

How Traditional Traffic Flows are Changing: The Eve of New Global Submarine Cable Networks?

Pacific Telecommunications Council – PTC 19

23rd January 2019, Honolulu

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An aerial photograph of a ship's wake in the ocean. The water is a deep blue, and the wake is a lighter, turquoise color with white foam. The wake starts from the bottom right and extends towards the top center of the frame. A semi-transparent grey banner is overlaid across the middle of the image, containing the main text.

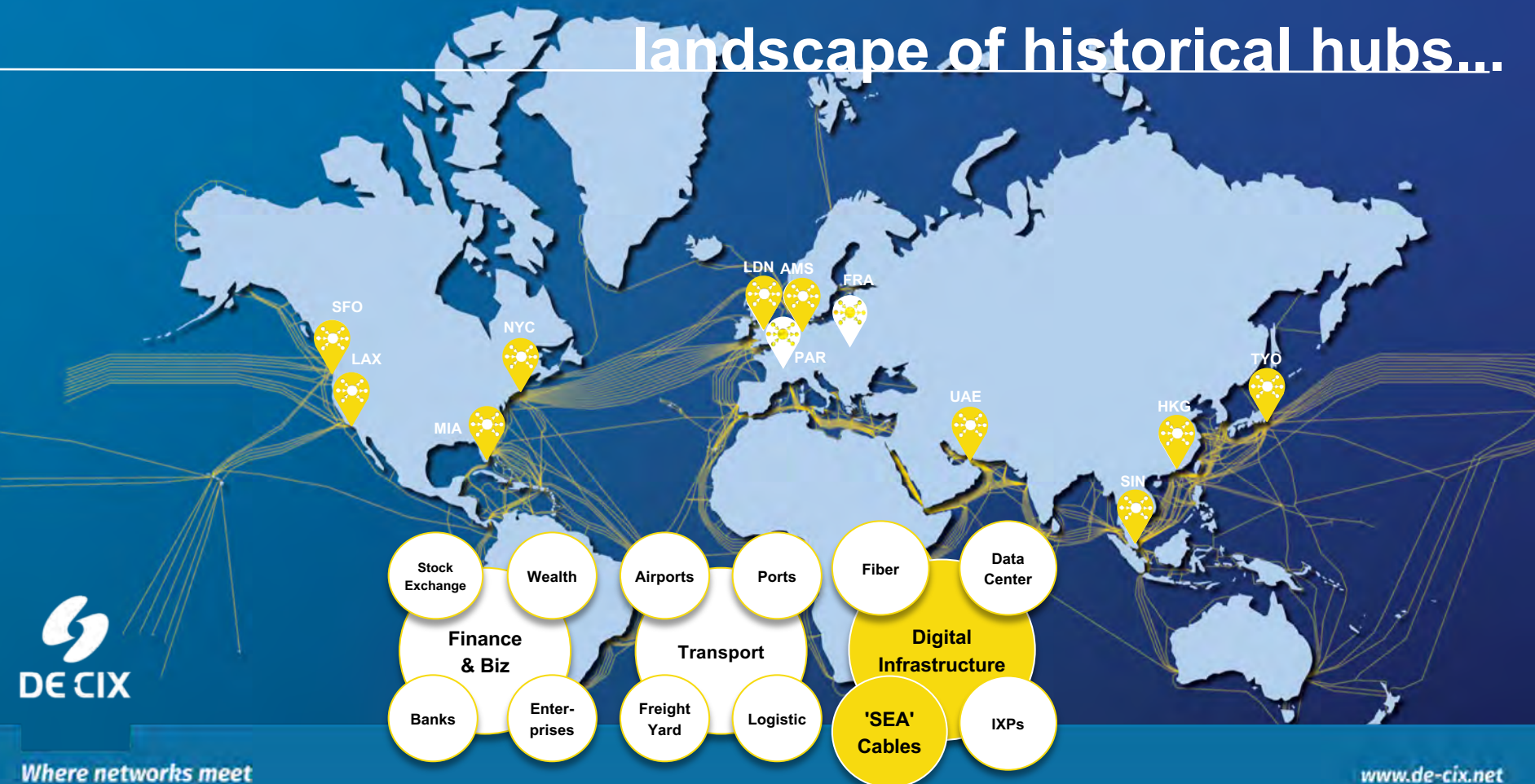
What does the traffic aggregation
look like as of today?



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landscape of historical hubs...



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...but new facts – the growth is heading south

<30%

30%

>40%

>40%

>45%

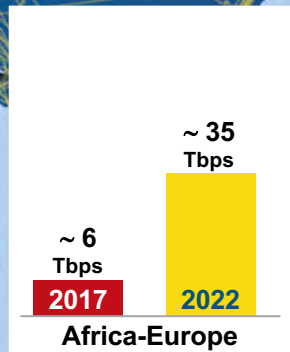
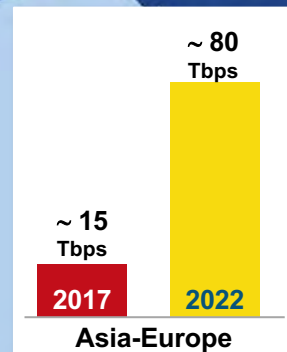
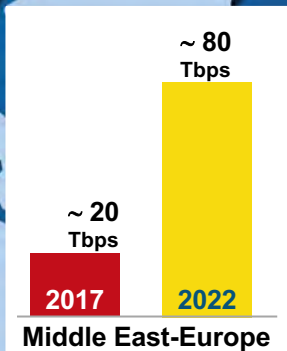
>35%



International Internet Bandwidth Growth by Region, 2017-2022 - source TeleGeography 2018

...but new facts – the growth is heading south

Examples of some major routes with Europe...

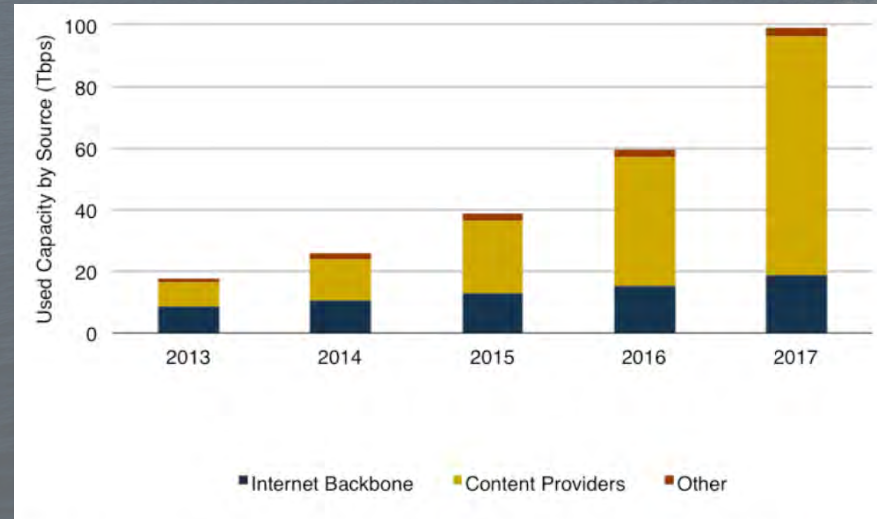


Used Bandwidth for Selected Routes, 2017-2022 - source TeleGeography 2018

...but new facts – content boosts the demand

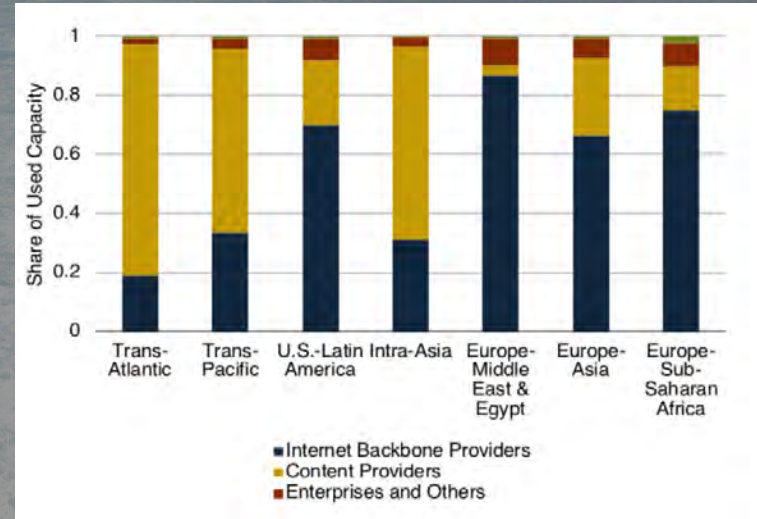
Trans-Atlantic Route

Used bandwidth by source 2013 – 2017



Major Routes

Used bandwidth by category 2017



impact – 3 significant trends...

1 Some content providers build/join their own sea cable consortium & incentivize individual ISPs to sign exclusively with single sea cable



2 The ownership of the value chain is changing



impact – 3 significant trends...

3 More sea cables have been deployed to serve the traffic flows with the “South” (e.g. MAREA, Seabras-1, EllaLink...)



A dramatic photograph of a massive, curling blue wave crashing over a small surfer. The water is a deep, vibrant blue, and the sky is a lighter, hazy blue. The surfer is a tiny figure in the center of the wave's barrel, emphasizing the scale and power of the ocean.

How will that influence historical & future hubs?



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Historical hubs will remain strategic ...

	2018 Bandwidth	CAGR, 2014-2018
U.S.		
Miami	20.0	27%
New York	19.2	25%
Los Angeles	16.7	30%
San Francisco	10.2	22%
Washington, DC	7.9	25%

	2018 Bandwidth	CAGR, 2014-2018
Europe		
Frankfurt	73.1	30%
London	55.7	26%
Amsterdam	48.4	29%
Paris	47.8	29%
Stockholm	21.3	29%
Marseille	18.3	55%

	2018 Bandwidth	CAGR, 2014-2018
Latin America		
São Paulo	9.2	34%
Buenos Aires	6.1	32%
Mexico City	5.5	36%
Rio de Janeiro	4.8	30%
Santiago	4.1	39%

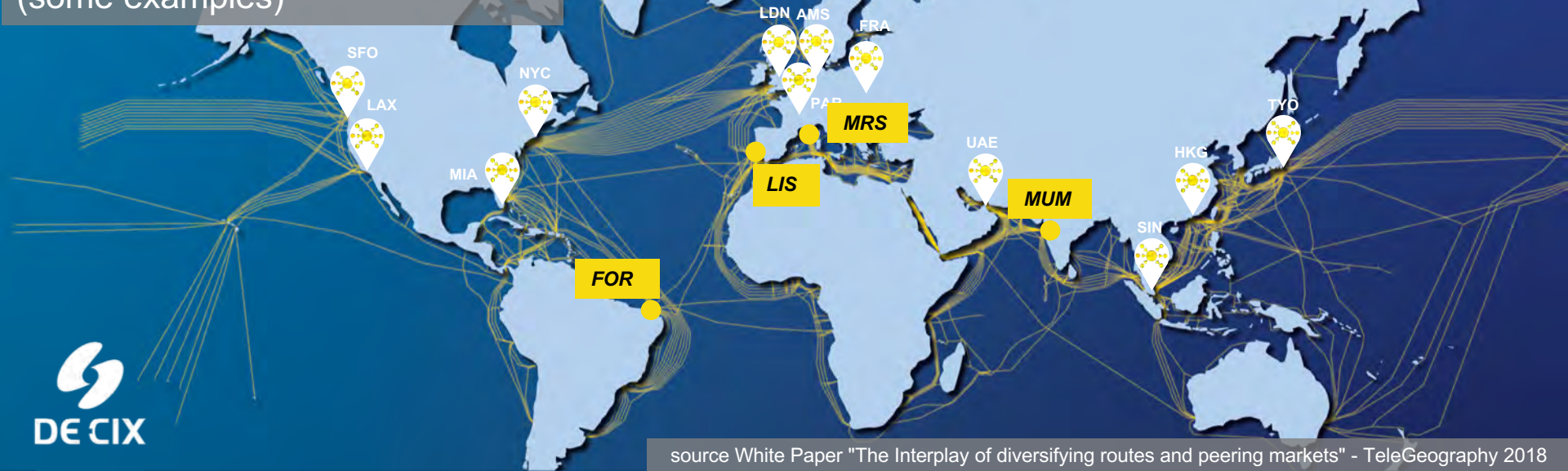


source White Paper "The Interplay of diversifying routes and peering markets" - TeleGeography 2018

...but new hubs are likely to emerge

...at new aggregation points
of Sea Cable capacities.

(some examples)



source White Paper "The Interplay of diversifying routes and peering markets" - TeleGeography 2018

Take Away

Find out much more...

White Paper Telegeography 2019 –

*"Subsea Cables and Interconnection Hubs.
The Interplay of diversifying routes &
Peering Markets"*

Available NOW on de-cix.net



take away

Regime of traffic flows & interconnection will be modified, with ***stronger focus on southern hemisphere***

New hubs will be created and will ***change the existing global interconnection landscape***

How prepared are you for the Eve of New Global Submarine Cable Networks?



Thank you for your attention!

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