufacturing to mining and logistics, digital technologies are increasing efficiency, enabling new business models and generating rapidly growing demand for resilient digital infrastructure and international connectivity.

Agriculture

- Smart irrigation
- AI-based crop management

20 – 30% Higher agricultural productivity



Manufacturing

- Digital twins
- Predictive maintenance

15 – 30% Productivity increase



Logistics & Transport

- Real-time tracking
- AI optimization

10 – 20% logistics cost reduction



Mining

- Remote operations
- Connected equipment

10 – 20% Productivity improvement



Healthcare

- AI diagnostics
- Electronic Health Records

30% Reduction in administrative costs



Public sector

- e-Government
- Digital public services

20 – 50% Reduction in administrative costs



Digitalization is becoming a **horizontal productivity driver across all sectors of the economy**, making resilient digital infrastructure a strategic prerequisite for sustainable economic growth and long-term competitiveness.

The Digital Ecosystem: Driving Growth, Connectivity, and Infrastructure Demand

Digital transformation has become a catalyst for economic competitiveness

International experience demonstrates that countries which have successfully accelerated digital transformation have combined sustained investment in digital infrastructure with enabling public policies, creating the conditions to increase productivity, strengthen innovation ecosystems, improve public service delivery, attract private investment and enhance long-term economic competitiveness.

Singapore – Smart Nation

What was implemented?

- National Smart Nation strategy
- Digital government services
- National Digital Identity
- Cloud-first public administration



Main outcomes

- ✓ 94% of government services digitalized
- ✓ 85% citizen satisfaction
- ✓ Faster service delivery and lower administrative costs

South Korea – National 5G

What was implemented?

- Nationwide 5G rollout
- Early spectrum allocation
- Public-private investment



Main outcomes

- ✓ Expected US\$152 billion economic output by 2026
- ✓ 600,000 jobs supported

Indonesia – Thailand

What was implemented?

- Aadhaar digital identity
- Unified Payments Interface (UPI)
- Digital public infrastructure
- Nationwide digital connectivity expansion



Main outcomes

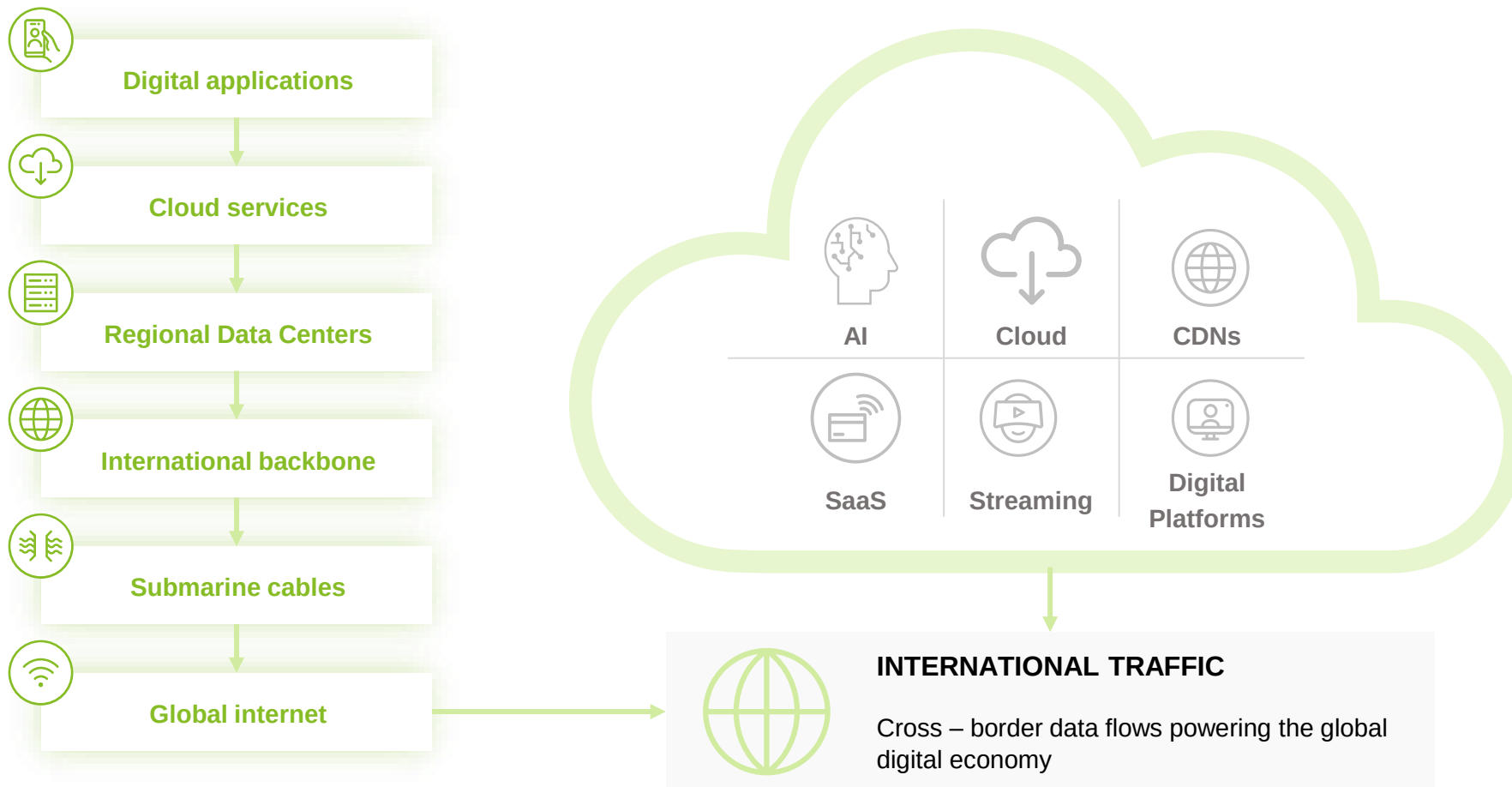
- ✓ 1.419 billion Aadhaar digital identities
- ✓ 18.3 billion UPI transactions
- ✓ 668 banks and payment applications connected to UPI

These experiences demonstrate that **digital transformation is not driven solely by technology deployment**, but by **coordinated investment in digital infrastructure**, supportive **regulation** and **long-term national digital strategies**.

The Digital Ecosystem: Driving Growth, Connectivity, and Infrastructure Demand

Digitalization as a driver of exponential growth in international data traffic

The adoption of artificial intelligence, cloud computing, digital platforms and data-intensive applications is fundamentally changing how digital services are delivered. As computing, storage and content distribution become increasingly centralized in hyperscale facilities, a growing share of digital traffic must traverse international networks, making high-capacity cross-border connectivity a strategic requirement for supporting future digital demand.



Digital services increasingly **rely** on **globally distributed** cloud **platforms**, **hyperscaler** and international **CDNs** rather than **locally** hosted **infrastructure**. As a result, **digital transformation** is generating sustained **growth** in **cross-border data flows**, reinforcing the **need** for resilient **international infrastructure**.

The Digital Ecosystem: Driving Growth, Connectivity, and Infrastructure Demand

The Digital Domino Effect

The IP transit price is an integral component of a dynamic cycle where all key drivers are interconnected, each influencing and reinforcing the others. This interrelationship creates a continuous feedback loop that impacts market competitiveness, infrastructure development, and ultimately the cost passed on to end consumers.

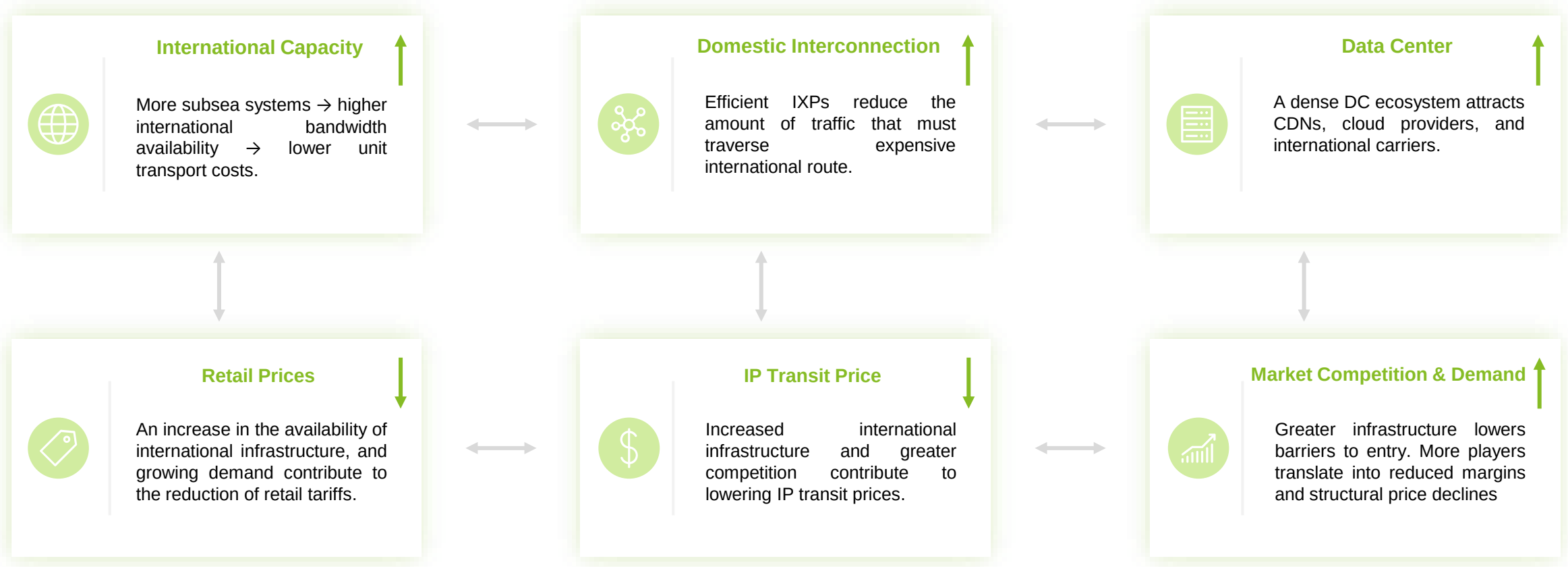




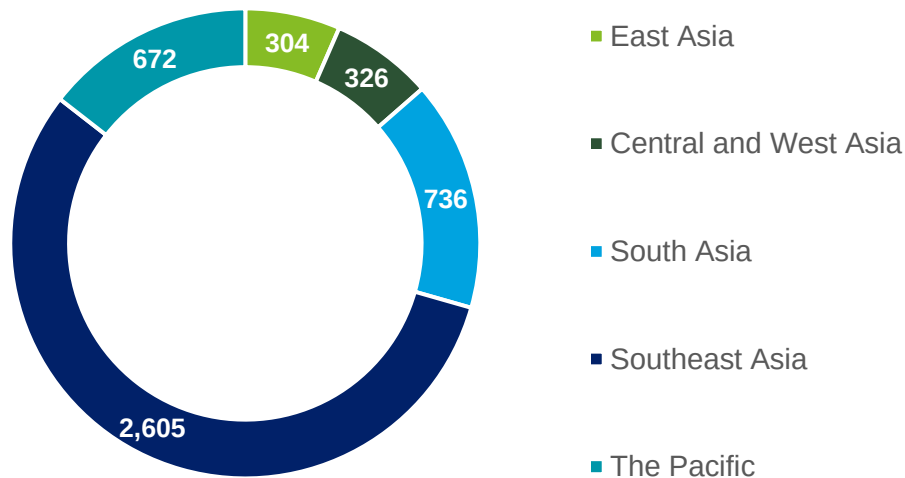
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Regional Market Dynamics

Submarine Cables

The distribution of submarine cable systems is uneven and reflects the existing disparities among the different regions where the ADB operates. The region with the largest planned capacity deployments in the coming years is **Southeast Asia**, followed by South Asia, the Pacific, Central and West Asia, and finally East Asia. This imbalance is particularly evident in Southeast Asia, which hosts a significant number of connections with the United States.



Projected capacity, Tbps

Southeast Asia is the region expected to grow the most, 2.605 Tbps. This is due to the location of the region, between the continent and United States, making it a landing point between the 2 continents.

Central and West Asia is expected to add 326 Tbps, mainly driven by the SeaMeWe-6 cable, owned by a consortium of telecom operators, connecting between Europe and Asia.

South Asia is set to grow by 736 Tbps, driven by systems owned by Google, Meta, and telecom operators, including a major link between Asia and Africa (Djibouti).

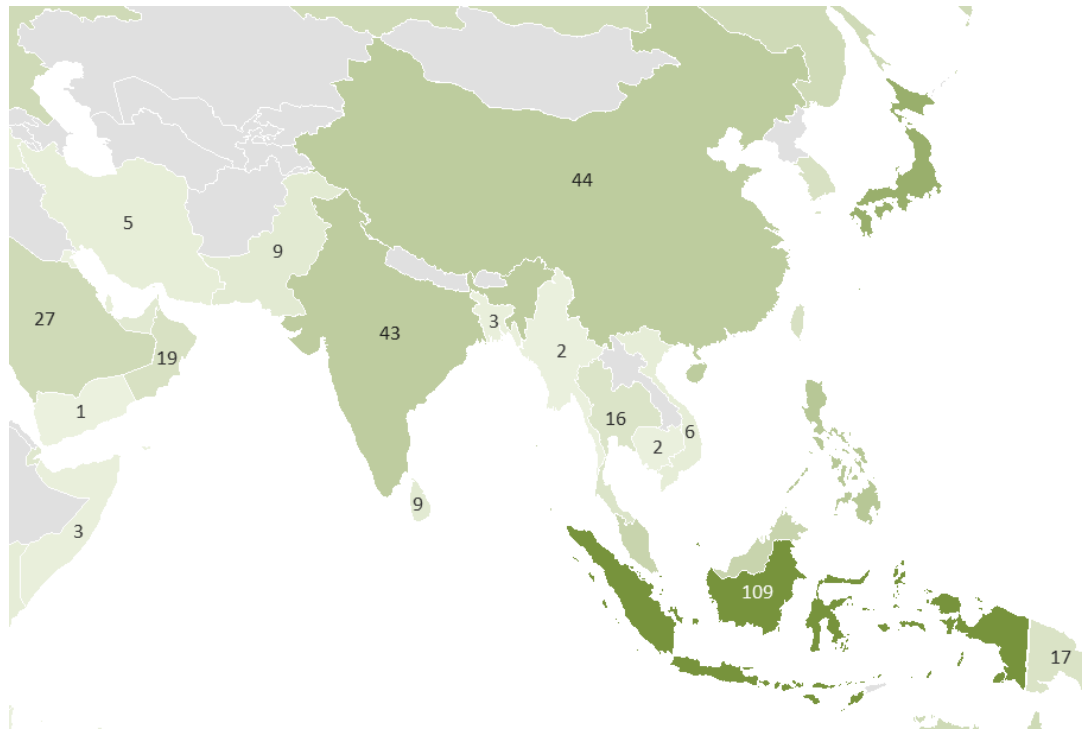
The Pacific region is expected to grow 672 Tbps in the next year. The systems planned to be deployed in the region are mainly property of Google and Meta.

East Asia is projected to add 304 Tbps next year, ranking last among the five regions in planned deployments. The upcoming cables, owned by Chinese and Cambodian operators, will connect exclusively within Asia.

Regional Market Dynamics

Submarine Cables

Given the central role of submarine cables in positioning a city or country as an international traffic hub, the analysis will focus on the most relevant cable systems in the region, including their landing points, capacity, and ownership. To determine whether any additional country is emerging as a potential hub, planned submarine cable deployments and their landing points will also be examined, to identify locations that are becoming focal points for new infrastructure investments.



Number of cable landings in Asia

The total number of submarine cables landing in a country or city is not fully representative of its potential as an international traffic hub, since in Asia the specific geography of certain countries, such as archipelagos or nations with extensive coastlines like Indonesia, naturally requires a higher number of landing points without necessarily reflecting greater hub relevance.

The relevance of a submarine depend on various factors:



Total capacity.



RFS year.



Geographical location.

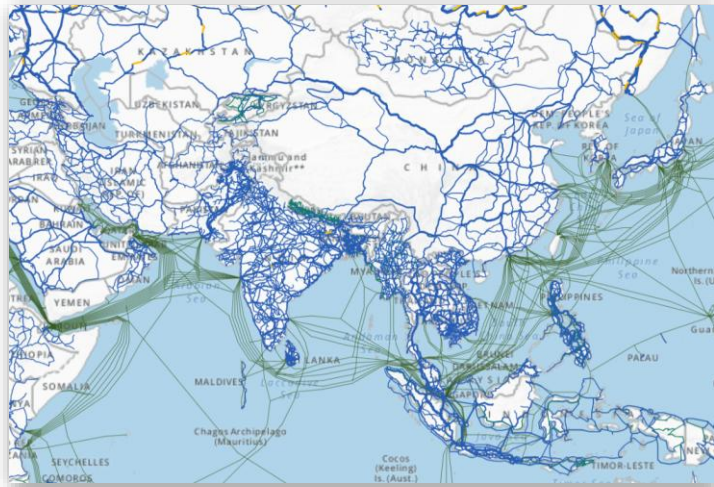


Number of countries connected.

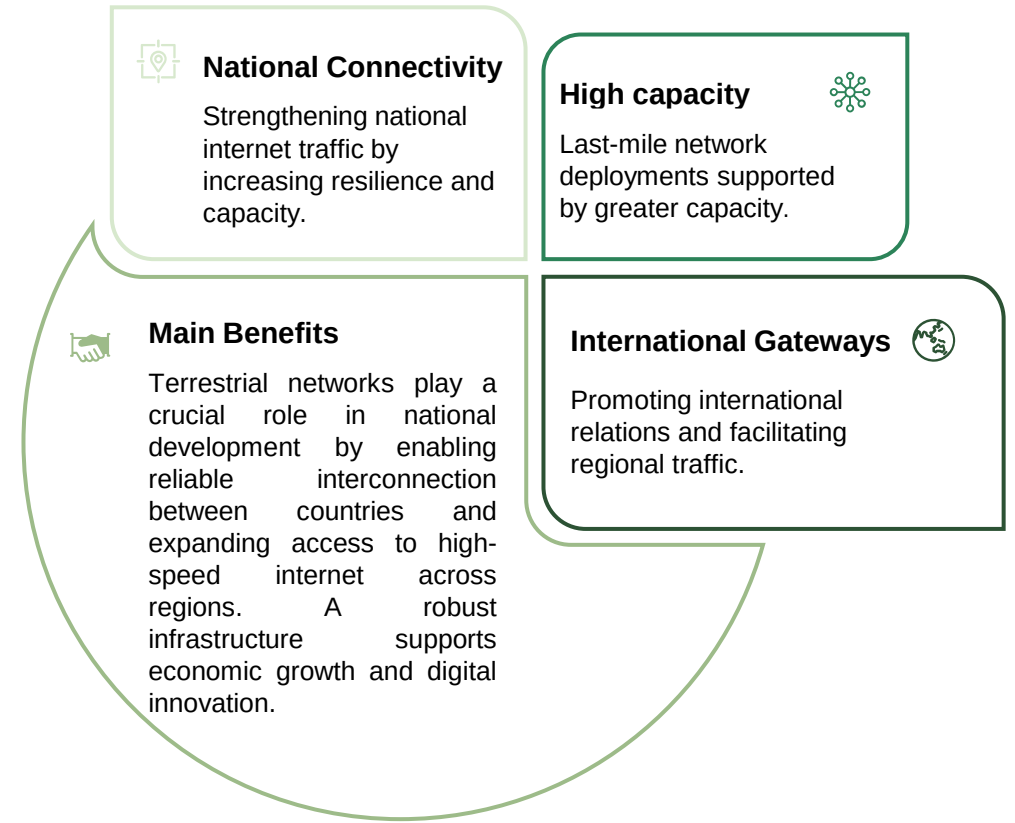
Regional Market Dynamics

Terrestrial Connectivity Infrastructure

Terrestrial telecommunications networks are a highly relevant asset across the Southeast Asian markets under study. The region presents significant opportunities for the development and expansion of terrestrial connectivity, although deployment conditions vary considerably across countries due to their diverse geographic and infrastructure characteristics.



Although terrestrial network deployments have international significance, they are typically shaped by the policies and infrastructure priorities of individual countries. As a result, across the Southeast Asian markets under study, terrestrial network development varies significantly, with some countries featuring relatively extensive and robust infrastructure, while others rely on more limited networks connecting major urban centers or providing cross-border links with neighboring countries.



Regional Market Dynamics

Datacenters

Data centers are essential components of the global communications network and critical infrastructure for international traffic. They provide content hosting, data storage, and processing, acting as key nodes for routing and distributing digital traffic. Their capacity and location directly influence the efficiency and resilience of international connectivity and the ability of countries to function as digital traffic hubs.

There are currently around **5.835 data centers worldwide**, of which nearly **2.000 are located in the Asia region**.

The type of services offered by data centers are, among others:



Colocation: Provision of physical space, power, cooling, and security to host clients' servers.



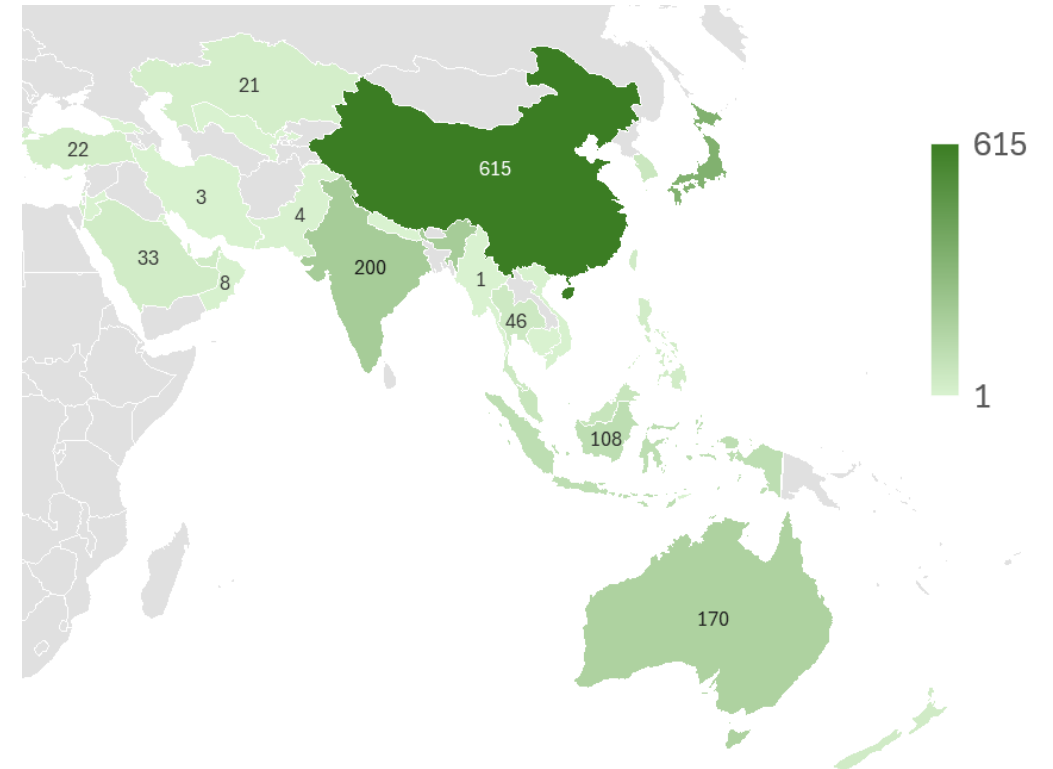
Hosting/Managed Services: Managed services where the data center operates servers, applications, and storage on behalf of the client.



Cloud Services: Infrastructure as a Service (IaaS), Platform as a Service (PaaS), or Software as a Service (SaaS).



Edge Computing: Data processing closer to the point of generation to reduce latency and improve performance.

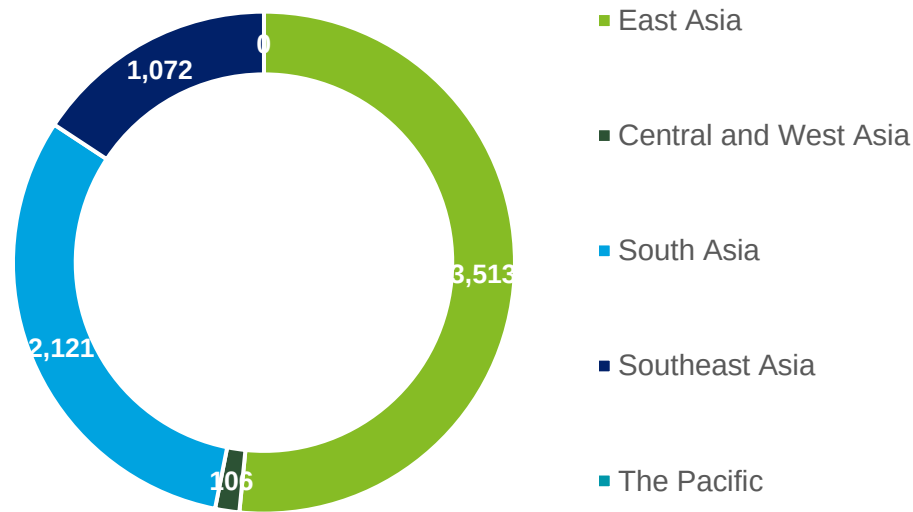


Number of DCs in Asia

Regional Market Dynamics

Datacenters

The distribution of data centers across the regions where the ADB operates, similar to the case of submarine cables, is uneven and reflects the countries that host or generate the most content and attract the highest investment. In this context, East Asia leads due to China's substantial content demand, followed by South Asia, primarily driven by India. Countries such as Indonesia, Thailand, and the Philippines show significant potential in terms of data center hosting and capacity expansion.



DC capacity, MW

Southeast Asia has a total data center processing capacity of 1.072 MW, with Thailand, Indonesia, and the Philippines as the leading countries in terms of capacity. Their strategic location makes the region optimal for DC deployment.

Data centers in East Asia are primarily located in China, with a total processing capacity of approximately 3.513 MW. This substantial capacity is largely driven by China's high population and the corresponding demand for digital services.

Central and West Asia has a total data center processing capacity of 106.27 MW, with facilities primarily located in Turkey and Kazakhstan. While Kazakhstan hosts a larger number of data centers, Turkey is home to the region's largest facilities.

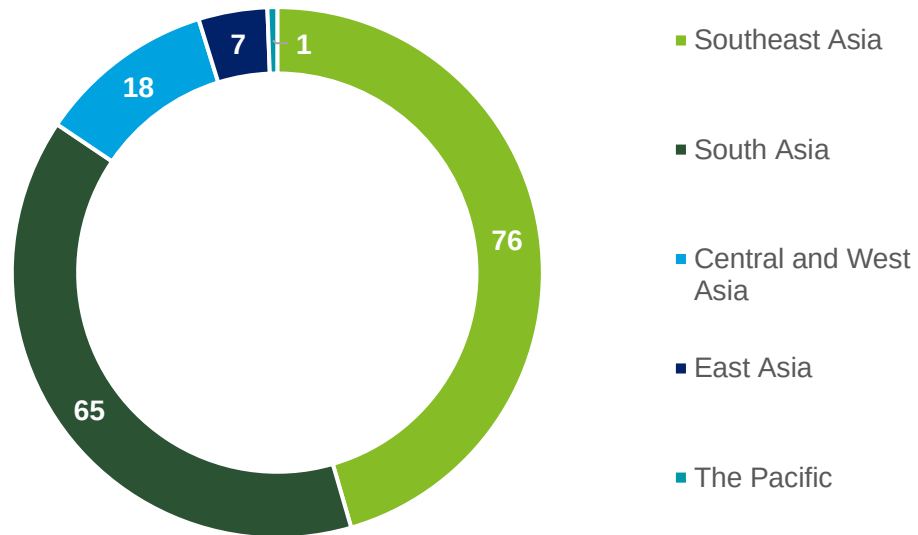
South Asia has a total data center processing capacity of 2.121 MW, primarily concentrated in India, which hosts 200 data centers. Major technology and cloud providers, including Google, AWS, and Alibaba, maintain presence in the country.

The Pacific region has no significant data centers, primarily due to its island-dominated geography and the lack of major content generation or international connectivity demands that would require substantial computational capacity.

Regional Market Dynamics

IXPs

Within the regions where the Bank operates, two stand out for their high number of IXPs: Southeast Asia and South Asia. The significant concentration of IXPs in these areas is driven by their strategic role as linking hubs, connecting countries within the continent and serving as interconnection points between multiple submarine cable networks.



The region with the **largest number of IXPs** within the Bank's areas of operation is **Southeast Asia**, primarily driven by Indonesia's strong presence, as previously mentioned. The **Philippines** also stands out, hosting **13 IXPs**, followed by Thailand.

In **South Asia**, there are a total of **65 IXPs**, the majority concentrated in India (60). Other countries in the region, such as **Bangladesh (2 IXPs)** and **Maldives, Bhutan, and Nepal (1 IXP each)**, have a much smaller presence.

Central and West Asia ranks third, with **18 IXPs**. No single country dominates the region, though **Georgia and Pakistan host 4 IXPs each**, **Kyrgyzstan and Uzbekistan have 3 each**, and the remaining countries operate between 1 and 2 IXPs.

In **East Asia**, there are **7 IXPs**, all located in **China**, reflecting a concentrated but robust interconnection infrastructure. Finally, the **Pacific region** has only **one IXP**, located in Vanuatu, underscoring the limited interconnection capacity and scale of digital infrastructure across the island nations.



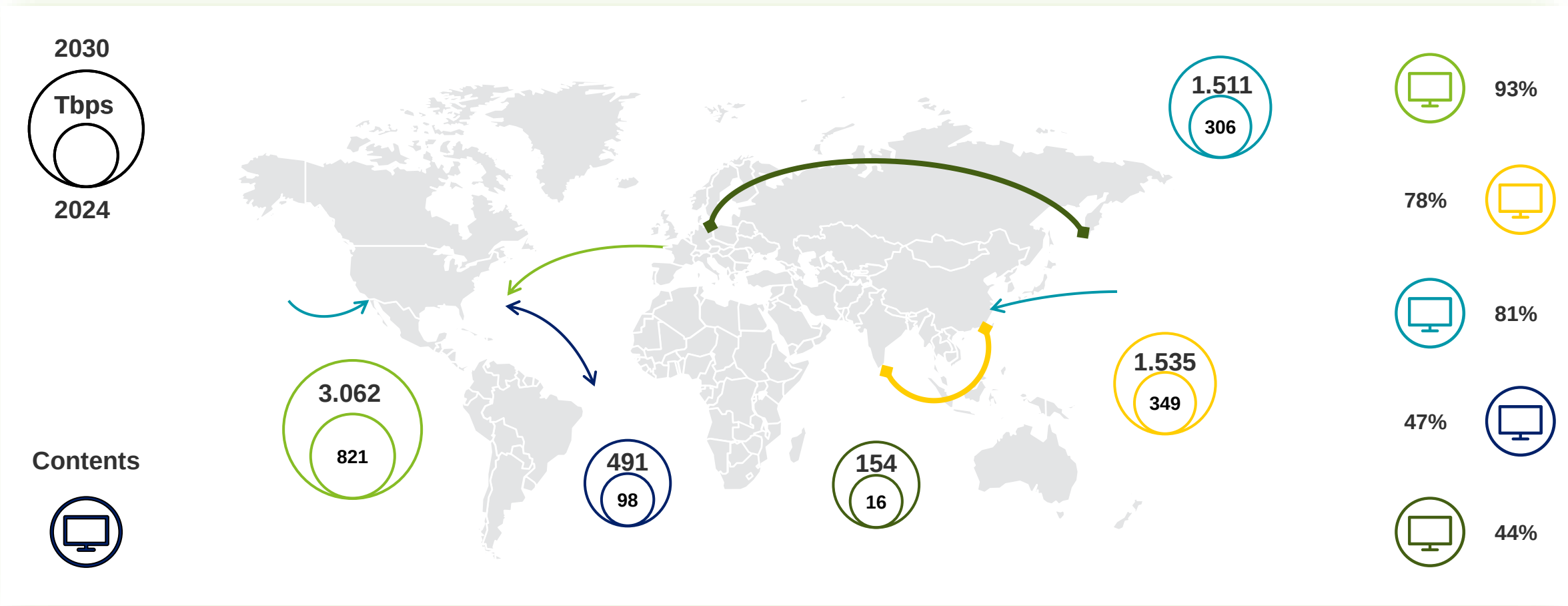
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Regional Market Dynamics

Global Capacity of Content Providers

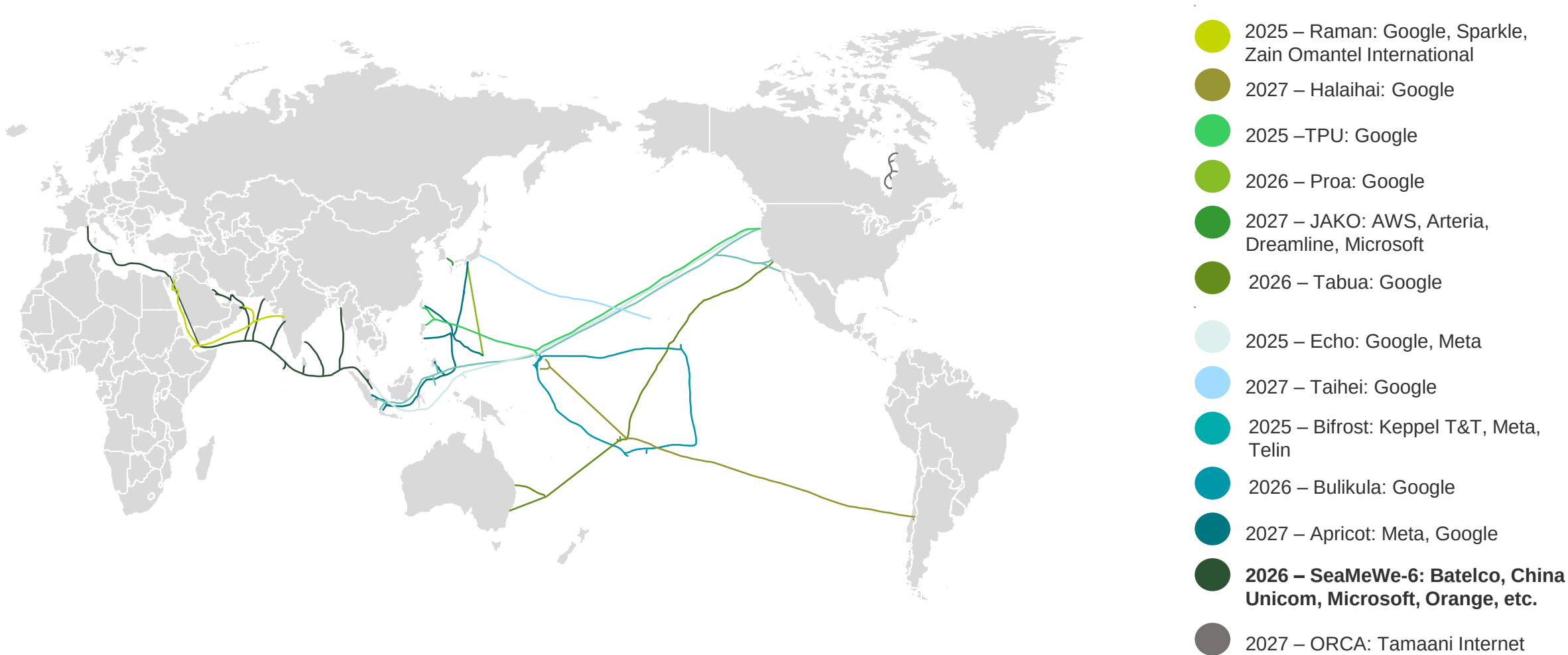
Additionally, in the analysis of international connectivity infrastructure it is important to address the effect of content providers. Their influence is particularly significant on transoceanic routes, where they play a major role in shaping global connectivity. As a result, their presence and investments are more prominent in the total capacity of regions such as Europe and the United States, compared to other parts of the world.



Regional Market Dynamics

Content Provider Submarine Cable Deployments

Content providers deliver capacity through their deployments of submarine cables. In the following figure, upcoming submarine cable deployments by content providers are presented. While these cables primarily serve the internal needs of the companies, they will also provide capacity to third parties, supporting broader international connectivity and regional traffic distribution.



Source: Internal analysis

Regional Market Dynamics

Hub Effect

The hub effect describes a country's capacity to concentrate and redistribute international traffic, using its connectivity infrastructure to function as a central node for regional and global data exchange. Currently, 9 cities are recognized as global international traffic hubs, though several other cities serve as key hubs within their respective regions.

International outbound traffic from a country, generated by demand from users abroad, is strongly influenced by the hub effect. The amount of content hosted in a given country depends on two main factors:



The volume of content produced domestically.



The presence of international content providers within the country.

As a result, countries with greater volumes of locally hosted content tend to act as hubs, supplying this content to neighboring countries that lack it. This dynamic drives higher demand for international capacity routes to ensure efficient content distribution.

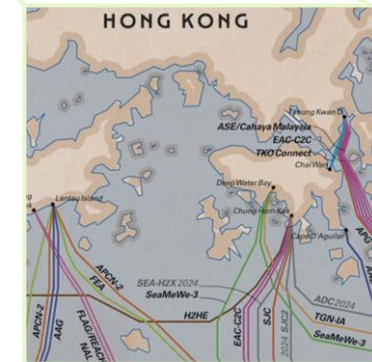
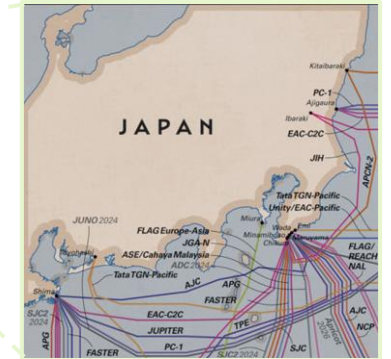
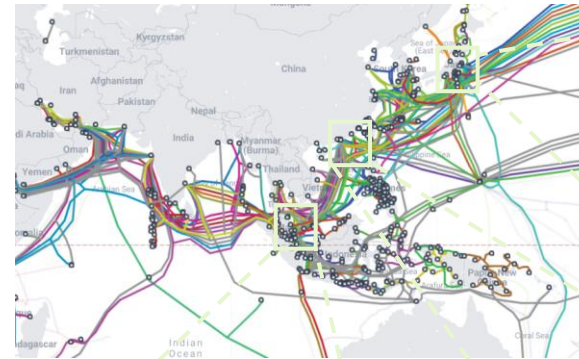




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Diagnosis of Market and Pricing Dynamics

Total Capacity by Region

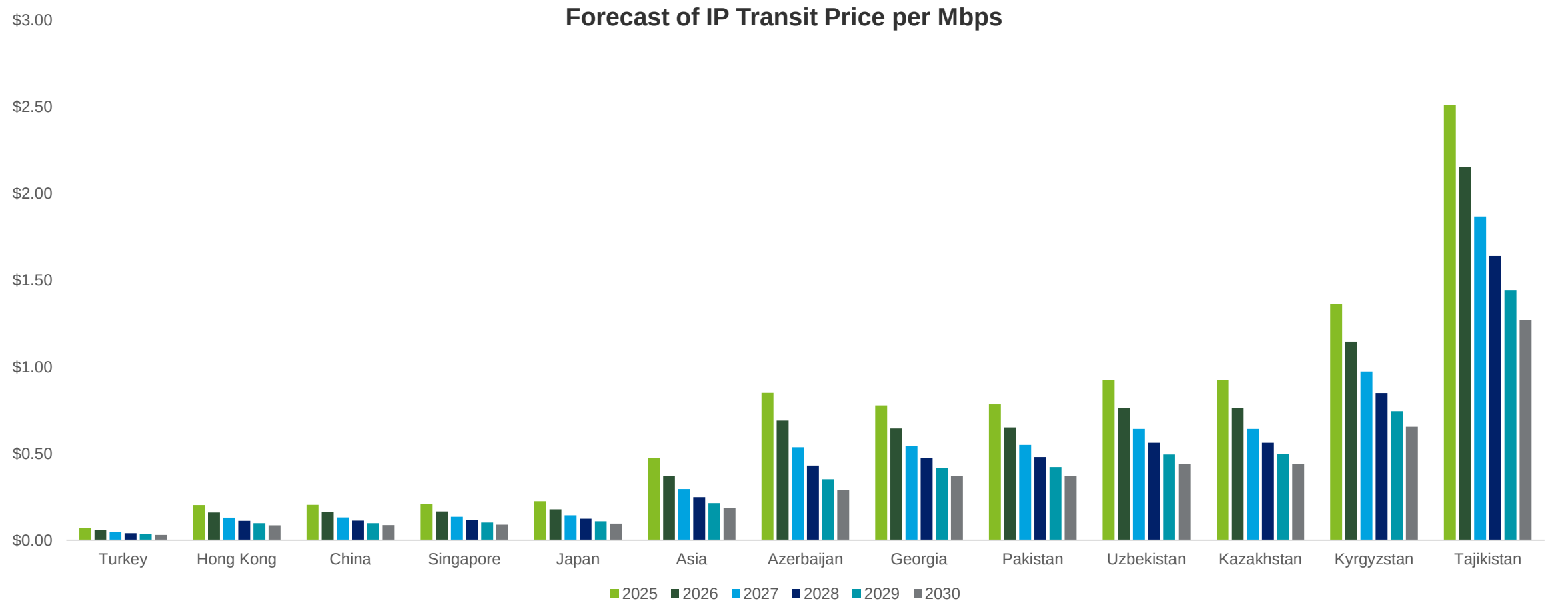
The regional comparison of Capacity Exchanged, Data Center Capacity, and the number of IXPS provides a comprehensive view of the digital infrastructure landscape across ADB’s operating regions. This overview highlights structural differences, emerging strengths, and existing gaps, helping to contextualize each region’s position within the broader ecosystem of connectivity and data services.

ADB Region	Capacity Exchanged (Gbps)	Capacity of Data Centers (MW)	Number of IXPs
Central/West Asia	29.444	106	18
South Asia	107.301	2.121	65
Southeast Asia	143.668	1.072	76
The Pacific	741	No significant data centers	1
East Asia	292.569	3.513	7

Diagnosis of Market and Pricing Dynamics

IP Transit Pricing Forecast for Asia

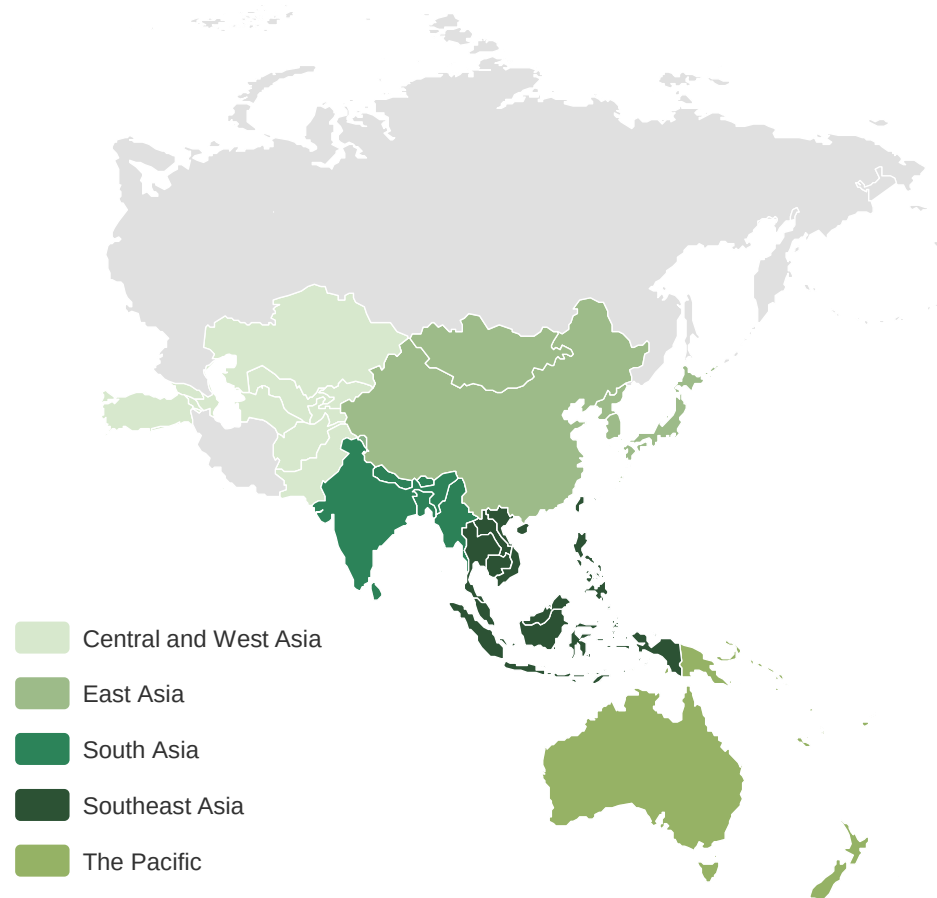
The following chart shows the projected evolution of IP transit prices in the coming years. This forecast is based on currently planned infrastructure deployments. Additional or accelerated deployments would increase international capacity and competition, potentially driving prices lower than projected.



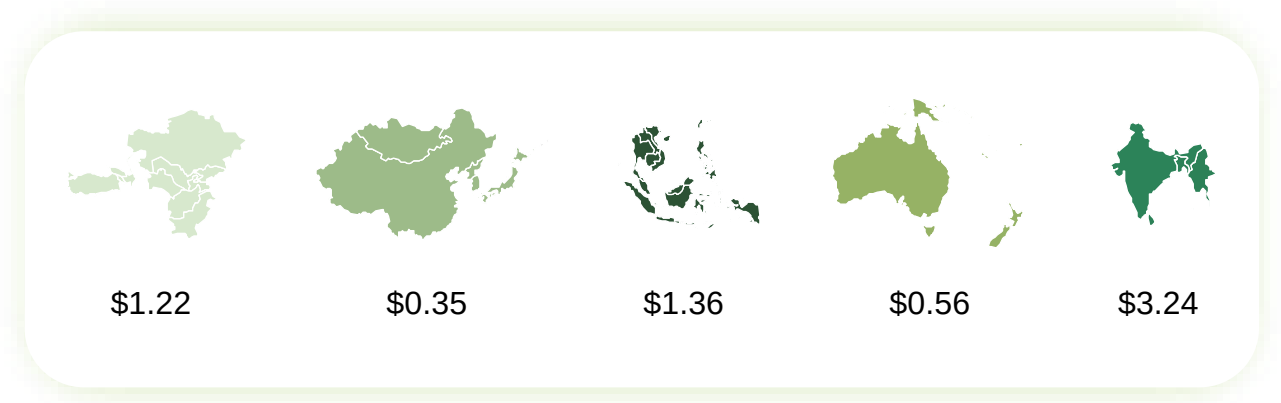
Diagnosis of Market and Pricing Dynamics

Regional Analysis of IP Transit Prices

The average IP transit price across ADB regions reveals significant variation in the cost of international connectivity, reflecting differences in infrastructure maturity, competition, and regional integration. These regional averages provide a high-level view of the structural conditions that shape affordability, network performance, and the overall digital readiness of each subregion.



Source: Internal analysis



Regions with lower average transit costs, such as **East Asia** and **The Pacific**, benefit from **stronger interconnection** and **higher traffic aggregation**, enhancing their ability to attract international carriers and scale digital services.

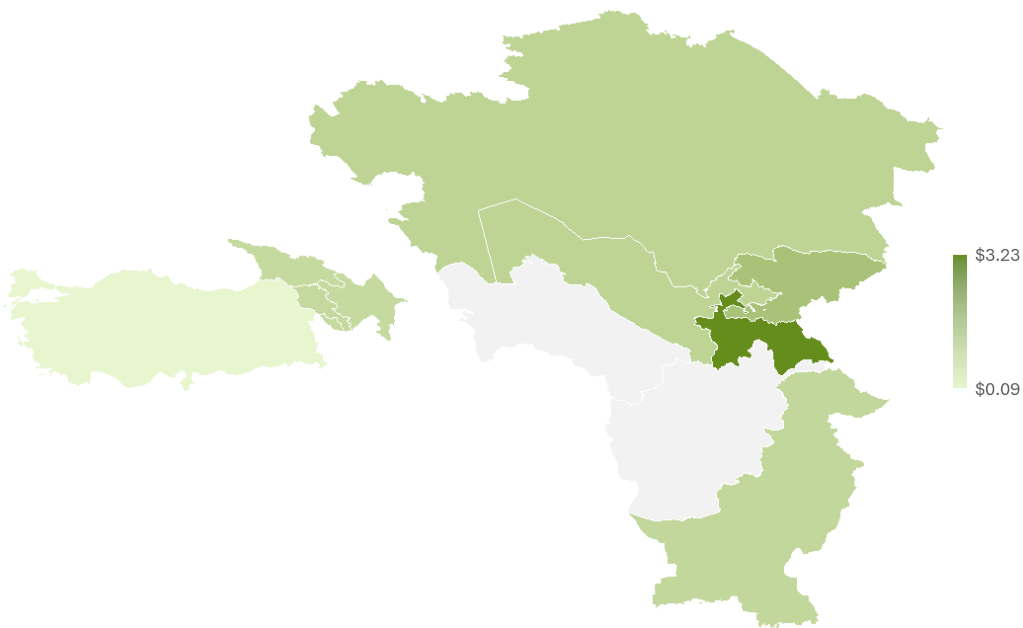
In contrast, regions with higher prices, particularly **South Asia**, face structural constraints that can hinder digital inclusion and **limit their capacity to compete in the global digital economy**, underscoring the need for targeted investment and regional infrastructure development.

Diagnosis of Market and Pricing Dynamics

Analysis of IP Transit Prices in Central and West Asia

Central and West Asia occupies an intermediate position within Asia, combining one of the region's most competitive markets with several high-cost economies. While IP transit prices have declined steadily across most countries, significant internal disparities persist, reflecting uneven infrastructure development and interconnection maturity.

Central and West Asia



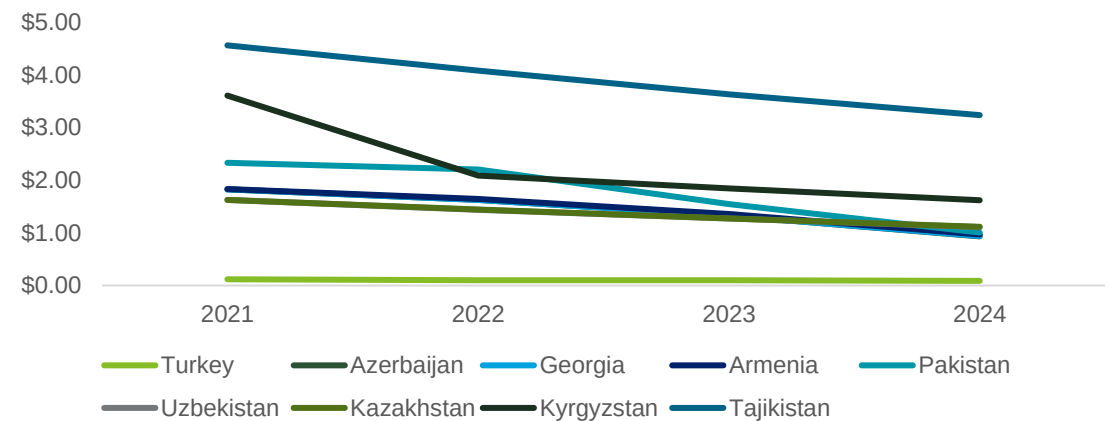
Turkey stands out as the most competitive country in the region, followed by **Azerbaijan, Georgia, and Armenia**, supported by more robust international routes, greater traffic aggregation, and stronger operator competition.



Tajikistan and **Kyrgyzstan** continue to exhibit the highest prices due to structural constraints and limited interconnectivity.



Overall, the region shows a clear downward trend in pricing, however, substantial internal disparities remain, reflecting different stages of infrastructure development.



Diagnosis of Market and Pricing Dynamics

Effect of Regulation on IP Transit Prices

Regulation shapes the competitive landscape, cost structure, and incentives to invest in IP transit infrastructure. Markets with effective regulatory frameworks tend to exhibit lower IP transit prices and faster price declines.



Market liberalization & Competition Policy

- Opening the market to new operators
- Removing entry barriers.
- Restrictions to prevent anti-competitive practices.
- Allowing international carriers

↑ Competition → ↓ Prices



Infrastructure Deployment Regulation

- Ease of obtaining rights-of-way permits.
- Policies enabling infrastructure sharing.
- Incentives for investment.
- Regulatory costs associated with deployment.

↑ Ease of deployment → ↓ Prices



Interconnection & Open Access Regulation

- Non-discriminatory wholesale access.
- Obligation to allow colocation and interconnection.
- Peering openness at IXPs and carrier-neutral facilities.
- Access conditions for local infrastructure.

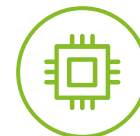
↑ Open access → ↓ Prices



Licensing & Administrative Framework

- Licensing costs and complexity for network or wholesale service operation.
- Speed of regulatory processes.
- Bureaucratic requirements for deploying infrastructure.

↑ Costly/complex licenses → ↑ Prices



Regulatory Support for Digital Ecosystems

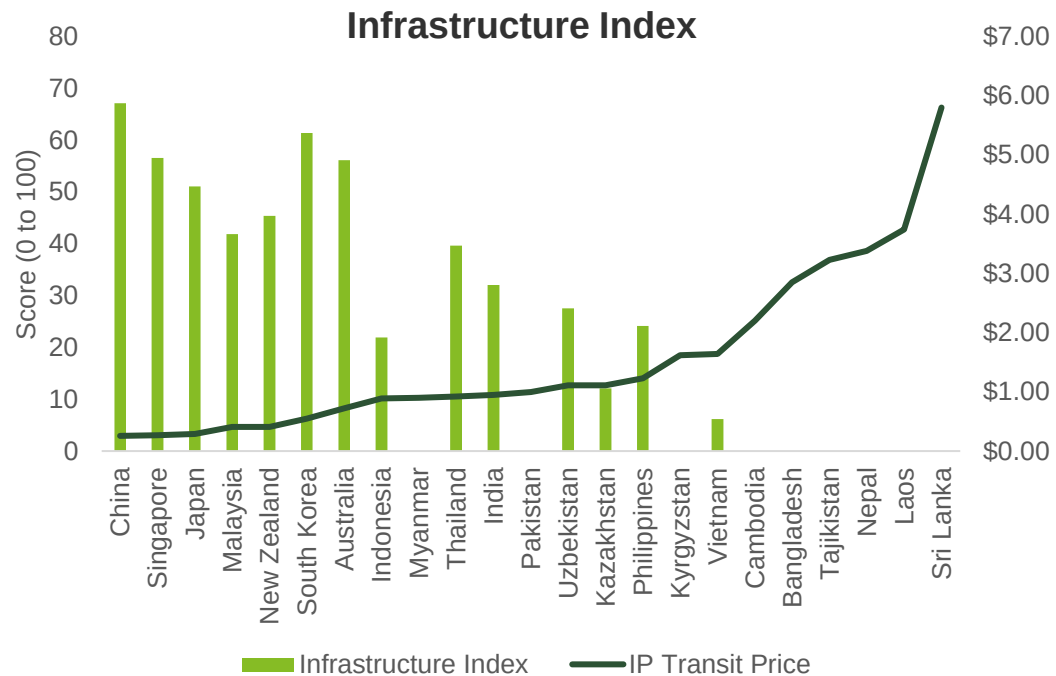
- Promotion of neutral IXPs.
- Policies to attract data centers and cloud regions.
- Regulations that facilitate the entry of CDNs and content providers.
- Rules on data localization or incentives for digital infrastructure.

↑ Competition → ↓ Prices

Diagnosis of Market and Pricing Dynamics

Effect of Infrastructure on IP Transit Prices

The following section illustrates the relationship between digital connectivity infrastructure and IP transit prices across countries. It highlights how stronger national infrastructure ecosystems reduce the structural cost of data transport and are therefore associated with lower wholesale IP transit prices.



Higher connectivity infrastructure is strongly associated with **lower IP transit prices**, confirming the role of infrastructure as a key cost driver.



Established regional hubs (Singapore, Hong Kong, Japan) combine high connectivity scores with the **lowest IP transit prices**, reflecting mature subsea, IXP, and data center ecosystems.



Countries with solid but incomplete infrastructure (Malaysia, Thailand, India) show moderate prices.



Markets with **weak or missing infrastructure** face significantly **higher IP transit prices**, due to reliance on long-haul international routes and limited local traffic exchange.



Strong infrastructure **attracts content and cloud providers**, reinforcing traffic aggregation, competition, and sustained price reductions.

Greater telecom infrastructure → ↓ structural cost of transporting data → ↓ efficient local traffic exchange → ↓ dependence on long-haul international routes → ↑ traffic aggregation and economies of scale → ↑ competition among carriers → ↓ Lower IP transit prices → ↓ **retail broadband prices**

Diagnosis of Market and Pricing Dynamics

Case Study: Development of High-capacity International Infrastructure in Myanmar

IP transit prices across Asia are declining as international connectivity expands and competition increases. While mature digital hubs consolidate their low-cost position, cases such as Myanmar clearly demonstrate how new high-capacity infrastructure can rapidly and significantly reduce IP transit prices beyond regional and global trends.



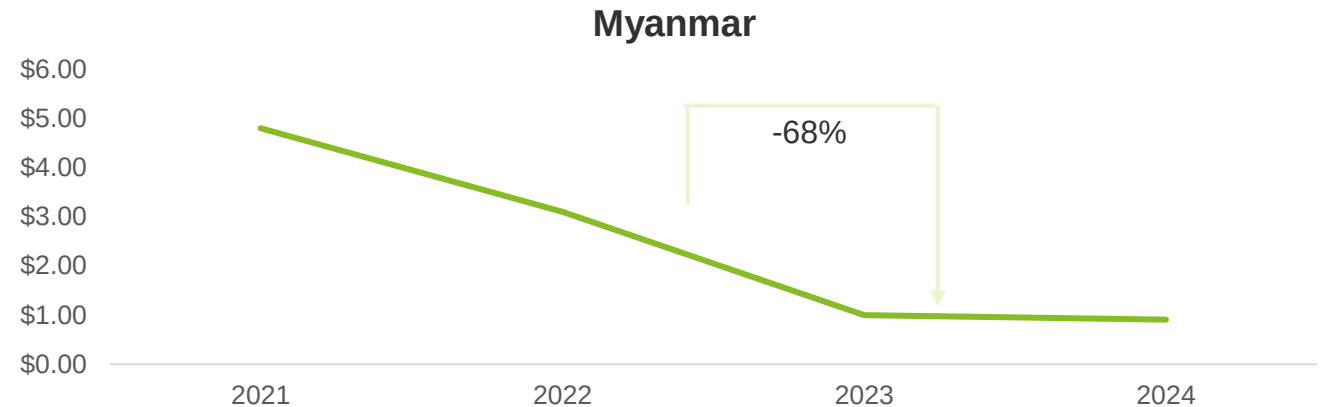
Countries that started with very high prices, such as Sri Lanka, Laos or Nepal, have seen significant reductions, although they remain among the region's most expensive markets.



Markets with already low costs, such as Turkey, China, Hong Kong, or Singapore continue to consolidate their competitive position, stabilizing at the lowest price levels.



Overall, falling transit prices are expanding affordable and competitive connectivity, attracting greater international traffic and strengthening Asia's role in the global digital ecosystem.



In the case of Myanmar, the **deployment of high-capacity international infrastructure** has led to a **reduction in IP transit costs** over the period analyzed. In **2023**, the **UMO submarine cable** entered service, adding substantial international capacity and resulting in a **68% decrease in IP transit prices between 2022 and 2023**. This reduction is higher than the **global average decline of 17% and the Asian average of 20% observed in the same year**. This illustrates how improved access to international capacity has a direct and pronounced impact on lowering IP transit prices.

Diagnosis of Market and Pricing Dynamics

Economic and Social Impact of IP Transit Prices

IP transit pricing has a direct impact on key economic and social outcomes, influencing digital inclusion, the attractiveness of markets for investment, and the development of regional connectivity. Lower transit costs support more affordable broadband, promote infrastructure growth, and enhance the competitiveness of national digital ecosystems. IP Transit price impacts on three main areas:

Digital Inclusion



Lower IP transit costs can directly improve affordability of retail connectivity, enabling broader access to digital services.

Cost reductions facilitate the expansion of networks into underserved areas, supporting higher internet penetration.

More accessible connectivity strengthens access to digital tools, including online education platforms and e-government services.

Network Expansion



Transit pricing influences broadband deployment, shaping how quickly operators extend their infrastructure.

When transit costs fall, countries are better positioned to scale digital ecosystems, allowing cloud services, content delivery, and local platforms to flourish.

Affordable transit supports deeper participation in global digital value chains by reducing operational barriers.

Investment Attraction



Competitive IP transit pricing enhances the perceived stability and efficiency of a market.

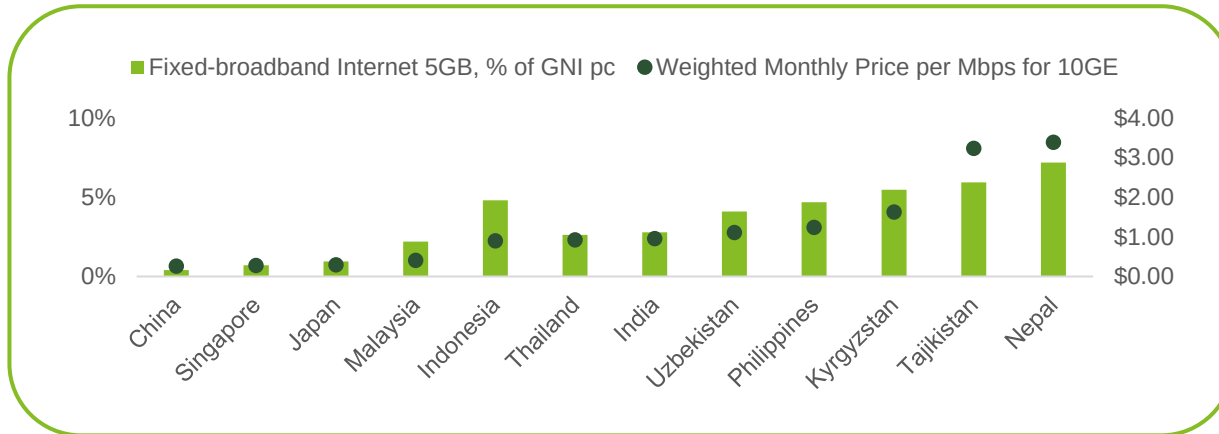
Lower connectivity costs play a role in attracting data centers, infrastructure deployments, and interconnection hubs, which rely on robust and cost-effective bandwidth.

Markets with favorable transit conditions are more likely to draw long-term digital infrastructure investment.

Diagnosis of Market and Pricing Dynamics

Impact of IP Transit Prices on affordability and digital inclusion

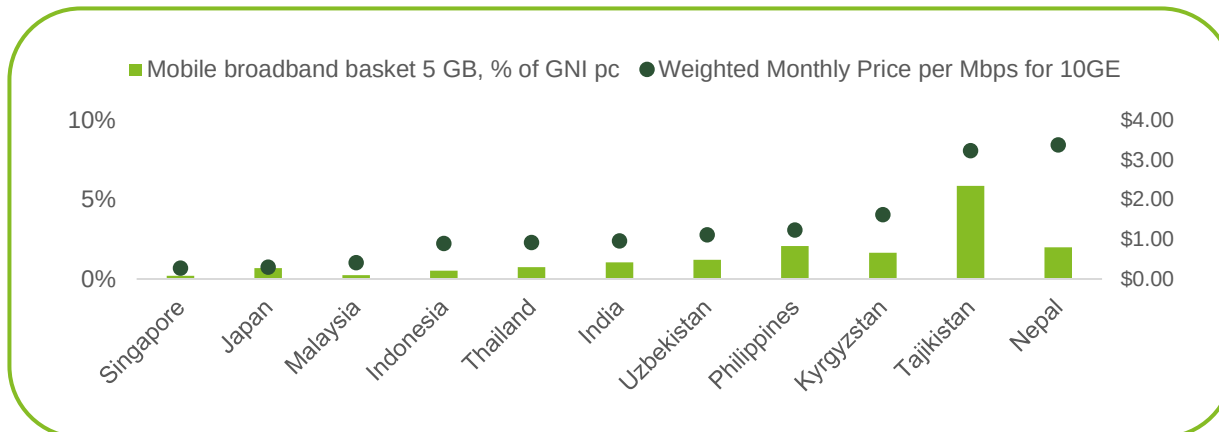
Lower IP transit prices are closely associated with more affordable fixed and mobile broadband services, as wholesale connectivity costs directly influence retail broadband pricing, playing a key role in expanding digital inclusion by reducing cost barriers to access.



The data reveals a **strong link** between **IP transit costs** and the **affordability** of broadband services, both fixed and mobile.



Markets with **low IP transit costs** (China, Singapore, Japan) also exhibit **highly affordable** fixed and mobile broadband, with retail prices low relative to national income levels.



As **transit prices rise**, broadband becomes **less affordable**: mid-priced markets (Malaysia, Indonesia, Thailand) face higher GNI burdens, while **high-cost markets** (Tajikistan, Nepal) show the **highest affordability gaps**, up to 6–7% of GNI pc for fixed broadband.



Lower IP transit prices reduce operators' wholesale expenses, enabling cheaper data plans and supporting **broader digital inclusion**.

Diagnosis of Market and Pricing Dynamics

Impact of IP Transit Prices on Investment Attraction

Competitive IP transit pricing enhances a market's appeal to both domestic and international investors, reducing operational barriers for data centers, cloud regions, and interconnection hubs. As connectivity becomes more cost-efficient, countries position themselves more strongly to attract long-term digital infrastructure investment.

There are two main ways to assess the attractiveness of a telecommunications market for investor:



The first is to analyse overall investment within the market, both domestic and foreign, as it reflects the level of confidence and activity in the sector.



The second is to examine foreign investment specifically, which is particularly relevant because it indicates the market's ability to attract external stakeholders such as content providers and major technology companies.



High levels of foreign investment signal that the market offers strong growth potential, favorable conditions, and strategic value for international players.

Total investment in telecommunications

Overall capital invested within the country's telecom sector.

- Network infrastructure.
- Domestic operator capex.
- Government and public-sector contributions.

Measures the scale of development and commitment to modernize the sector.

Foreign investment in telecommunications

Capital injected by external players into the national telecom ecosystem.

- Global tech companies.
- Content providers.
- International telecom operators and infrastructure firms.

Signals that the market is attractive and competitive internationally.

Both metrics give a full picture of a market's maturity, attractiveness, and long-term growth potential.



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From Vision to Execution: Aligning Digital Ambition with Infrastructure Investment

A comprehensive digital plan goes beyond telecommunications infrastructure

Digital transformation requires a holistic approach that goes beyond expanding connectivity networks. While telecommunications infrastructure provides the foundation for digital development, its impact depends on the existence of complementary enablers such as digital capabilities, regulatory frameworks, adoption initiatives and sector-specific digital solutions.



Digital Infrastructure

Physical and technological foundation required to enable digital transformation, including broadband networks, mobile connectivity, international connectivity, data centres and cloud infrastructure.



Enablers

Complementary infrastructures and services that enable the deployment, resilience and scalability of digital ecosystems.



Capacity Building

Development of human capabilities required for citizens, businesses and public institutions to effectively use, manage and create value from digital technologies.



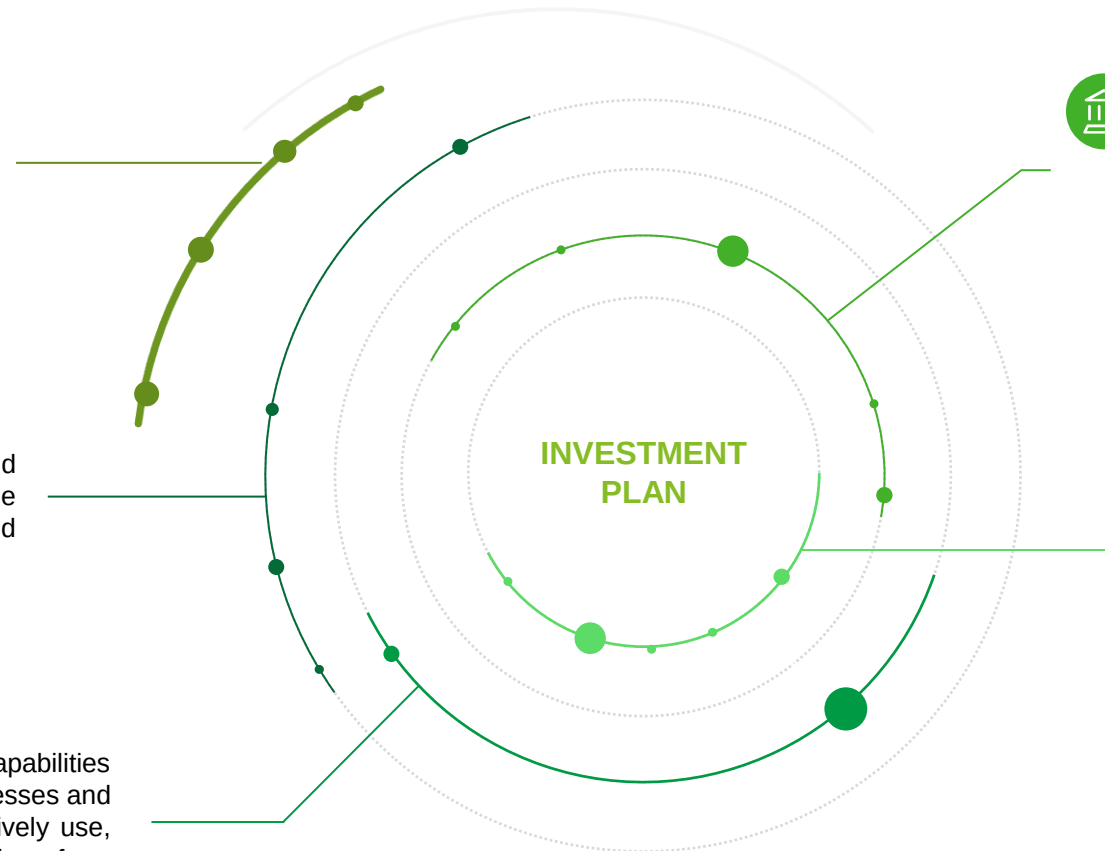
Regulatory Framework

Legal, regulatory and governance environment required to support a secure, competitive and innovation-driven digital ecosystem.



Demand Creation

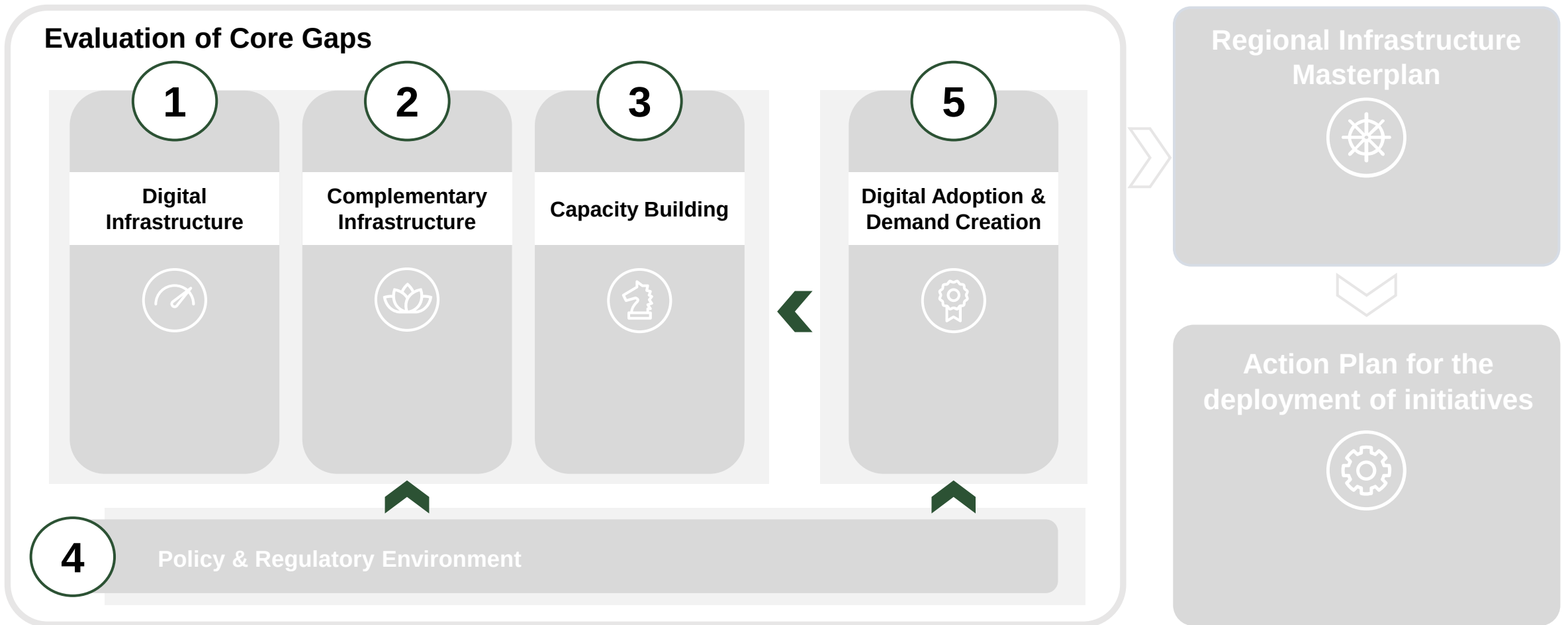
Set of initiatives aimed at stimulating the uptake and effective use of digital services among citizens, businesses and government entities.



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Structured approach, from gap assessment to implementation roadmap

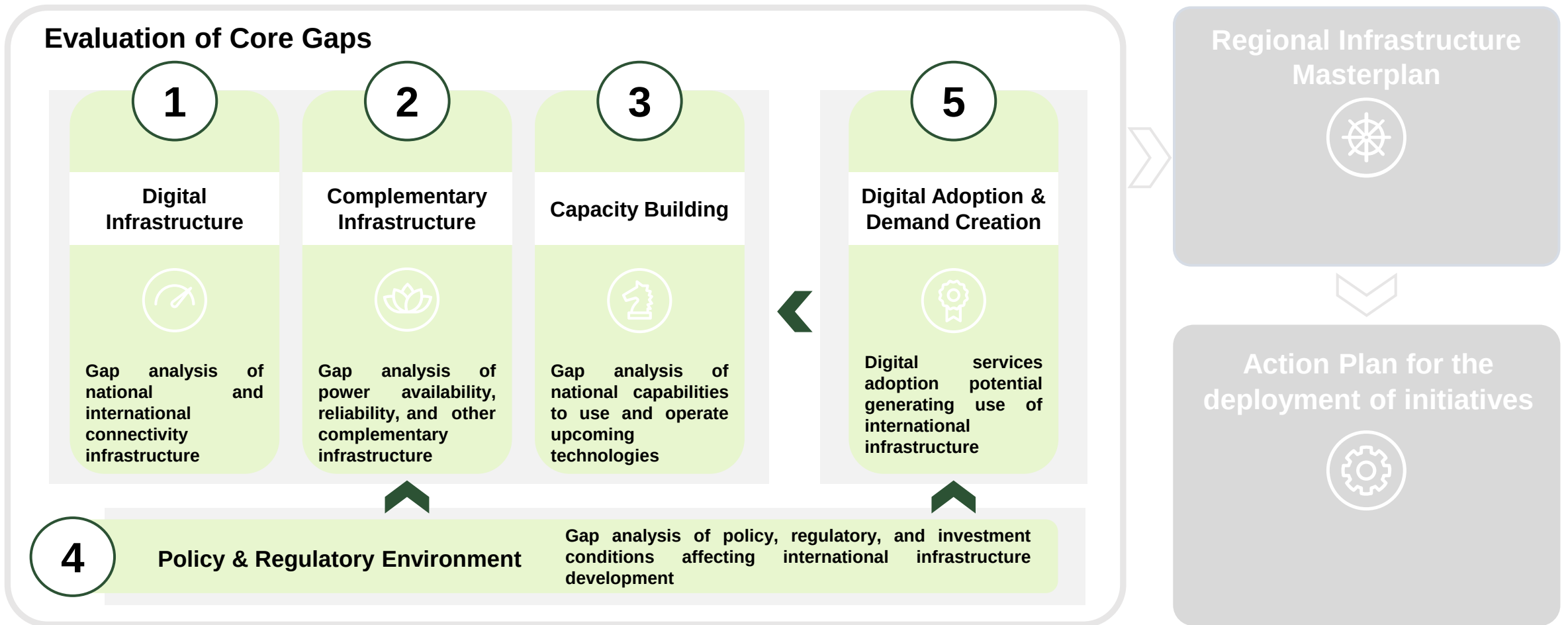
A successful digital transformation plan requires a structured methodology that first identifies the main gaps across the different digital pillars, then defines targeted initiatives to address these gaps, and finally establishes a clear implementation roadmap. This approach ensures that investments are prioritized according to strategic needs, with defined responsibilities, timelines and governance mechanisms to enable effective execution.



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Structured approach, from gap assessment to implementation roadmap

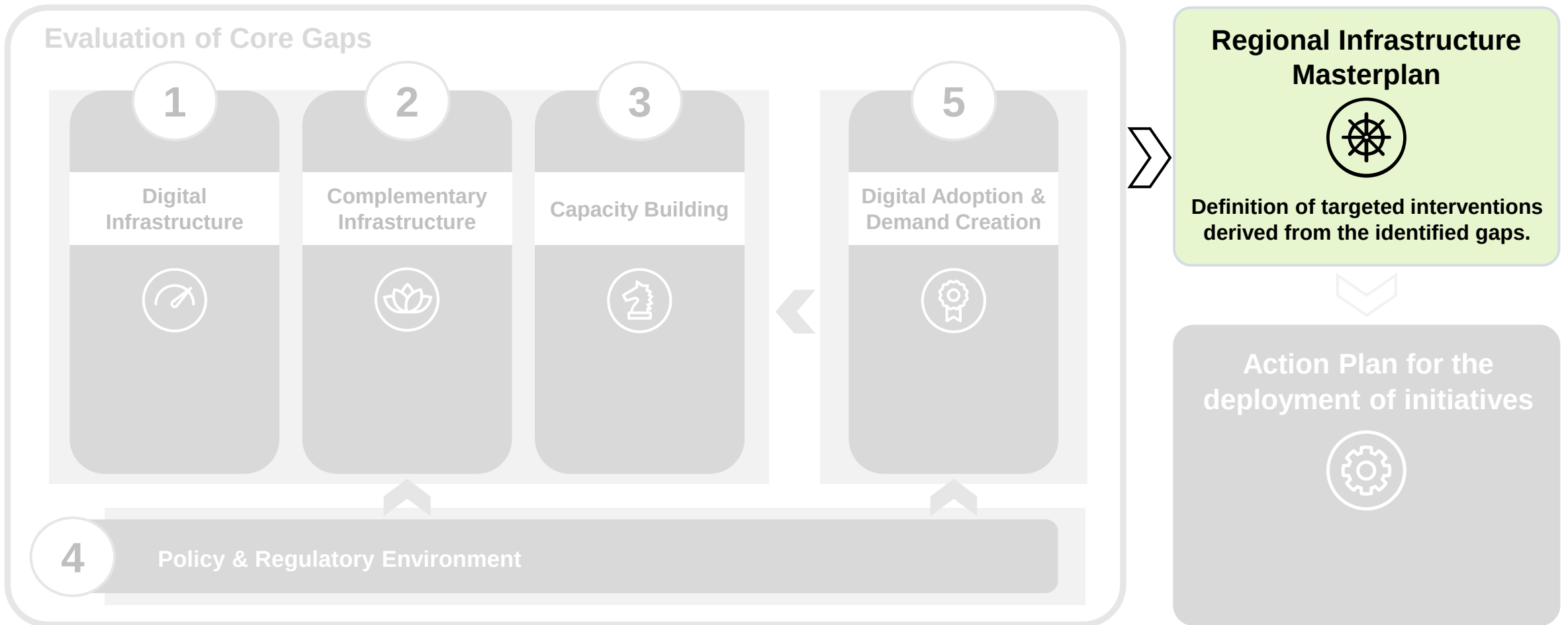
The evaluation of Core Gaps consist on assessing the current state of the digital ecosystem by evaluating the maturity level of each transformation pillar, identifying key gaps, bottlenecks and priority areas that need to be addressed to accelerate digital development..



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Structured approach, from gap assessment to implementation roadmap

The Regional Infrastructure Masterplan consist on translating the identified gaps into concrete digital initiatives by defining the actions, projects and policies required to strengthen each pillar, while prioritizing interventions based on their expected impact, feasibility and strategic relevance.



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Structured approach, from gap assessment to implementation roadmap

The Action Plan for the deployment of the initiatives consist on creating a structured implementation roadmap that defines the sequencing, timelines, responsibilities, governance mechanisms and key milestones required to successfully execute the digital transformation strategy.

