



Protect.
Connect.
Grow.

Building a case for Africa

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TERACCO[®]
DATA ENVIRONMENTS

Agenda

View of Africa

- Business Opportunities in Africa

Africa ICT

- Connecting Africa
- Terrestrial Fibre Overview
- African Market Place

Neutrality

- The Transit Effect
- The Peering Effect
- Ecosystem Growth

A view of Africa



...GDP Growth is Outpacing Asia

There are more middle income households in Africa than there are in India. (KPMG)

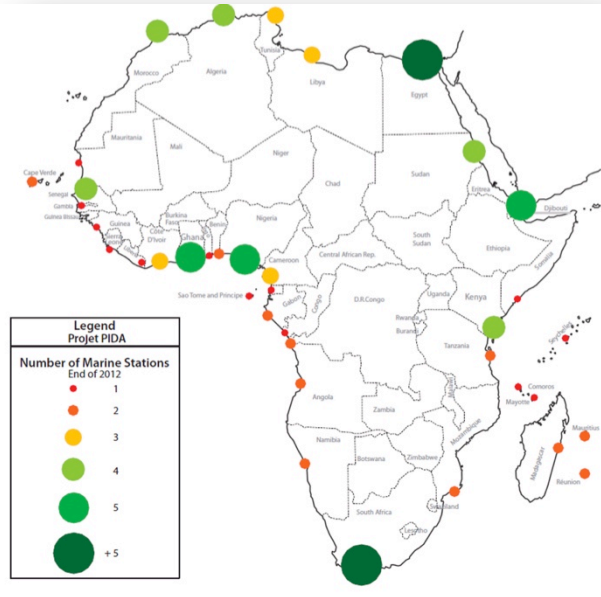


*The true size of Africa: Kai Krause

Myriad business opportunities

- IT services growing in rapidly growing economies - Nigeria, Ghana, Kenya, Tanzania, Uganda & Angola
- Key drivers for growth and IT services opportunities in 2013 include:
 - **Infrastructure projects** e.g.: Lagos metro blue line, Ethiopia Djibouti railway, next gen satellite network projects, PPPs.
 - **Growth in Financial Services** – Geo-expansion across Africa. More than 50 mobile money initiatives existed in 2011
 - **Government spend** – Increased economic growth will see gov spending on energy, transport, infrastructure, and citizen centric services accelerate in larger economies.

Connecting Africa to the World



South Africa

15th

largest telecoms market in the World (2012)
<http://www.youtube.com/watch?v=HZcHwQ6tL2k>

50.5m / 59.4m

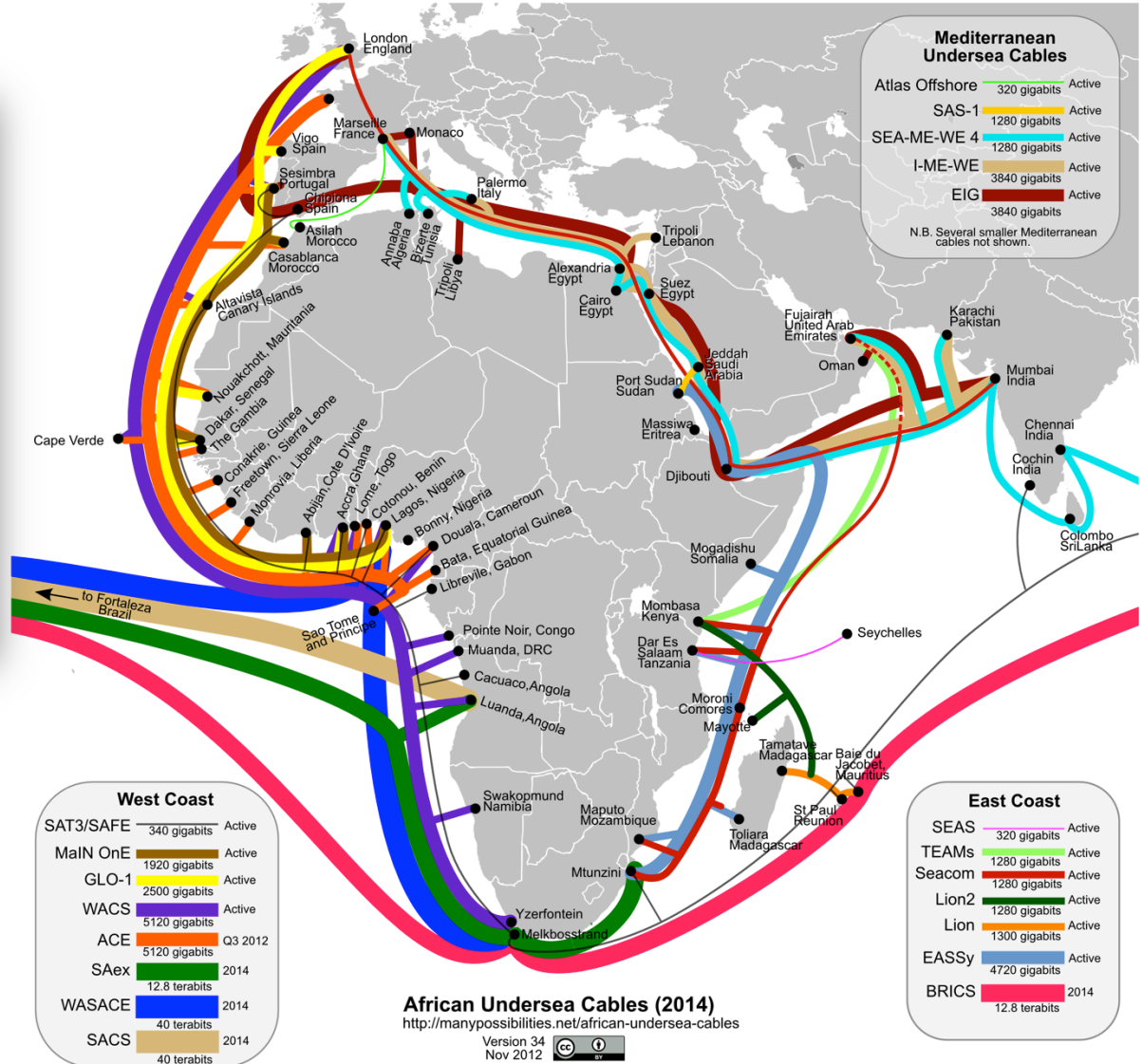
people / mobile phones

<http://www.guardian.co.uk/world/interactive/2012/oct/30/africa-technology-broadband-statistics>

8.5m

Internet users (2012)

<http://www.internetworldstats.com/stats1.htm>



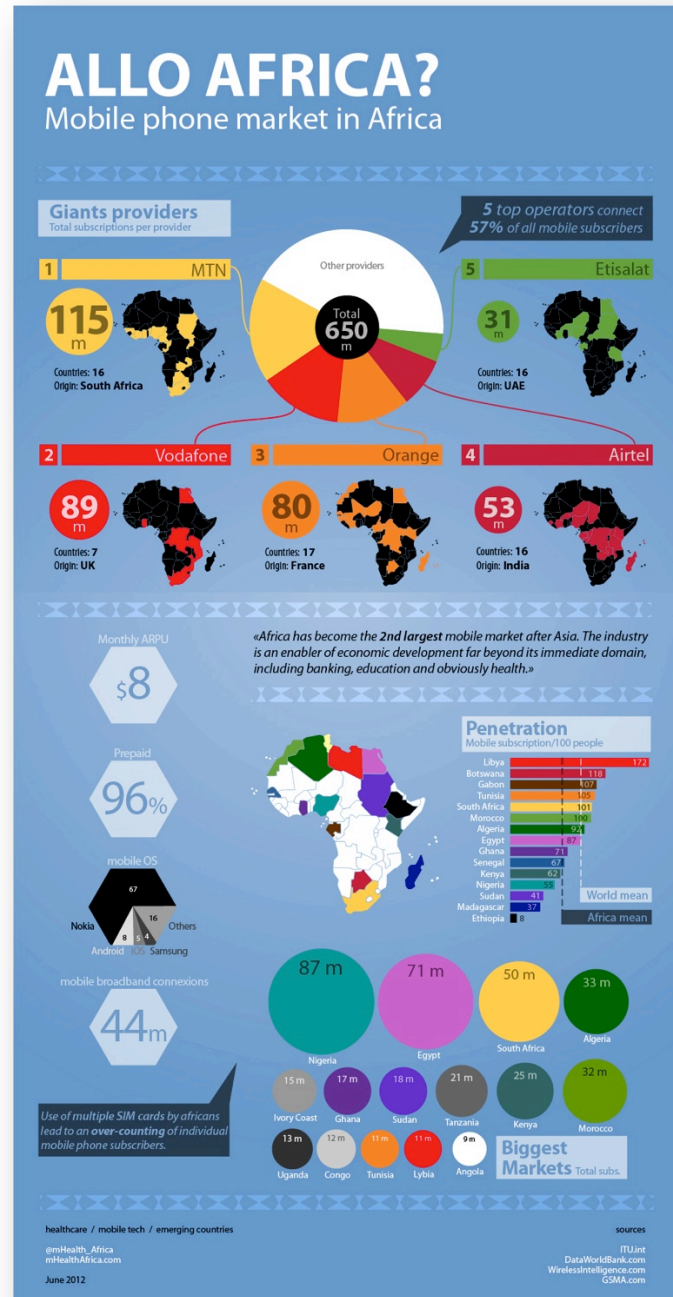
Terrestrial Fibre

- Increased investments by Governments and Private sector
- By July 2012, Africa's total inventory of terrestrial transmission networks reached 732,662-km
- 313m people were within reach of a fibre node
- Expected to reach 50% of population with completion of planned projects

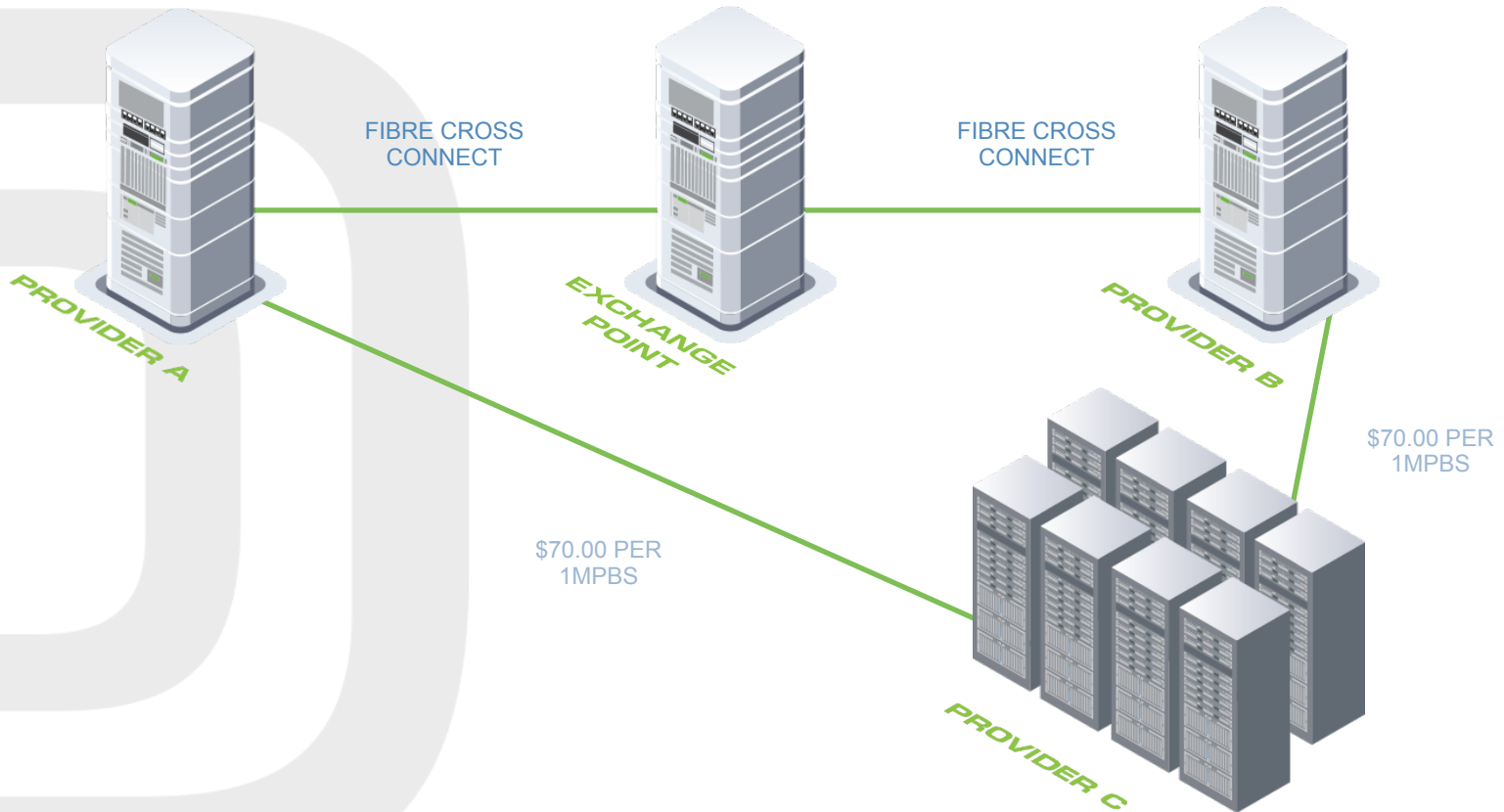


Africa ICT Landscape

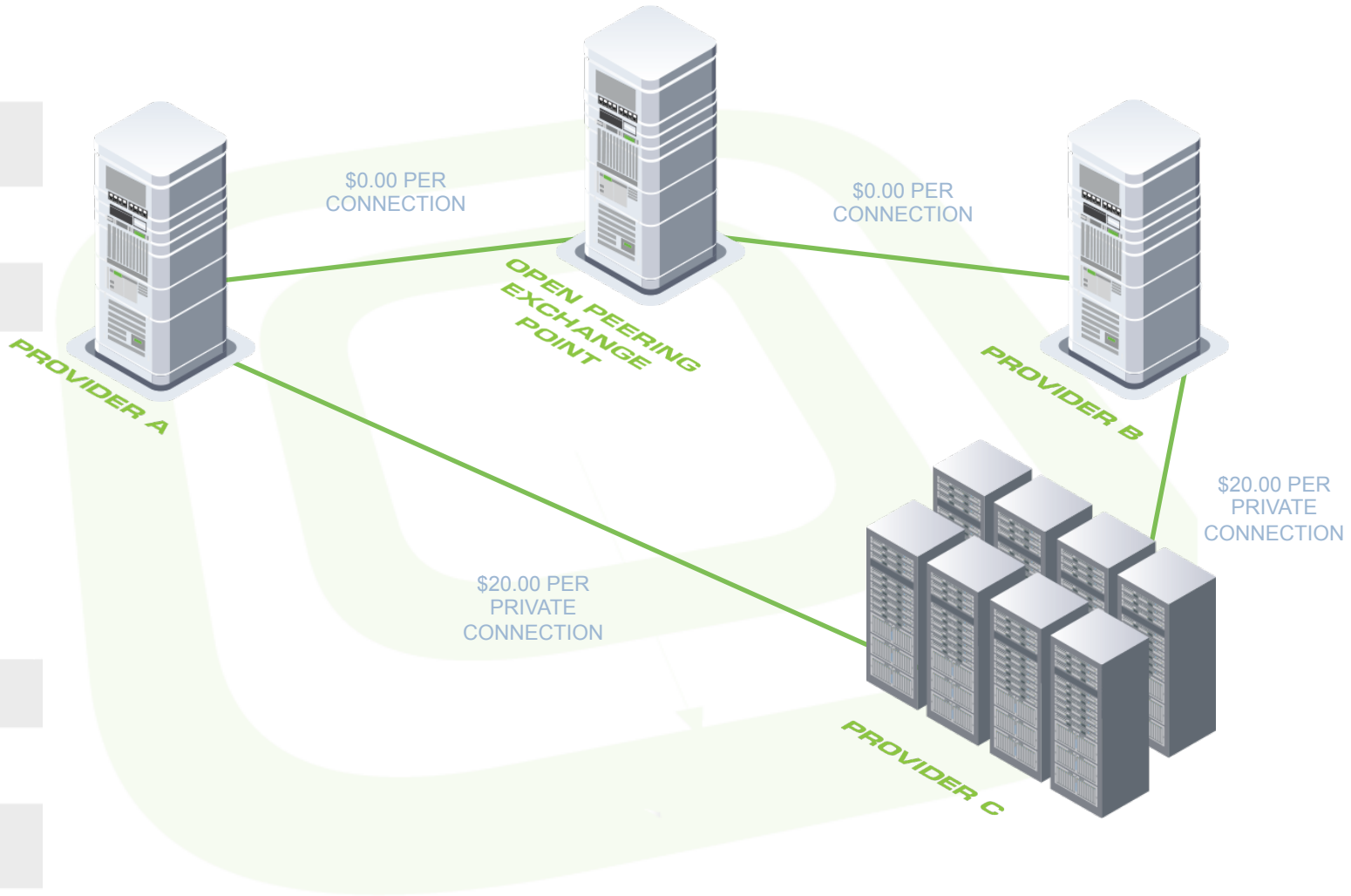
- 99% of the content consumed Internet by Users in Africa is imported
- 4 Countries Egypt, Kenya, Nigeria and South Africa contribute to 99% of Africa's local traffic.
- This creates an Internet traffic Trade deficit or "Internet Transit Deficit" – where significantly less traffic is generated locally than accessed internationally.
- Internet penetration is > 13% and rising.
- Facebook enjoys the contributions of over 51 million African users at a 4,8% penetration rate
- Africa is the 2nd largest mobile market globally – after Asia



Non Neutral Facility



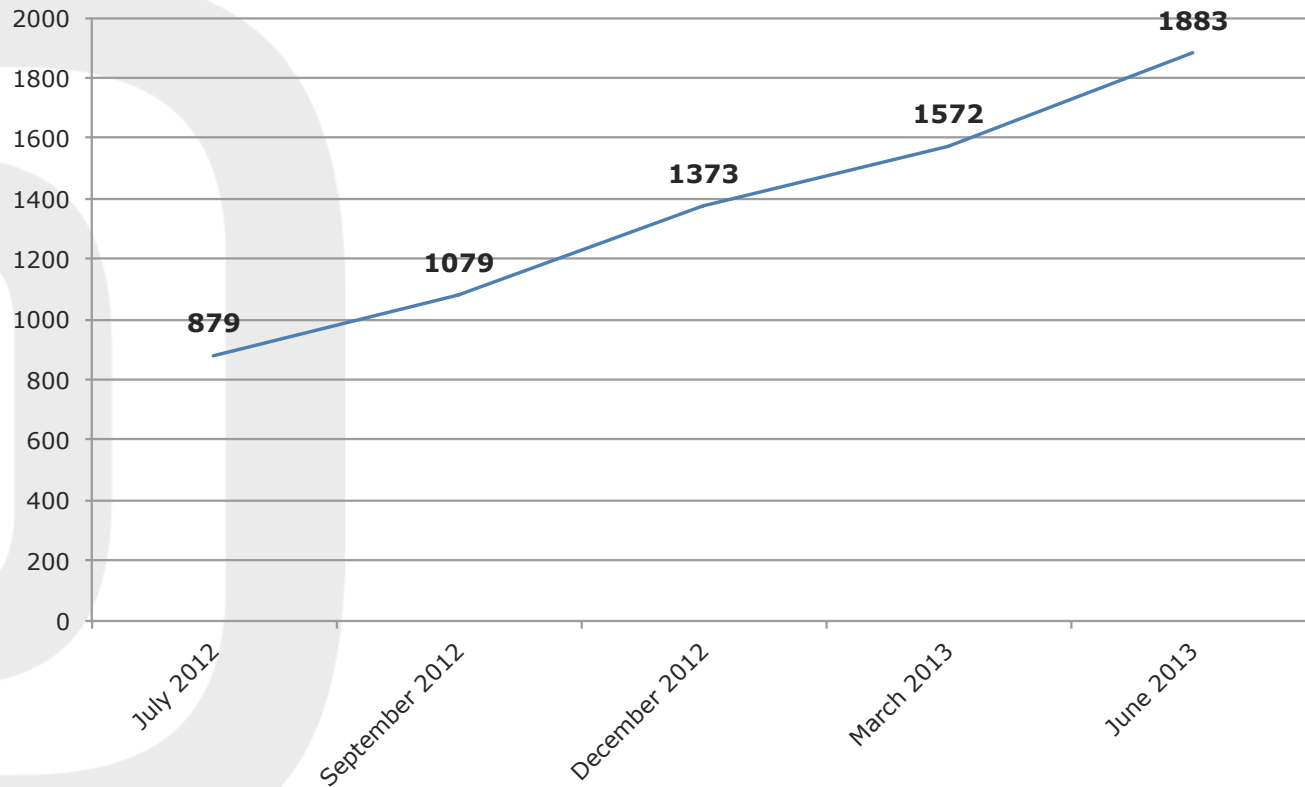
Neutral Facility



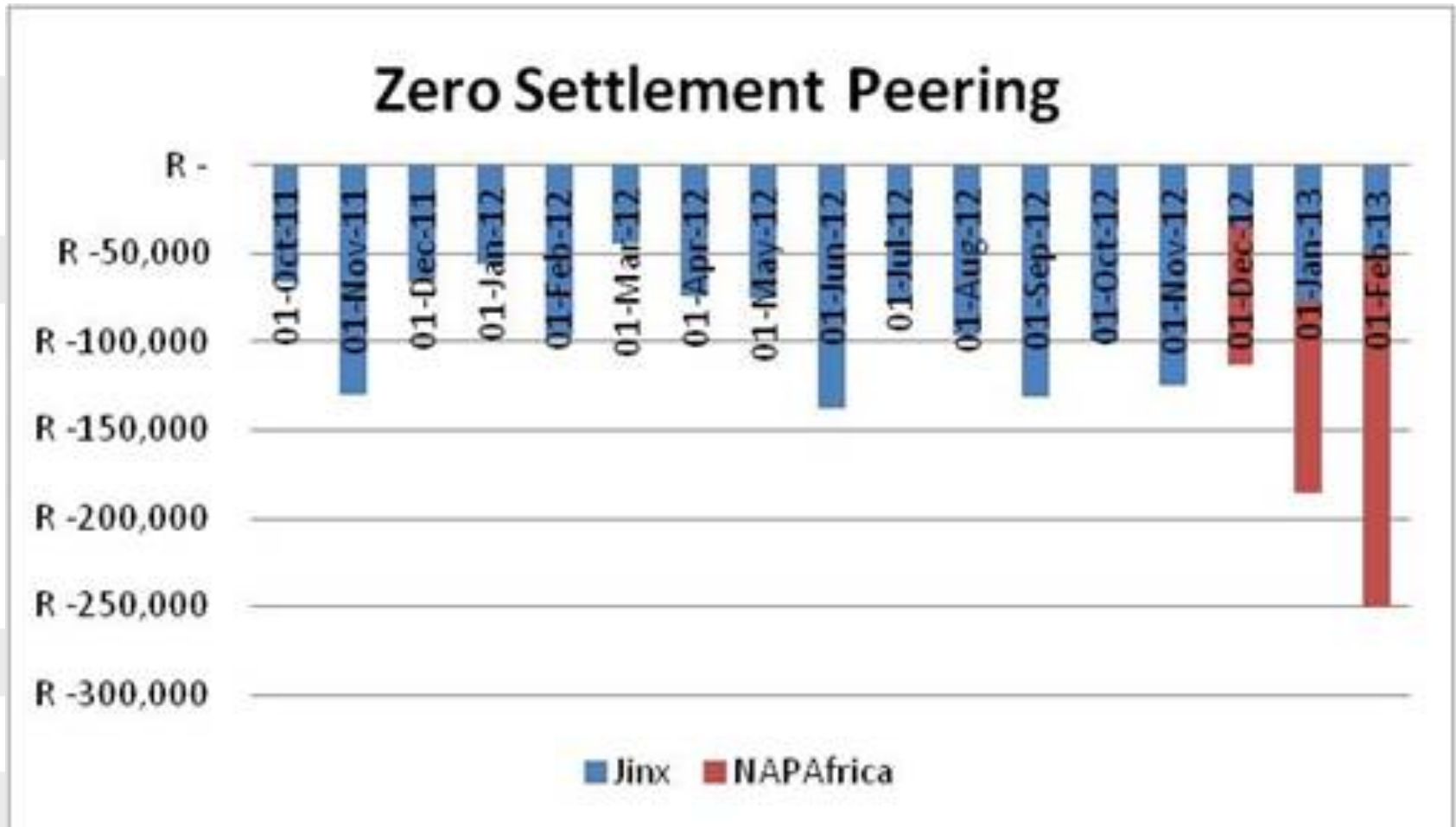
Protect. Connect. Grow.

Ecosystem Growth

INTERCONNECTS



The Peering Effect



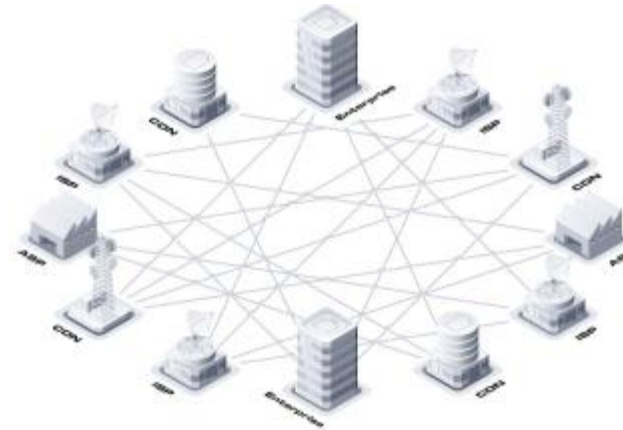
Ecosystem Growth

Neutral SLA based facilities are key for African ecosystem growth

Low cost interconnect key

Neutral, open peering exchange availability

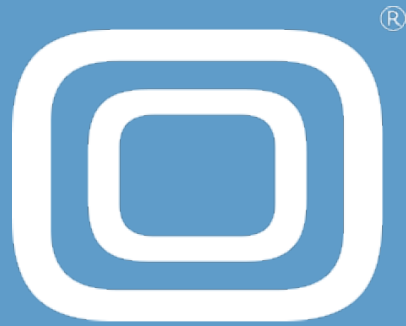
Extensive opportunities for ecosystem growth in all sectors e.g. financial, ISP, Carrier, Content etc.



Connecting without Exchange



Connecting with Exchange



Thank you
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