

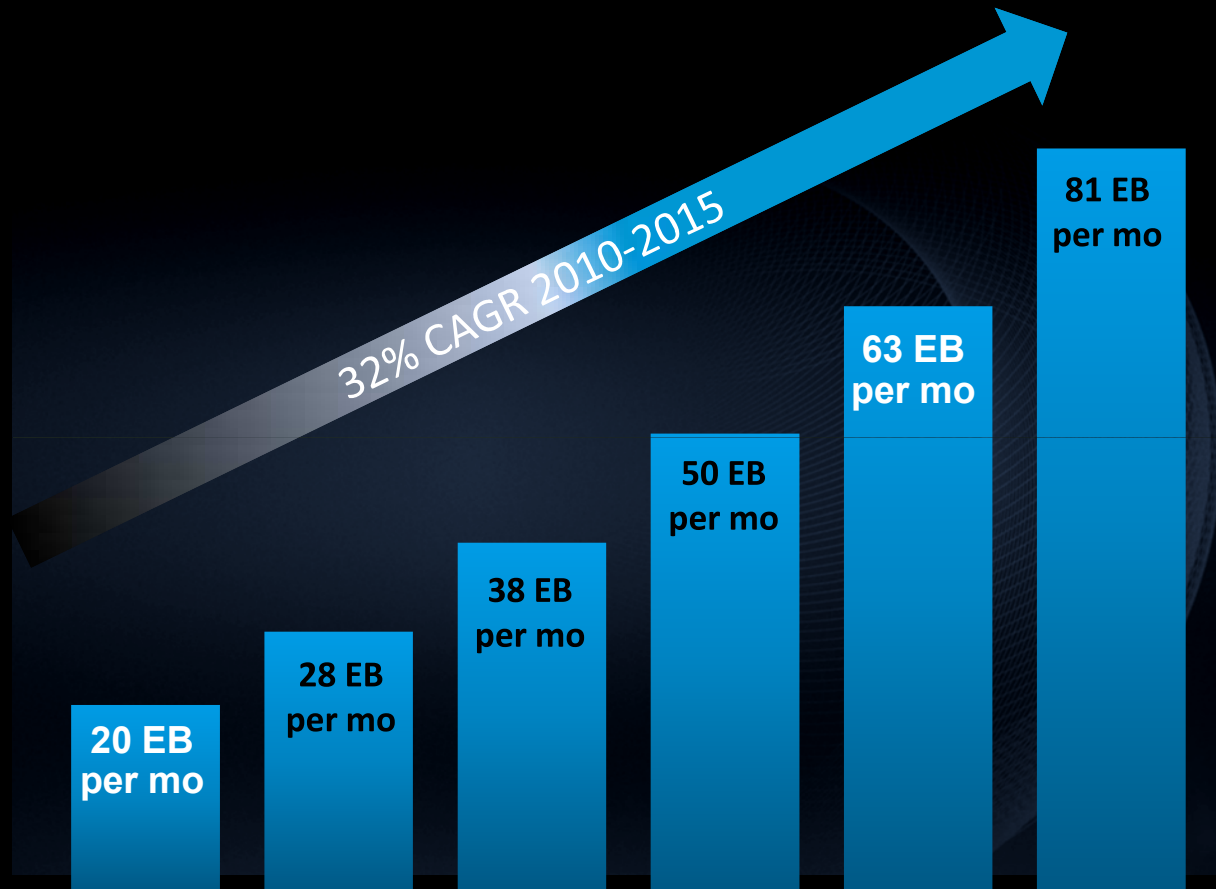
Internet Values

Net
Heads
"Us"

- Open
- End-to-End
- Bottom up
- Consensus process
- Decentralized
- Multi-stakeholder
- Generative

Entering the Zettabyte Era

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

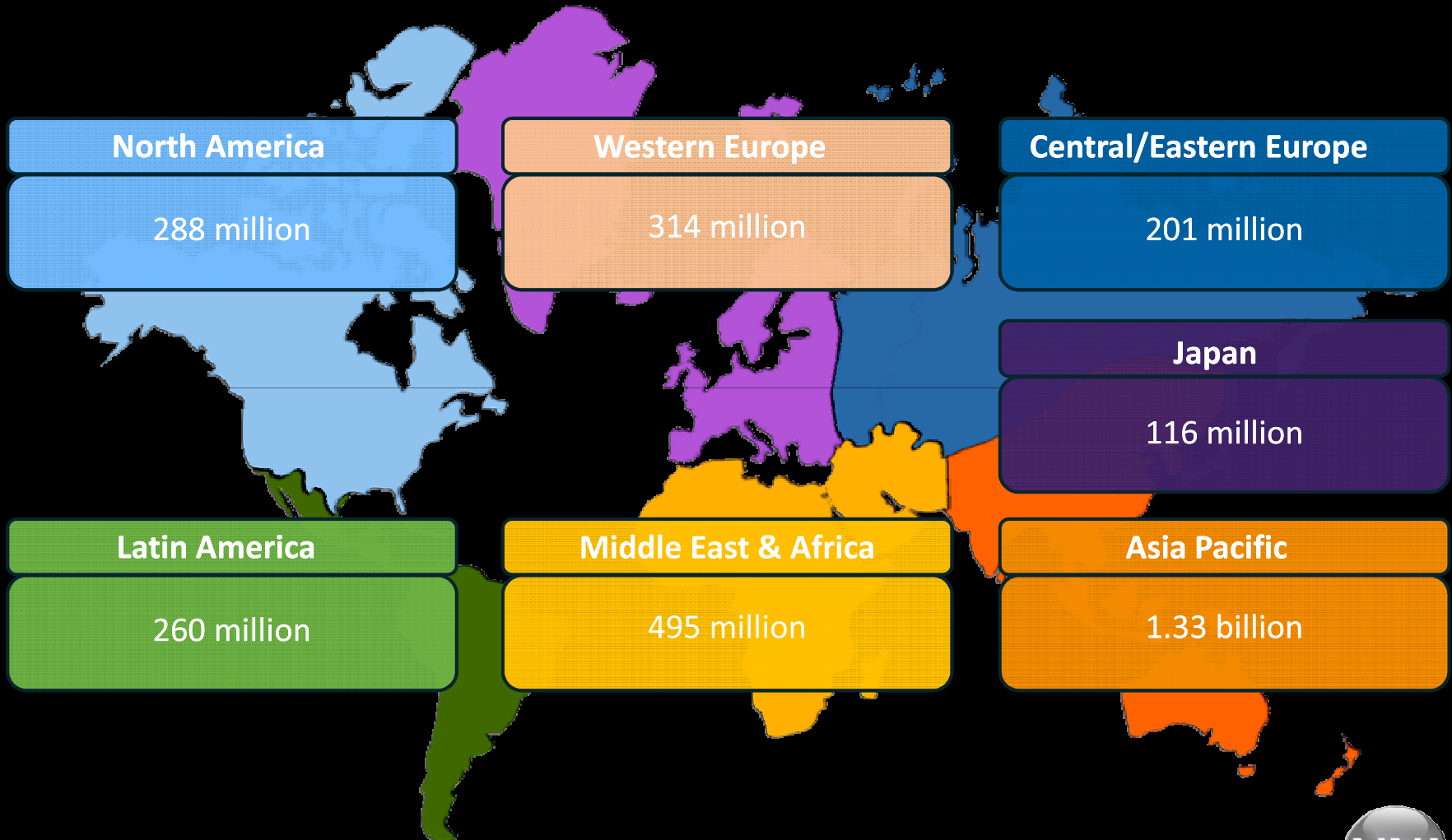


The World Is Changing...FAST



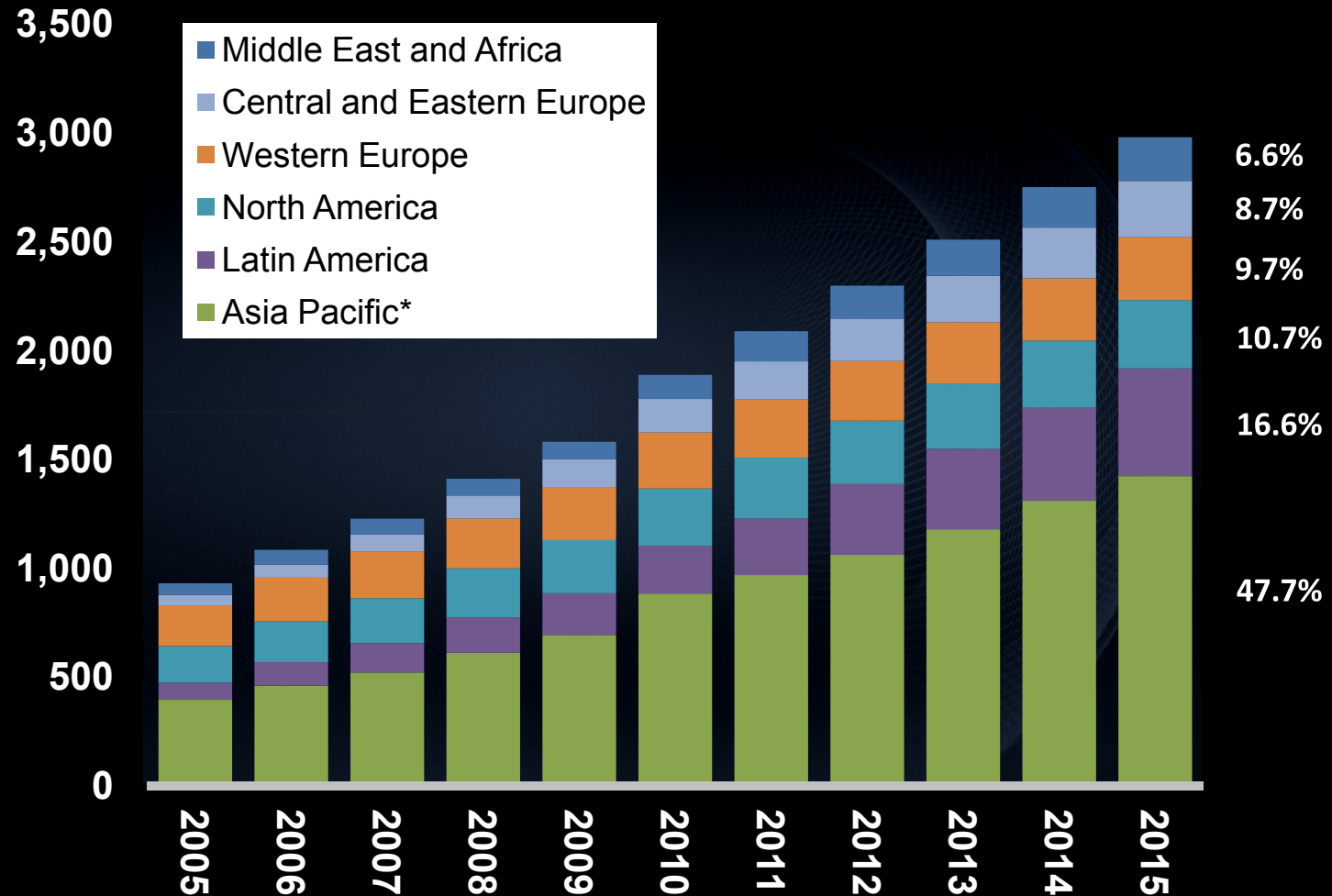
Global Internet Users by Region, 2015

By 2015, there will about 3B Internet Users



Regional Internet Users

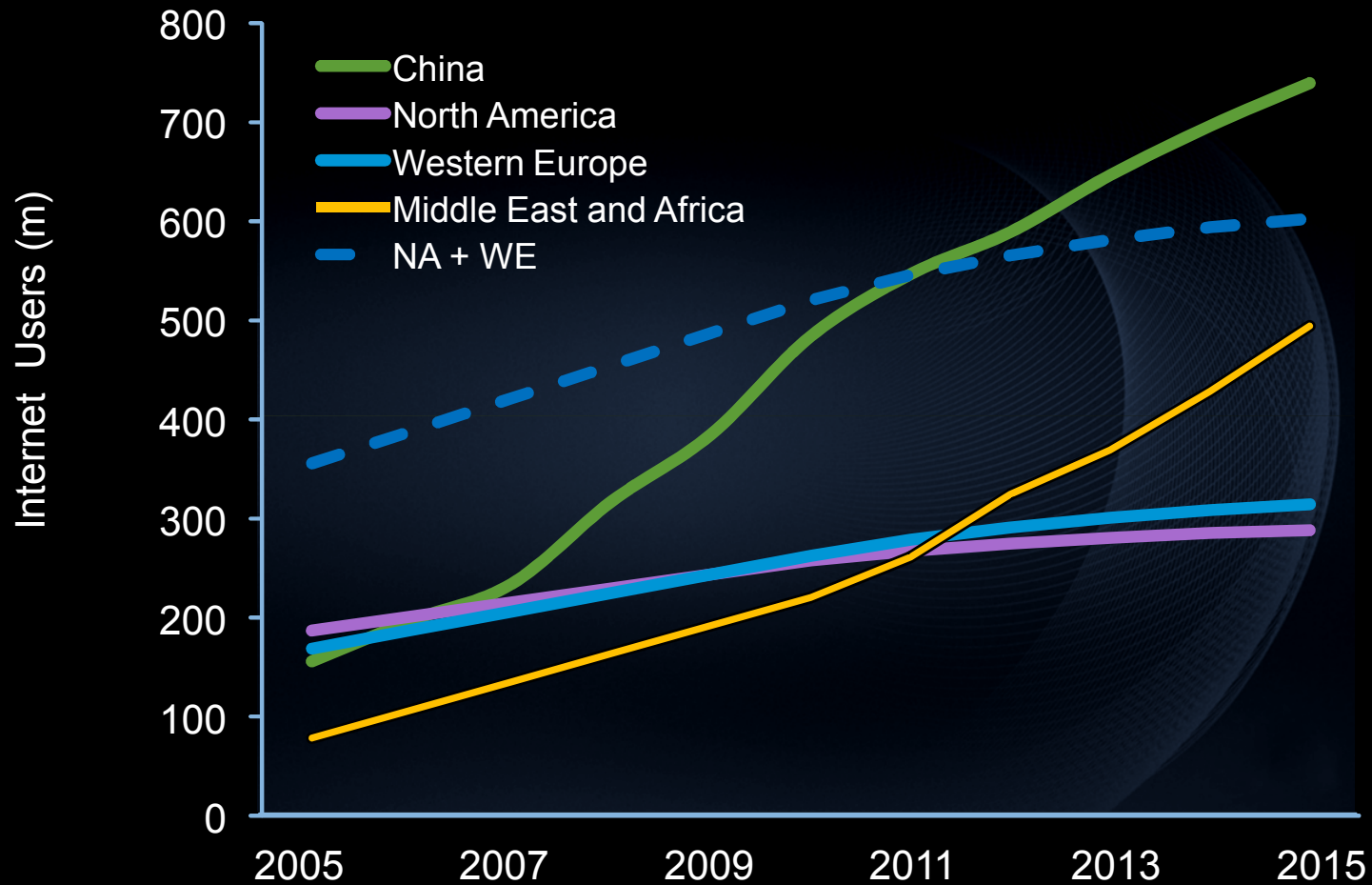
By 2015, APAC will have nearly half of global Internet Users



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

Milestones: 2006 and 2012

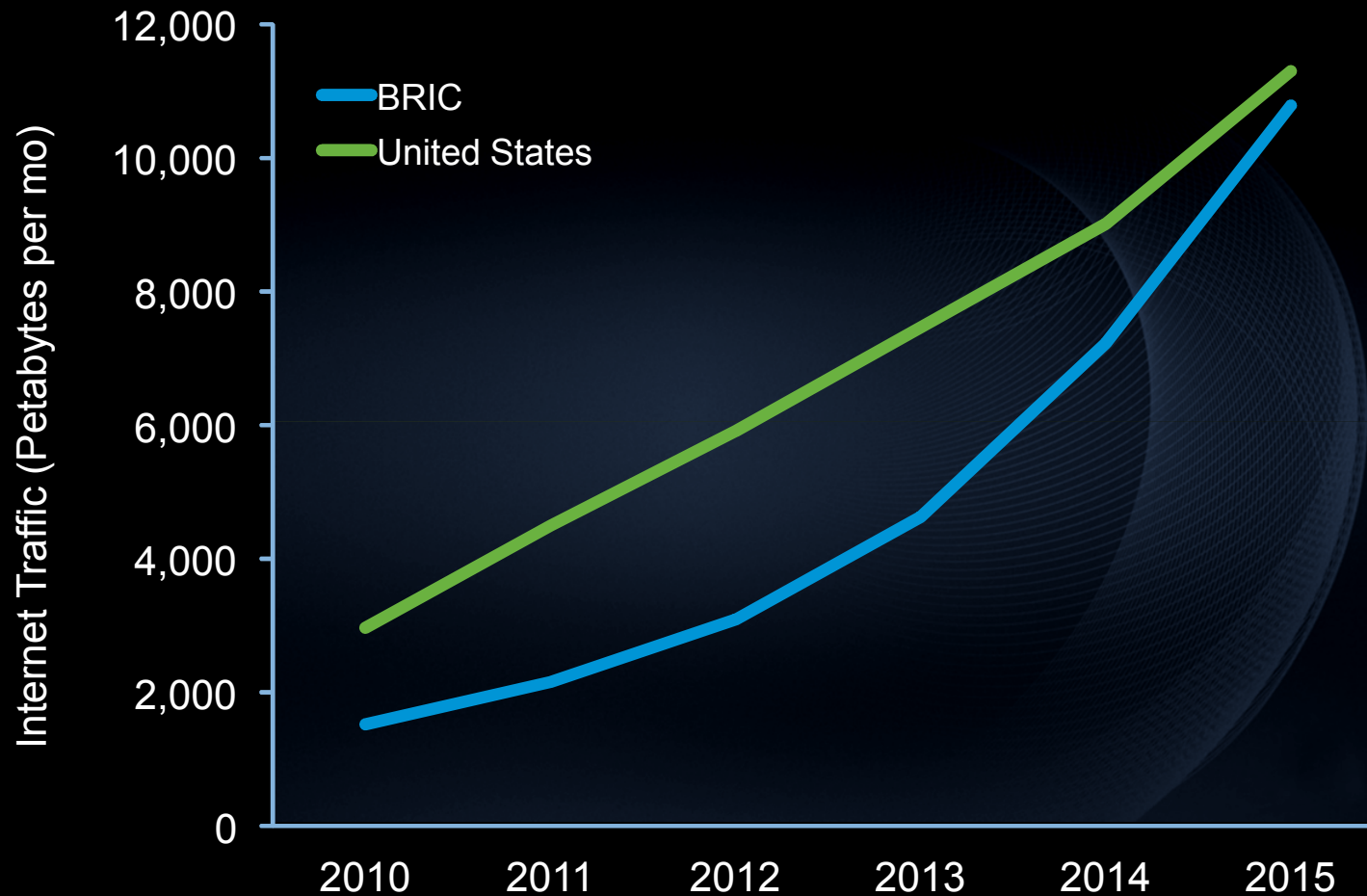
In 2006, China surpassed both NA and WE in Internet Users
In 2012, China will surpass NA+WE and MEA will surpass NA and WE,



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

Milestones: 2015

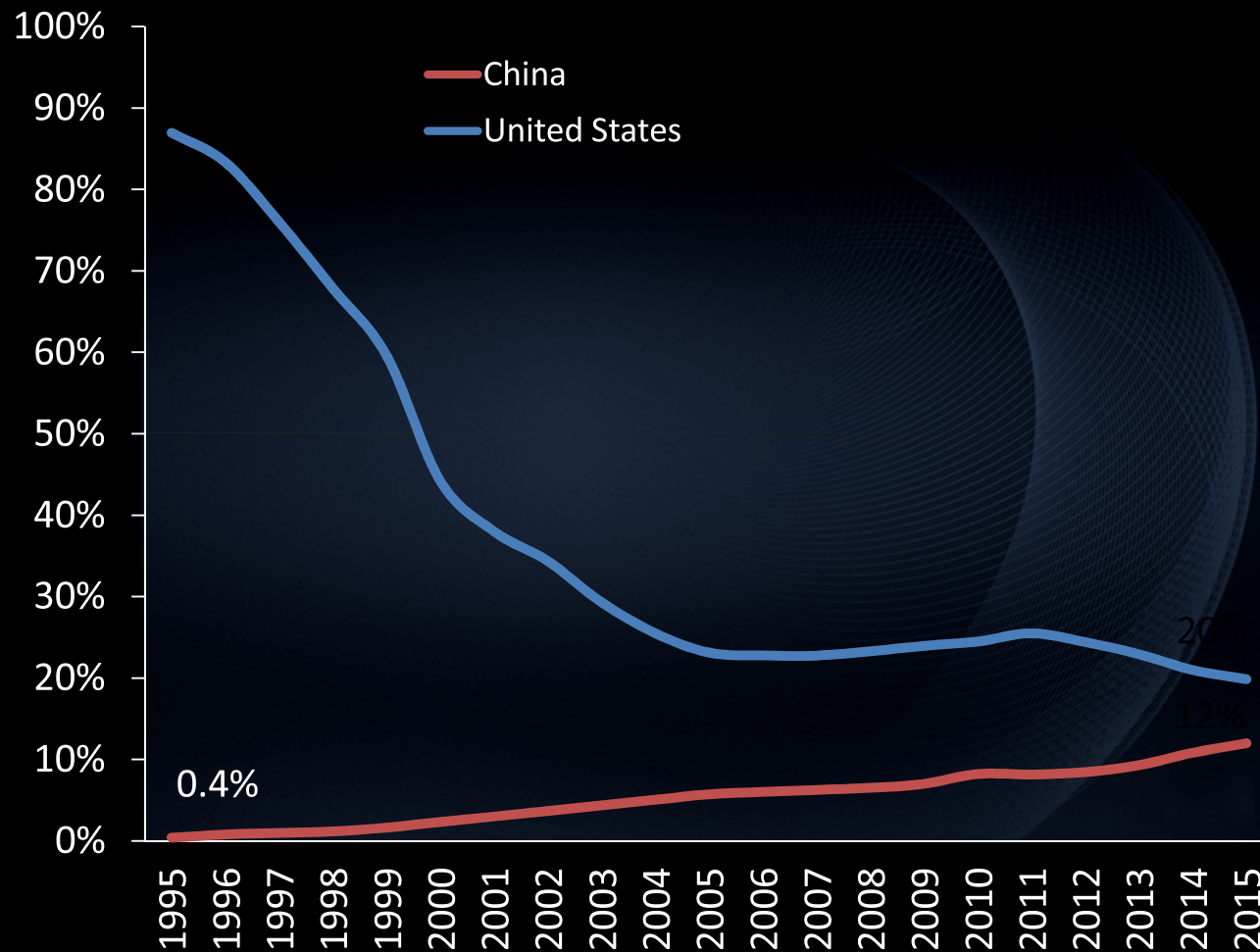
In 2015, BRIC will nearly equal the US in Consumer Internet Traffic



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

US Share of Internet Traffic, Compared to China

China to reach 12% of total global Internet traffic in 2015



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

Good News...and Not Such Good News

- The Internet and broadband is following the pattern set by the “mobile miracle”
- Not all countries are benefiting equally or at the same pace from the broadband revolution
- The Internet’s center of gravity is shifting to Asia and emerging economies from NA and WE
- Countries and international organizations will step up efforts to control the Internet
- We can no longer assume our values will prevail

Internet Values

“Us”

- Open
- End-to-End
- Bottom up
- Consensus process
- Decentralized
- Multi-stakeholder
- Generative

“Them”

- Controlled
- Fragmented
- Top down
- Voting process
- Centralized
- Government leads
- Static

We cannot just keep talking to ourselves