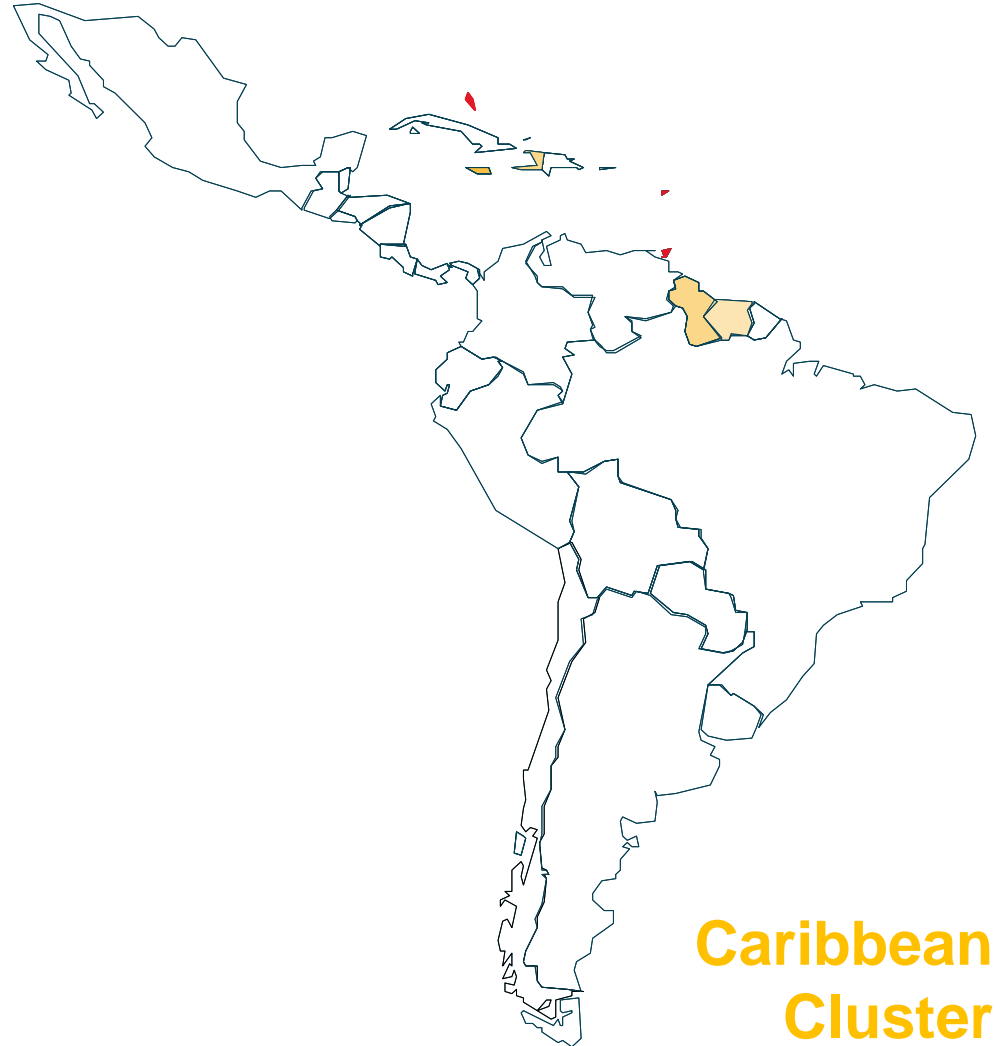


Inter-American Development Bank (IDB)

IDBA - Broadband Development Index for Latin America and the Caribbean

IDBA 2015



Caribbean



Barbados



Jamaica



Trinidad & Tobago



Bahamas



Suriname



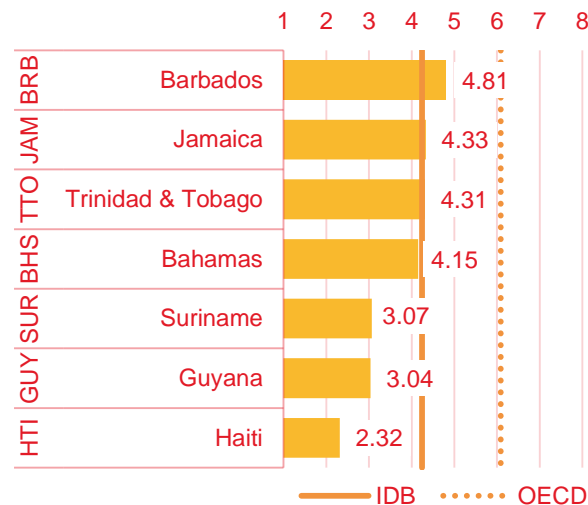
Guyana



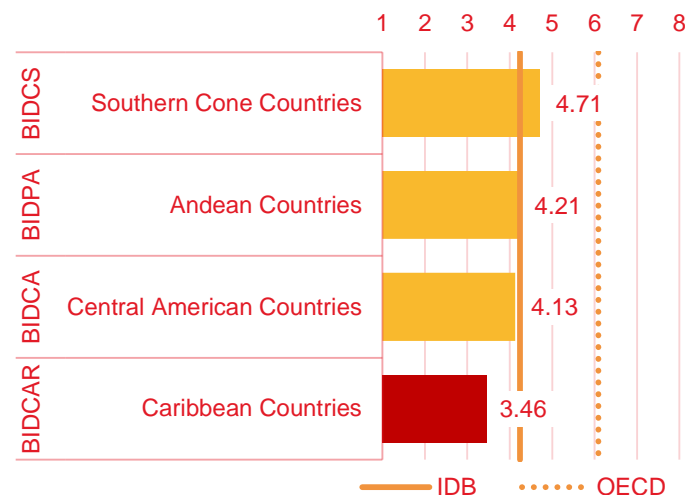
Haiti

(Ranking)

IDBA 2015



IDBA 2015



Caribbean 2015

- **Public Policy and Strategic Vision:**

In the Public Policy and Strategic Vision pillar most countries overtake four points and, thus, the aggregated value of the IDB cluster. Besides, just two countries do not reach three points in this pillar.

- **Strategic Regulation:**

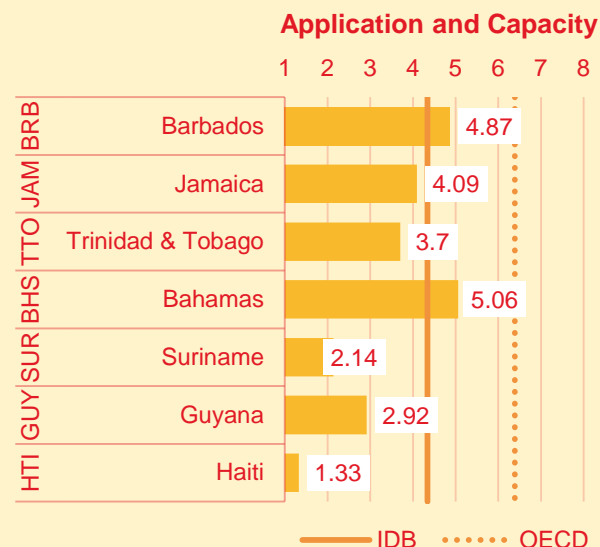
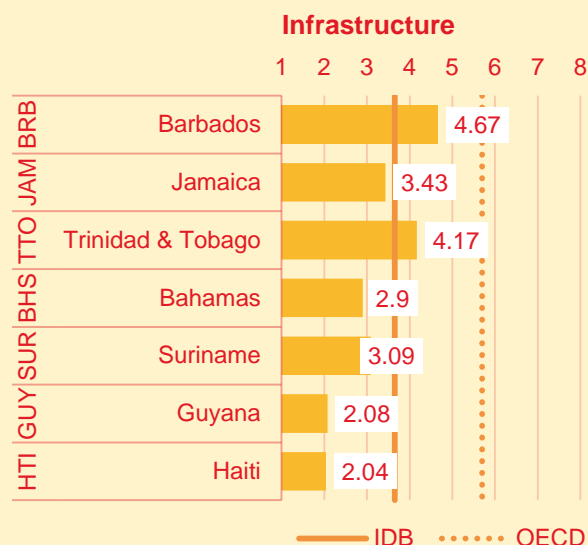
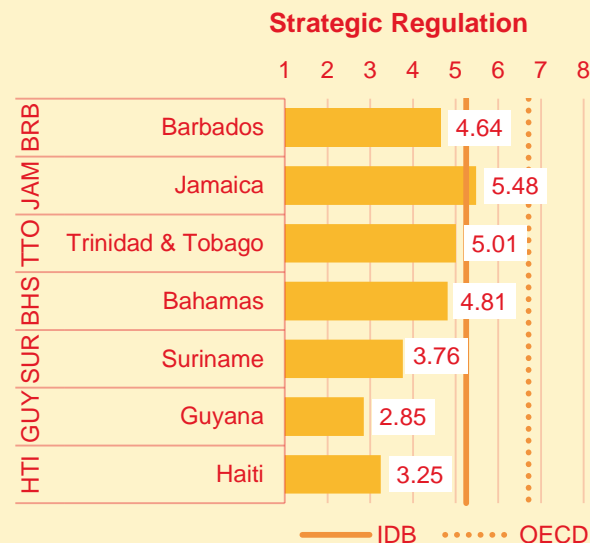
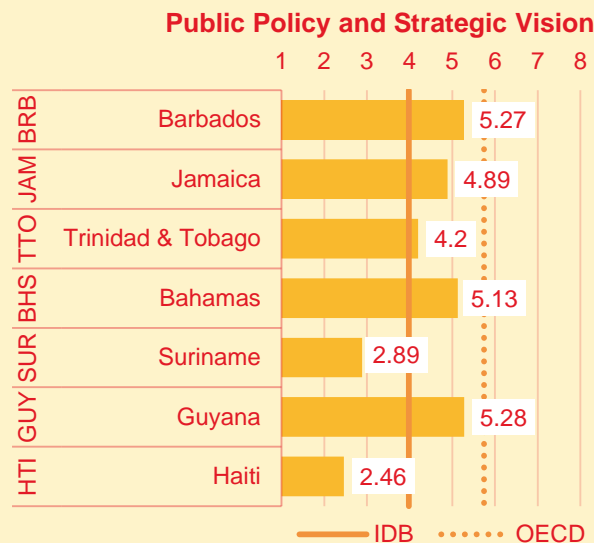
Jamaica is the only country which overtakes the aggregated value of the IDB countries in this pillar. Moreover, Strategic Regulation is the pillar where Jamaica achieves its best score. Guyana and Haiti rank the last positions of the pillar.

- **Infrastructure:**

In general, Infrastructure is the pillar which contains the worst scores in all the Caribbean countries. Only two countries leave behind the aggregated value of the IDB cluster and most countries do not go above four points.

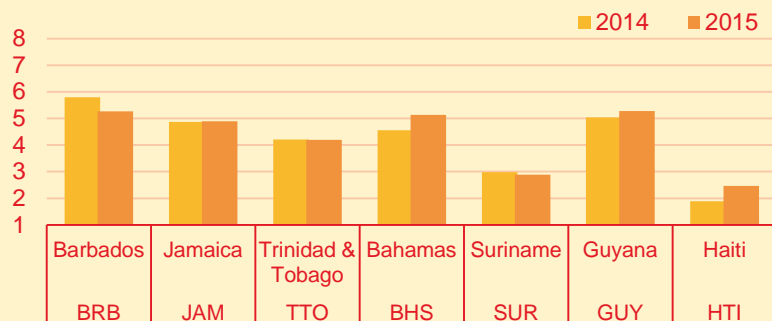
- **Application and Capacity:**

Application and Capacity pillar contains the worst score. Haiti does not even get 2 points, the worst score. The country also has the IDBA worst score with respect to the Caribbean and IDB countries.

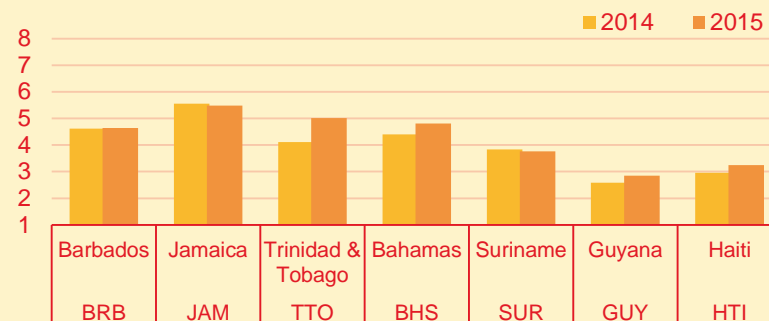


Caribbean 2014 - 2015

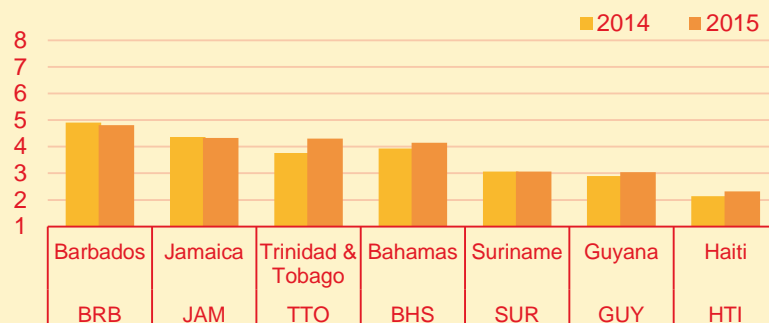
Public Policy and Strategic Vision



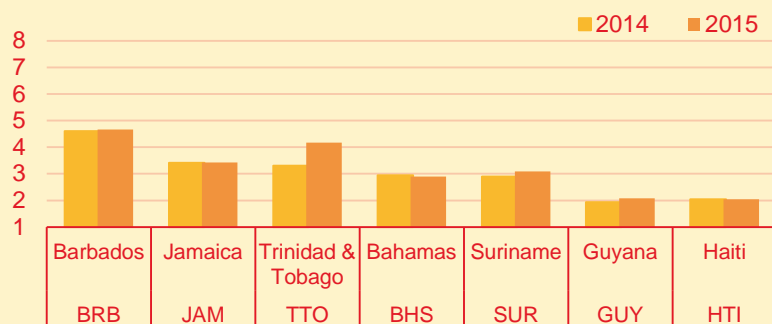
Strategic Regulation



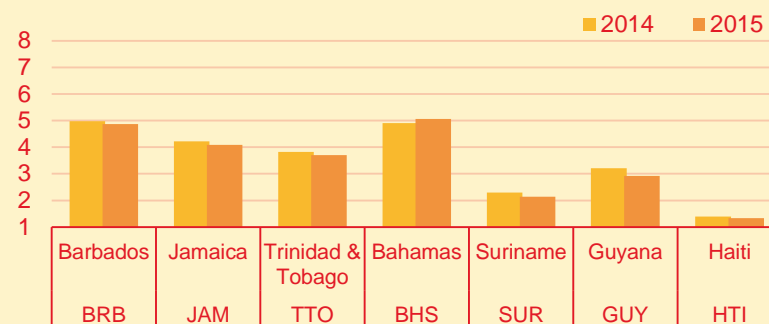
IDBA



Infrastructure

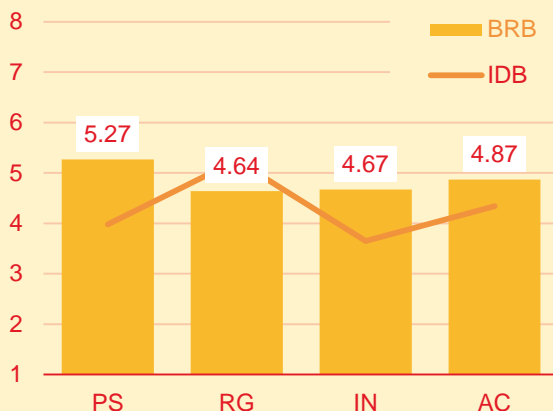


Application and Capacity



Barbados

Population:	286.070 inhabitants
Surface Area:	430 Km ²
Population Density:	665 inhabs./Km ²
Households:	107.530 households
Persons per household:	3
GDP:	3.846.917.653 USD PPP
GDP per capita:	13.448 USD PPP



PS: Public Policy and Strategic Vision
 RG: Strategic Regulation
 IN: Infrastructure
 AC: Application and Capacity



Variation of Barbados in IDB ranking comparing to 2014

Public Policy and Strategic Vision



↓ 2

Barbados shows an absolute and relative deterioration in almost every variable which composes this pillar. This deterioration is the reason why Barbados falls two positions in the Public Policy and Strategic Vision pillar.

Strategic Regulation



↓ 3

In spite of Barbados's better absolute value in the Internet and telephony sectors competition index and equal score in fixed and mobile broadband market concentration, the country falls three positions in this pillar due to position losses respect to the rest of the IDB countries in all the variables of this pillar.

Infrastructure



=

In Infrastructure terms, Barbados retains its position in almost every variable that composes the pillar. Although Barbados shows a noteworthy improvement on international Internet bandwidth in both, absolute and relative values, this is not enough to change its rank position in the Infrastructure pillar.

Application and Capacity



↓ 2

Barbados presents a two-point decline in the Application and Capacity pillar. This drop is mostly due to the relative deterioration that the country shows with respect to the rest of the IDB countries as far as percentage of individuals using the Internet, Business-to-Business Internet use and Internet access in schools.

Barbados

Country situation by pillar compared to the cluster:

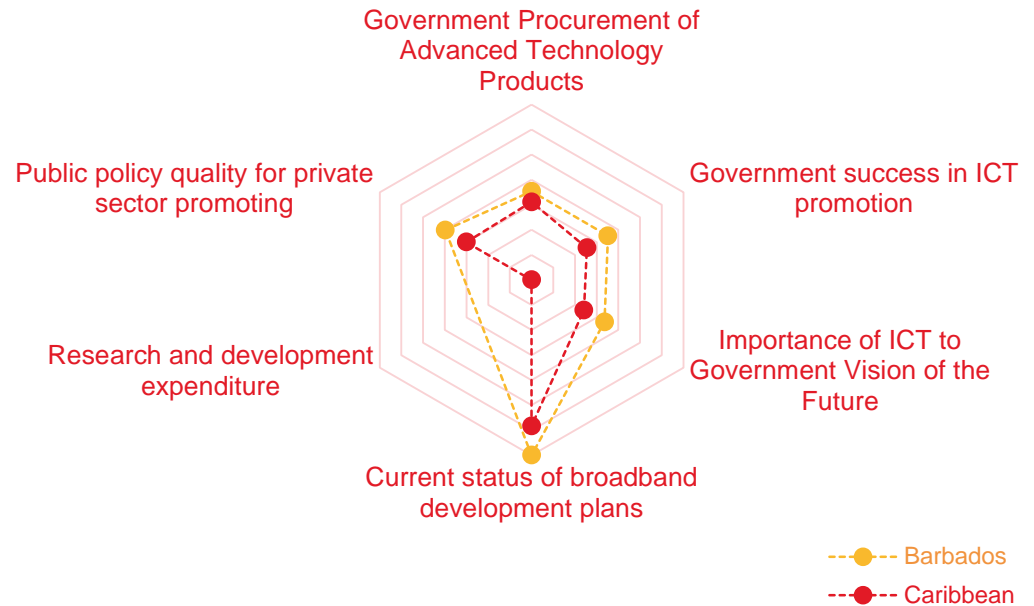
• Public Policy and Strategic Vision:

Barbados ranks position number four on the ranking of Public Policy and Strategic Vision for the IDB cluster and position number two for the Caribbean one. That is possible thanks to the Government's procurements and success on ICT promotion, the importance of ICT on the Government's future vision and the quality of the public policies for private sector development promotion. Besides, Barbados has a National Information and Communication Technologies Strategic Plan.

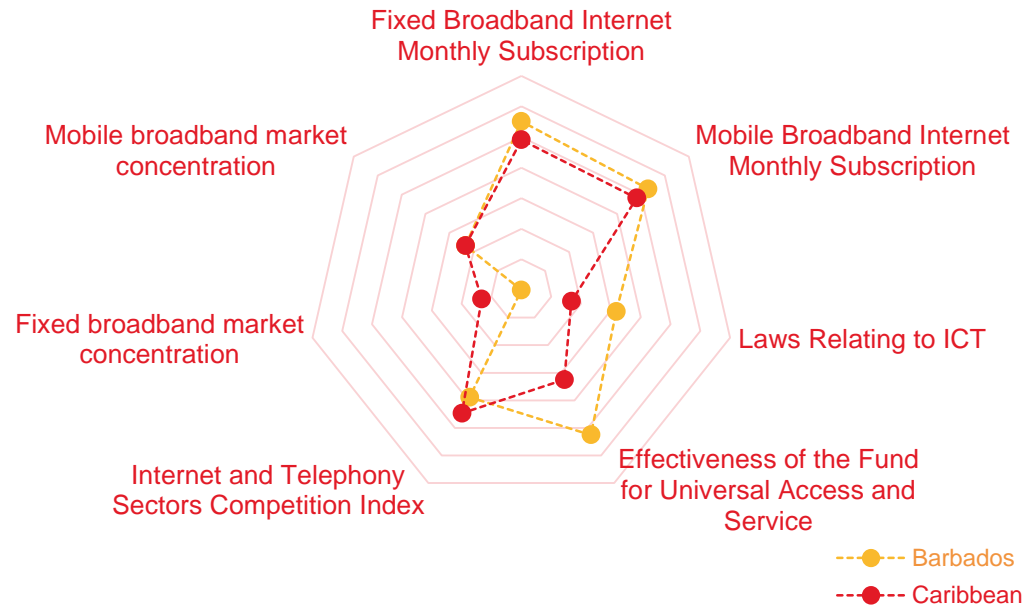
• Strategic Regulation:

Although there is only one player in the mobile broadband market with the consequent lack of competition, the tariffs are still even low than the ones of the aggregation of the Caribbean countries. Moreover, in Barbados the vision of the current laws regulating the ICT sector is much better than in its cluster. Finally, the effectiveness of the Fund for Universal Access and Service, once again higher than that of the cluster, makes it possible for Barbados to achieve the first position on the ranking of this pillar for the Caribbean countries.

Public Policy and Strategic Vision



Strategic Regulation



Barbados

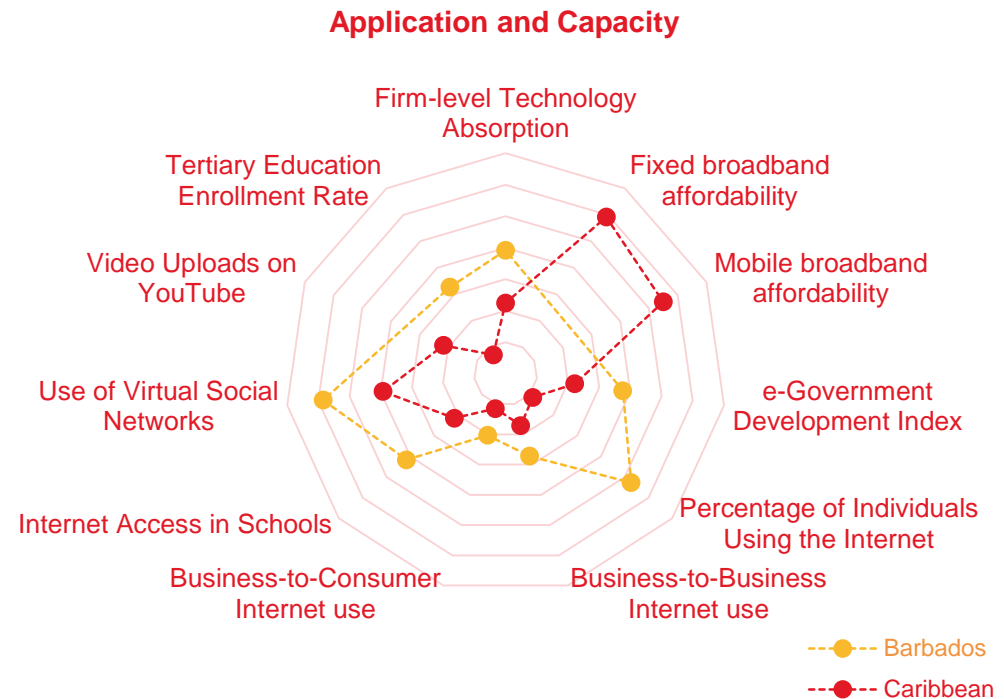
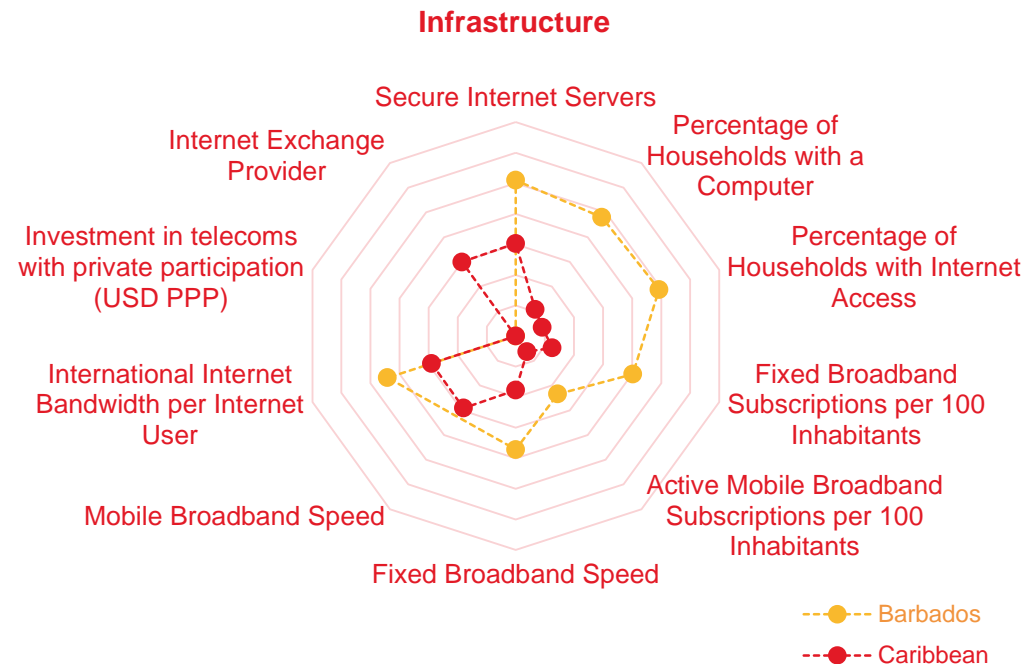
Country situation by pillar compared to the cluster:

• Infrastructure:

The country is the leader of the Infrastructure pillar for the IDB member countries. Even though there is no IXP in Barbados, the international Internet bandwidth is the highest one of all the Caribbean countries. Also, for the rest of the variables of the pillar Barbados accounts for a much higher value both on the ones relating to national broadband speed and on the ones regarding penetration.

• Application and Capacity:

The score of Barbados concerning Application and Capacity matters is higher than the one of the IDB cluster thanks to the huge number of individuals using the Internet, the adoption rate of technology and broadband at the business level, the development degree of the e-Government, the high number of tertiary education students or the number of schools with Internet access.





Variation of Jamaica in IDB ranking comparing to 2014

Public Policy and Strategic Vision



Related to this pillar, Jamaica moves down positions on the importance of ICT to Government's vision of the future variable and, despite the fact that it moves up four positions on Government procurement of advanced technology products variable and maintains its position in the other variables, it is not enough to increase its position in the pillar. In fact, Jamaica loses one position since Bahamas surpasses it in the ranking.

Strategic Regulation



Jamaica undergoes position losses with regard to the rest of the IDB countries, concerning fixed and mobile broadband monthly tariffs and fixed and mobile broadband market concentration. These position losses added to other countries' higher improvement are the reason why Jamaica drops one position in the Strategic Regulation pillar.

Infrastructure



In Infrastructure pillar Jamaica losses positions with respect to the rest of the IDB countries, regarding fixed broadband tariffs and national and international broadband speed. Although Jamaica gets better in terms of the percentage of households with a personal computer and with Internet access, other countries' stronger improvements make Jamaica fall in this pillar.

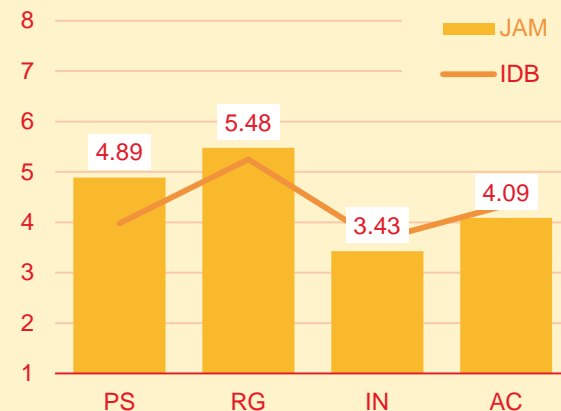
Application and Capacity



Even though Jamaica presents relative improvements in some variables of this pillar, the noticeable worsening in Internet access in schools and virtual social networks use cause the two-point Jamaica decline in this pillar.

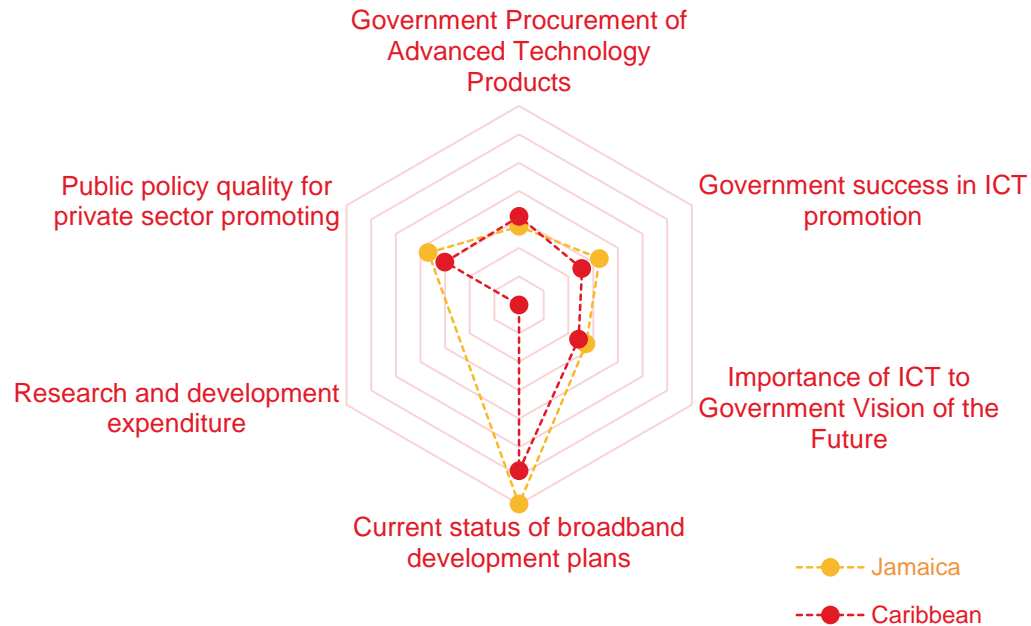
Jamaica

Population:	2.798.800 inhabitants
Surface Area:	10.990 Km ²
Population Density:	251 inhabs./Km ²
Households:	800.270 households
Persons per household:	3
GDP:	24.140.993.016 USD PPP
GDP per capita:	8.893 USD PPP

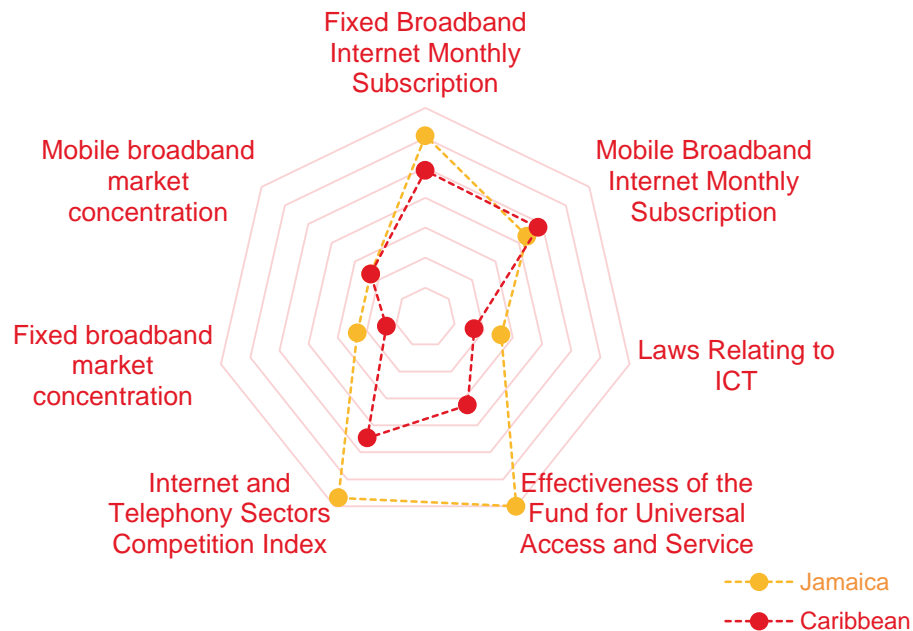


PS: Public Policy and Strategic Vision
 RG: Strategic Regulation
 IN: Infrastructure
 AC: Application and Capacity

Public Policy and Strategic Vision



Strategic Regulation



Jamaica

Country situation by pillar compared to the cluster:

Public Policy and Strategic Vision:

Jamaica reaches the worst position on a ranking in the one of Public Policy and Strategic Vision, with position number four. Although the current status of the national broadband development plan is the best possible, the public policies for ICT promotion and the importance given to them by the Government are still in a worse position than those in Guyana. Despite this bad position on the ranking, Jamaica does not have its worse score in this pillar.

Strategic Regulation:

Jamaica achieves its higher score in this pillar. This can be understood seeing the values of the variables concerning competition on broadband and telephony markets, the relatively low monthly prices of a typical both fixed and mobile broadband subscription or the effectiveness in the use of the resources of the Fund for Universal Access and Service. Jamaica remains one step ahead of the rest of the Caribbean countries being one of only two countries with a fully effective Fund.

Jamaica

Country situation by pillar compared to the cluster:

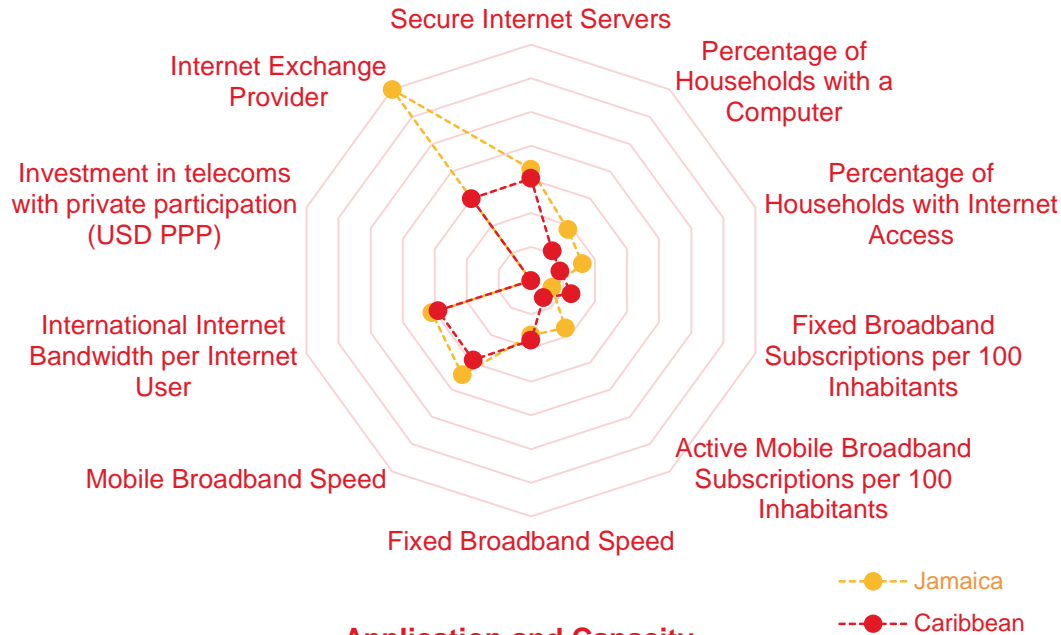
• Infrastructure:

Jamaica stays on the top three of its cluster in this pillar. It is the Caribbean country with the maximum mobile broadband speed. Moreover, there is an IXP in Jamaica so the international Internet bandwidth is also one of the highest of the Caribbean region. Better mobile broadband performance versus that of the fixed service seems to influence Jamaicans when deciding what type of service subscribe to.

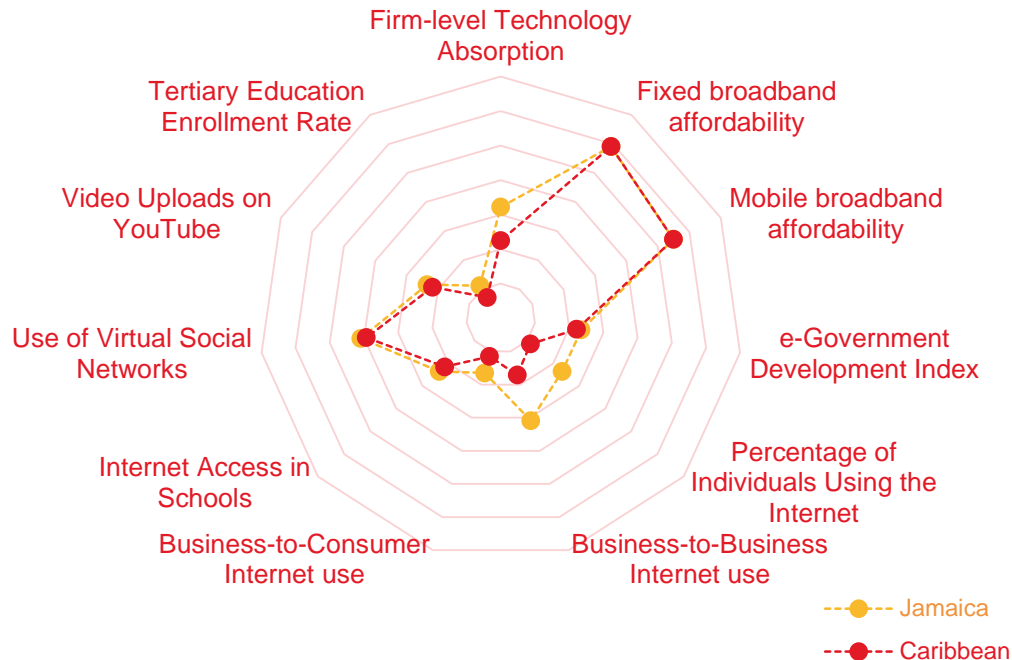
• Application and Capacity:

The low broadband penetration rates are not a consequence of high prices unaffordable for Jamaicans as they are quite adequate for their incomes. A remarkable fact is that broadband and related services are significantly used in the business environment: the firm-level technology absorption and the use of the Internet for Business-to-Business and Business-to-Consumer transactions are more widely used at Jamaica than in the Caribbean cluster.

Infrastructure

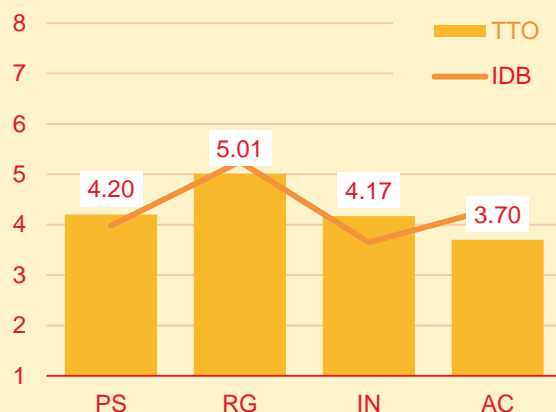


Application and Capacity



Trinidad & Tobago

Population:	1.344.200 inhabitants
Surface Area:	5.130 Km ²
Population Density:	262 inhabs./Km ²
Households:	408.940 households
Persons per household:	3
GDP:	40.831.860.409 USD PPP
GDP per capita:	30.445 USD PPP



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 AC: Application and Capacity



Variation of Trinidad & Tobago in IDB ranking comparing to 2014

Public Policy and Strategic Vision



↑ 2

Trinidad and Tobago presents a two-point rise in this pillar, mostly due to the Government procurement of advanced technology enhancement and the stronger deterioration of the rest of the IDB countries.

Strategic Regulation



↑ 5

In absolute terms, Trinidad and Tobago shows improvements on fixed and mobile broadband monthly tariffs. Besides, other variables, such as, Internet and telephony sectors competition index goes through enhancements that motivate the rise of Trinidad and Tobago in the Strategic Regulation pillar.

Infrastructure



↑ 7

With regard to Infrastructure, the existence of an IXP is probably one of the reasons why the international fixed broadband speed has grown in the last year. The IXP presence and the broadband international bandwidth along with other countries' worsening, leads Trinidad and Tobago to rise seven positions in this pillar.

Application and Capacity



↓ 1

In spite of the country's relative improvements in the firm-level technology absorption and in the use of virtual social networks, Trinidad and Tobago also shows worse results in Internet access in schools and B2B and B2C Internet use, causing its one-position fall in the Application and Capacity pillar.

Trinidad & Tobago

Country situation by pillar compared to the cluster:

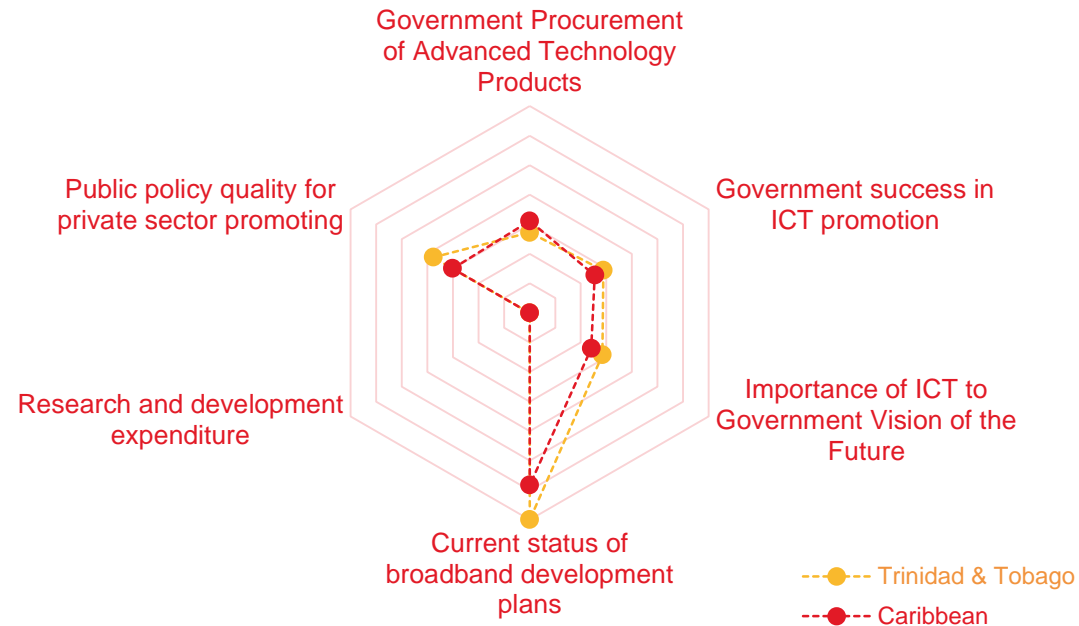
• Public Policy and Strategic Vision:

Bahamas and Guyana take advantage over Trinidad and Tobago in this pillar as a result of the higher scores obtained in the variables in general. The biggest difference between those countries in terms of public policies is given by the difference on the Government procurement of advanced technology products.

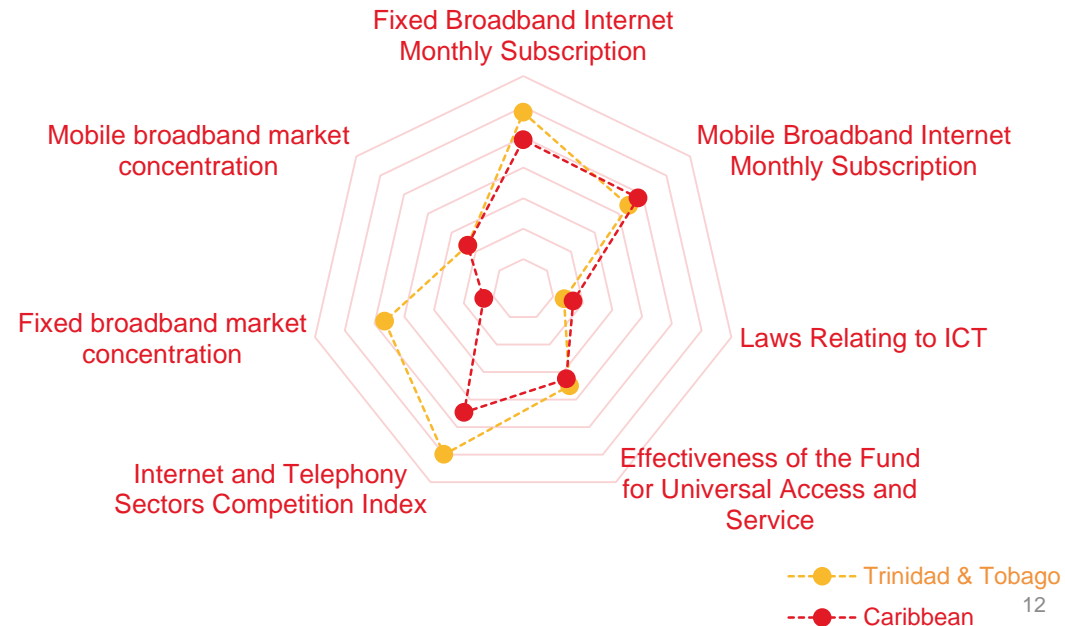
• Strategic Regulation:

Trinidad and Tobago is one of only two Caribbean countries that reaches its better score in the pillar of Strategic Regulation. The good situation in terms of competition in the fixed broadband market enables the country to have one of the lowest prices of the IDB region for a subscription to this service. Certainly, the country is the only one at the Caribbean with a relatively good situation of competition in the fixed sector. The Internet and Telephony sectors competition has also one of the highest levels of the region.

Public Policy and Strategic Vision



Strategic Regulation



Trinidad & Tobago

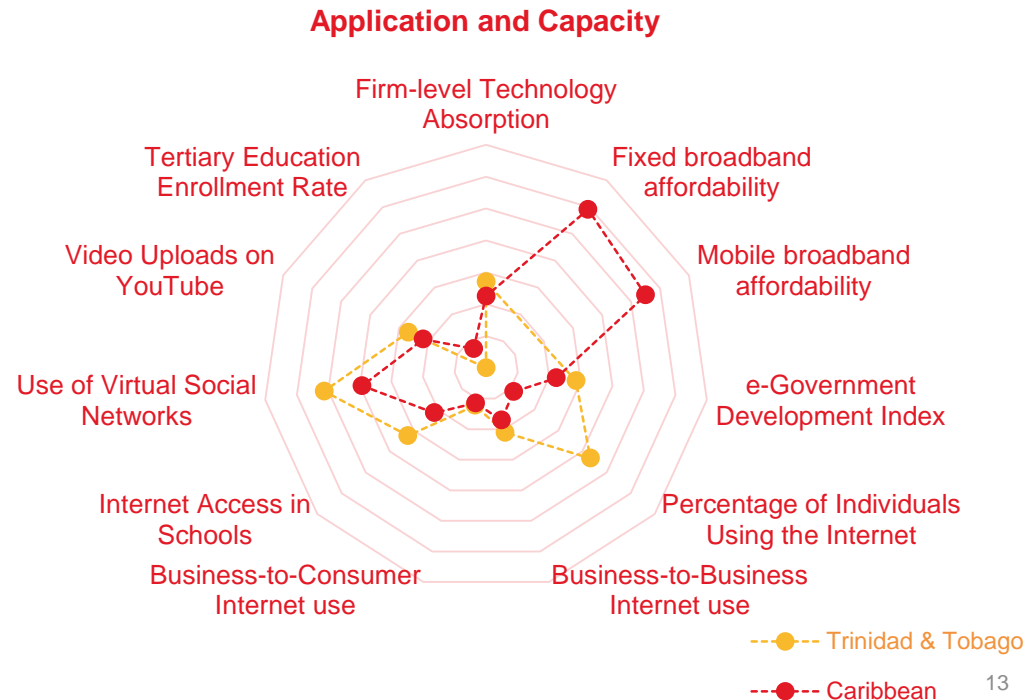
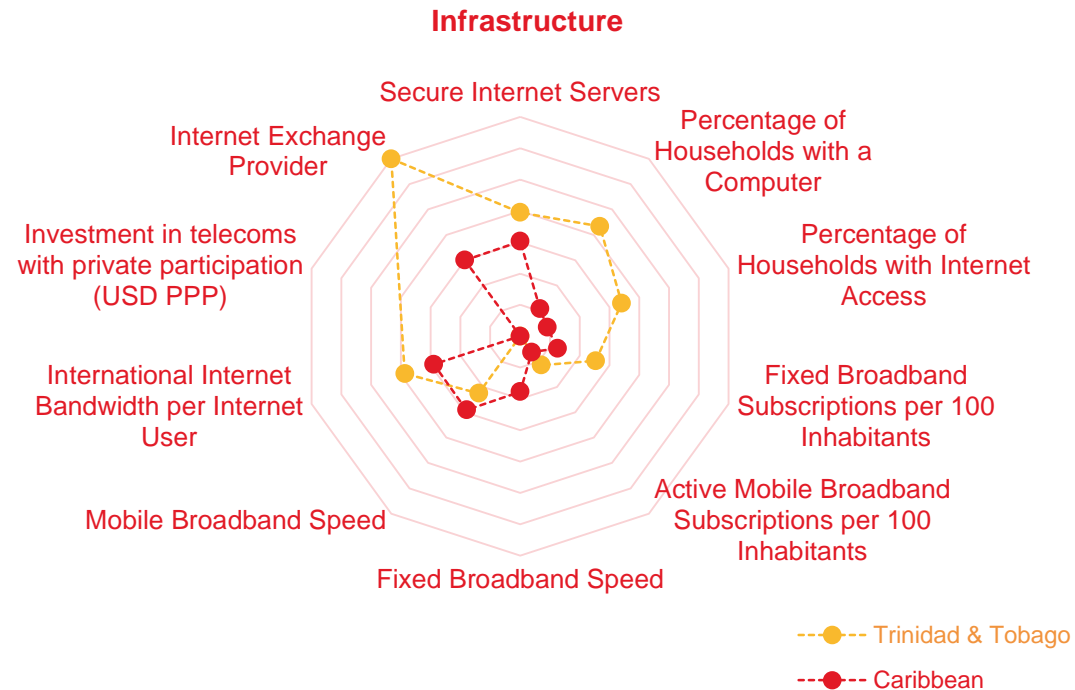
Country situation by pillar compared to the cluster:

• Infrastructure:

Infrastructures in Trinidad and Tobago are in a good stage of development. There is an IXP and, in consequence, a higher international Internet bandwidth. The country accounts for the second highest percentage of households with personal computer. The same situation with the percentage of households with Internet access and, clearly connected, with the percentage of inhabitants with a fixed broadband subscription.

• Application and Capacity:

The pillar concerning Application and Capacity matters is the one with the biggest difference between the value for Trinidad and Tobago and the one for the IDB cluster. That is caused by some of the variables with too low scores as the number of tertiary education students, for example not easily compensated by others with higher results like the one measuring the number of Internet users.





Variation of Bahamas in IDB ranking comparing to 2014

Public Policy and Strategic Vision



↑ 6

In the Public Policy and Strategic Vision dimension, the lack of data in most variables along with the good status of broadband development plans, makes Bahamas place six positions above its last year position in this pillar.

Strategic Regulation



↓ 1

The worsening of Bahamas with respect to the other IDB countries in terms of fixed broadband monthly subscription as well as fixed broadband market concentration leads the country to lose one position in the Strategic and Regulation pillar. However, Bahamas shows an improvement in mobile broadband monthly subscription.

Infrastructure



↓ 3

Bahamas maintains its position in almost every variable of the Infrastructure pillar. The exception is the international Internet bandwidth with a relative deterioration compared to the rest of the IDB countries' value. This fact added to other countries enhancements drives Bahamas to lose three places in the ranking of the Infrastructure pillar.

Application and Capacity

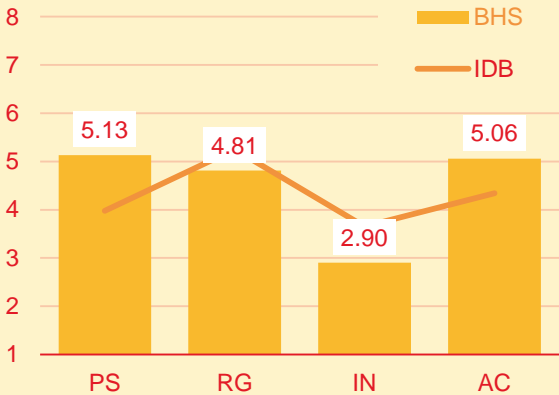


↑ 4

Concerning the Application and Capacity pillar, Bahamas' lack of information in most of the variables that compose the pillar, along with the higher number of individuals using the Internet per 100 inhabitants with respect to the rest of the IDB countries carries a four-position rise in this ranking for Bahamas.

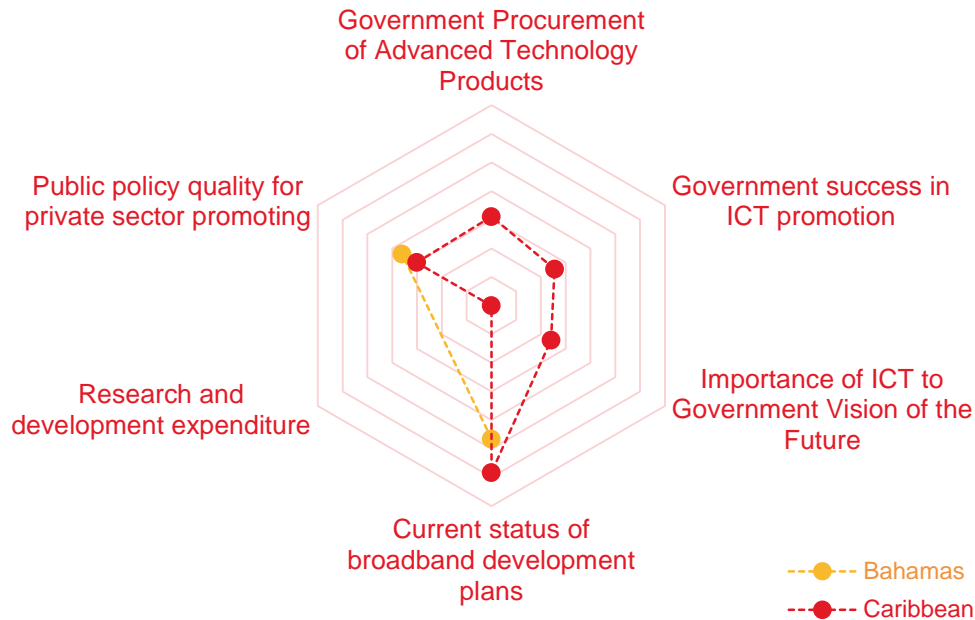
Bahamas

Population:	382.570 inhabitants
Surface Area:	13.880 Km ²
Population Density:	38 inhabs./Km ²
Households:	111.510 households
Persons per household:	3
GDP:	8.998.368.765 USD PPP
GDP per capita:	23.521 USD PPP

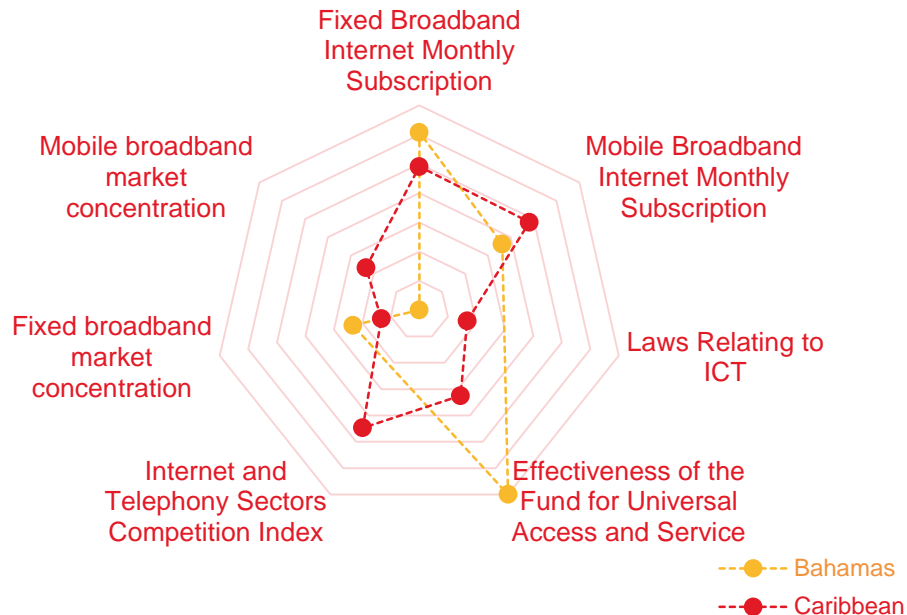


PS: Public Policy and Strategic Vision
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Public Policy and Strategic Vision



Strategic Regulation



Bahamas

Country situation by pillar compared to the cluster:

Public Policy and Strategic Vision:

This is the pillar in which Bahamas has suffered the greatest improvement comparing with the results of the previous version of the Index. Although the country does not reach the highest possible score, compared with the IDBA of last year, at least now there is data available on the status of the broadband development plans in Bahamas. It has to be taken into account the lack of data of three up to six of the variables of the pillar.

Strategic Regulation:

Bahamas is one of only two countries with a fully effective Fund for Universal Access and Service, alongside Jamaica. Thanks to it, together with the affordable prices of the fixed broadband Internet subscriptions, the low competition index of the mobile broadband market and its unaffordable tariffs are not enough to make Bahamas losses positions in the Caribbean cluster ranking of this pillar comparing with the position in the IDBA ranking.

Bahamas

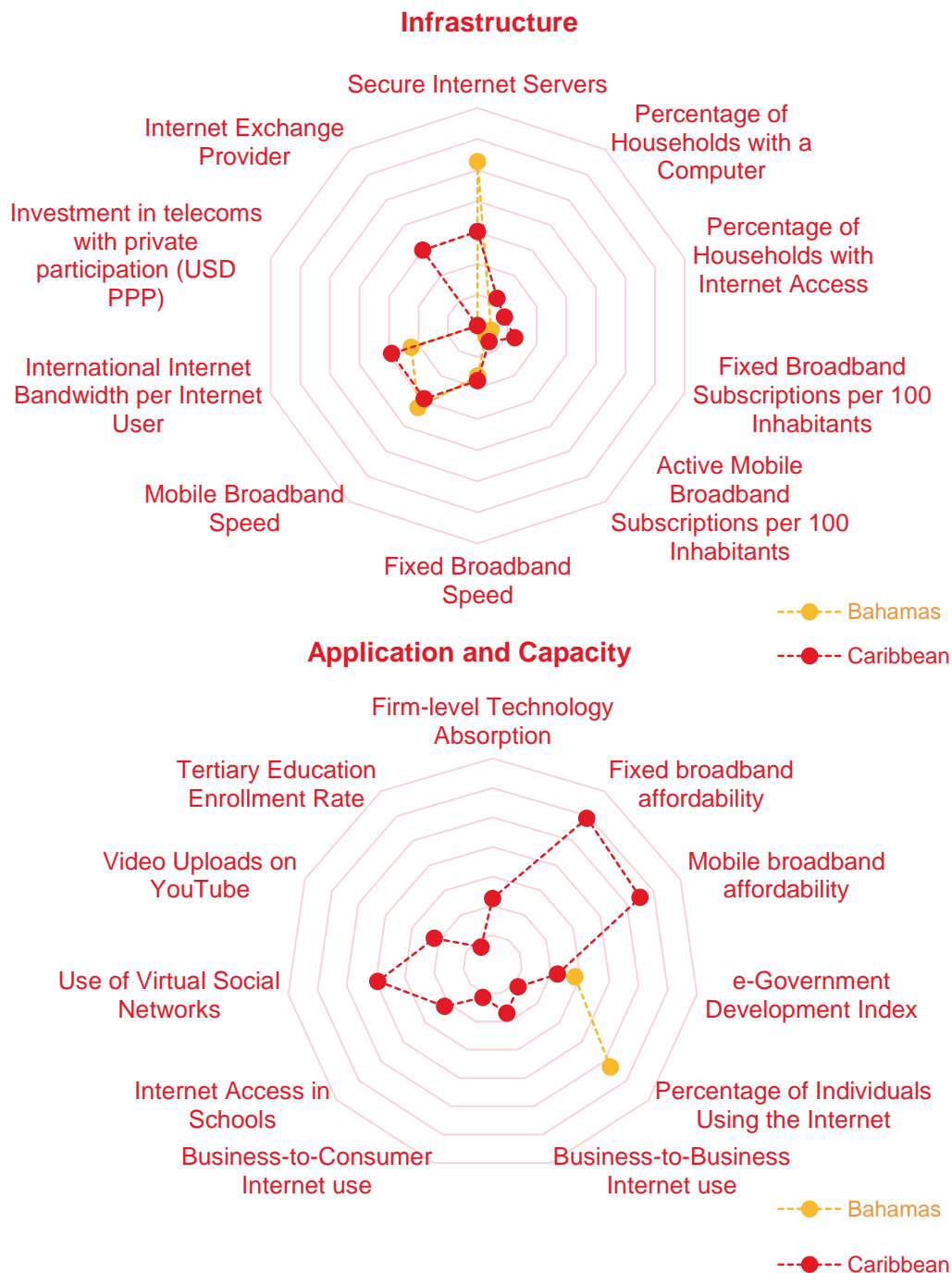
Country situation by pillar compared to the cluster:

• Infrastructure:

Bahamas is the Caribbean country with the highest number of secure Internet servers. Apart from that, this is the pillar in which Bahamas has the worst score because of the low values in the rest of the variables, below the aggregated value of the cluster except for the mobile broadband speed. In fact, Bahamian mobile broadband speed is the second fastest one of the entire Caribbean region.

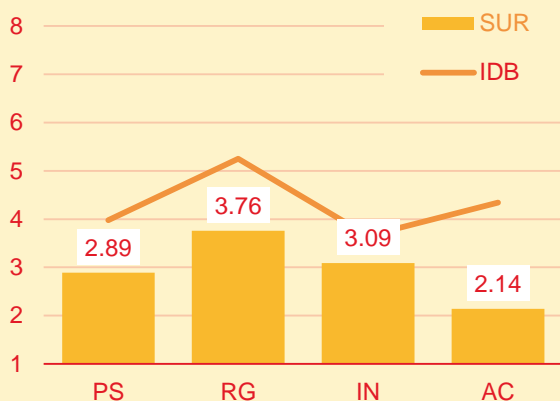
• Application and Capacity:

The lack of data for most of the variables considered in this pillar leads to give more importance to the ones available so that the score of the pillar is calculated. This, along with the fact that data available of the amount of users of the Internet and the level of development of the e-Government are better than those for the cluster, is the reason why Bahamas is the country with the best score in terms of Application and Capacity.



Suriname

Population:	543.930 inhabitants
Surface Area:	163.820 Km ²
Population Density:	3 inhabs./Km ²
Households:	101.870 households
Persons per household:	5
GDP:	8.666.735.201 USD PPP
GDP per capita:	16.071 USD PPP



PS: Public Policy and Strategic Vision
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Variation of Suriname in IDB ranking comparing to 2014

Public Policy and Strategic Vision



Even though Suriname shows a comparative fall with respect to the rest of the IDB countries in almost every variable of the Public Policy and Strategic Vision pillar, the country maintains its position in the ranking of the pillar mainly as a result of the worse results of other countries.

Strategic Regulation



Suriname shows relative deteriorations with regard to the rest of the IDB countries in some variables of the Strategic Regulation pillar. Despite these deteriorations, Suriname preserves its position in this pillar in some way thanks to a worse deterioration of other countries.

Infrastructure



Suriname gets worse in terms of the number of secure Internet servers and the percentage of households with Internet access. However, the improvement concerning the number of fixed broadband subscriptions, the mobile broadband speed and the international Internet bandwidth compensates the deteriorations so that Suriname maintains the same position in the Infrastructure pillar.

Application and Capacity



Is the only pillar in which Suriname changes its position. Although Suriname loses positions with respect to the rest of the IDB countries in many variables of the pillar, the stronger falls of others countries lead Suriname to climb one position in the ranking of the Application and Capacity dimension. Indeed, Suriname shows better results than Nicaragua, the opposite that happened last year.



Suriname

Country situation by pillar compared to the cluster:

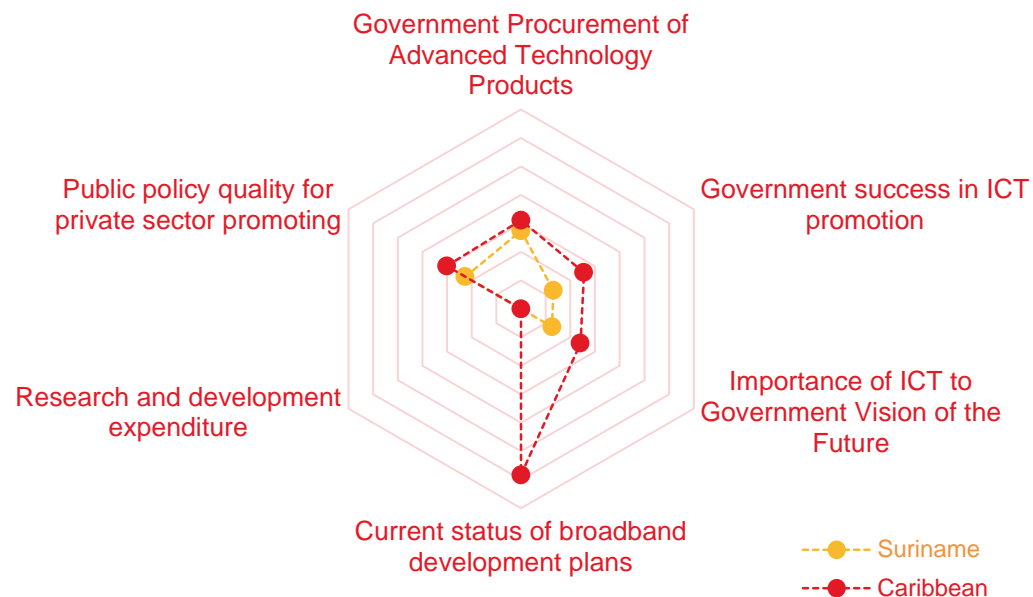
• Public Policy and Strategic Vision:

At the moment of the data gathering, there was no available data on the status of broadband development plans in the country. Most of the countries get a high score on this variable and this absence motivates its weight to be equally divided into the rest of the variables. The problem is that the values in those variables is relatively low and so it is the score of Suriname on this pillar.

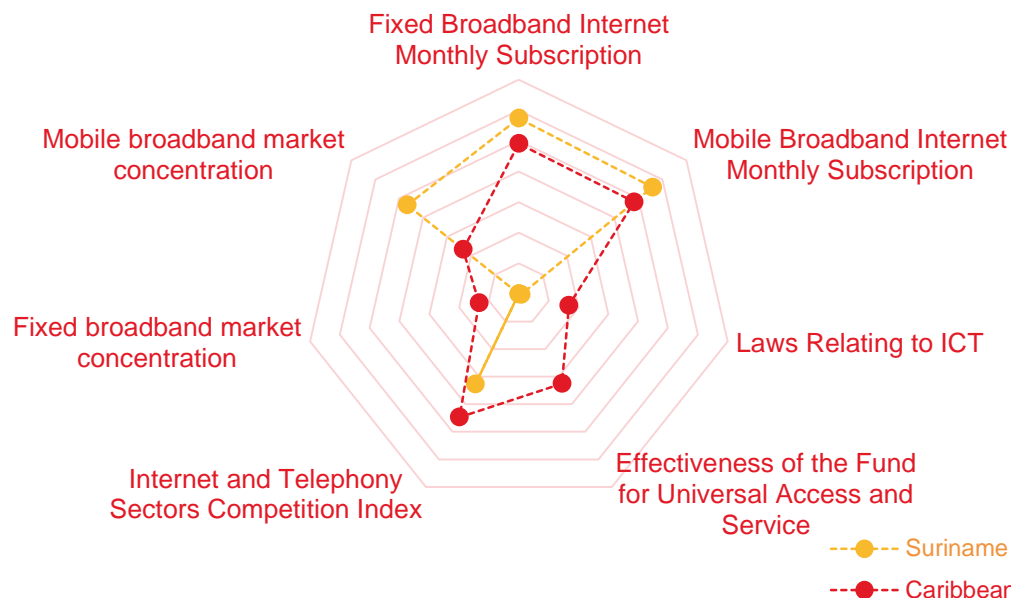
• Strategic Regulation:

Suriname is the Caribbean country with the better situation in terms of mobile broadband market competition. On the contrary, there is a monopoly in the fixed broadband market. However, the situation on subscription prices in both markets is almost the same in comparison with its cluster's results. Taking into account all the IDB members, Suriname is the third country with the cheapest tariffs of mobile broadband plans.

Public Policy and Strategic Vision



Strategic Regulation



Suriname

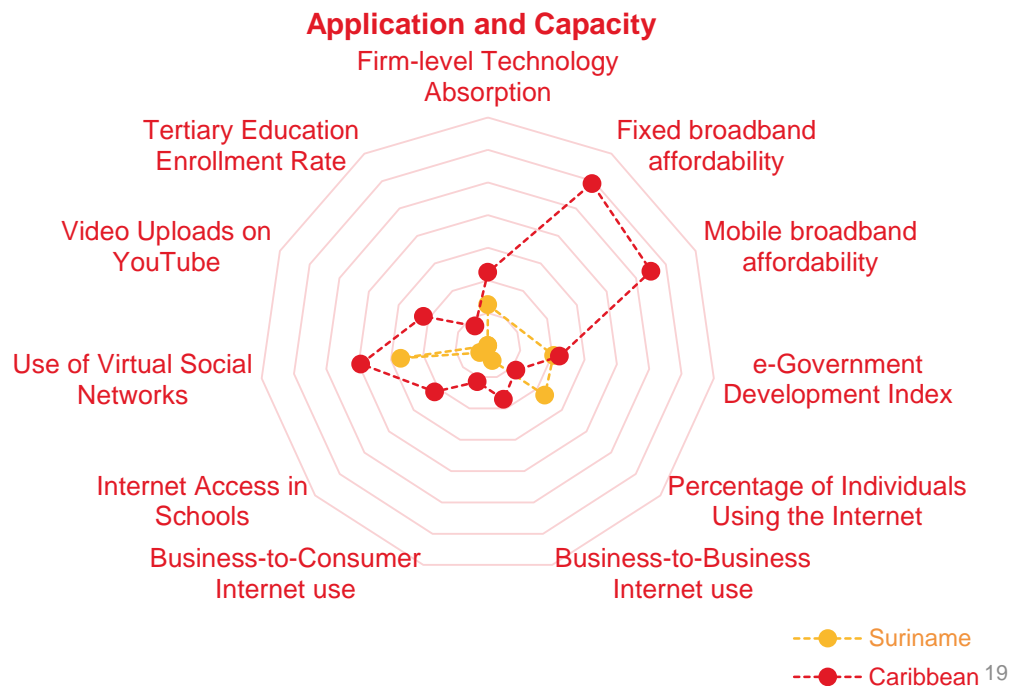
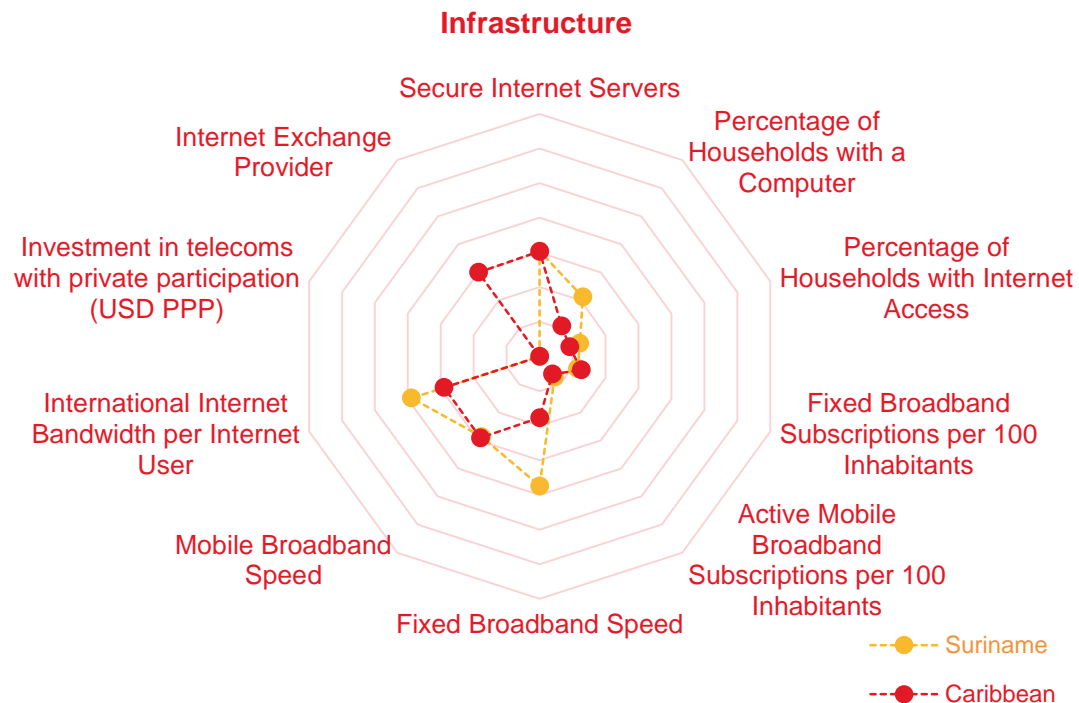
Country situation by pillar compared to the cluster:

• Infrastructure:

Surinamese situation in reference to telecommunications infrastructure is even better than in Bahamas. Considering all the IDB member countries, Suriname is the one with the highest fixed broadband speed. Moreover, despite the inexistence of an IXP, the country is in the top five of the IDB cluster regarding the international Internet bandwidth.

• Application and Capacity:

The Application and Capacity pillar is the only one in which Suriname improves its position compared with the previous year. However, Suriname is on the penultimate place on the ranking of this pillar for the Caribbean cluster. Guyana takes advantage over Suriname for its better results in nearly all the variables, except for the percentage of individuals using the Internet and the e-Government development index.





Variation of Guyana in IDB ranking comparing to 2014

Public Policy and Strategic Vision



Guyana climbs one position in the Public Policy and Strategic Vision ranking. This position rise is mainly motivated by the good status of broadband development plans and a more favourable public policy quality for private sector promoting.

Strategic Regulation



Relating to Strategic Regulation, Guyana gets the same place in the ranking of almost every variable of this pillar. Although Guyana, compared with the rest of the IDB countries, gets better in terms of fixed broadband monthly tariffs and gets worse in mobile broadband market concentration it is not enough to change its position in the Strategic Regulation ranking.

Infrastructure



Guyana shows improvements with respect to the rest of the IDB countries regarding to number of secure internet servers, percentage of households with a computer and broadband subscriptions. These improvements leads Guyana to go up one position in the Infrastructure pillar.

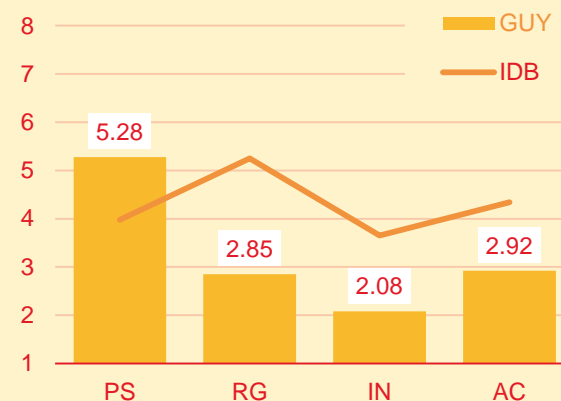
Application and Capacity



In spite of the fact that Guyana loses positions in several variables of the Application and Capacity pillar, the stronger deterioration of other countries compensates these losses, enabling the country to maintain its position in the Application and Capacity ranking.

Guyana

Population:	803.680 inhabitants
Surface Area:	214.970 Km ²
Population Density:	4 inhabs./Km ²
Households:	202.020 households
Persons per household:	4
GDP:	5.513.777.538 USD PPP
GDP per capita:	6.861 USD PPP



PS: Public Policy and Strategic Vision
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Guyana

Country situation by pillar compared to the cluster:

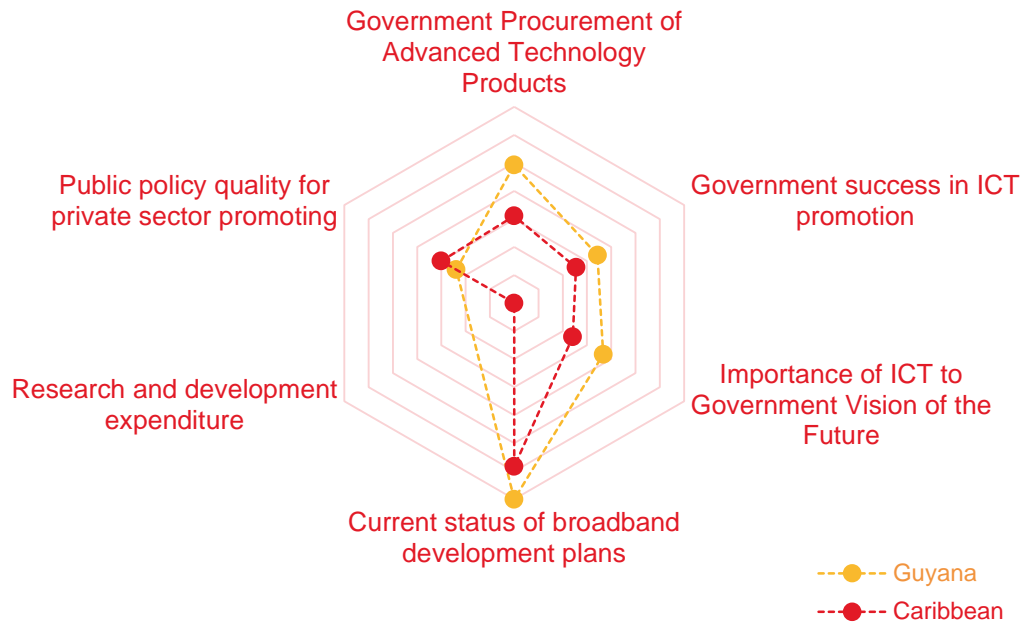
• Public Policy and Strategic Vision:

Although Guyana does not seem to have good-quality public policies for private sector development promotion, the great scores on the rest of the variables of the pillar, place the country in the first position of its cluster ranking for Public Policy and Strategic Vision. Indeed, just three other IDB member countries reach a higher score on the variable that measures the Government procurement of advanced technology products.

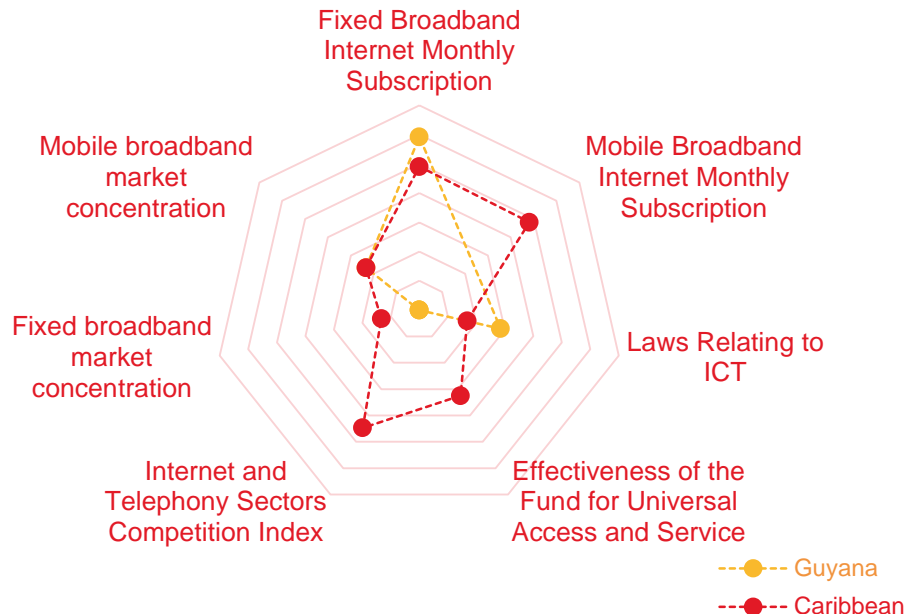
• Strategic Regulation:

Among all the Caribbean countries, Guyana is the one with the poorest results in reference to the Strategic Regulation status. The main cause of this situation is the value of the Internet and Telephony Competition Index as it is an indicator in which the rest of the countries, including Haiti, reach a much better score. This fact, along with the absence of a Fund for the extension of the Universal Access and Service, is more than enough to relegate Guyana to the last position in the ranking of the pillar.

Public Policy and Strategic Vision



Strategic Regulation



Guyana

Country situation by pillar compared to the cluster:

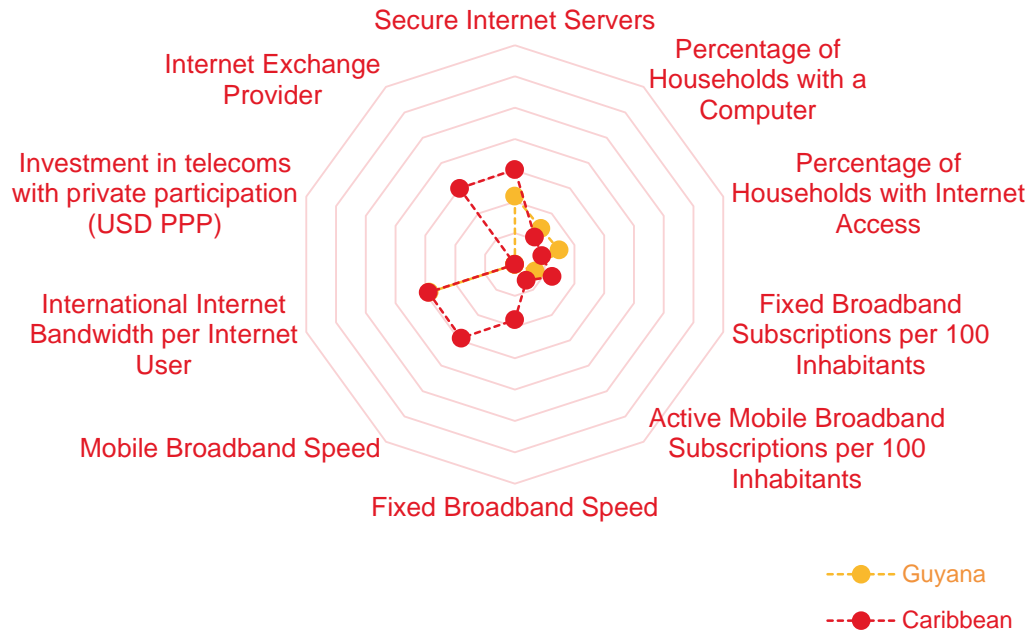
• Infrastructure:

Guyana gets its minimum score in this pillar, the same as Jamaica and Bahamas. There has not been implemented an IXP in the country and that is the reason why Guyana is one of three Caribbean countries with a score in international Internet bandwidth below four points. Besides, Guyana is the country with the lowest mobile broadband penetration among all the IDB member countries.

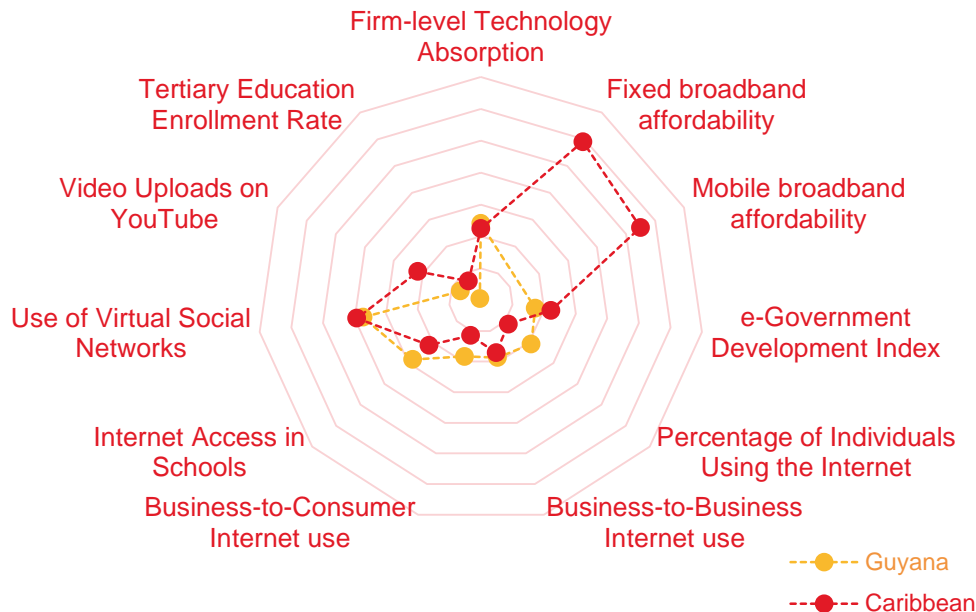
• Application and Capacity:

The score in the pillar regarding adoption and use of broadband and ICT enables Guyana to take advantage over Suriname. Although Suriname wins on number of Internet users and on the e-Government development level, Guyanese business companies use the Internet more intensely and have a higher grade of technology absorption than Surinamese ones.

Infrastructure

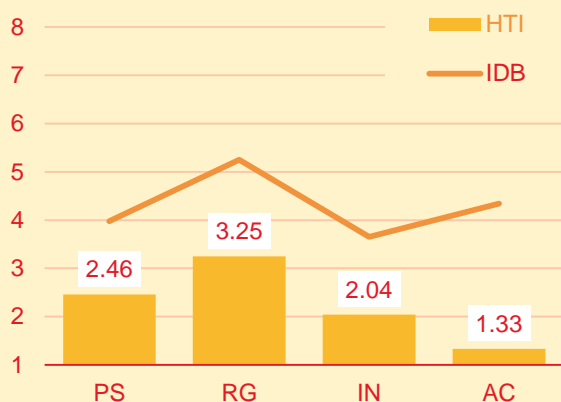


Application and Capacity



Haiti

Population:	10.461.000 inhabitants
Surface Area:	27.750 Km ²
Population Density:	380 inhabs./Km ²
Households:	2.357.400 households
Persons per household:	4
GDP:	18.308.615.205 USD PPP
GDP per capita:	1.750 USD PPP



PS: Public Policy and Strategic Vision
 RG: Strategic Regulation
 IN: Infrastructure
 AC: Application and Capacity

Variation of Haiti in IDB ranking comparing to 2014

Public Policy and Strategic Vision



Haiti improves in absolute terms as far as the status of broadband plans, the Government procurement of advanced technology products and the policy quality for private sector promoting concerns. These progresses enable Haiti to leave the last position in the pillar, surpassing Venezuela in the ranking.

Strategic Regulation



Haiti preserves its position in almost every variable of the Strategic Regulation pillar allowing the country to keep its position in the pillar. Haiti presents a comparative deterioration with respect to the other IDB countries in the mobile broadband market concentration at the same time it presents a relative improvement in the mobile broadband monthly tariffs.

Infrastructure



Infrastructure pillar is the one in which Haiti reaches the best position even though this year it losses a position. The country preserves its position in almost every variable of the pillar with the exception of the fixed broadband speed, which maintains its absolute value but loses a position in the ranking of the variable. However, other countries' improvement drives Haiti to lose a position in the Infrastructure pillar.

Application and Capacity



Regarding the Application and Capacity pillar, Haiti reveals a relative progress in Business-to-Business Internet use but the country also reveals a relative worsening in the use of virtual social networks. Even so, the country preserves its position in the rest of the variables of the pillar allowing Haiti to maintain its position in the ranking of the pillar.



Haiti

Country situation by pillar compared to the cluster:

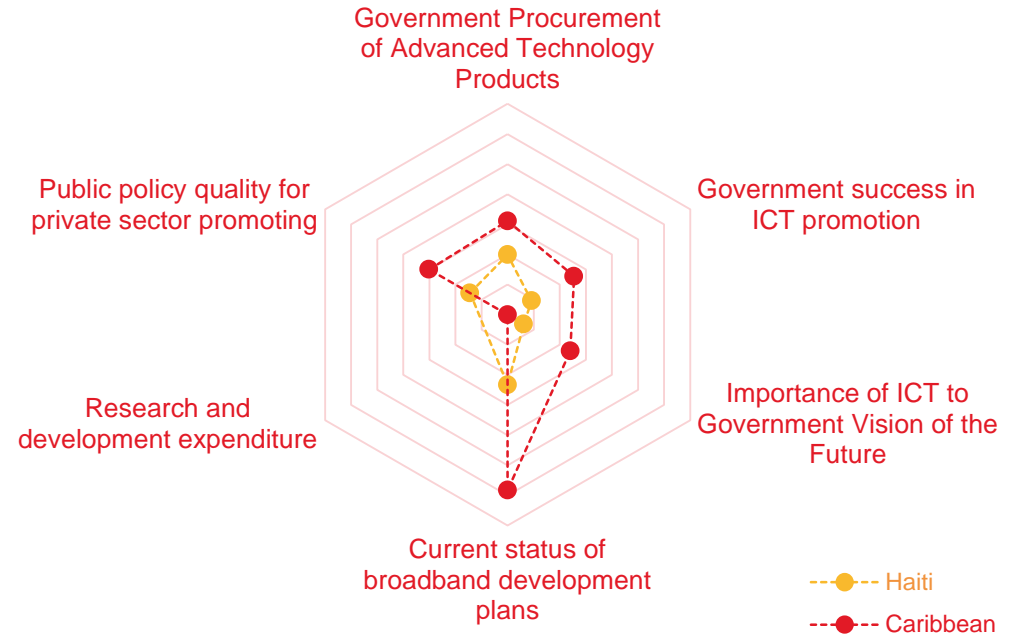
- Public Policy and Strategic Vision:

Haiti is the Caribbean country with the worst results on all the variables of the pillar. The status of the broadband development plans is the poorest one. Moreover, the public policies quality for private sector promotion is very low and the same happens with the Government policies on ICT promotion and vision for its future.

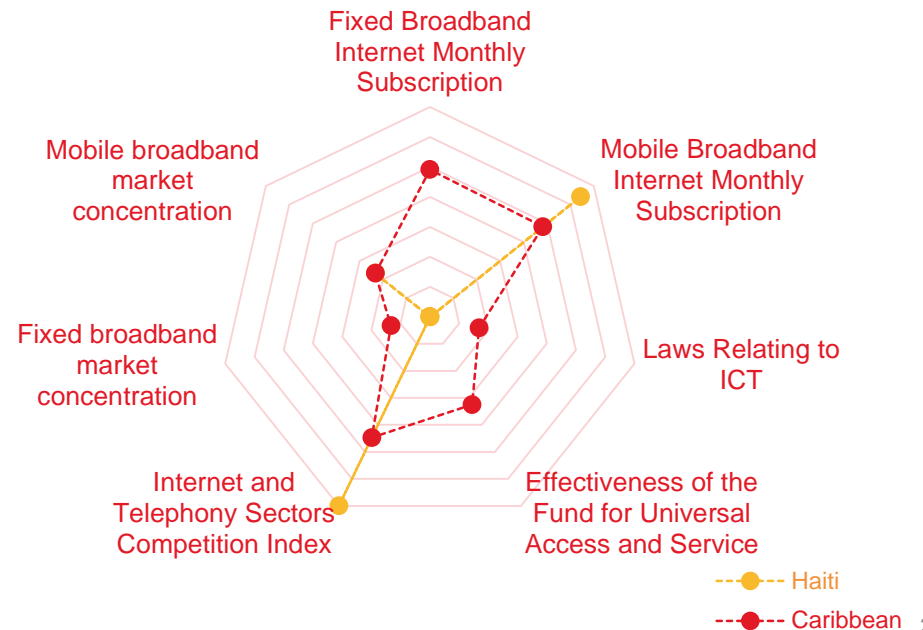
- Strategic Regulation:

Haiti gets its greatest score in the Strategic Regulation pillar. Amongst all the IDB countries, Haiti is the country with the cheapest prices in mobile broadband plans. Additionally, the country reaches the highest possible value in the Internet and Telephony competition index. However, the lack of competition in the fixed broadband market with just one operator offering the service and the consequent high prices of the service lead Haiti to the last position of the ranking of the pillar.

Public Policy and Strategic Vision



Strategic Regulation



Haiti

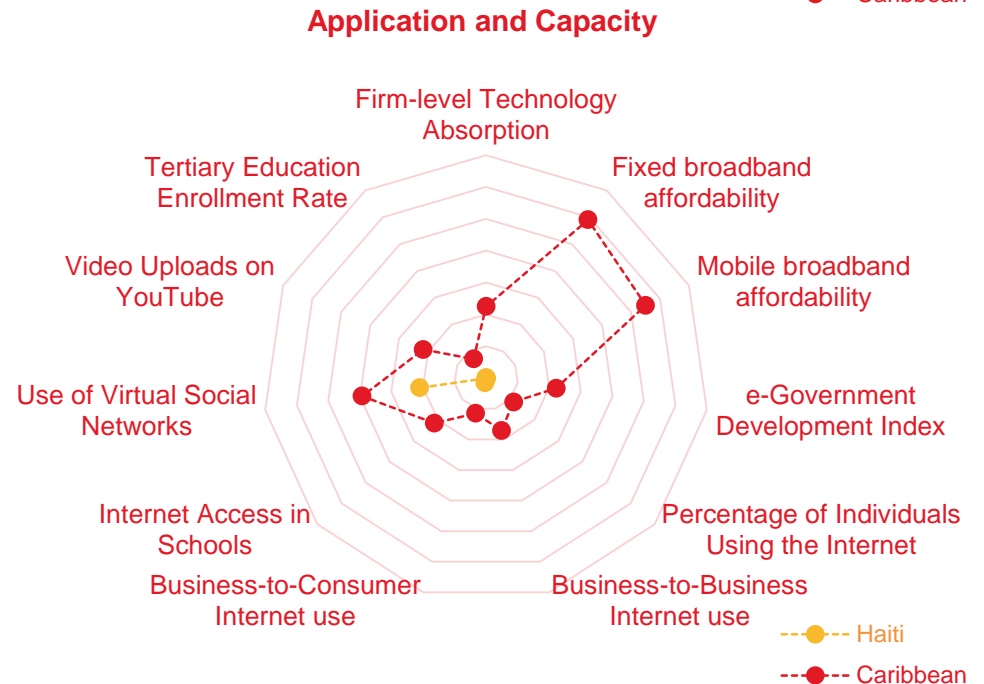
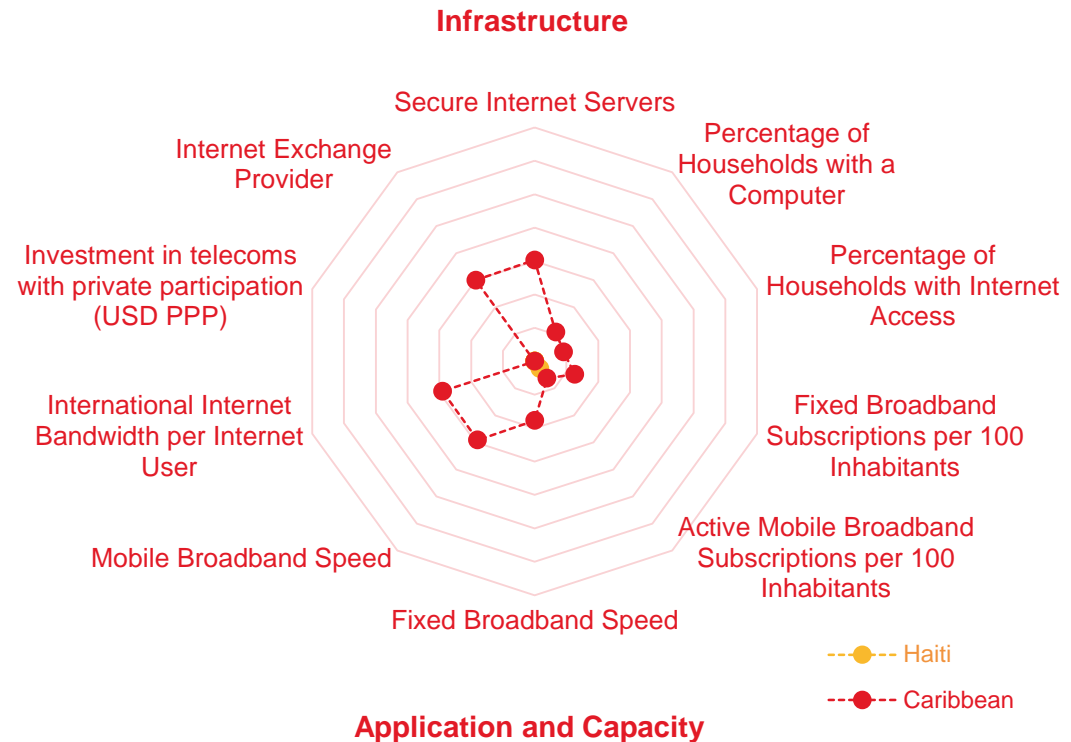
Country situation by pillar compared to the cluster:

• Infrastructure:

Infrastructure is the pillar where Haiti gets the better position, beating Guatemala and Honduras. That is possible due to the existing IXP that has not still been able to assure a good international Internet bandwidth in the country. Despite the fairly recent installation of the IXP, the country is not in a good position in terms of infrastructure with scores around one point in the rest of the variables.

• Application and Capacity:

Haiti gets its lowest score in this pillar, even worse than the score in 2014. Apart from the variables with no data available, Haiti is the IDB member country with the lowest number of Internet users and with the least developed e-Government. In addition, there is only one indicator of the pillar in which Haiti widely passes the minimum value punctuation of one out of eight. That indicator is the use of virtual social networks by particular users and business companies. However, Haiti ranks position number 22 in the ranking of that variable considering all the IDB members.





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