LIME Investor Presentation

September 2010

Introduction
David Shaw

LIME: One company – 13 territories

FY09/10 Revenue	FY09/10 EBITDA	FY09/10 EBITDA – Capex
$873m	**$270m**	**$156m**

Turks & Caicos

Leewards

BVI

St. Kitts

Anguilla

Antigua

Cayman

Jamaica

Montserrat

Dominica

Windwards

St. Lucia

Barbados

St. Vincent

Grenada
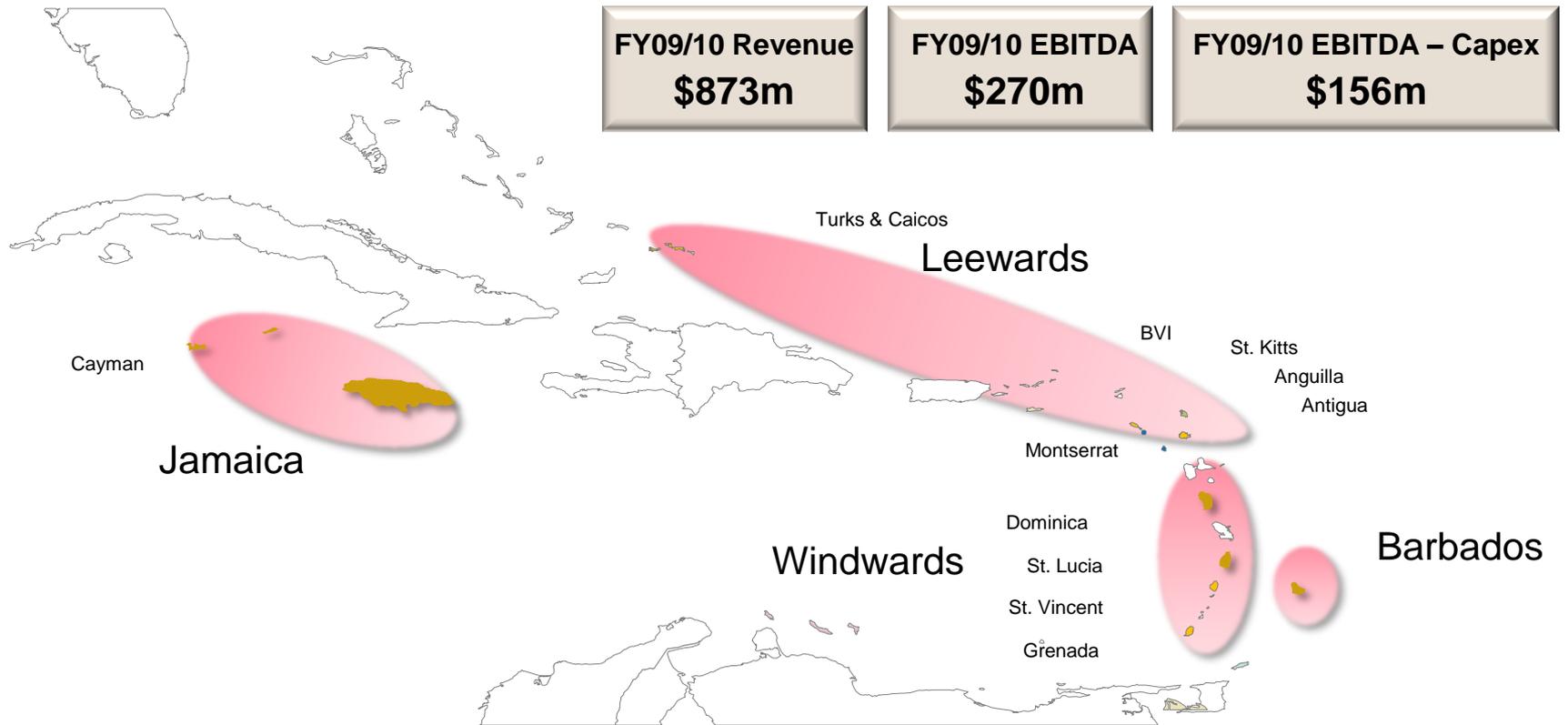
Population: 3.7 million…
~2,800 colleagues…

~ 1.3m mobile subs…
~ 630k fixed line subs…
~ 210k broadband subs…

…140 years serving the Caribbean

LIME

A journey of liberalisation

CWPLC acquires domestic licenses in BVI, Dominica, Montserrat, St. Lucia & Cayman

CWPLC acquisition continues with licenses in Turks & Caicos & Anguilla

Jamaica, Barbados & Grenada join group as full telecoms providers

First mobile competitor launches in Jamaica

12 of 13 markets fully liberalised
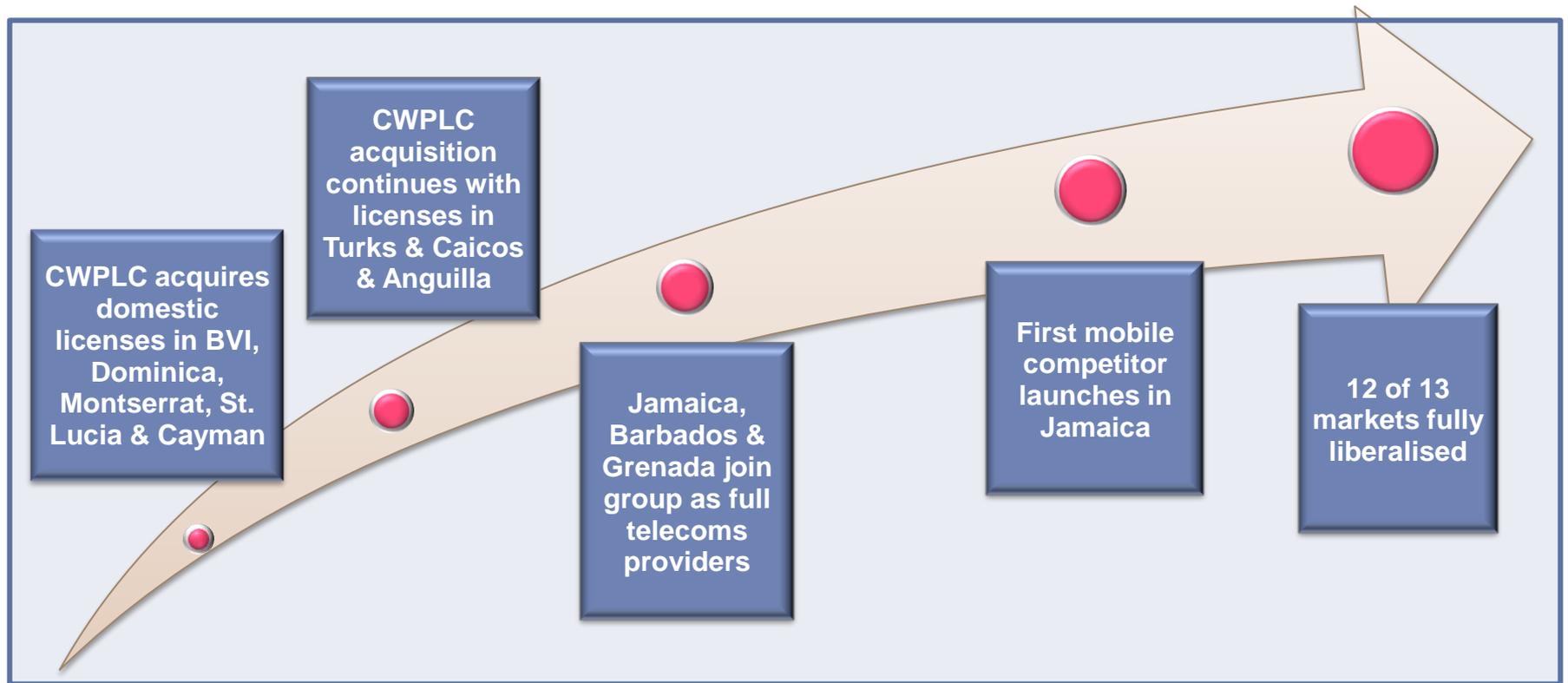
Number of Competitive Markets								
	1965-1970	1970-1975	1975-1980	1980-1985	1985-1990	1990-1995	1995-2000	2000-2005	2005-2010
Fixed	0	0	0	0	0	0	1	2	11
Mobile	0	0	0	0	0	0	10	12	12

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Where we were last August...

| The good...	...And the bad

The good...

- ✓ Strong market positions in most markets
- ✓ A long strong history with our customers, who want us to succeed
- ✓ Incredible footprint of government and enterprise relationships
- ✓ Talented and passionate people
- ✓ A natural place at the heart of Caribbean communities
- ✓ Regional functions have created a strong platform

...And the bad

- ✗ Weak Jamaica position
- ✗ A new brand that still has to emerge from its legacy
- ✗ Under-invested government relationships
- ✗ Lack of client focus in service strategy
- ✗ Low colleague engagement levels
- ✗ Challenging economic backdrop

**A business with significant potential…
…but required an improved way of doing business**

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Reflected in our financial performance

Revenue

-6% CAGR

1,041 → 873

06/07 — 09/10

EBITDA - capex

-9% CAGR

205 → 156

06/07 — 09/10

EBITDA

-8% CAGR

349 (34%) → 270 (31%)

06/07 — 09/10

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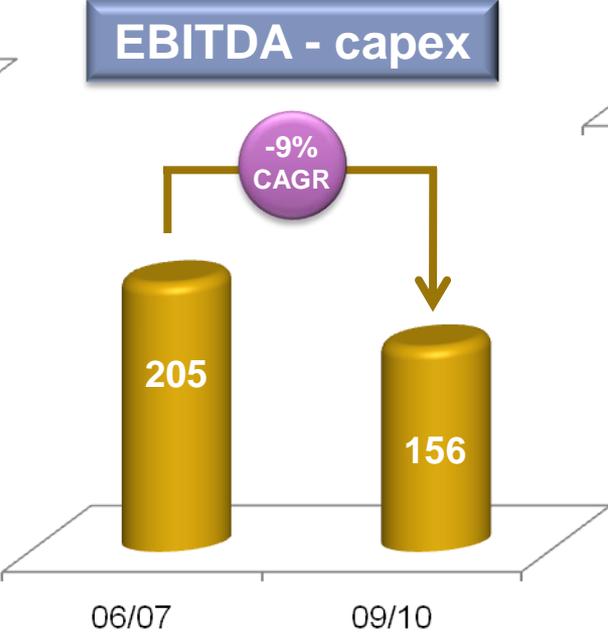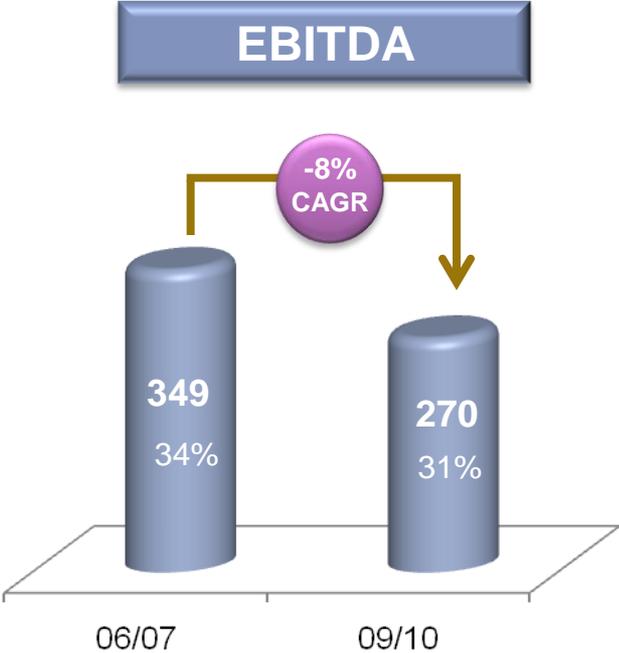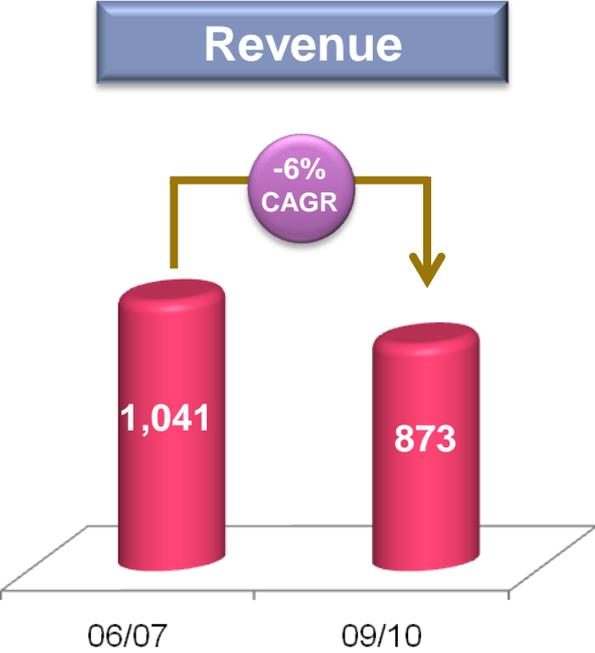
We have a clear strategy for the business

Market Leadership

Culture of performance & accountability

Brand which resonates strong family, community & social values

Platform for EBITDA growth via products & service delivery

… Scalable business model

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We have market leadership in most of our markets...

LIME is the #1 broadband provider in all 13 markets...
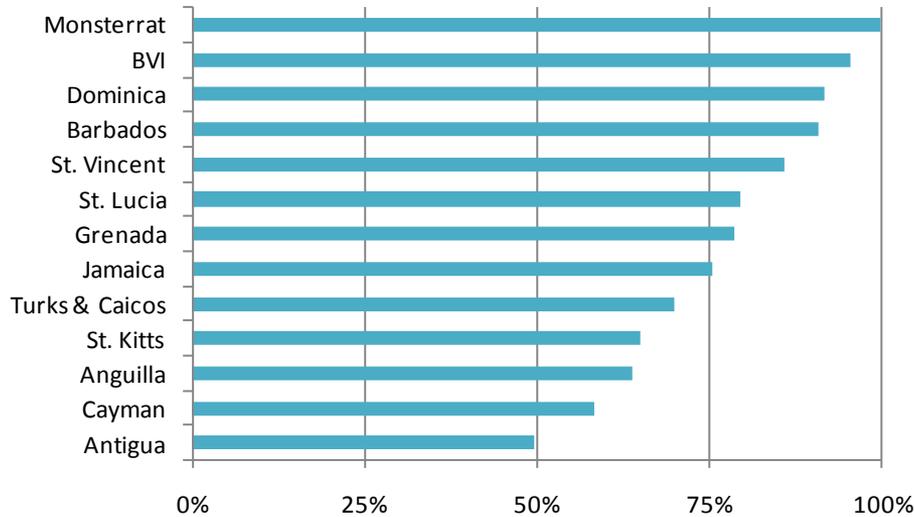
...and the #1 mobile provider in the majority

Estimated Market share data as of June 2010 • Handset Market share data provided.
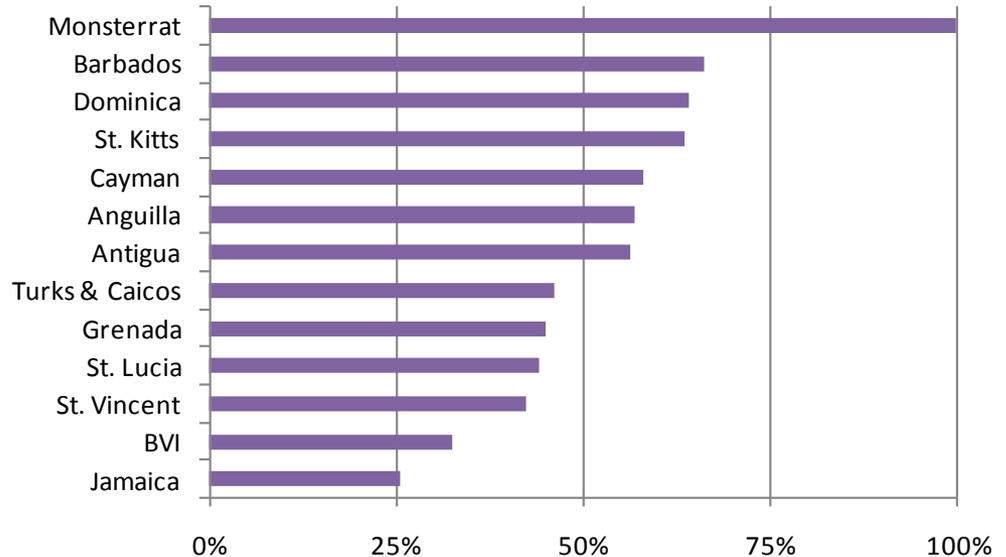
In spite of a fully competitive industry

Telephony	Internet	Mobile	Pay TV

Market Leader

| LIME share **90%** | LIME share **78%** | LIME share **36%*** | Local Cable Operators THE CABLE share **90%** |

Telephony:
- TeleBarbados — Every bit faster!
- Columbus Networks — Flow
- KARIB CABLE

Internet:
- Columbus Networks — Flow
- Local Cable Operators — THE CABLE
- KARIB CABLE

Mobile:
- Digicel group
- Claro
- SUNRISE TELECOM

Pay TV:
- LIME
- Columbus Networks — Flow
- KARIB CABLE
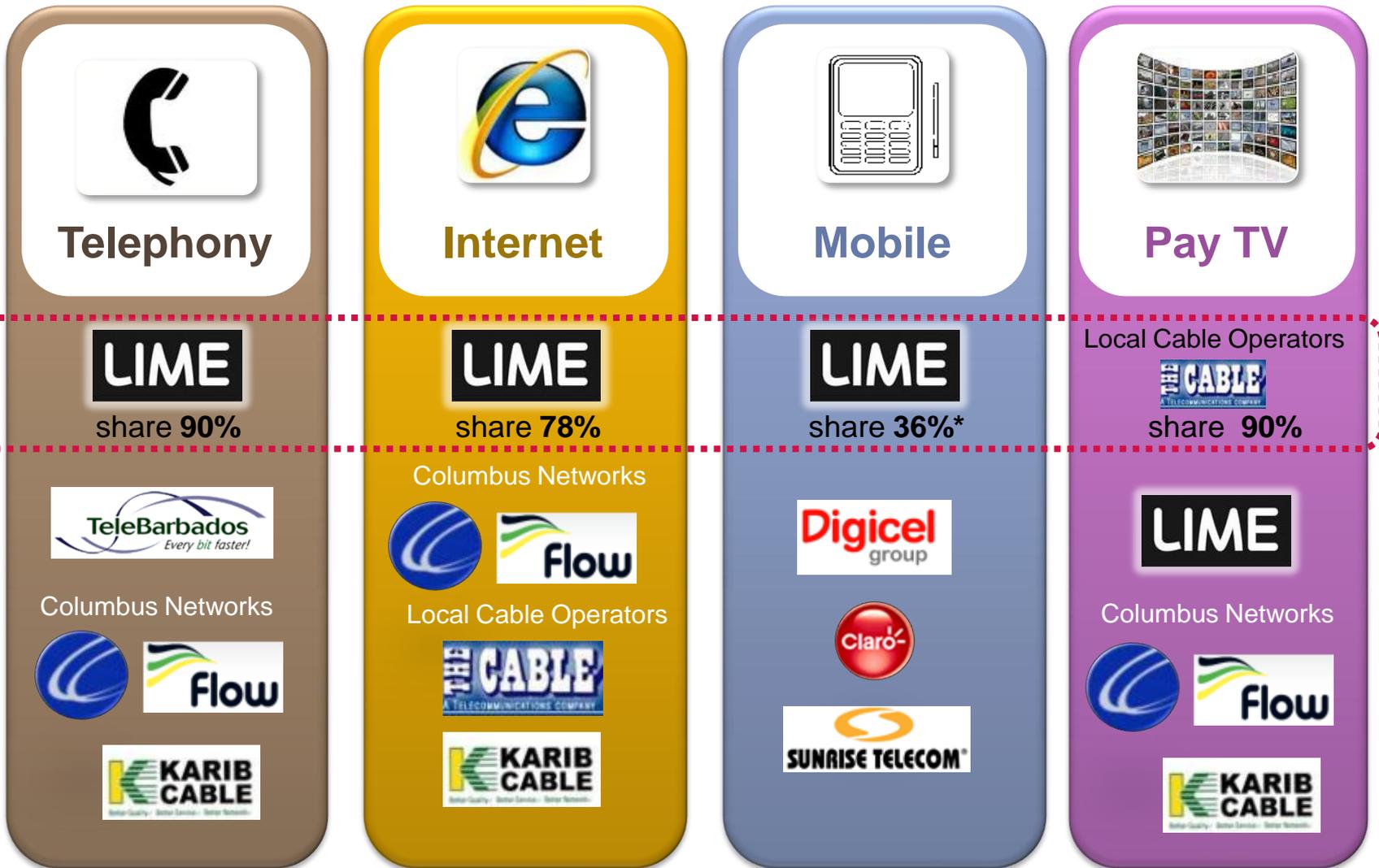
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*Excluding Jamaica LIME's Caribbean mobile market share is 54%.
Estimated Market share data as of June 2010 • Handset Market share data provided.*

8

There is plenty of room to grow in our existing geographic markets
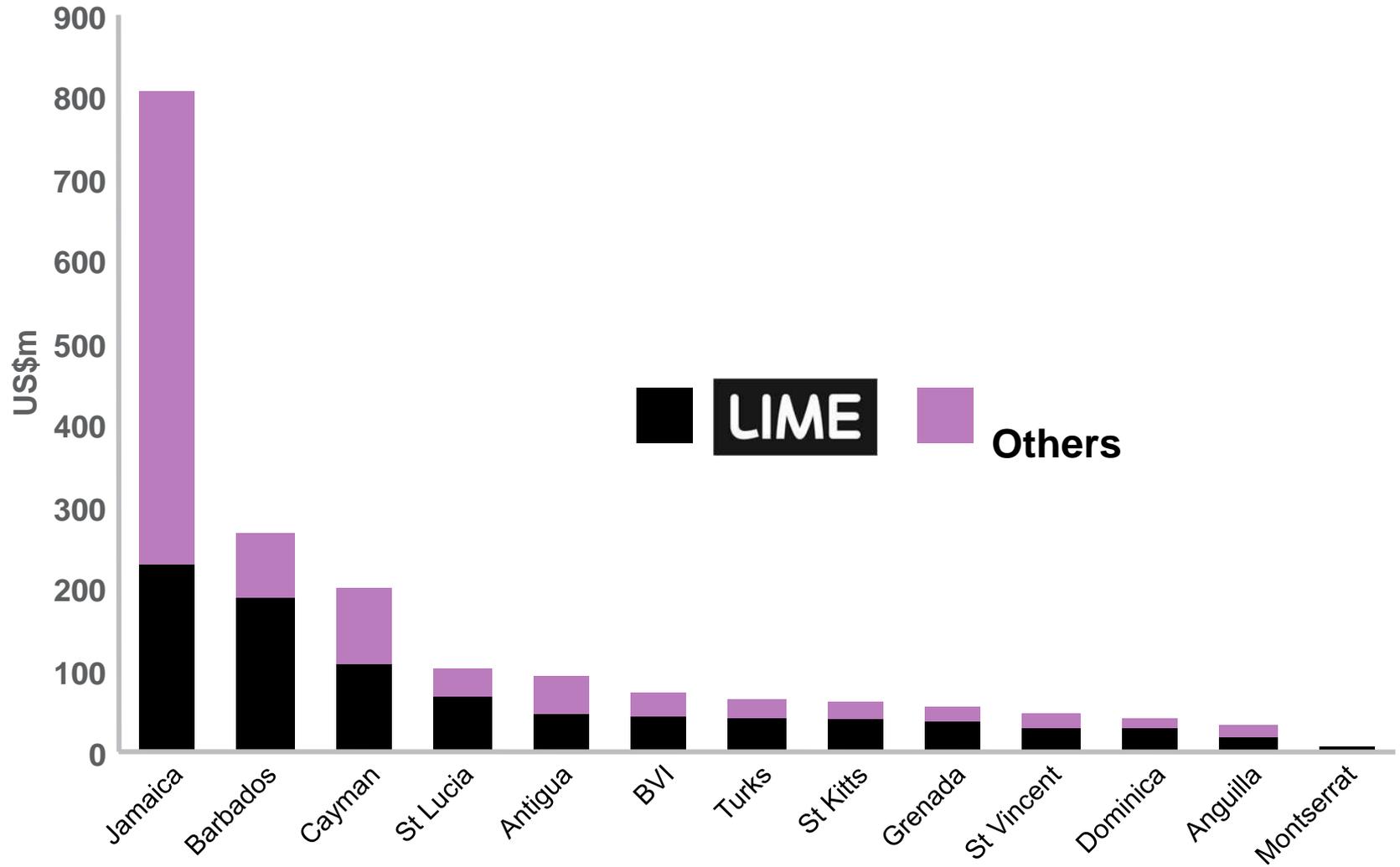
And we see opportunities in new products and services...

Carrier Sales	• Leverage existing assets • Invest in strategic cable opportunities
Enterprise & Governments	• Leverage strong Regional & Govt relationship • Utilise pan-Caribbean strategies
Connected Home Double & Triple play	• Launch pan-Caribbean TV product • Ignite Broadband product • Position LIME as a lifestyle brand
Mobile TV	• Launch Jamaican mobile TV product • Fuel Winback Jamaica strategy
Mobile Internet	• Launch 3G/4G in strategic locations in Caribbean • Lay foundation for mobile data rapid expansion

LIME

We have assembled a strong LIME leadership team

Donald Austin
EVP – Legal & Reg
National of Barbados

David Shaw
CEO
National of UK

Milton Brady
Chief Commercial Officer
National of Jamaica

Henry Reid
EVP – Human Resources
National of Jamaica

David Crawford
Chief Operations Officer
National of UK

Chris Dehring
Chief Marketing Officer
National of Jamaica

Gerard Borely
Chief Financial Officer
National of Trinidad

Unlocking the potential of our people is key

Where We're Going

How We're Getting There

People are our Competitive Advantage

Values led, Performance driven

Right person, Right role

Caribbean #1 Employer

Performance Culture

Talent

Career Paths

With a brand that resonates with the community
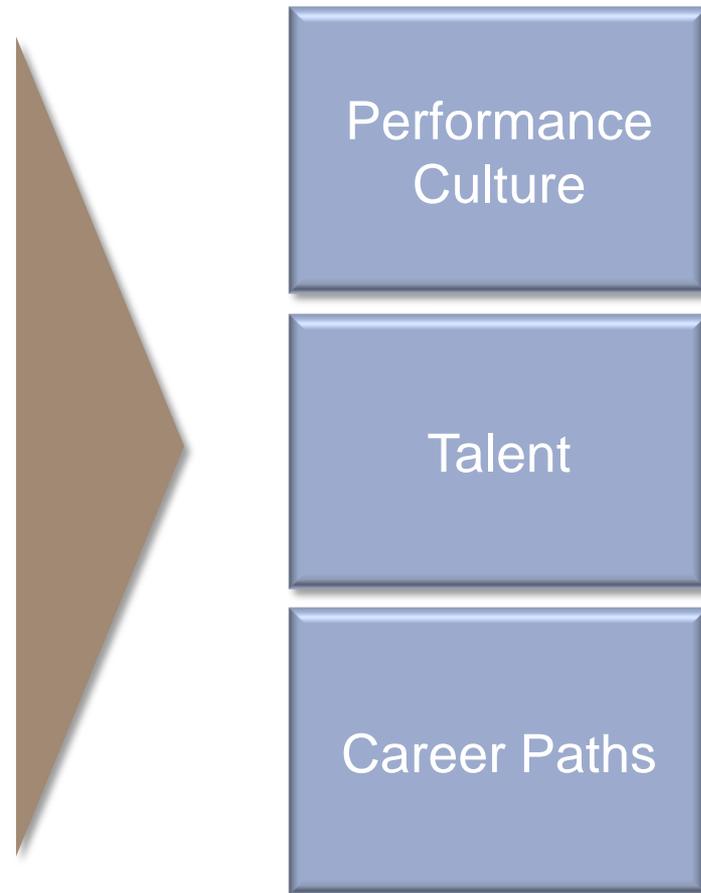
Delivered by a single unified regional business

Local Operations
where we need to remain nimble

- Local government & community relations
- Local marketing & advertising
- Local consumer sales & service
- Local promotion development & implementation

Regional Operations
where there are economies of scale

- Core networks & systems: strategy, design, plan, build, operate
- Remote network management via the NOC
- Remote customer support via Contact Centres
- Procurement & supply chain
- Product Mgt & Customer Segment Strategy
- Business High Value Account Management
- Finance & HR shared service centers

3rd Party Partners
To access world class practices & pricing

- 2 out of 3 Contact Centres
- Network Transformation
- CPE financing and account development

The Organizational Platform is solid and well aligned
The Delivery Platform is now well established and increasingly scalable
**The Service Platform is developing and on track**

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Economic & Regulatory Context
Gerard Borely

The Caribbean economy is challenging…

- Continued regional economic contraction; business activities, tax receipts and foreign exchange inflows continue to decline

- Continued high unemployment - government and business lay-offs and/or wage freezes

- Several countries have received and/or are awaiting IMF/multi-lateral agency budgetary support

- Governments raising taxes and user-fees

- Governments seeking to reduce expenditure/improve efficiency via strategic alliances

- Despite a few failures (Stanford, CLICO), the financial sector remains sound; reducing interest rates to stimulate investment

- Tourist arrivals are rebounding, buoyed by heavy discounting - but earnings from the sector have not recovered

..and will remain difficult in 2010

2010 Caribbean Tourism Trends
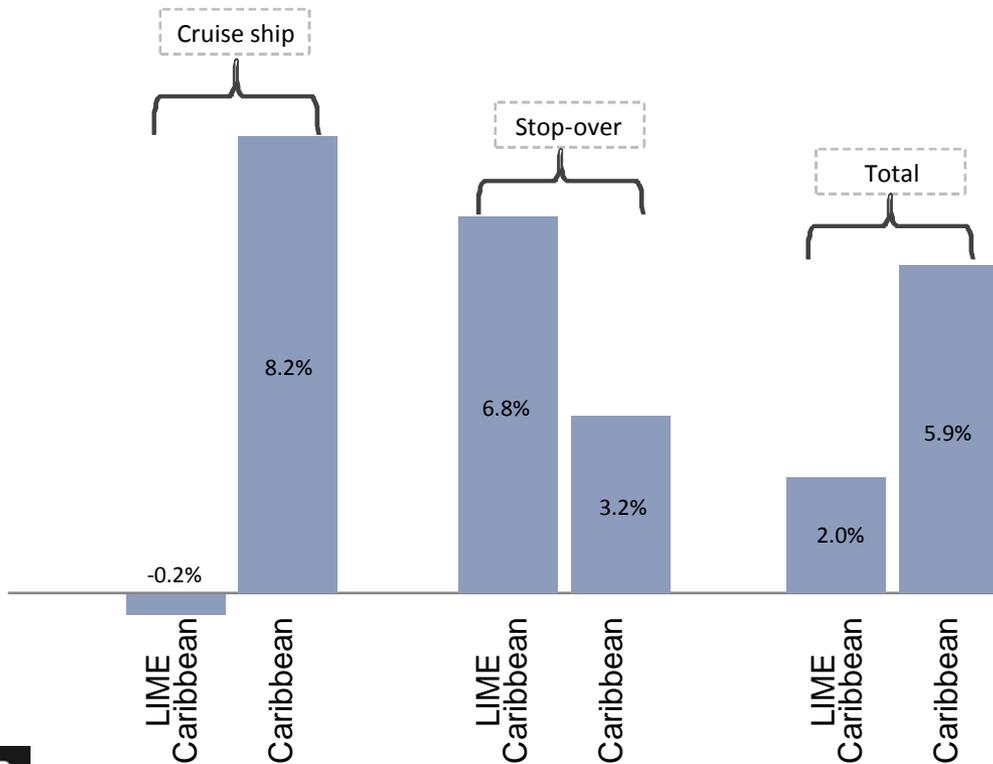
	YTD 2009	YTD 2010	Var
Stop-over			
Barbados	229,472	236,661	3.1%
Cayman	109,053	115,196	5.6%
Jamaica	485,097	529,934	9.2%
St. Lucia	100,577	109,514	8.9%
Cruiseship			
Barbados	350,298	347,789	-0.7%
Cayman	632,861	604,760	-4.4%
Jamaica	277,293	310,720	12.1%
St. Lucia	377,124	359,394	-4.7%
TOTAL			
Barbados	579,770	584,450	0.8%
Cayman	741,914	719,956	-3.0%
Jamaica	762,390	840,654	10.3%
St. Lucia	477,701	468,908	-1.8%

Excluding Jamaica LIME's business has broadly ridden the macro economy

Caribbean Excl Jamaica

GDP Growth (Barbados)

04/05	05/06	06/07	07/08	08/09	09/10
4.8%	3.9%	3.2%	3.4%	0.6%	-2.9%
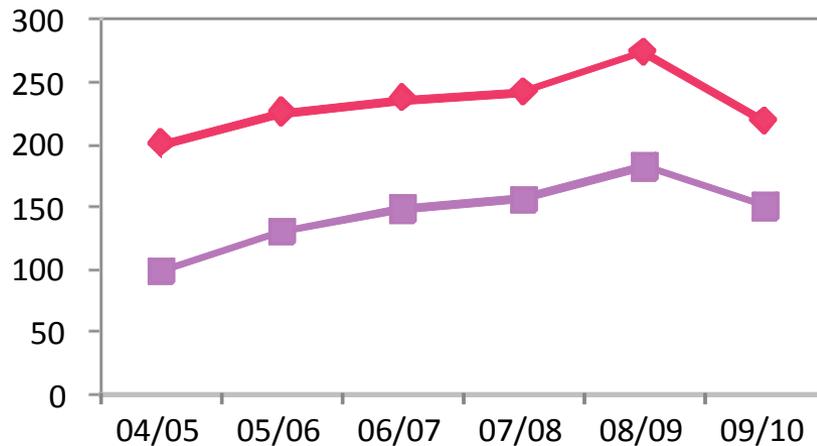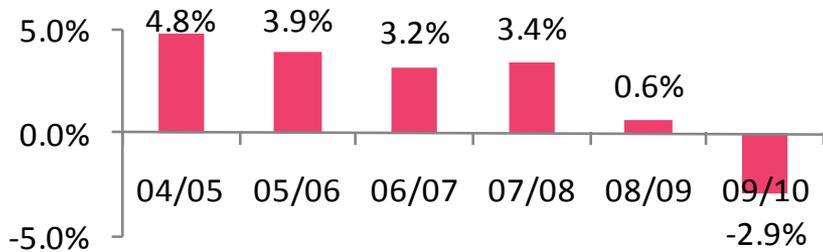
EBITDA — EBITDA - Capex

> Successfully held market share
> Growth in line with GDP

Jamaica

GDP Growth (Jamaica)

04/05	05/06	06/07	07/08	08/09	09/10
1.4%	1.0%	2.7%	1.4%	-1.2%	-4.0%
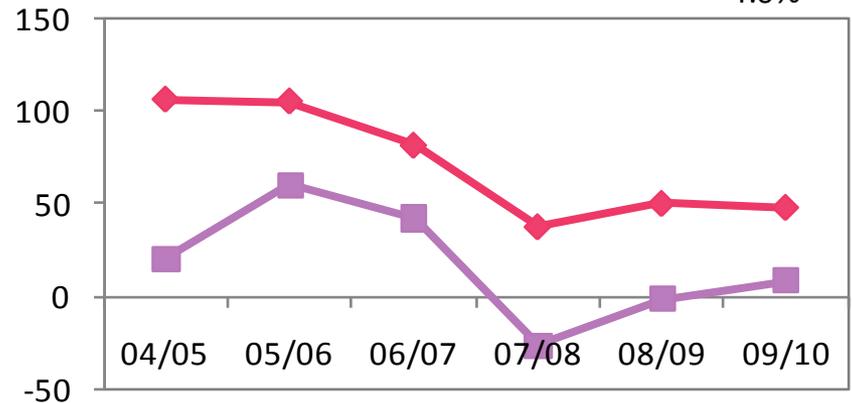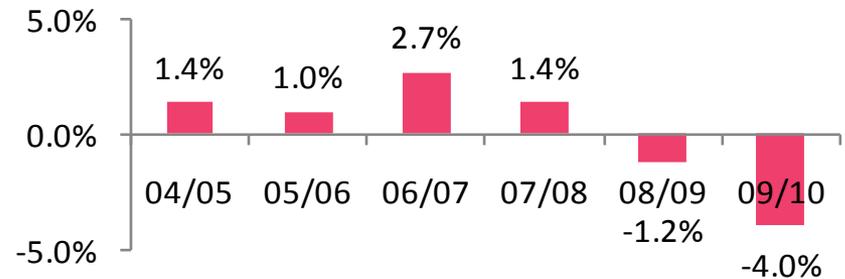
EBITDA — EBITDA - Capex

> Progressive loss of market share
> Historical decline in currency yoy which has now stabilised

# Key regulatory issues for the next two years …

- Mobile Number Portability
  - Regulatory obligation in the Cayman Islands
- Retail Price Regulation
  - Only ex-post competition regulation required
  - Pricing flexibility
  - Bundled offers
- Mobile Termination Rates and other interconnect charges
  - Cost oriented
  - Different rates for internationally-originated traffic
- Broadband Television
  - Lobby against piracy

Financial Performance
Gerard Borely

A business with strong cash conversion despite economic downturn…

$m (reported)

09/10 revenue	CoS	Gross margin	Opex	EBITDA	Capex	Cash exceptionals	OCF
873	(227)	646	(376)	270	(114)	(46)	110
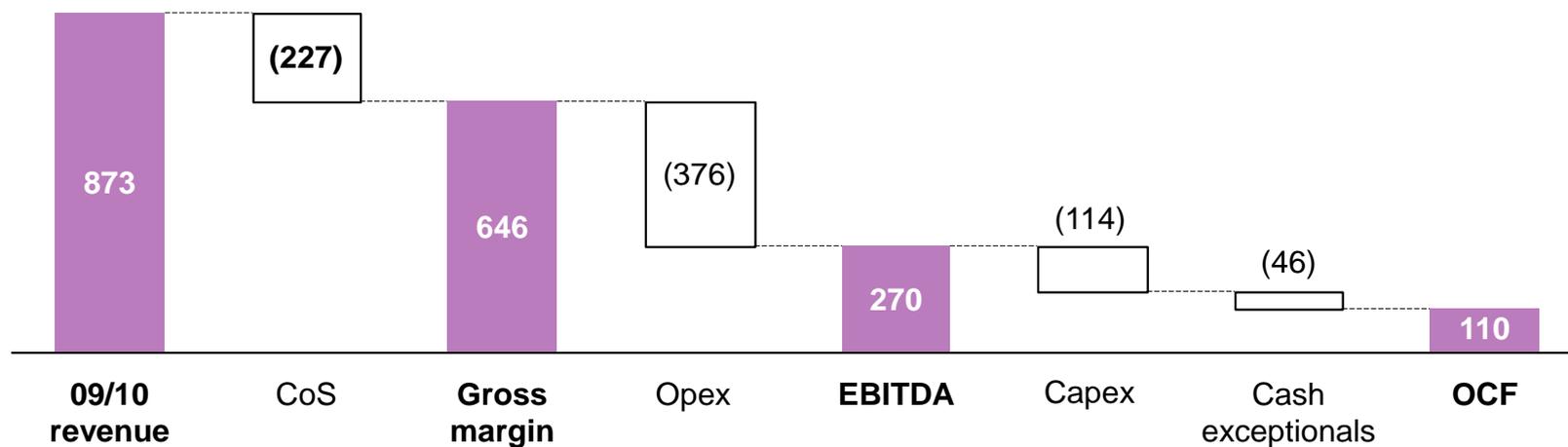
Highlights

- EBITDA margin maintained in H2
- Good cash conversion of profit
- Cash exceptionals coming to an end with the conclusion of One Caribbean
- FX headwind impact: revenue $46m, EBITDA $12m

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22

# A diverse geographic and product line profile …

2009/10
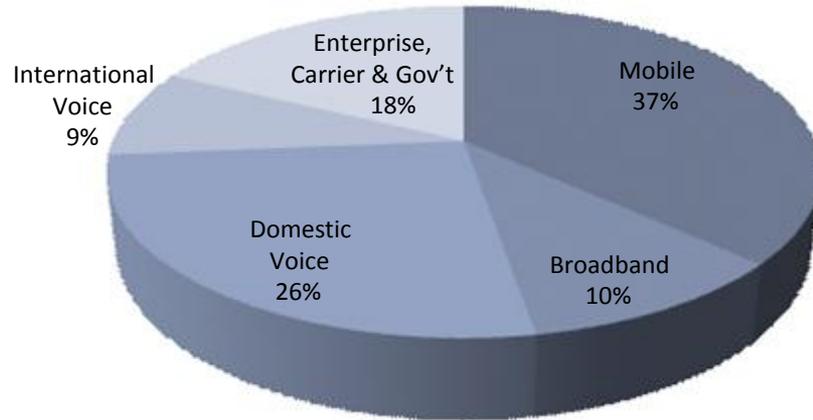
2008/09
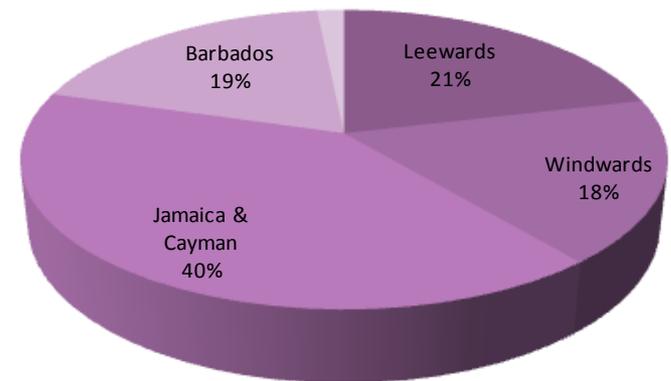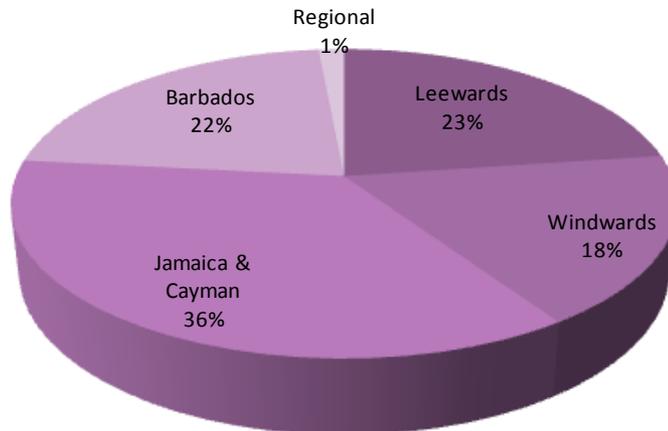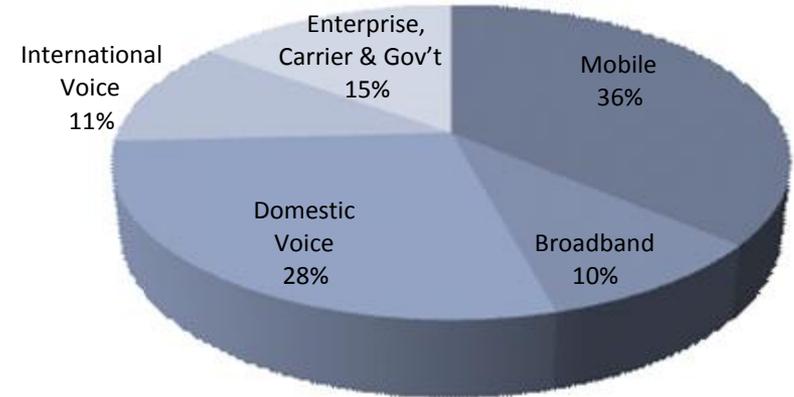
…with opportunities in Gov't, broadband and Jamaica & Cayman

Growth in customer numbers...

Customers

Mobile

1260 → 1254 → 1271
1% (08/09 to 09/10)

Broadband

187 → 199 → 211
6% (07/08 to 08/09), 6% (08/09 to 09/10)

Fixed

697 → 662 → 637
-5% (07/08 to 08/09), -4% (08/09 to 09/10)

07/08   08/09   09/10

ARPUs

Mobile

25 → 25 → 21
0% (07/08 to 08/09), -16% (08/09 to 09/10)

Broadband

41 → 40 → 38
-2% (07/08 to 08/09), -5% (08/09 to 09/10)

Fixed

46 → 46 → 39
0% (07/08 to 08/09), -15% (08/09 to 09/10)

07/08   08/09   09/10
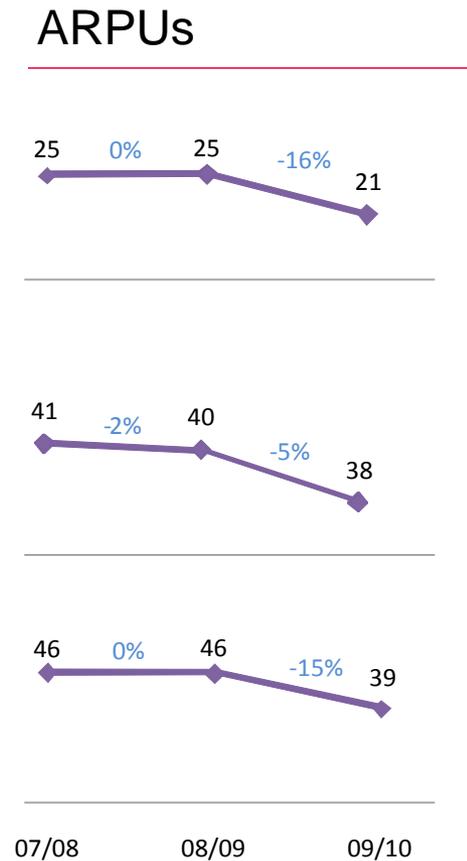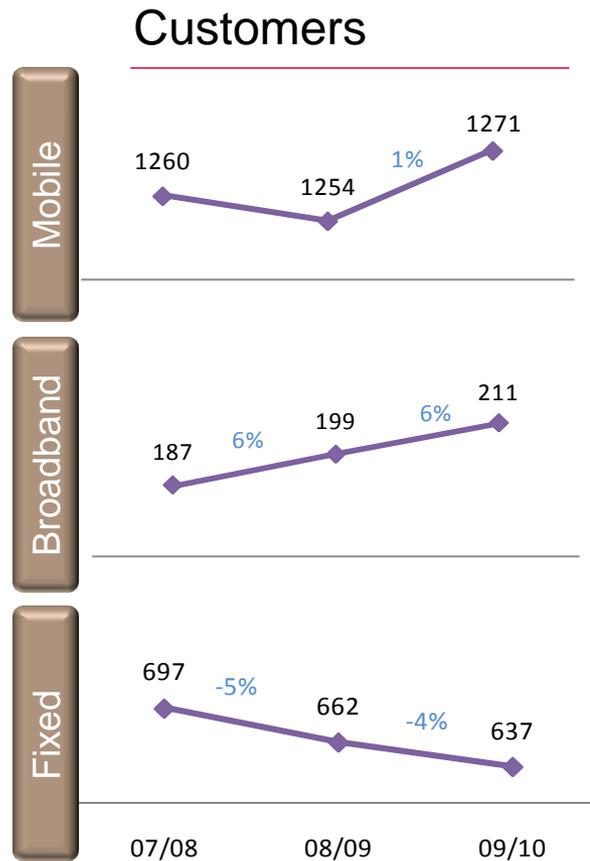
- 35% Mobile market share
- 79% broadband market share
- 93% fixed market share

- Fixed ARPU decreasing due to fixed to mobile substitution
- Tough economic conditions drove mobile ARPU down in 09/10

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Positions us for upside in economic recovery

24

Top-Line HoH & QoQ Trends
…and Q1 2010 trends indicate that the economic challenges continue

| Mobile | Broadband | Fixed |

Mobile subs (000s)

Broadband subs (000s)

Fixed subs (000s)
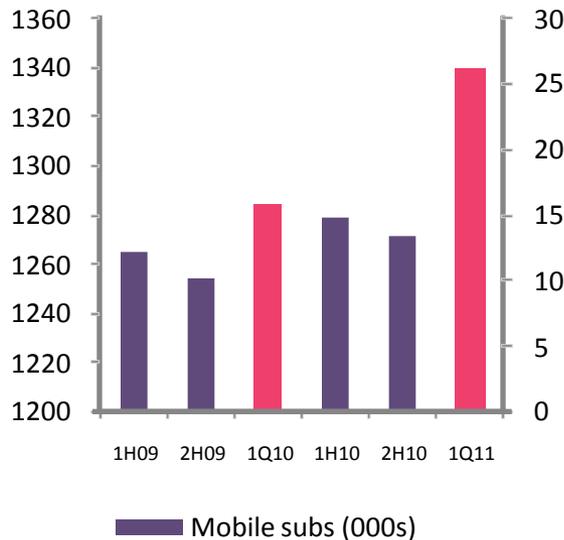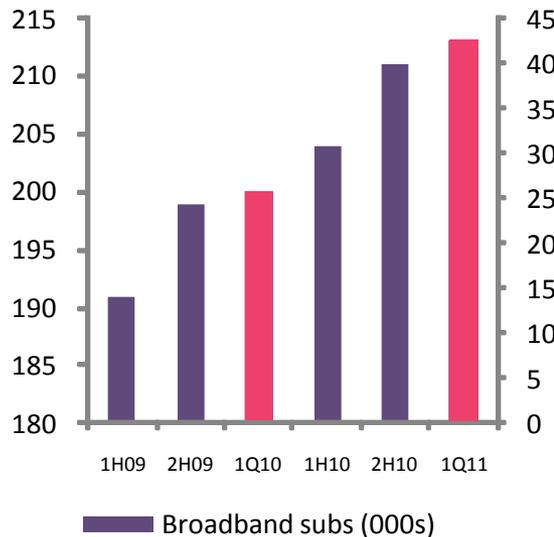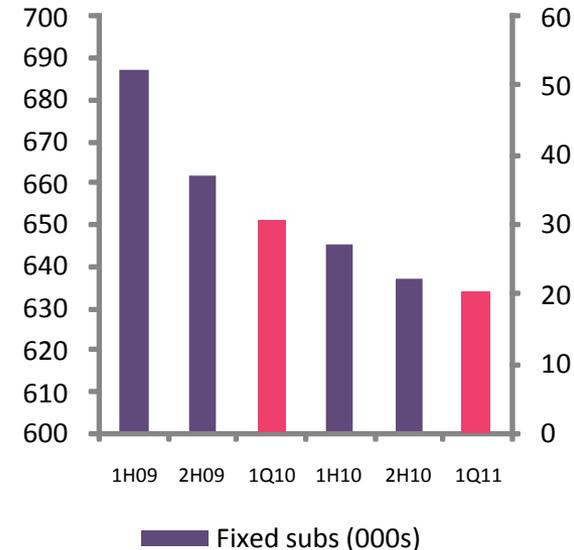
- Strong 5% QoQ growth in mobile customers
- Mobile ARPU down 10% on previous half and 14% from 1Q10

- Modest 1% QoQ growth in broadband customers
- Broadband ARPU remaining stable on previous half despite down 5% from 1Q10

- <1% QoQ decline in customer base
- Fixed ARPU down 5% on previous half and down 10% from 1Q10

Mobile Top-Line Performance

There are positive future indicators such as growth in mobile non-voice

Revenue Mix	Customers	ARPUs
Postpaid	• Seeing growth despite economic downturn	• Remain fairly strong despite economic downturn
Prepaid	• Modest growth in 09/10 after a contraction in 08/09 due to Jamaica's performance	• yoy decline >10% as competitive threats drive prices downwards
Inbound Roaming	• Visitor arrivals decline >10% across the Caribbean in 2010	• >40% yoy decline in inbound roaming revenues in 2009/10 reflective of weak economic climate
Data	• Smart phone penetration in Caribbean shows strong growth • 3G launch in Jamaica in 2009 further fuels growth in non-voice customer base	• >20% yoy increase in data revenues

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Financial performance trends

Despite cost containment, the challenging economy has impacted the bottom-line

Gross Margin $m

70%   74%   74%

07/08   08/09   09/10

Opex $m

419   381   376

07/08   08/09   09/10

EBITDA $m

292   337   270

07/08   08/09   09/10
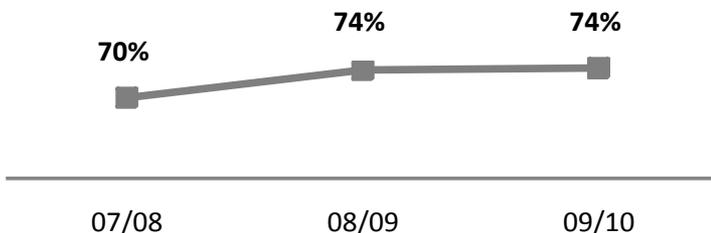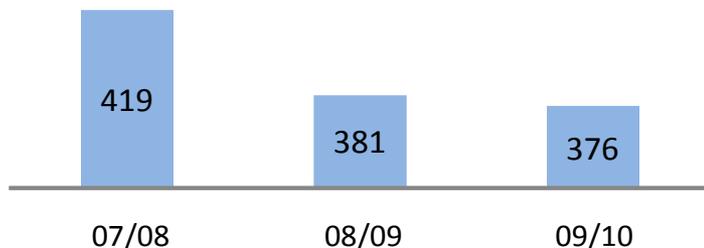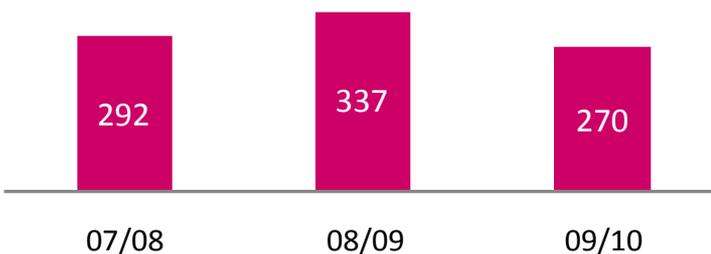
Gross Margin
- Revenue initiatives
- Optimising product/proposition mix
- Procurement benefits from One Caribbean

Cost Efficiency Focus
- Inflationary headwind
- Improved controls
- One Caribbean program
- Improved reporting and analysis of our results and key products

Drive EBITDA Margin
- Excluding Jamaica, LIME's EBITDA margin is 35% in 09/10

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Financial Performance Trends
Despite tough economy, business generates strong cash flows

Capex ($m)

07/08	08/09	09/10
176	150	114
17%	15%	13%

EBITDA – capex ($m)

| 07/08	08/09	09/10
116	187	156
11%	19%	18%
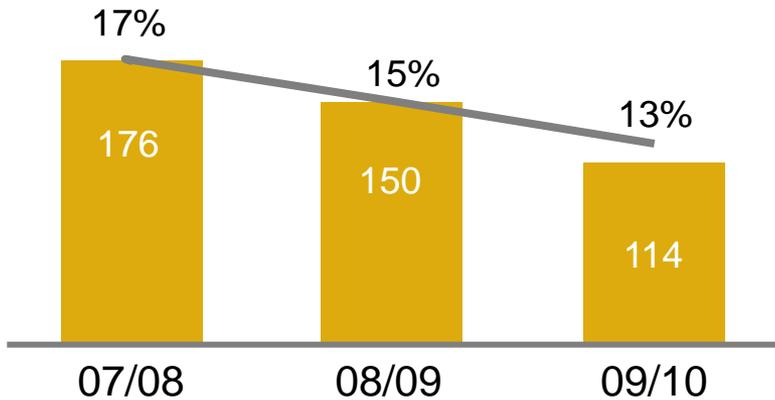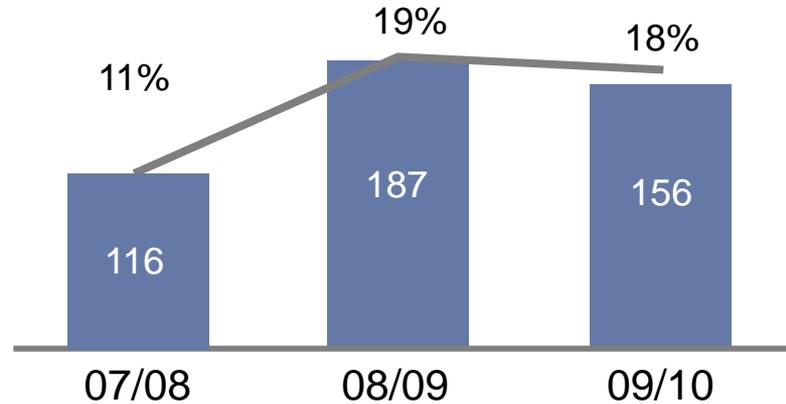
Capex Management

- Efficient capex management

- Strong supply chain management with 3rd party vendors

- Project Management control through single PMO function

Strong Cash Conversion

- Cash management

- Exceptional cost controls

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Building the scalable platform
David Crawford

# We are mid way through building a robust and scalable operating platform

2009 | 2010-11 | 2011-12

| The regional operating structure was put in place | Driving efficiency & scalability through investment in infrastructure, systems and processes | Delivering region-leading levels of operating performance and service |

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2009 created the "One Caribbean" structure

Turks & Caicos

Leewards

BVI

St. Kitts

Anguilla

Antigua

Cayman

Jamaica

Montserrat

Dominica

Windwards

St. Lucia

Barbados

St. Vincent

Grenada
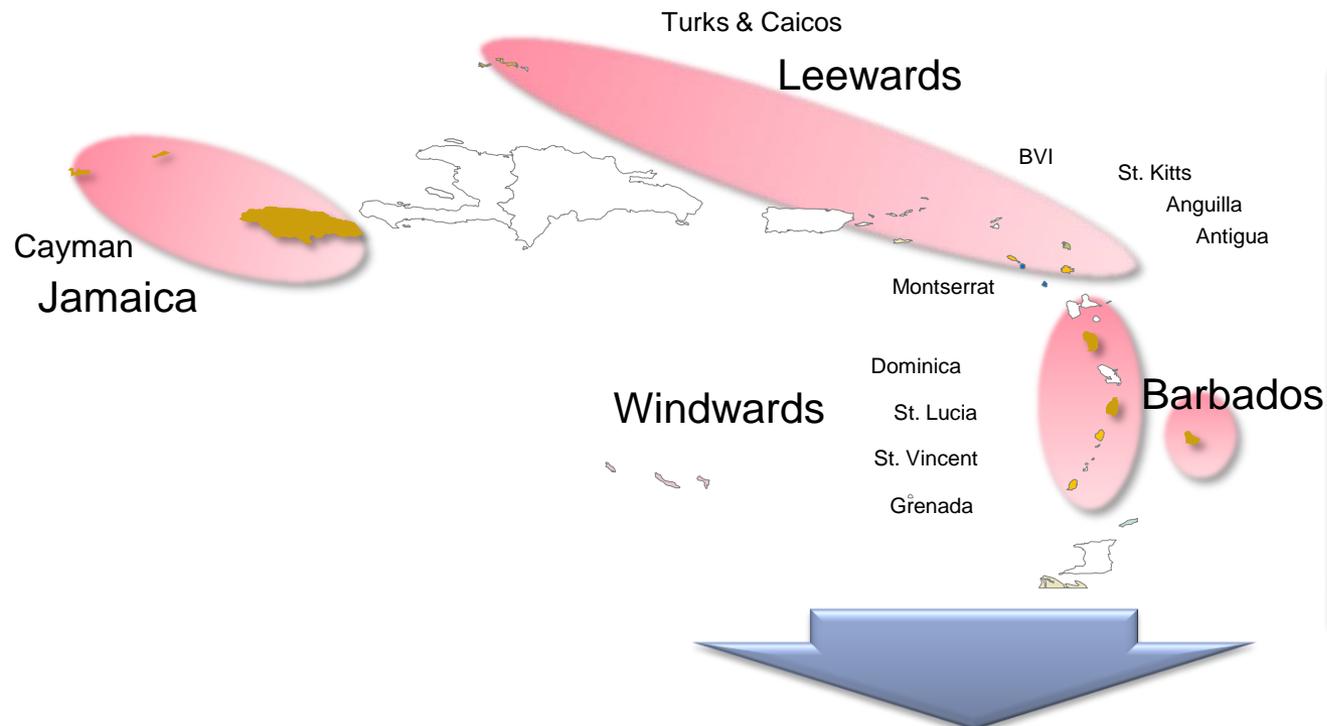
- 13 stand-alone business units
- 13 sales & marketing teams
- 13 network mgt & ops teams
- 13 billing platforms & formats
- 13 credit & collection teams
- 5 contact centres
- 4 bill print vendors
- 3 HR platforms
- 3 financial accounting platforms
- Separate PMO for each project

- 1 CTO function with 6 regional Platforms
- 1 remote "Service Assurance" function: 3 contact centres + 2 second line teams
- 1 Programme Mgt Office
- 1 HR Shared Service Centre and 1 Finance Shared Service Centre
- 1 Procurement & Supply Chain function
- 1 Regional Marketing function
- 1 Customer Segment function

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31

We are currently "enabling" the regional structure

Systems
- PeopleSoft: completed
- SAP: due to complete April 2011
- CIS / Liberate (billing & CRM): embedded and being enhanced
- End-to-end fault diagnostics, ticket and workforce mgt: kicked off

Infrastructure
- Upgrade & implementation of redundant core architecture
- Consolidation of suppliers for Mobile, Fixed, MPLS & CPEs

Processes
- Process improvement function established: solution, service & process design
- Single way of running projects & programmes implemented
- Product rationalisation ongoing (2 yr programme)
- Regional sales training academy
- Regional HR management

Fully functional & scalable regional platform

We are evolving both the Core & Access infrastructure

Regional "core" architecture

Mobile Packet Core | Cable infra (L1 Transport)

NGN Voice Traffic Core | MPLS Core
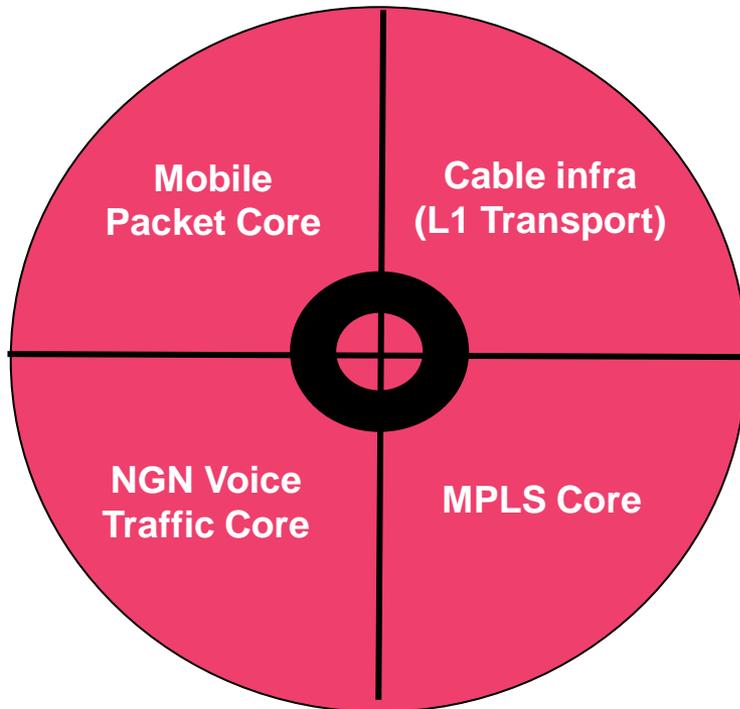
With geographic redundancy

"Hybrid access"

Fixed
- Sweat the copper asset
- Shorten "loop lengths" to deliver 8meg broadband
- Deploy fibre to new high value developments

Mobile
- Ongoing maintenance & expansion of 2G
- 3G where there is a business case
- Spot wi-fi opportunities

Within 6 months 80%+ of Jamaica's telecoms market ($) will be covered by both LIME fixed and mobile broadband
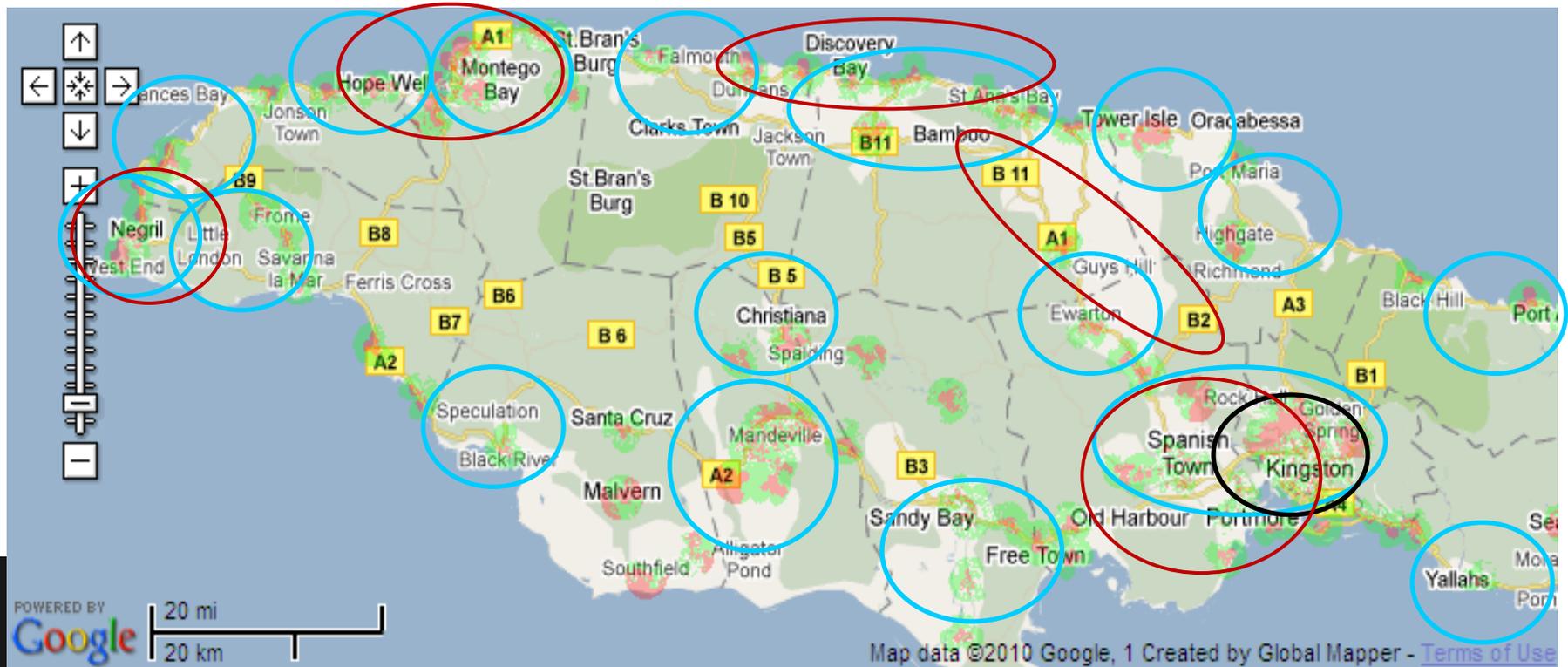
- LIME Fixed Internet- 8MB included   - 3G Coverage   - Expanded 3G Coverage by 2011 March

34

The best stores

The most capable of handling high growth

The best online functionality

Reputation for Service & Product innovation

We will be the best service operator across the region

The best contact centre

> Avg time to answer
> Shortest call wait
> First call resolution
> CSAT

The most accurate Bills

Quickest service implementation

Fewest service outages or degradations … And then fastest restoration

Best Networks

Best regarded Account teams

> New service
> Additions / Top-ups

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35

Go To Market
Chris Dehring

LIME

36

Goal
Redefine
"Cable & Wireless"

The Objective
"evolution not revolution"

Repair shortfall of initial rebrand, especially positioning and look & feel

Improve colleague engagement

Re-engage with key customer segment

Landline | Internet | Mobile | Entertainment

Talk for Hours.

Everything changes when you go faster.

A better place

It started with a War Cry...

LIME has an integral place in Caribbean life and in the COMMUNITIES we are a part of...

No one can "Out-Caribbean" us...

Ended with Our Vision...

Our Promise...

So what is my promise?

To build, connect and serve our communities

LIME

And a refined set of values to guide us

I live by four core principles. Everyday.

Respect
We treat our customers and each other as we want to be treated.

Deliver
We keep our word. We do what we say we're going to do.

Win
Caribbean people are winners. We win by helping our customers and communities to win.

Innovate
We always find a way to help our customers and communities and love coming up with new ways to do it.

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Consumer brand endline...

Landline | Internet | Mobile | Entertainment

| Lacked emotion | What we do… not who we are | We are more than a collection of services |

LIME. For living. Everyday.

A simple and powerful message that represents our place in Caribbean society and our brand promise of:

Building, Connecting and Serving our Communities

Brand LIME

Brand name has made traction	Black was overused in look and feel but remains the colour of "Brand LIME"	Caribbean vibe is represented by the complementary colours of the new look and feel

Landline | Internet | Mobile | Entertainment

New look more reflects Caribbean life...

The transformation...

49
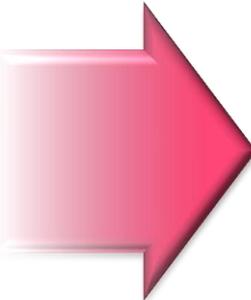
Our improved Visibility...

...and will be backed up by action

"Stop saying it. Just do it."

LIME customers

Go To Market Strategies

LIME

Our Major Top-Line Growth Opportunities...

Carrier Sales
- Leverage existing assets
- Invest in strategic cable opportunities

Enterprise & Governments
- Leverage strong Regional & Govt relationship
- Utilise pan-Caribbean strategies

Connected Home
Double & Triple play
- Launch pan-Caribbean TV product
- Ignite Broadband product
- Position LIME as a lifestyle brand

Mobile TV
- Launch Jamaican mobile TV product
- Fuel Winback Jamaica strategy

Mobile Internet
- Launch 3G/4G in strategic locations in Caribbean
- Lay foundation for mobile data rapid expansion

Winback Jamaica
- Use new strategic thinking to reclaim marketshare
- Become #1 telecomms provider in this market

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...are aligned to our vision for our key segments

	Consumer Market: $700m	SME Market: $400m	Enterprise Market: $300m	Govt Market: $200m	Carrier
Jamaica & Cayman	*Vision:* "Virgin" of the Caribbean	*Vision:* "Big Co capability, Small Co prices"	*Vision:* "Mini CWW" of Caribbean	*Vision:* *CW Panama* of Caribbean	*Vision:* Open Reach / backbone of Caribbean
Barbados					
Windwards	*Benefits:* Drive Customer retention & acquisition Drive new revenue Deliver LIME brand promise	*Benefits:* Drive customer loyalty in valuable segment	*Benefits:* "Trusted advisor" Long-term high quality revenues Offset margin pressure	*Benefits:* "Strategic partner" Long-term high quality revenues New revenue sources	*Benefits:* Short and long-term EBITDA boost Harvest existing assets
Leewards					
Landline					
Internet	*Enablers:* TV Broadband Bundling capability	*Enablers:* Bundling capability ICT capability Direct channel	*Enablers:* Technical sales capability Delivery cap'ty Datacentre Service culture	*Enablers:* Technical Sales capability Delivery capability Service culture	*Enablers:* Undersea capacity investment
Mobile					
Ent'ment					

Major moves are in TV, Broadband, Bundling, Managed Services and Carrier

54

Winning back mobile market in Jamaica

LIME

Jamaican economy & market is complex

- Jamaican economy comprises a large informal element - according to IMF 2008 estimates this accounts for as much as 35% of the total economy –

    - Formal GNP/capita = $5.1k

    - Formal + informal GNP/capita= $6.8k

- Jamaica should be considered as a sum of parts – income profiles vary greatly and Jamaica represents the single largest middle income population in the English speaking Caribbean

- Recent IMF approved loan of 27-month US$1.3bn (9% of GDP) lends stability to the Jamaica economy and will remove immediate downward pressures on its currency devaluation. Jamaica Central Bank forecasts for 2010 has lower inflation and modest GDP growth. Jamaica's credit rating has already improved.

- Long-term currency stability depends on how quickly government executes on its restructuring plans, and on the up-tick in remittances from the US and UK

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LIME's starting point in Jamaica

Product	LIME Jamaica Mkt share by $ value	Jamaica Mkt size & growth	Competitive activity
Mobile	8-10%	$480-500m →	Claro ramping up, Digi well entrenched
Fixed	85-90%	$130-140m ↘	F2M substitution, TV players take share
Broadband	70-75%	$30-40m ↗	TV players taking share, Digi Wimax launches June '10
TV	0%	$60-70m ↗	Columbus' growth slowing…
Enterprise / Govt	70-80%	$50-70m →	Retain strong share but Columbus, Digi and others making inroads
TOTAL*	**25-30%**	**750-800m**	

Source: LIME, Digicel and Columbus financials, LIME estimates

The bad	The good…
✗ Network not fit for purpose	✓ Customers who want us to succeed
✗ Competitors heavily out-spend us on marketing / sponsorship / advertising	✓ Solid asset base on which to build
✗ "Walk backwards slowly" mindset still prevails but no longer valid	✓ **Only player** with potential quad-play
✗ Marginal position in largest product market (mobile)	✓ Strong senior team (regional and local)
✗ Weakening position in fixed and B'band	✓ Lines of influence being restored
✗ Digicel X-net rates is a major hurdle`	✓ Talented and passionate people – underlying "latency"
	✓ Regional operating model in place

Mobile competitive landscape:

LIME perspective

Mobile market shares by operator

Digicel group
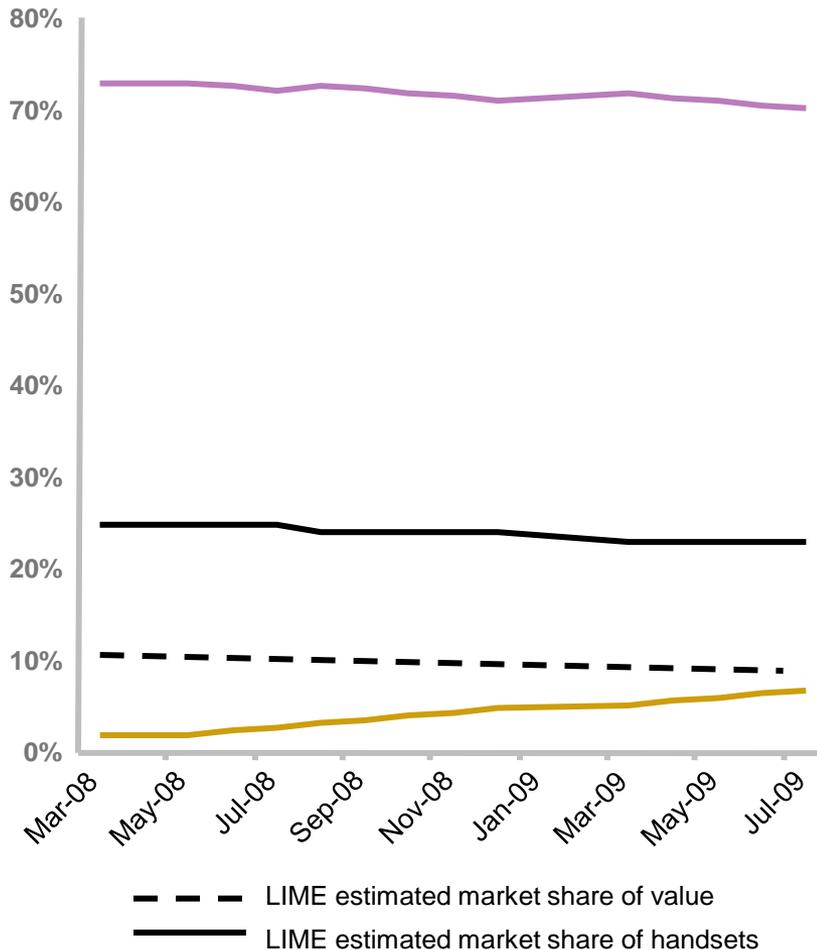
Still dominant, risky gearing
- Continues to dominate all key market segments
- Current blended ARPU: $15-17
- Marginal mkt. share declines due to Claro
- Continues to pump money into ATL/sponsorship
- Pulling back on SAC
- Ramping up sales of Wimax to Consumer / SME
- Remains highly geared (5x)

LIME

Holding steady, 3G yet to impact
- Current blended ARPU: $8-9
- Remains #2 …for now
- Fastest 3G network
- Still primarily used as second handsets due to x-net effect and coverage / quality perceptions

Claro

Slowly ramping up
- Current blended ARPU: $10-12
- Still a marginal player
- Getting more aggressive on marketing
- Now has a credible coverage footprint

- - - LIME estimated market share of value
—— LIME estimated market share of handsets

Broadband competitive landscape:

LIME perspective

Subscriber market shares (est)
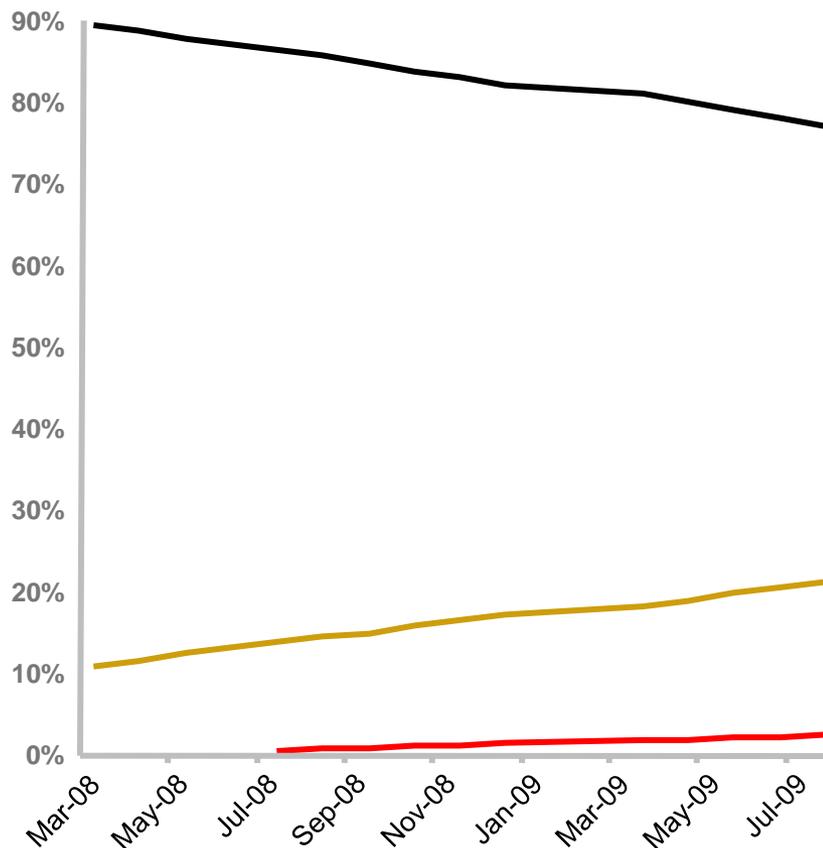
LIME

Leader

- Speed, quality and reliability
- Targeted (HVHD) investment program now underway to increase capacity and improve service reliability
- Content play will stem churn

Flow

Growing

- Increasingly strong broadband footprint in HVHD areas (now slowing)
- 15Mb offering seen as highly attractive – bundled with attractive TV offering
- Gearing and shareholder instability no doubt causing some problems

We must adopt a new approach...

| **Why?** | • After 9 years of heavy mass-marketing by Digicel, a like-for-like mass-market counter-offensive is unlikely to have a major impact in the short/medium term
• Change the dynamics of the game in Jamaica |

| **Strategy** | • Mission **"Overlord"** |

Utilizing our core strength

| A business run by Jamaicans | The concept of "community" is therefore not an abstract one | We understand our communities better than anyone | We are the community |

The invasion has begun...

Mobile Data

Jamaica … this is our proving ground for the 'Mobile Data' case in the Caribbean

Our marketing needs to be heard
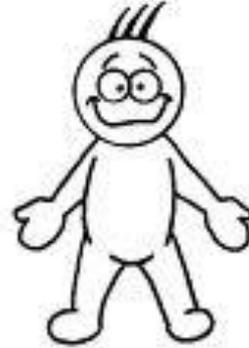
Our customers need to be drawn to LIME 3G

Our shop staff need to be well trained

We need a decent range of smartphones … which are not just blackberries

With some compelling propositions

And the 3G network needs to work really well

The Mobile Data Future at LIME

Market

Infrastructure

Drive Consumer Appetite

- Drive Smartphone penetration through attractive handset offers
- Lead on the creation of Caribbean relevant applications (eg partner with tertiary education institutions on application development courses)
- Educate consumers on practical uses of mobile data (e.g. mobile TV)

Network investment Optimization

- Continue to rollout and develop Jamaica 3G network
- Augment with outsourced Network for Mobile TV
- Create a strong robust EDGE solution across the rest of the region as a tactical quick fix

Explore Business Case for 4G in greenfields

- Continue to push to see how we can make 4G viable in high GDP business units
- Secure 4G/LTE spectrum where necessary
- Ensure the business case for 4G/LTE rollout stacks up

Ensure Jamaica 3G implementation is a roaring commercial success

Mobile TV

Mobile TV
LIME will be the 1st Telecom to offer Mobile TV in Jamaica

- Mobile TV will be a key differentiator

- Linear TV channels on a mobile phone will demonstrate practical usage of mobile data. For living. Everyday.

- Platform in Jamaica (outsourced network) is test case for pan-Caribbean launch

- No stress on mobile network

- Launch targeted Christmas 2010

- Halo effect on LIME mobile (3G & Edge) network

Mobile TV
Unique ecosystem in the Caribbean

Content

Availability of inexpensive domestic & international 'high-demand' content

Spectrum

Availability of spectrum for mobile TV broadcasting

LIME
The dominance of telecoms in the space

Handsets

Availability handsets and software developments which enables most data and smart phones
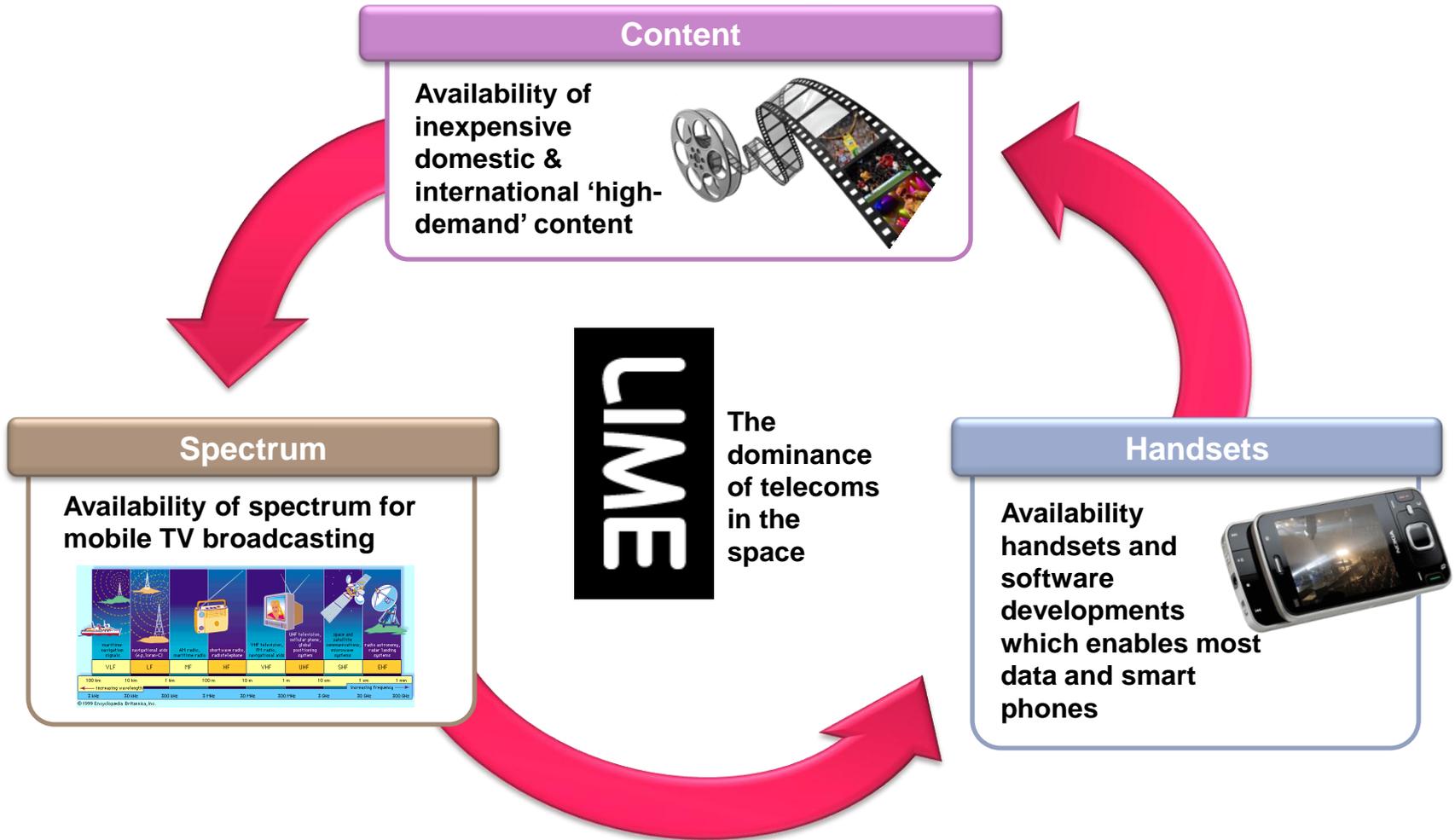
Mobile TV

Appealing content is key for this market

International News	Sports	Music & Entertainment	Kids Channels

International News

International news

Sports

Premium sports

Music & Entertainment

Popular music channels

Kids Channels

Popular kids channels

Mobile TV

Unique content for living, Everyday.

And the market is excited and ready...

The Connected Home
Wireline, Broadband & TV Strategies

The Connected Home
## A Double & Triple Play & Full Communication Suite

Launch Pan-Caribbean TV Product

- Become the Caribbean market leader for PayTV in 3 years
- Focus on 2 Geographic segments: Jamaica and Barbados
- Focus on 2 customer segments: based on ARPU potential and needs
- Focus on 2 screen strategy for the home: TV & PC
- Create strong selling points: High On Value – a service that people will recommend

Ignite Broadband

- In some markets – eg Jamaica – broadband is still at the beginning of the growth stage
- Invest in strategic 8Mps infrastructure for High Value High Density locations
- Ensure pricing tracks International standards
- Leverage TV product to reduce Broadband churn

Manage Traditional Wireline Decline

- Manage churn through attractive propositions – unlimited local calls, IDD packages
- Invest in targeted copper line infrastructure to ensure a solid base for broadband & TV products
- Encourage loyalty through reward schemes

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# Enterprise & Governments & SMEs
'Leveraging Relationships'

LIME

Strong Sales Pipeline

Pie chart 1 (Sales stages):
- Prospecting 10%
- Proposal Made 16%
- Negotiation 21%
- Proposal Accepted 18%
- Contract Signed 19%
- Billed 16%
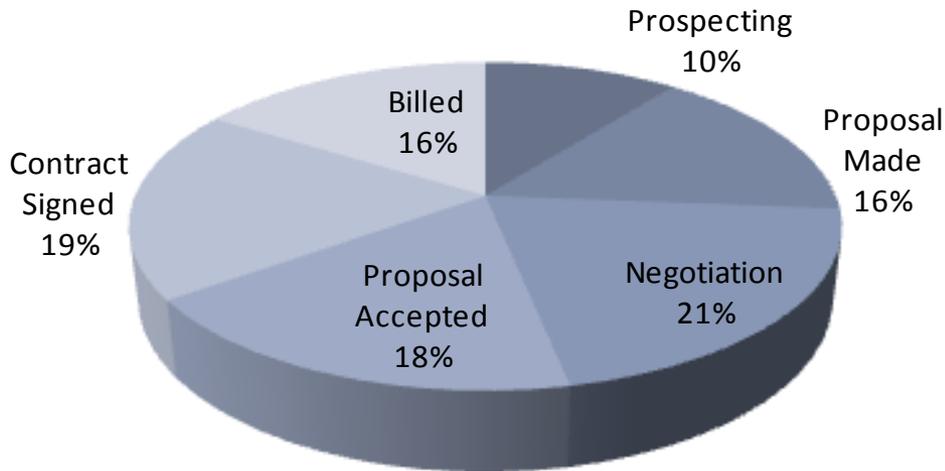
New focus on improving the prospecting book

Pie chart 2 (Segments):
- Managed Busines 4%
- Other 2%
- SME 5%
- Corporate 25%
- Govt 29%
- Enterprise 35%
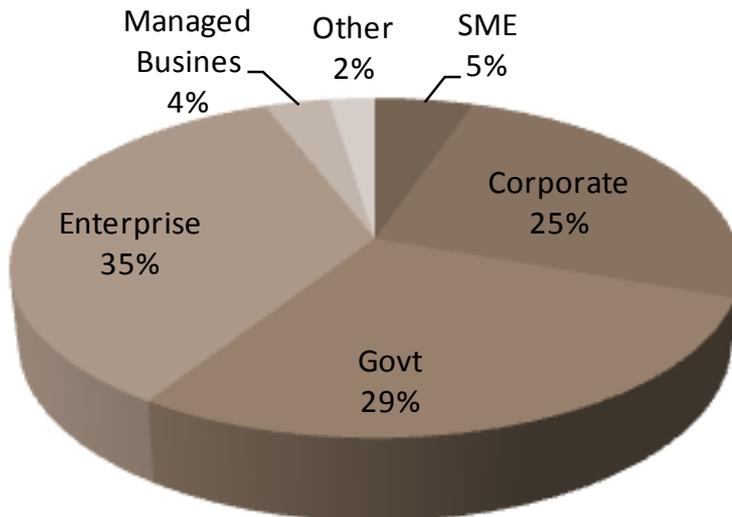
Strong signs of growth in Enterprise

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Government & SME segments are the greatest opportunities for Growth

- Government & SME segments offer the greatest growth potential with LIME's est. market share 25% and 17% respectively

- LIME will build on its success with Enterprise Customer management to win in the Government segment

- LIME will focus on growing its capability to offer tailored managed services for these segments

- LIME will focus on a transactional model for the SME segment and deliver innovative, reliable, cost-effective products

Government Segment: A new approach

A regional Government Segment team provides strategic planning and support to leverage resources and best-in-class standards across the region


Regional Government Segment Team

Seminars & Solution Presentations

Capacity Capability

Major Opportunities

RFP Support

KPI Reporting

Strategy & Solutions

Local Sales & Support Teams

Relationship & in-country Support

Government Customer

In-country teams are responsible for relationship management, identification of opportunities and provision of local support

Strategy: To become the trusted advisor to government for ICT solutions

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Carrier Services 'New opportunity'

CWC majority owned, Consortia & IRU systems
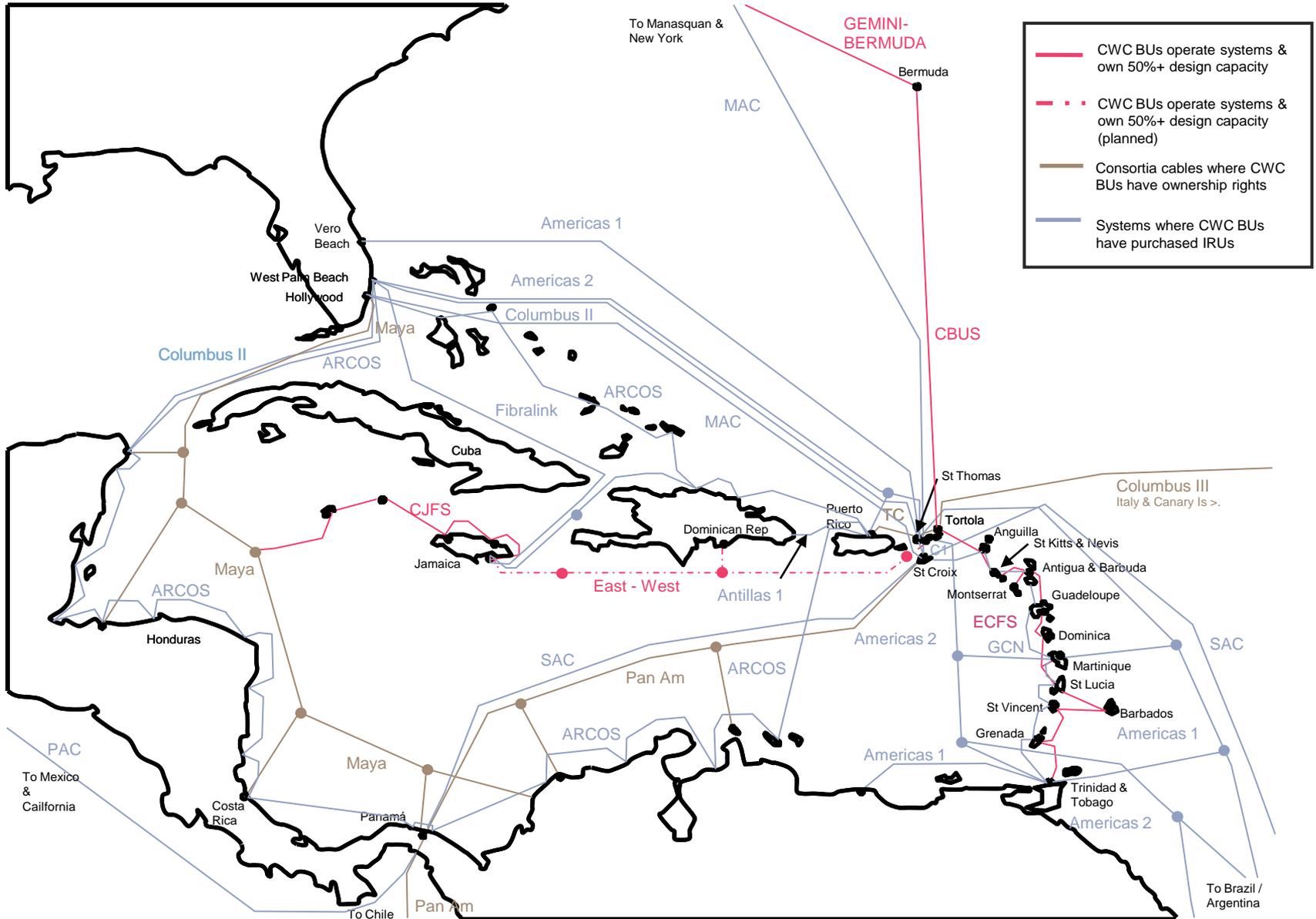
Market Size Analysis

Annual Revenues from Capacity Leases

Actual & Forecast ($m)
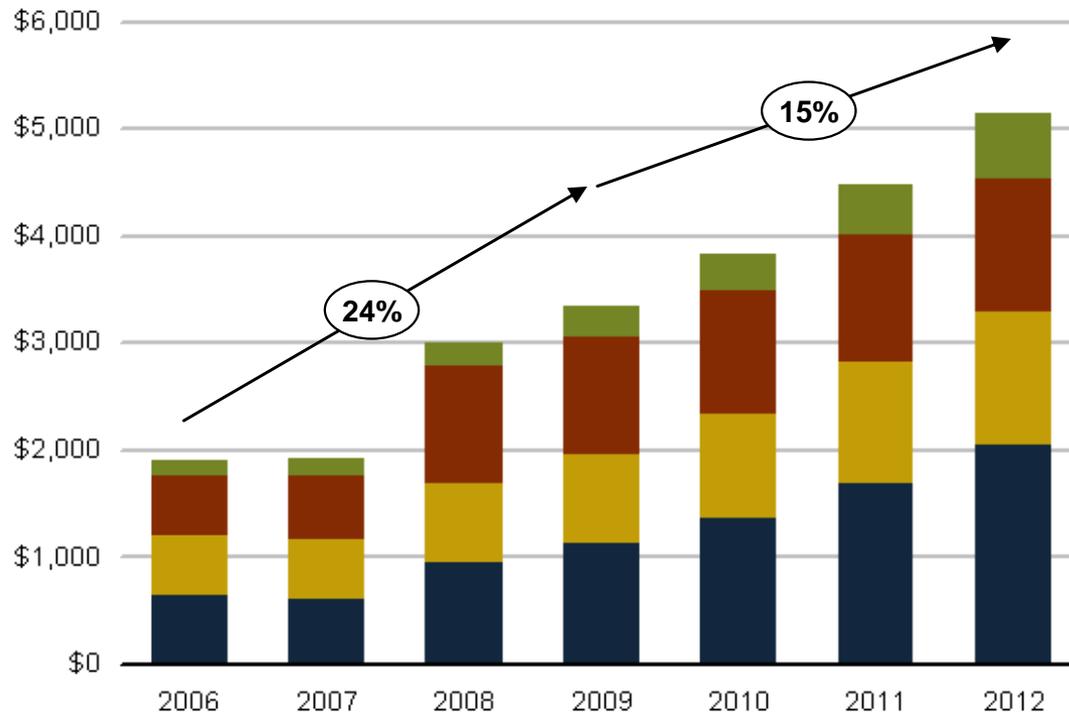
	CAGR 2006-9	CAGR 2009-12
■ Trans-Atlantic	14%	16%
■ Trans-Pacific	30%	4%
■ Intra-Asia	21%	8%
■ U.S.-Latin America	24%	20%

Capacity Sales Strategy

1. Align LIME carrier services with Global Carriers for data RFP's

2. Target carriers that are currently NOT participants in any consortium of Caribbean cable systems to increase IRU sales

3. Work with local carriers in Off-net Caribbean countries to give LIME an extended network that will allow for the provision of "aggregated solutions" for the entire Caribbean region

4. Using the "E-W Cable" create a ring topology for diverse routing in both Jamaica and Dominican Republic

5. Partner with selective carriers to provide access to LIME markets

In Conclusion
David Shaw

LIME

Summary

- We have great opportunities for growth – especially in Jamaica

- We are introducing genuinely differentiated products and services to defend and grow in the Caribbean

- Carrier will provide medium term upside

- Operating Costs are under control – and the regional platforms created by One Caribbean will drive them down further

- We have the people to do this

LIME Investor Presentation

September 2010