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Insights about Digital Transformation and ICT Opportunities for Brazil

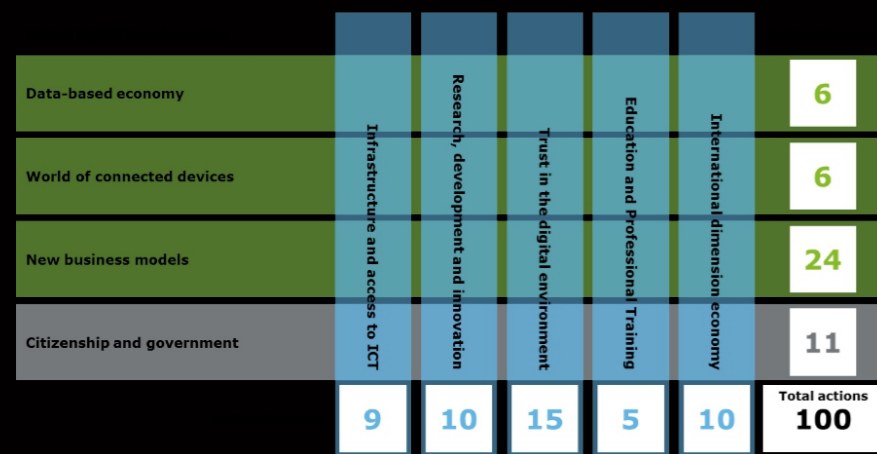
A brief overview

The Information and Communications Technology sector is an enabler of the digital economy worldwide. By 2022, mobile services will account for 5% of global GDP*

Deloitte has conducted a study about the Information and Communications Technology (ICT) sector in Brazil. It covers the main drivers for ICT development, the existing barriers and the possible actions to overcome them.

Brazilian strategy to ICT

The Brazilian Digital Transformation Strategy (e-Digital) is an initiative of the Federal Government and is coordinated by the Ministry of Science, Technology, Innovation (MCTIC). It draws a set of strategical actions for the development of telecommunications and technological sectors in Brazil.



Source: Framework of MCTIC E-Digital

Deloitte's "Insights about Digital Transformation and ICT Opportunities for Brazil" is a continuation of the e-Digital, deep diving into recommendations for priority ICT areas.

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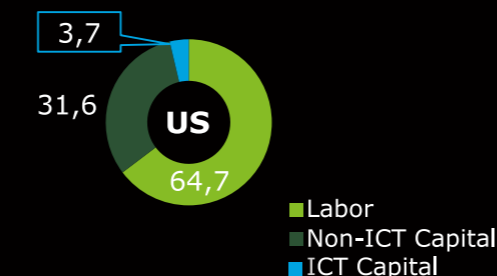
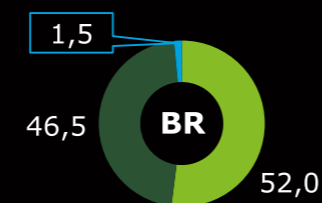
ICT Sector in Brazil

Brazil has a well-developed mobile services market. However, mobile penetration is low in comparison to Latin America and world levels.

40.6% of the Brazilian population was unconnected in 2016...

...the country has room to increase ICT investments to the same levels of developed countries (in % of GDP)

Brazilian investments in ICT represented 1,5% of its GDP in 2016.



Source: Total Economy Database from The Conference Board, 2016.

ICT investments can speed up Brazil's development and address current gaps

Priority investments for value creation

Foundational investments can generate value creation, drive competitiveness and improve the country's economy, workforce and social welfare.



5G ready, everything connected

5G will only become a reality if Brazil overcomes its current challenges of site acquisition, licensing and right-of-way for antennas and optical fiber deployment



Optical fiber: The bridge to the future

Like water, gas and energy, broadband internet has become a basic need, because it provides the infrastructure to the digital economy



Cloud: The sky is not the limit

National security, regulation, costs and local workforce are the main drivers to boost cloud and local datacenters in Brazil



Safe City: First safe, then smart

High-technology is helping cities to be safer at affordable prices



Talent: Brazil, the talent hub for Latin America

No digital revolution is enabled only with technology; a skilled workforce is also an essential component in this scenario

*Source: The Mobile Economy, 2018, GSMA