

USTELECOM
THE BROADBAND ASSOCIATION

We are Broadband.

Perspectives on a Flexible Framework for Global Internet Growth

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Presentation to ETNO-ITU Workshop

19 April 2012

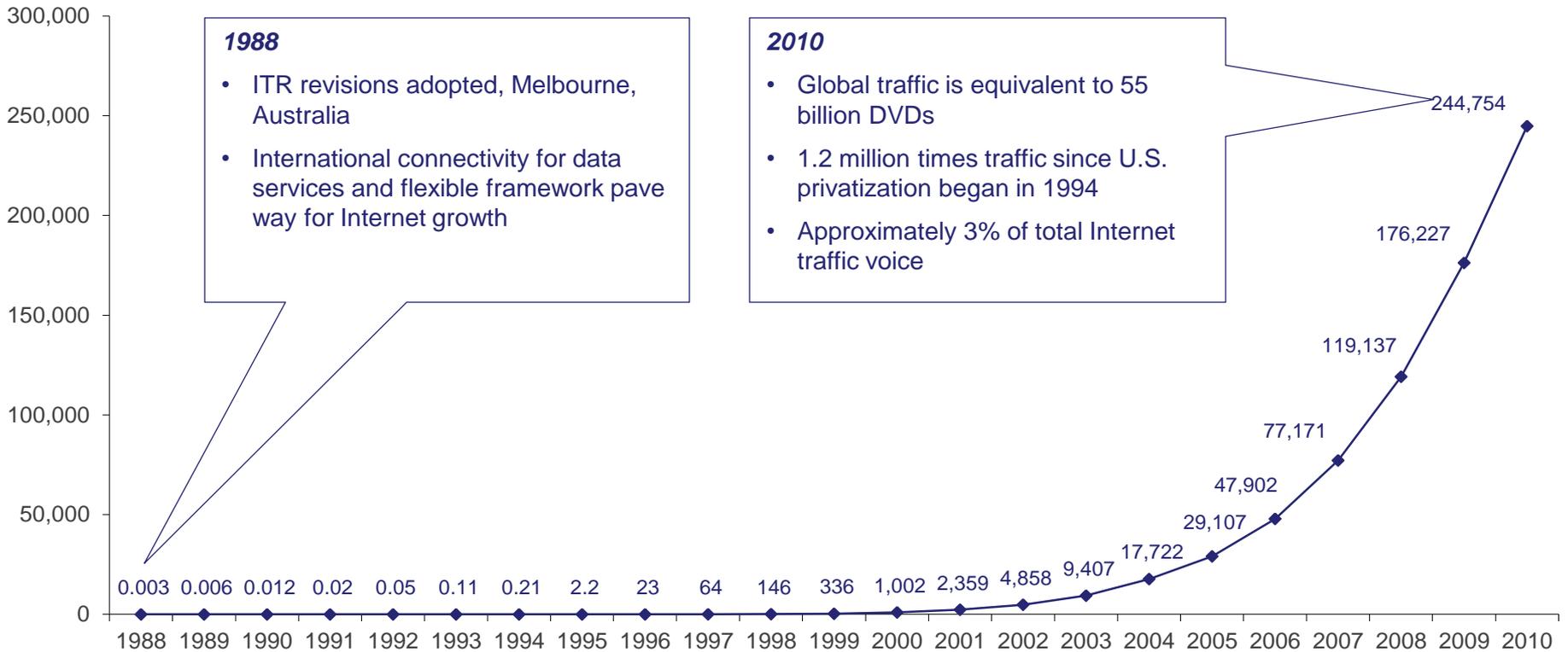
Brussels, Belgium

USTelecom Represents Broadband Providers

- Members include more than 100 companies, spanning small rural to multinational competitors: AT&T and Verizon
- Offer voice, video, Internet service
- Invest tens of billions annually, supporting 11 million ICT jobs
- Transitioning from switched-voice service to IP-based broadband

'88 Framework Fostered Exponential Growth of Global Internet

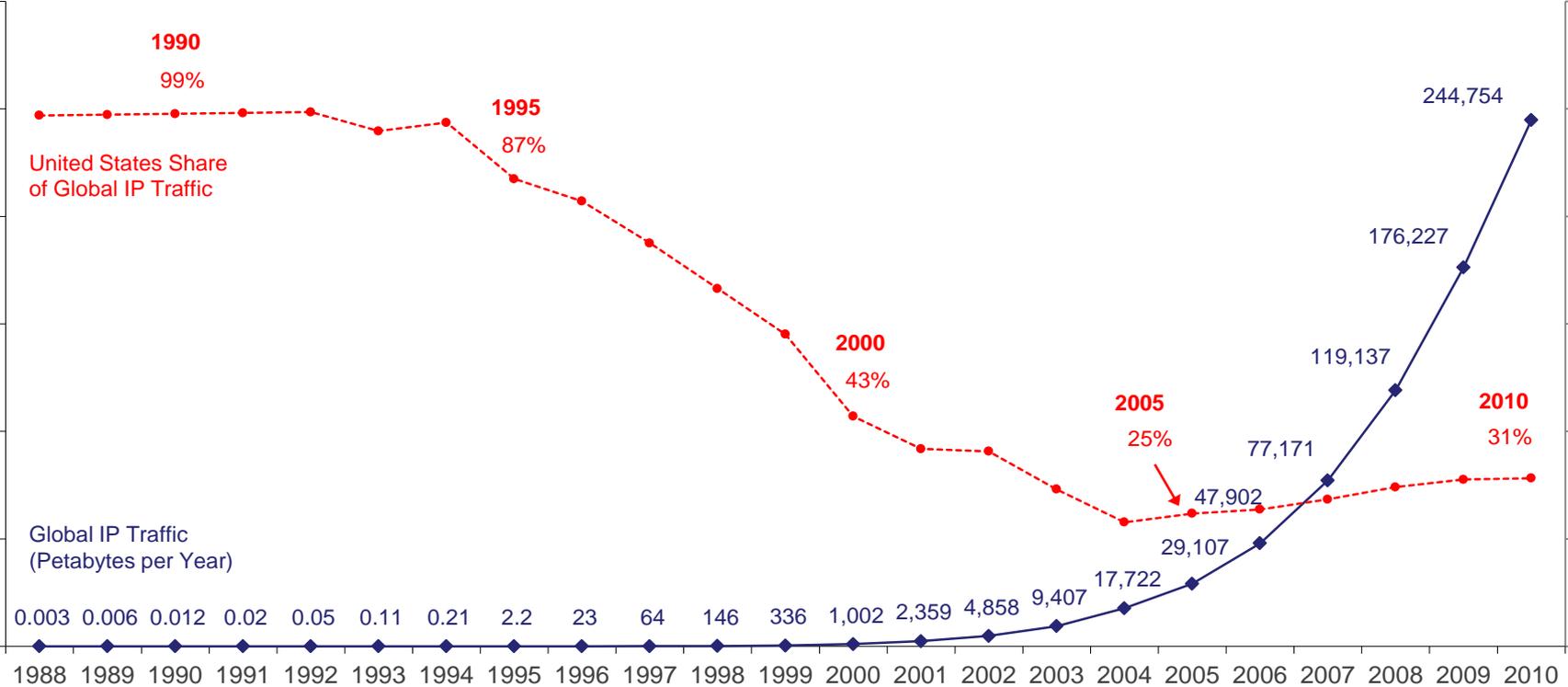
Estimated Global Internet Protocol (IP) Traffic, 1988-2010 (Petabytes per Year)



Source: Cisco Visual Networking Index (VNI) and USTelecom Analysis.

Under '88 Framework Internet No Longer Primarily U.S. Phenomenon

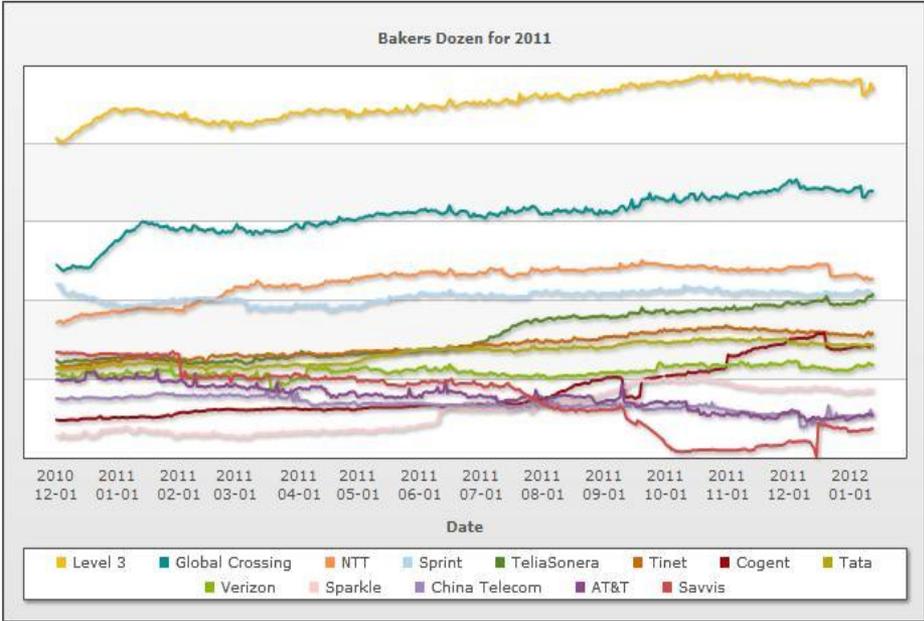
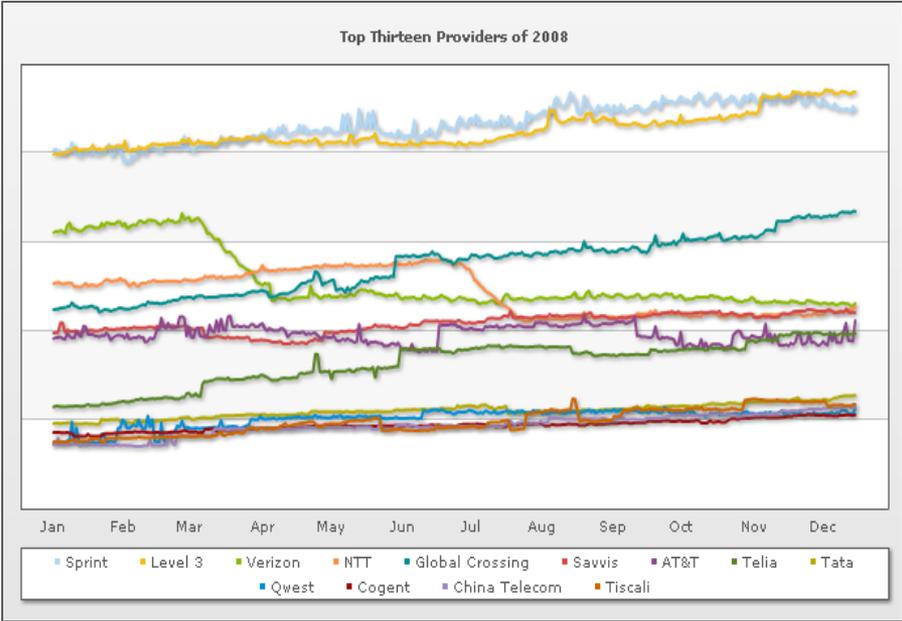
Estimated Global Internet Protocol (IP) Traffic and U.S. Share, 1988-2010 (Petabytes per Year)



Source: Cisco Visual Networking Index (VNI) and USTelecom Analysis. 2005 and later U.S. data were revised. Pre 2005 data were not revised and are estimated by applying pre 2005 growth rates to revised 2005 data.

Internet Backbone Is Becoming More International

Renesisys™ Global Internet Provider Rankings, 2008 - 2011



- January 2008 Ranking – Top 13**
- | | |
|--------------------|-------------------|
| 1. Sprint | 8. TeliaSonera |
| 2. Level 3 | 9. Tata |
| 3. Verizon | 10. Cogent |
| 4. NTT | 11. Qwest |
| 5. Global Crossing | 12. Tiscali |
| 6. Savvis | 13. China Telecom |
| 7. AT&T | |

- Year End 2011 Ranking – Top 13**
- | | |
|--------------------|-------------------------|
| 1. Level 3 | 8. Cogent |
| 2. Global Crossing | 9. Verizon |
| 3. NTT | 10. Sparkle (T. Italia) |
| 4. Sprint | 11. China Telecom |
| 5. TeliaSonera | 12. AT&T |
| 6. Tinet | 13. Savvis |
| 7. Tata | |

Source: Renesisys™. <http://www.renesisys.com/blog/2012/02/a-bakers-dozen-2011-edition.shtml#more>. Absolute scores are not meaningful; relative shifts are.