

A Connected World

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Just about everything in our world will be connected, seamless and smart.

- Our content will follow us no matter what device we're using.
- Our homes and cars will be extensions of our smartphones and tablets.
- The highest levels of education will be accessible to millions more people wherever they are located.
- And advancements in healthcare will occur in ways we haven't yet imagined.





We can expect...

- 1. The pace of innovation will accelerate.
- Customer expectations for mobile, ultra-fast and effortless communication will continue to soar.
- 3. Network usage will grow, driven by ever richer data applications and a dramatic increase in video.
- 4. And, for providers, all of these will make consistent investment and relentless innovation more important than ever, as new technology replaces the old much faster.

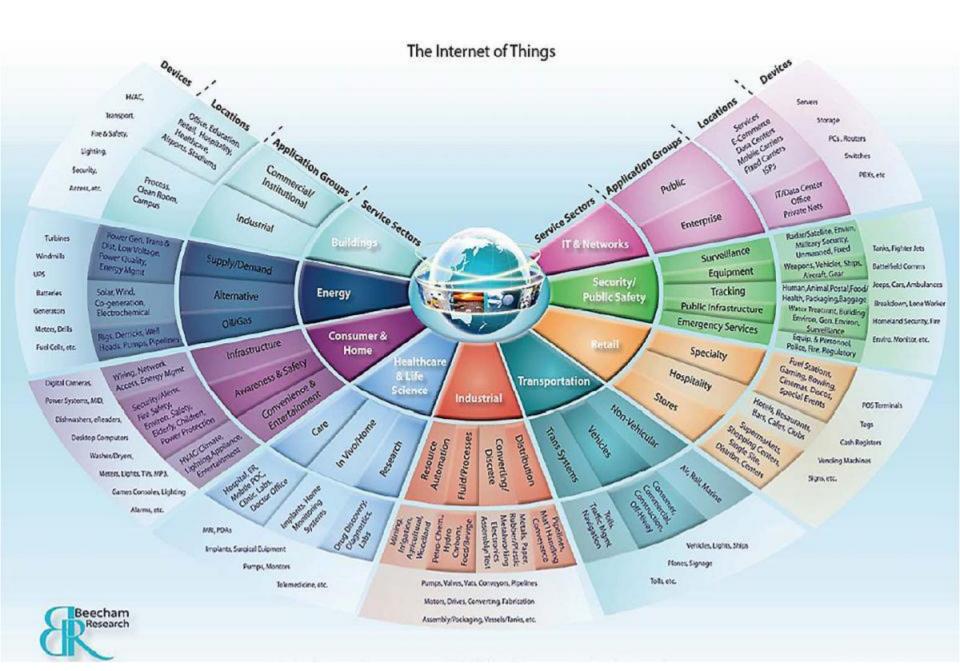


Cisco: M2M

Globally, M2M modules will account for 35% (7.3 billion) of all networked devices in 2018, compared to 19% (2.3 billion) in 2013.

- In Latin America, M2M modules will account for 27% (445.5 million) of all networked devices in 2018, compared to 15% (158.3 million) in 2013.
- In Western Europe, M2M modules will account for 47% (1.3 billion) of all networked devices in 2018, compared to 27% (432.0 million) in 2013.





Big Data

Every single minute...the world generates 1.7 million billion bytes of data...equal to 360,000 DVDs.

According to IBM...90% of all data in the world has been generated over the last two years.





The countries and regions that are developing growth-oriented policies enabling this new era of communication and the global, digital economy will see the most success.





Premier network experience



Cisco: IP Traffic

- Globally, IP traffic reached 51.2 Exabytes per month in 2013, up from 41.3 Exabytes per month in 2012.
- Globally, IP traffic will reach 131.6 Exabytes per month in 2018, up from 51.2 Exabytes per month in 2013.
- In 2018, the gigabyte equivalent of all movies ever made will cross Global IP networks every 3 minutes.



Premier network experience
Investment



Premier network experience

Investment

Spectrum



Spectrum – the lifeblood of the mobile Internet

The map matters.

Owners' economics drive the greatest development and conservation of any scare and finite natural resource.

Markets are best suited to drive technological decisions.

Markets are very efficient at harmonizing spectrum across geographies.



Premier network experience

Investment

Spectrum

Good tax policies



Premier network experience

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Good tax policies

Consumer Trust



As we look to the future

Companies must be disruptive to live

Investment continues at extraordinary levels – enabling more bandwidth

3 Sm

Smartphones will become the remote controls of our lives

4

The cloud and LTE will impact every industry over the next 5 years

5

Education will be significantly impacted by technology



Thank you.

