

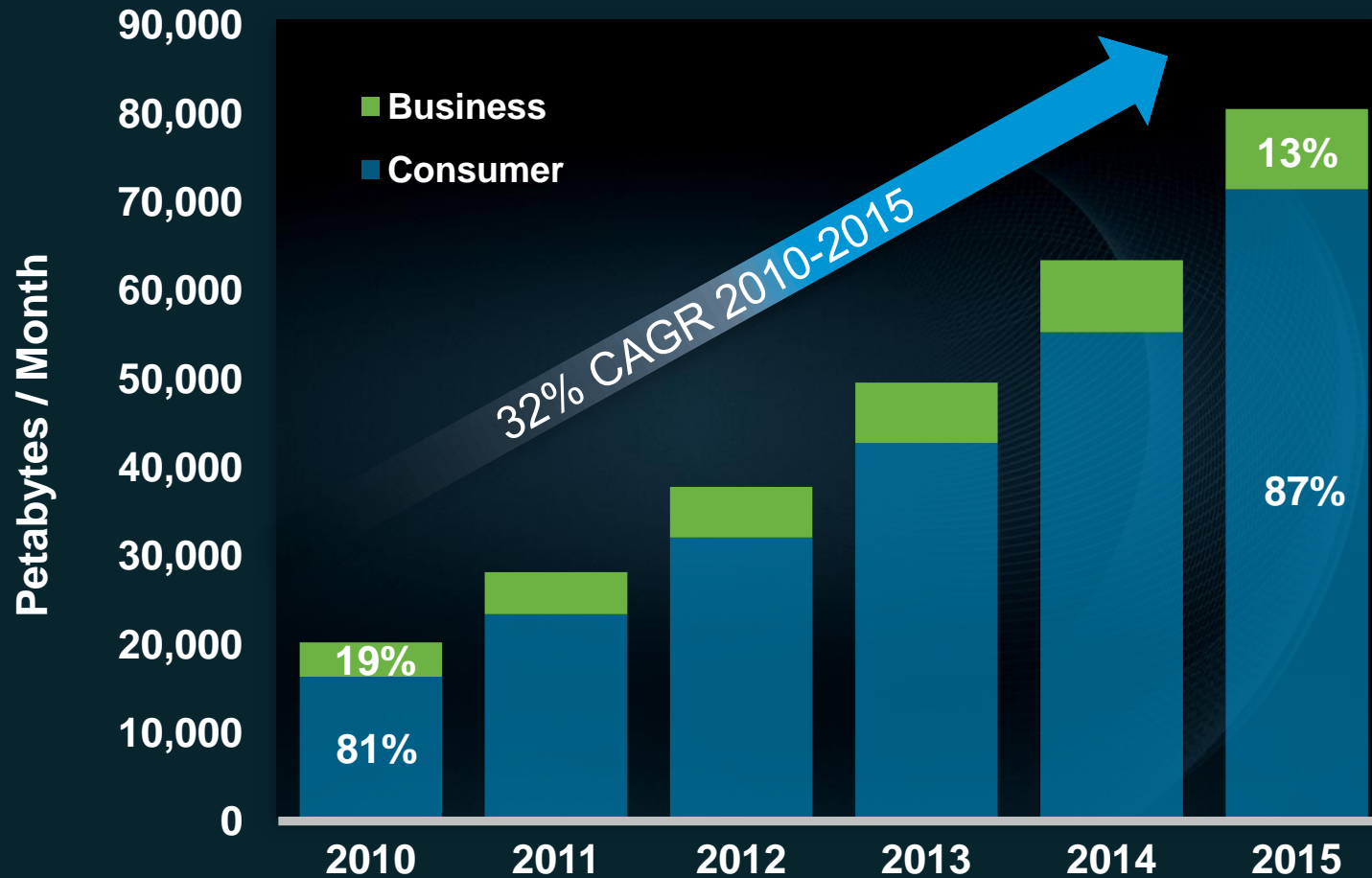
Competition: Removing Bottlenecks Bundles and Convergence

Andres Maz

Advanced Technology Policy

Buenos Aires, Noviembre 2011

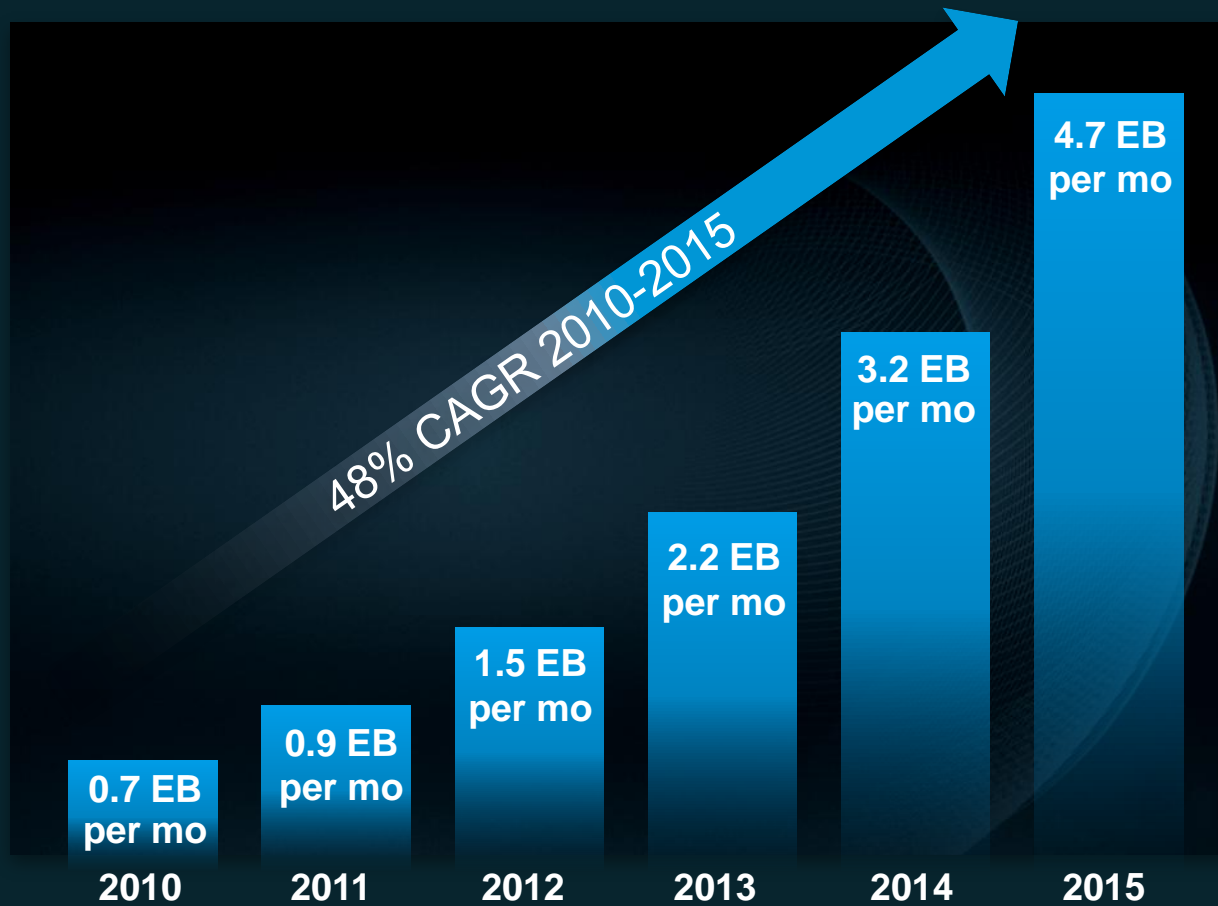
Global IP traffic will increase 4-fold from 2010 to 2015



Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–2015

Latin America Topline

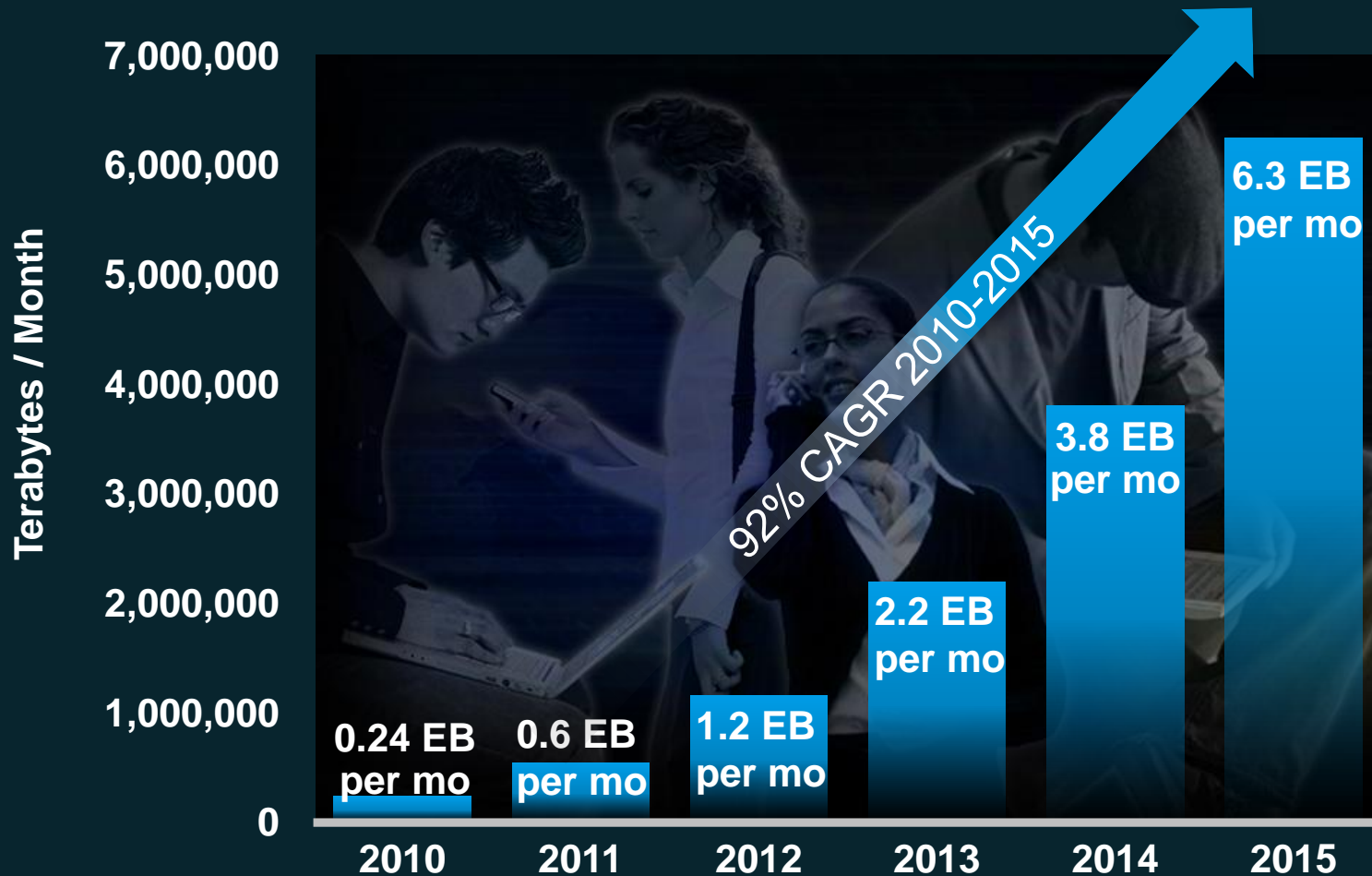
IP traffic will increase 7-fold from 2010 to 2015



Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–2015

Global Mobile Data Traffic Growth / Top-Line

Global mobile data traffic will increase 26X from 2010 to 2015



Source: Cisco Visual Networking Index (VNI) Global Mobile Data Traffic Forecast, 2010–2015

Drivers

Latin America IP Traffic Drivers, 2010–2015



More Devices
1B Connections



Faster Broadband Speeds
2.9-Fold Speed Increase

**Key
Growth
Factors**

More Internet Users
260 Million Internet Users

More Rich Media Content
190K Video Minutes per Second

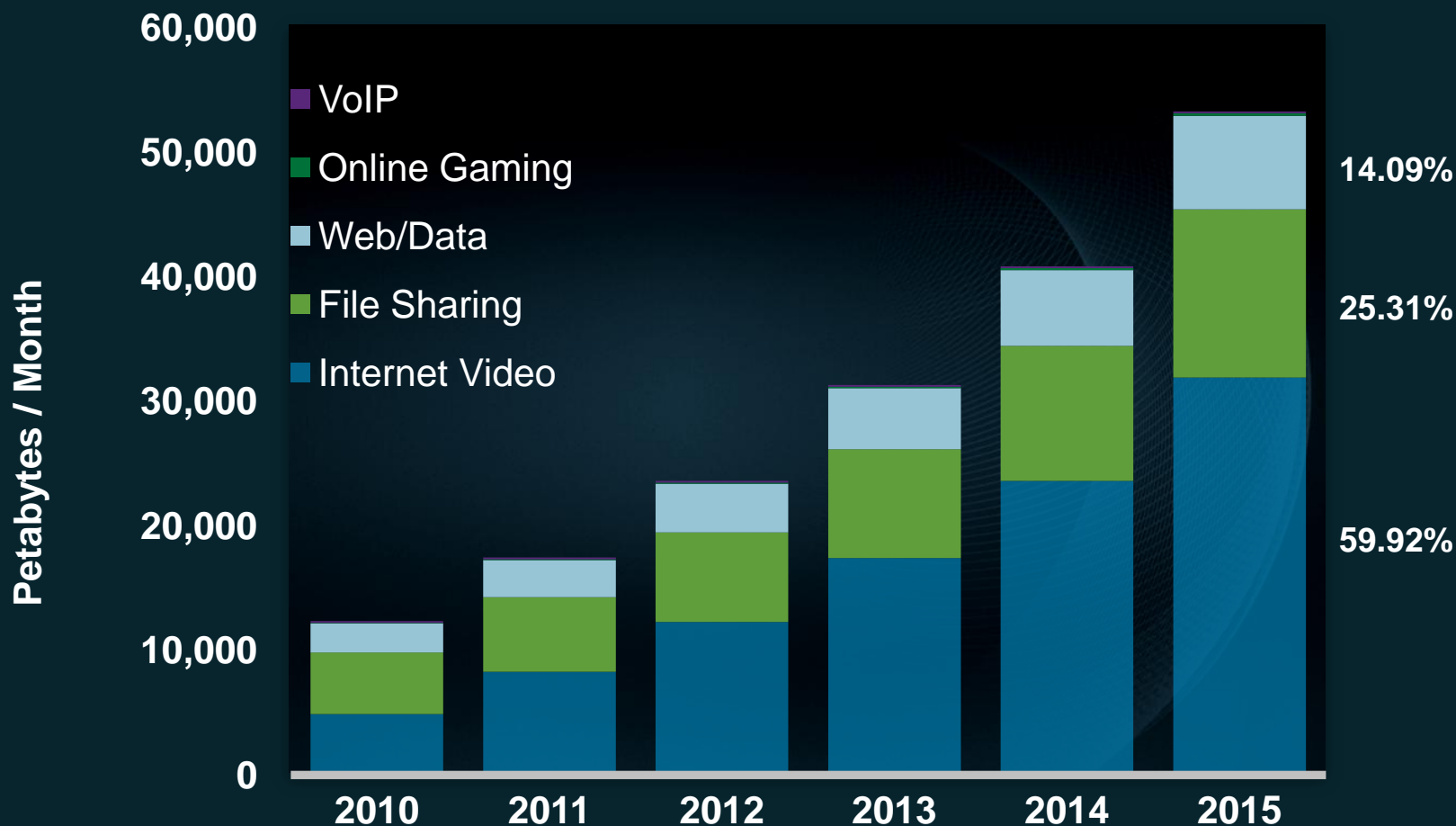


Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–2015

Latin America

Consumer Internet Traffic / Applications

Internet Video dominates consumer Internet traffic

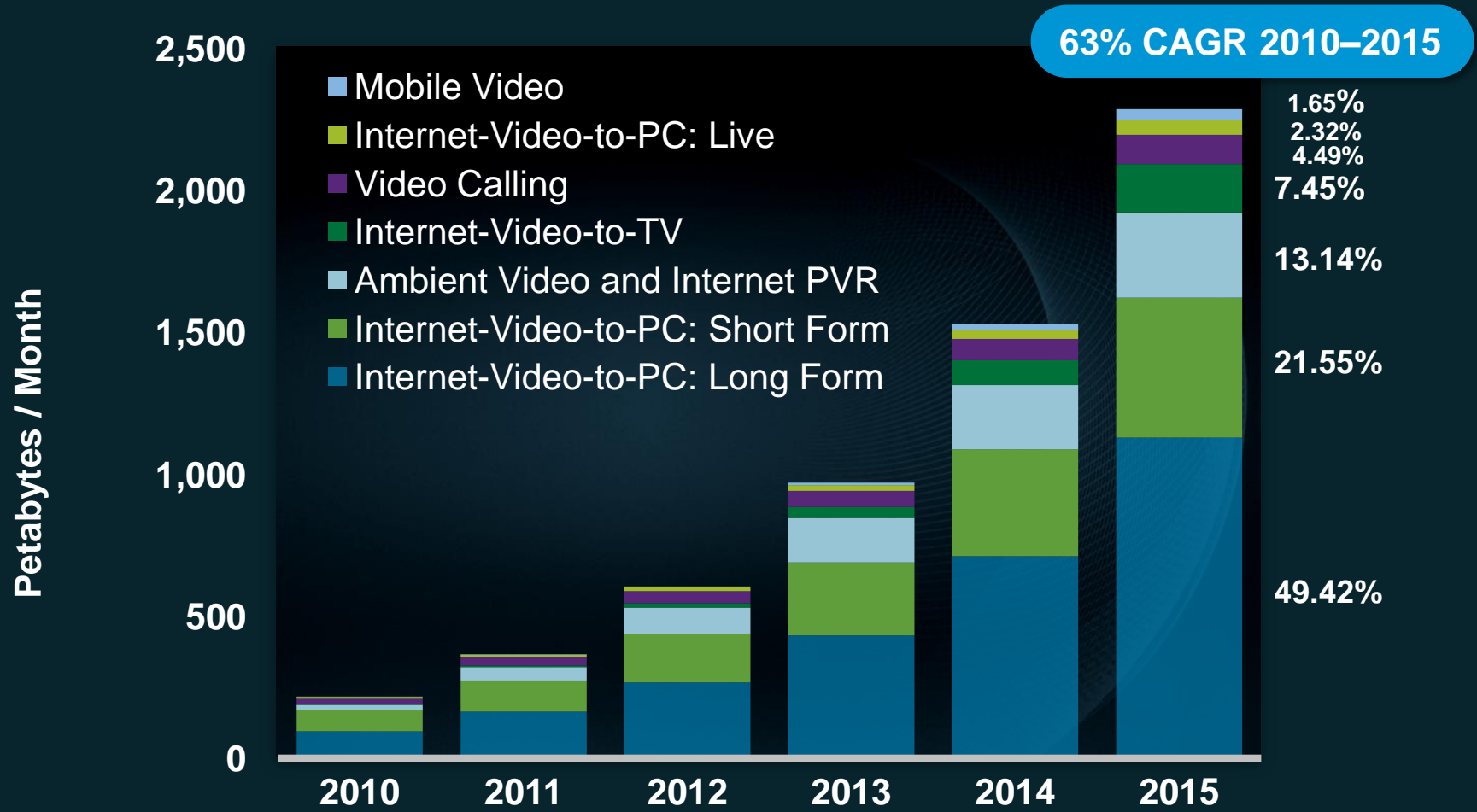


Online Gaming and VoIP forecast to be 0.68% of all consumer Internet traffic in 2015

Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–2015

LATAM Consumer Internet Video Composition

Video traffic increasingly driven by long-form video



Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–2015



By 2015, two-thirds of the world's mobile data traffic will be video.

Mobile video traffic will more than double every year between 2010 and 2015.



Source: Cisco Visual Networking Index (VNI) Global Mobile Data Traffic Forecast, 2010–2015

Implications

Next Generation Platforms Programming on the Go



Push vs. Pull



Evolution to Convergence

Mobile Telephony	Fixed Telephony	Internet	Broadcast TV	Pay-TV
	⊘		⊘	⊘
	⊘	⊘	⊘	⊘

Urgent reforms required to eliminate

- Different Regulatory Frameworks
- Different Tax treatments
- Foreign Direct Investment Restrictions in one or more markets

Thank you.

amaz@cisco.com

