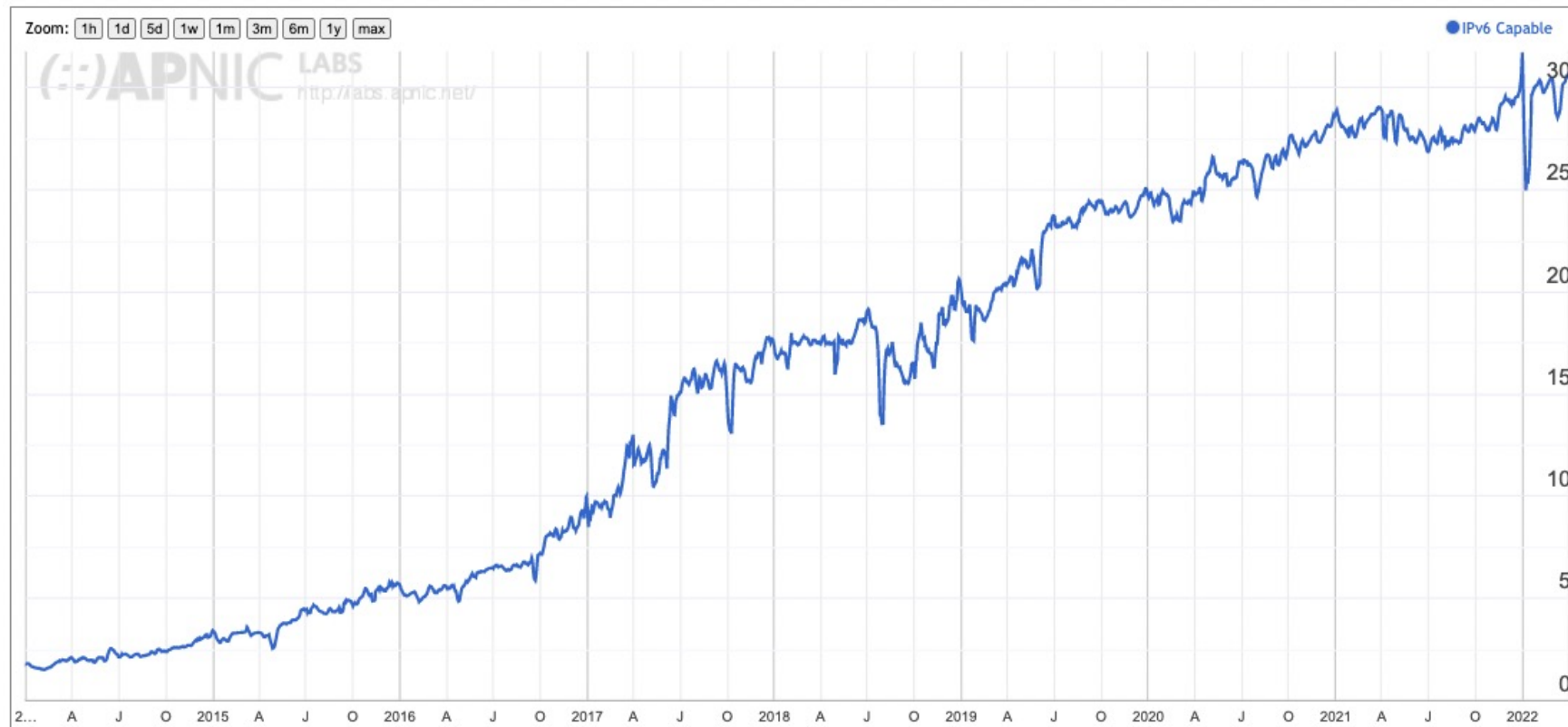
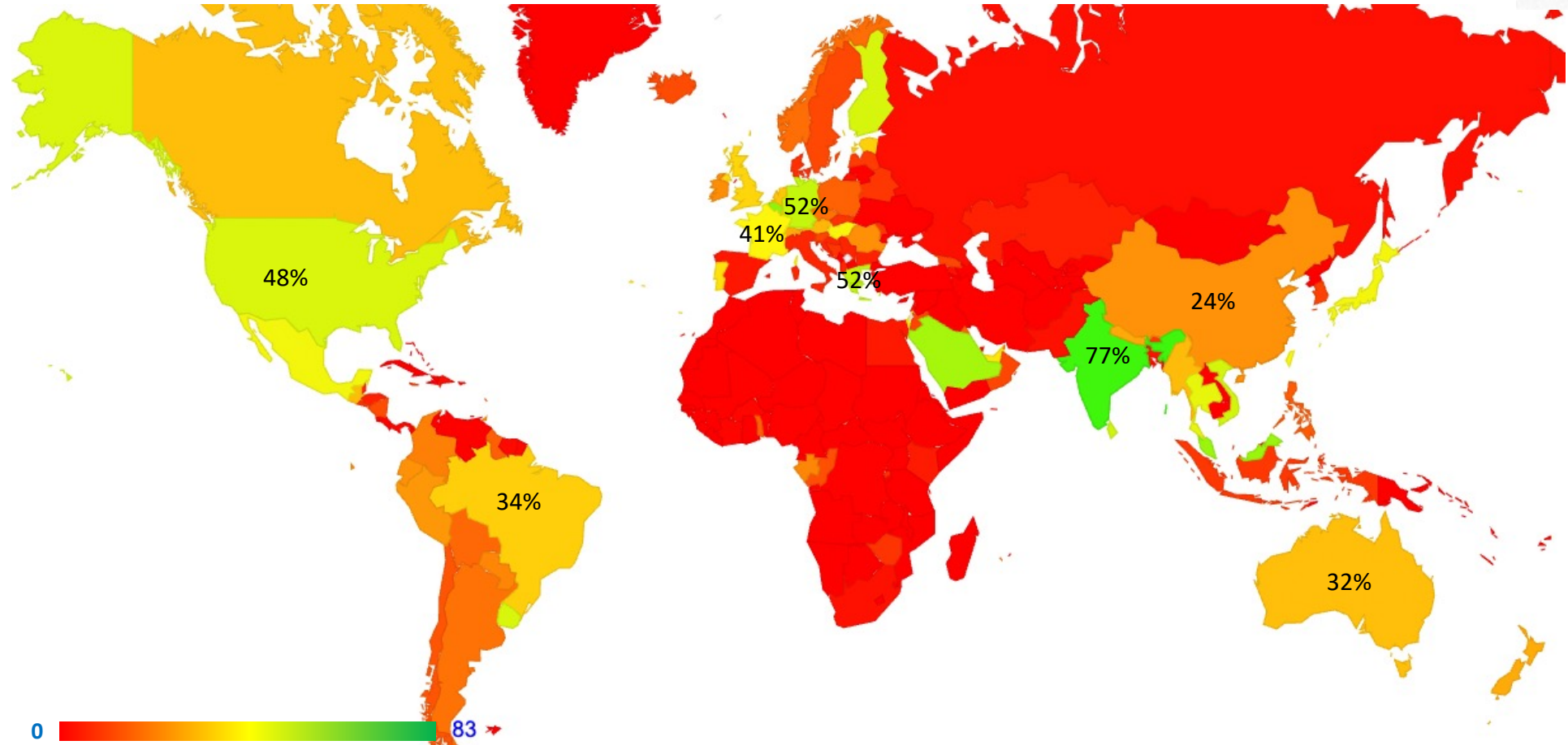


Where are we with IPv6 adoption?

- At the start of 2022 IPv6 finally touched 30% of the world's users



But not everyone all at once

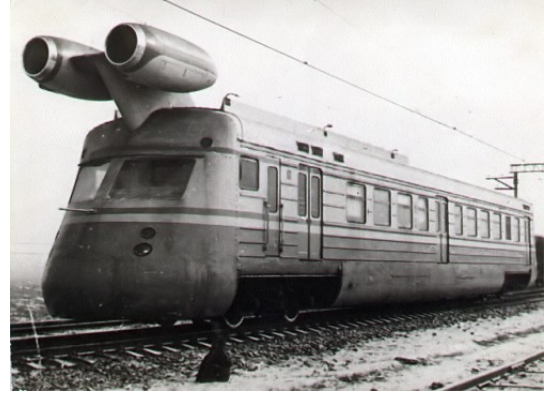


Why?



- This is a deregulated industry, not a command economy
- Access markets are showing signs of saturation – which means that established access enterprises see less scarcity pressures than new market entrants – the larger established providers are showing no signs of stress, so we wait and wait and ...
- Enterprises are far less enthusiastic about IPv6 than consumer retail (weekday use of IPv6 is lower than weekend use)
- Legacy 3G networks had issues with dual protocol support
- This is a market where early adopters are penalised with additional cost and laggards are rewarded by avoiding incremental costs

IPv6?



- Deployment of IPv6 does not instantly provide the network operator with competitive advantage
 - Yes, they still need to support IPv4 access to end client systems
 - The support infrastructure is now required for both protocols
- But there are some advantages
 - The general support for DNS-based Happy Eyeballs in apps and platforms means that dual stack deployment relieves pressures on residual IPv4 pools in CGNs

Not with a Bang but a Whimper

- This is shaping to be a story of a protracted decline of reliance on IPv4
- There is no clear flag day, and no clear event to say “we’ve arrived!”
- Consumer markets are in transition
- Enterprise markets will follow
- Because we have no alternative path to follow!