



Cisco Networking Academy Program Latin America Overview

Marco Cobb
Regional Manager
Cisco Networking Academy Program
Latin America

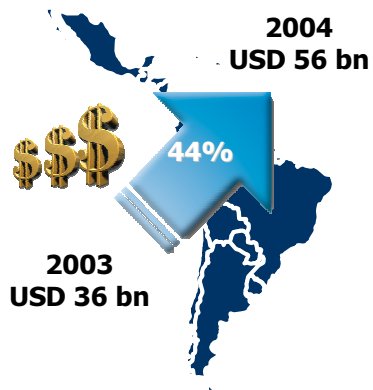
Agenda

- **State of the IT market**
- **Academy Program in Latin America**
- **Highlights**
- **Skills Demand European Study**
- **Future Directions**



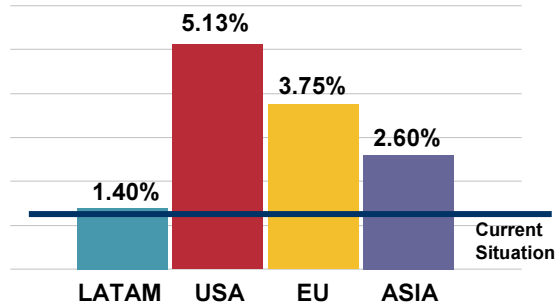
IT Environment in Latin America

Foreign Investment Turnaround



IT Penetration

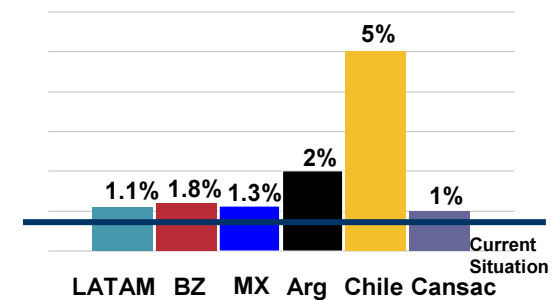
2004 Information Technology Investment as Percentage of GDP by Region



Source: Pyramid Research. IDC, World Bank

BB Penetration

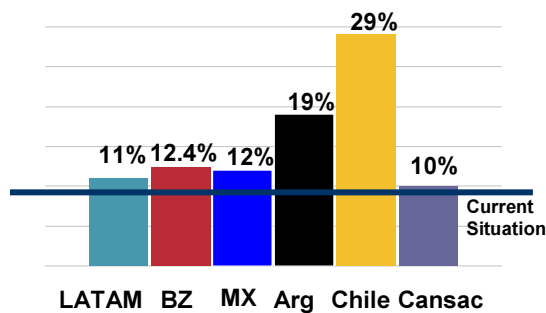
2005 Pyramid Research
Percentage of total Population



Source: Pyramid Research. IDC, World Bank

Internet Penetration

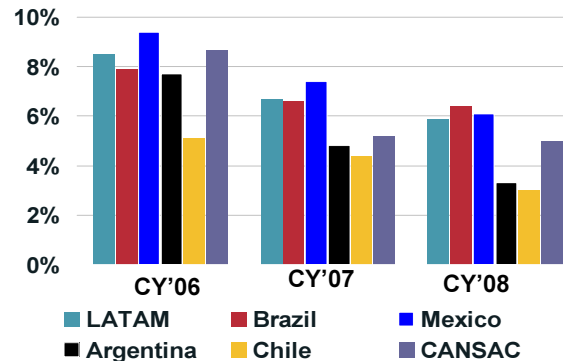
2005 Pyramid Research
Percentage of total Population



Source: Pyramid Research. IDC, World Bank

PCs Growth

2005 Pyramid Research
Year-over-Year Growth %

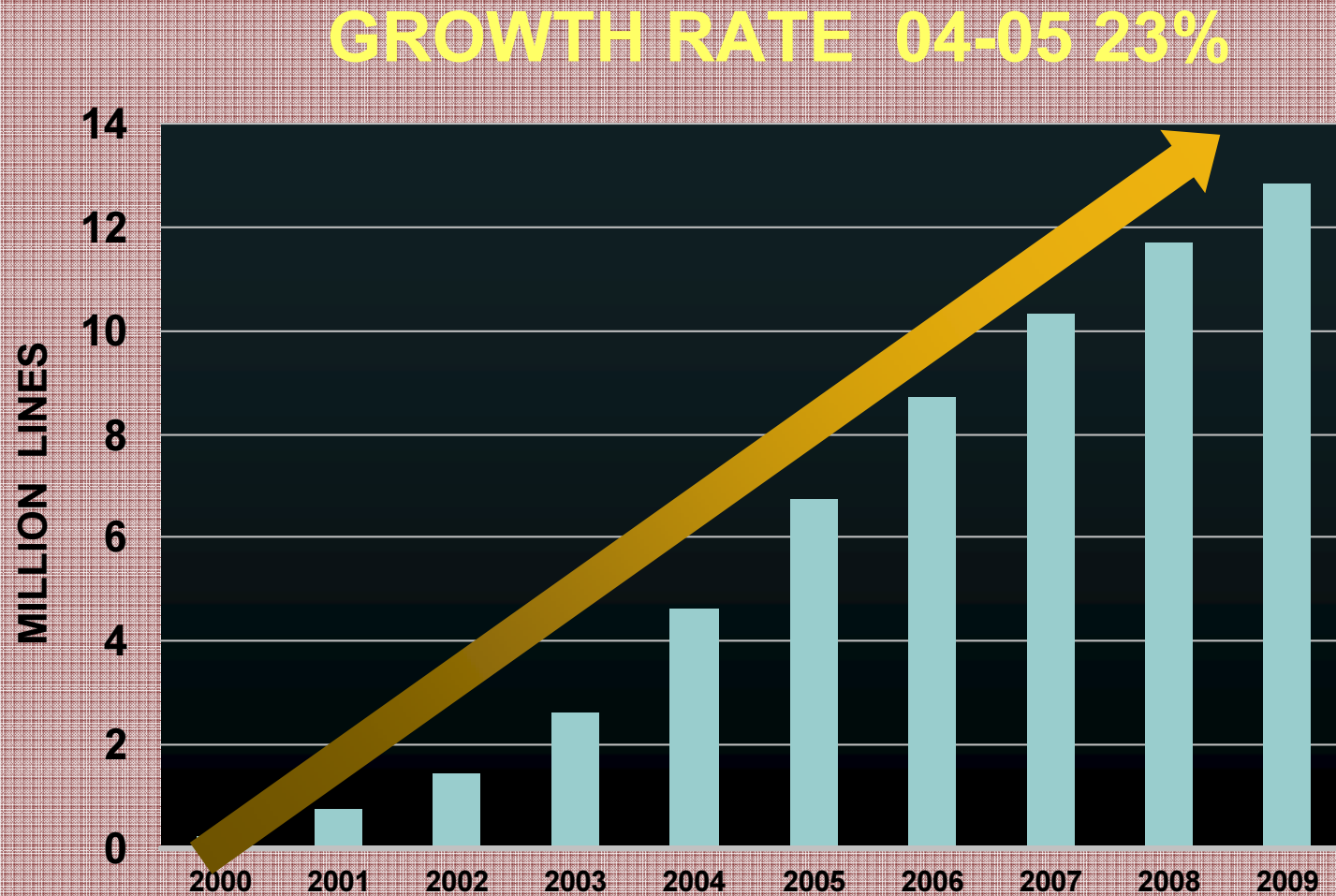


Source: Pyramid Research. IDC, World Bank



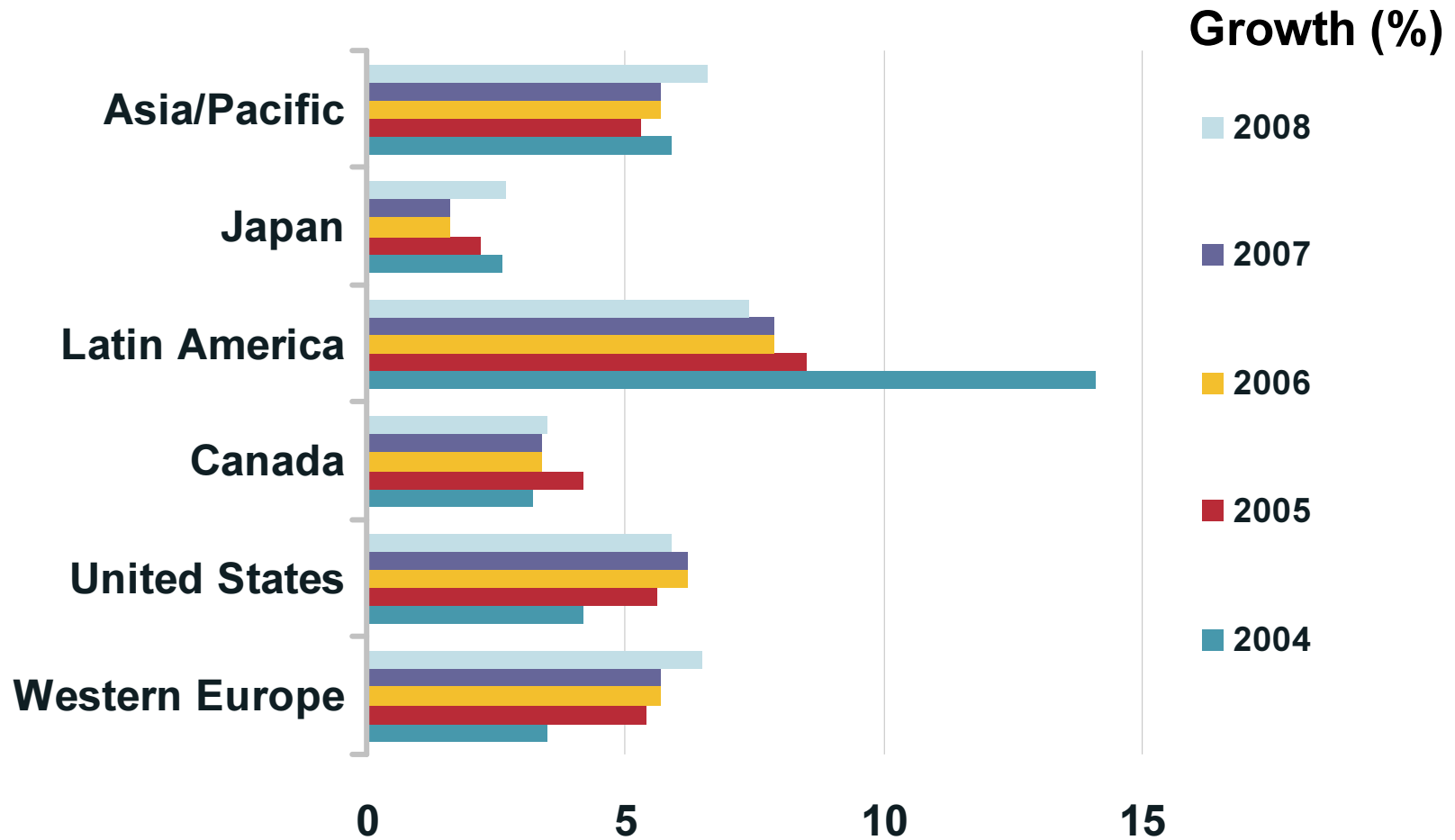
Source: Govts data, IBGE, Pyramid Research 2005, Latin Focus and Economist Intelligence Unit

Number of Broadband Lines in Latin America



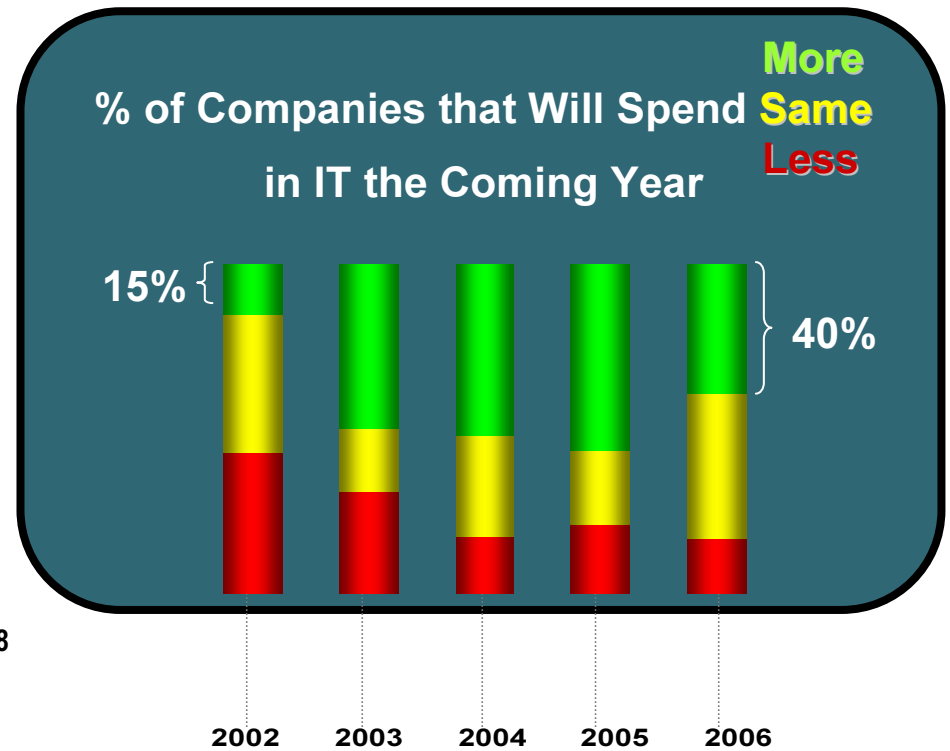
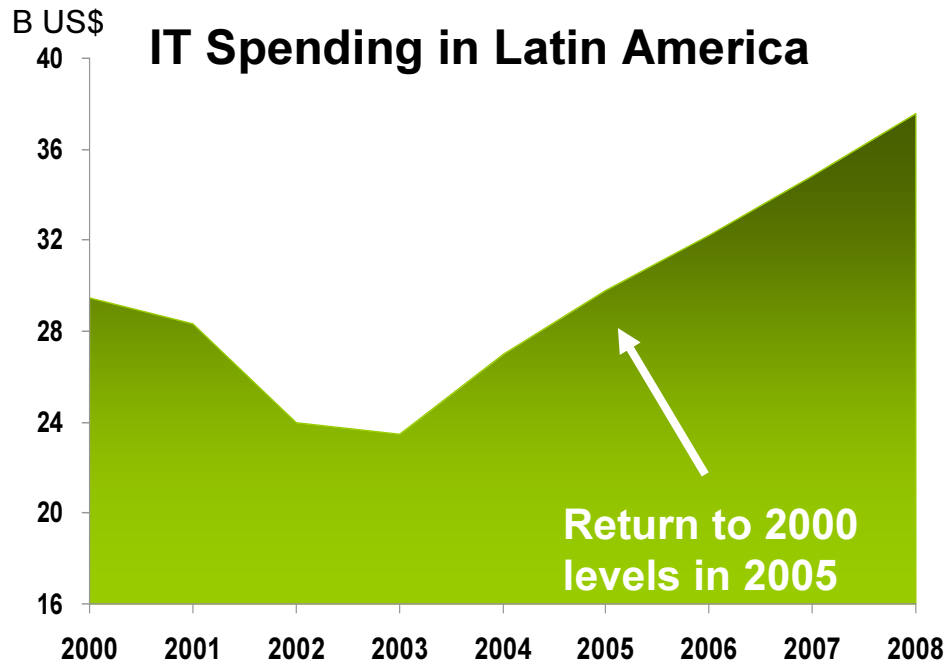
Source: Pyramid Research 2005

IT Spending Growth by Region



Source: IDC Black Book Q4 2004

The IT Rebound Is Underway and Business Optimism Remains High



Source: IDC Latin America IT Spending Trends, 2005

Technology Is Key To Development

“The two fundamental equalizers in the global economy are the Internet and education. The Internet is creating unprecedented opportunities for businesses, individuals and governments and the winners will be those with the right skills and knowledge to compete.”

**John Chambers
President and CEO
Cisco Systems, Inc.**



Education

Economic Growth in the Knowledge Economy is fueled by an educated workforce and is the key to innovation



Growing and attracting a high-quality, educated workforce is critical to a country's continued economic growth

Key message

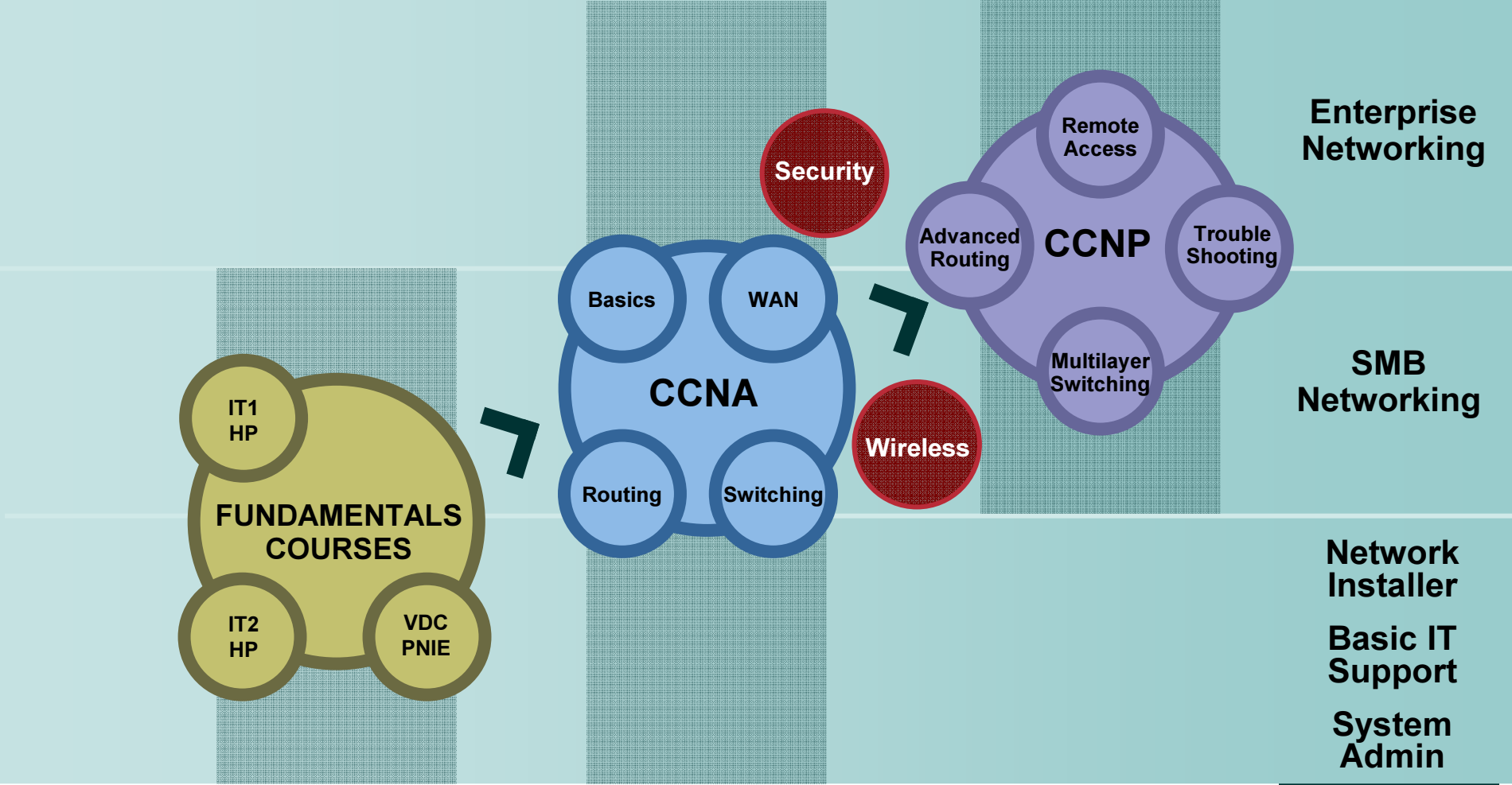
- **Students get the knowledge and abilities required in the market which make them more **COMPETITIVE****



Certification...English....

Multiple Pathways and Exit Points

CAREERS



The 2005 e-readiness rankings

Economist Intelligence Unit

The Economist

(<http://www.eiu.com/2005eReadinessRankings>)

Economist Intelligence Unit e-readiness rankings, 2005				
2005 e-readiness rank (of 65)	2004 rank	Country	2005 e-readiness score (of 10)*	2004 score
1	1	Denmark	8.74	8.28
2	6	US	8.73	8.04
3	3	Sweden	8.64	8.25
4	10	Switzerland	8.62	7.96
5	2	UK	8.54	8.27
6 (tie)	9	Hong Kong	8.32	7.97
6 (tie)	5	Finland	8.32	8.08
8	8	Netherlands	8.28	8.00
9	4	Norway	8.27	8.11
10	12	Australia	8.22	7.88
11	7	Singapore	8.18	8.02
12 (tie)	11	Canada	8.03	7.92
12 (tie)	13	Germany	8.03	7.83
14	12	Austria	8.01	7.68
15	16	Ireland	7.98	7.45
16	19	New Zealand	7.82	7.33
17	17	Belgium	7.71	7.41
18	14	S. Korea	7.66	7.73
19	18	France	7.61	7.34
20	22	Israel	7.45	7.06
21	25	Japan	7.42	6.86
22	20	Taiwan	7.13	7.32
23	21	Spain	7.08	7.20
24	23	Italy	6.95	7.05
25	24	Portugal	6.90	7.01
26	26	Estonia	6.32	6.54
27	31	Slovenia	6.22	6.06
28	27 (tie)	Greece	6.19	6.47
29	27 (tie)	Czech Republic	6.09	6.47
30	30	Hungary	6.07	6.22
31	29	Chile	5.97	6.35
32 (tie)	36	Poland	5.53	5.41
32 (tie)	32	South Africa	5.53	5.79
34	39 (tie)	Slovakia	5.51	5.33
35	33	Malaysia	5.43	5.61
36	39 (tie)	Mexico	5.21	5.33
37	34	Latvia	5.11	5.60
38	35	Brazil	5.07	5.56
39	37	Argentina	5.05	5.38
40	38	Lithuania	5.04	5.35
41	47	Jamaica**	4.82	5.11

Emerging markets have some e-readiness elements in place. All the components of a digital economy—infrastructure, security, transparency, innovation and **skills**—must be properly interlaced to ensure adequate e-readiness. These are still in deficit in most emerging markets, but a few are world-class or near to it in selected areas, the best examples being Estonia (26th), Slovenia (27th) and the Czech Republic (29th) with their strong development of e-government services.

Academy Program in Latin America



Cisco Networking Academy Program: Global Impact Since 1997

COUNTRIES WORLDWIDE

150 +

STUDENTS WORLDWIDE

1.6 Million +

ACADEMIES WORLDWIDE

10,000 +



INSTRUCTORS WORLDWIDE

30,000 +

TOTAL EXAMS TAKEN

40 Million +

LANGUAGES

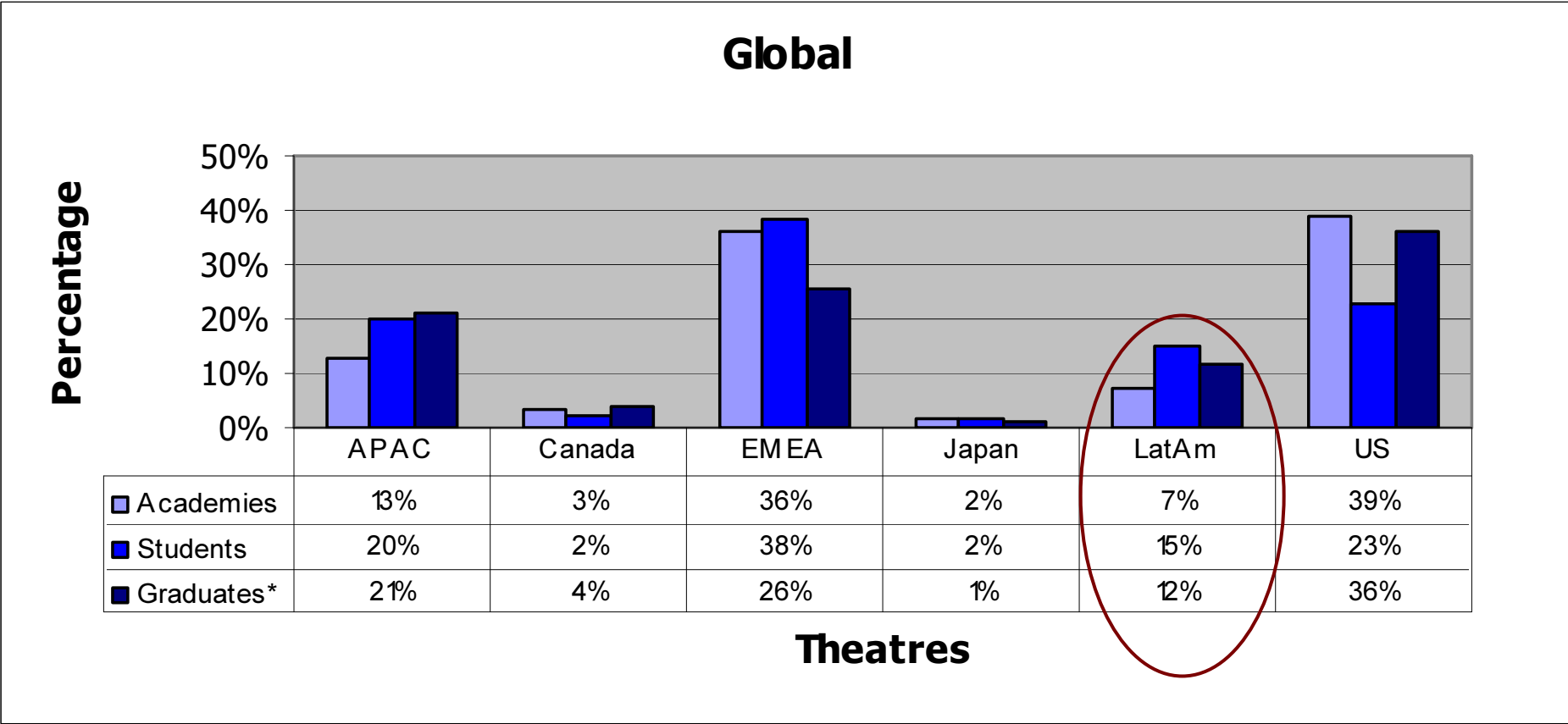
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Statistics Latin America

Latam General Stats. Stats Date: Feb. 1st, 2006				
Country	# Students	# Acads	# Instructors	# Graduates
MX	31.856	295	1.033	13.307
Mexico	31.856	295	1.033	13.307
CANSAC	20.620	241	825	18.136
Bahamas	0	1	17	0
Barbados	0	1	0	0
Belize	48	1	5	0
Colombia	7.053	77	259	5.600
Costa Rica	1.645	15	54	2.022
Dominican Republic	1.749	15	59	2.241
Ecuador	2.135	22	87	1.450
El Salvador	251	5	13	310
Guatemala	390	8	10	168
Haiti	122	1	3	83
Honduras	311	6	21	85
Jamaica	701	3	49	322
Nicaragua	430	8	25	438
Panamá	611	7	32	722
Puerto Rico	128	7	21	293
Trinidad and Tobago	42	5	9	2
Venezuela	4.959	59	161	4.400
Brazil	7.086	112	345	8.983
Brazil	7.086	112	345	8.696
SAS	8.555	108	439	13.110
Argentina	3.961	40	187	8.595
Bolivia	596	6	26	1.382
Chile	2.069	33	144	1.783
Paraguay	331	3	10	332
Perú	1.555	24	68	741
Uruguay	43	2	4	277
Latam	68.117	756	2.642	53.536

* **Note:** Graduate definition: students who have successfully completed CCNA 4, CCNP4, Wireless, Security, Cabling & IT 1 and IT 2.

Global Program at a glance



Indicators vs. Participating

Country	Pop (M)	Int U (000)'S	Int.P	GDP \$(B)	IT Spe \$(M)	%ITS	St/IT Spe.	St/Int.U's	Students	Acads.	% Non-part	St./Acad	Instruct.	Graduates	Fem.St.	%F.S.
Mexico																
MEXICO																
Bahamas																
Barbados																
Belize																
Colombia																
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Uruguay																
SAS																
Latam																

Indicators vs. Participating

Country	Pop (M)	Int U (000)*S	Int.P	GDP \$(B)	IT Spe \$(M)	%ITS	St/IT Spe.	St/Int.U's	Students	Acads.	% Non-part	St./Acad	Instruct.	Graduates	Fem.St.	%F.S.
Mexico	106.2	12,192	11%	698.8	7,903	1.13%	4.0	2.6	31,856	295	1%	108	1,033	13,307	10,169	32%
MEXICO	106.2	12,192	11%	698.8	7,903	1.13%	4.0	2.6	31,856	295	1%	108	1,033	13,307	10,169	32%
Bahamas	0.3	45	14%	5.6	47	0.84%	0.0	0.0	0	1	0%	0	17	0	0	N/A
Barbados	0.3	38	14%	2.8	24	0.84%	0.0	0.0	0	1	0%	0	0	0	0	N/A
Belize	0.3	35	12%	0.9	?	?	?	1.4	48	1	0%	48	5	0	2	4%
Colombia	46.0	2,961	6%	101.1	1,798	1.78%	3.9	2.4	7,053	77	1%	92	259	5,600	1914	27%
Costa Rica	4.4	889	20%	19.0	237	1.25%	6.9	1.9	1,645	15	0%	110	54	2,022	265	16%
Dominican Republic	9.3	1,291	14%	20.0	171	0.86%	10.5	1.4	1,794	15	6%	120	59	2,241	196	11%
Ecuador	13.2	563	4%	31.2	323	1.04%	6.6	3.8	2,135	22	8%	97	87	1,450	519	24%
El Salvador	7.0	312	4%	16.1	179	1.11%	1.4	0.8	251	5	0%	50	13	310	28	11%
Guatemala	13.1	773	6%	27.6	200	0.73%	1.9	0.5	390	8	27%	49	10	168	65	17%
Haiti	8.2	500	6%	5.2	?	?	?	0.2	122	1	0%	122	3	83	37	30%
Honduras	7.3	307	4%	7.8	56	0.72%	5.6	1.0	311	6	0%	52	21	85	92	30%
Jamaica	2.8	384	14%	8.8	49	0.56%	14.2	1.8	701	3	0%	234	49	322	127	18%
Nicaragua	5.8	69	1%	4.8	22	0.46%	19.7	6.3	430	8	43%	54	25	438	116	27%
Panama	3.3	209	6%	14.0	202	1.44%	3.0	2.9	611	7	0%	87	32	722	152	25%
Puerto Rico	3.9	819	21%	49.9	648	1.30%	0.2	0.2	128	7	13%	18	21	293	12	9%
Trinidad and Tobago	1.3	181	14%	11.9	75	0.63%	0.6	0.2	42	5	0%	8	9	2	3	7%
Venezuela	26.5	1,999	8%	118.8	1,093	0.92%	4.5	2.5	4,959	59	6%	84	161	4,400	1,234	25%
CANSAC	152.7	11,375	7%	445.6	5,124	1.15%	4.0	1.8	20,620	241	7%	86	825	18,136	4,762	23%
Brazil	181.2	22,864	13%	624.9	12,231	1.96%	0.6	0.3	7,086	112	1%	63	345	8,983	753	11%
BRAZIL	181.2	22,864	13%	624.9	12,231	1.96%	0.6	0.3	7,086	112	1%	63	345	8,983	753	11%
Argentina	39.1	7,471	19%	164.1	2,088	1.27%	1.9	0.5	3,961	40	5%	99	187	8,595	283	7%
Bolivia	9.2	217	2%	9.1	89	0.98%	6.7	2.7	596	6	0%	99	26	1,382	118	20%
Chile	15.5	4,554	29%	99.9	1,406	1.41%	1.5	0.5	2,069	33	0%	63	144	1,783	273	13%
Paraguay	6.2	305	5%	6.7	66	0.98%	5.0	1.1	331	3	0%	110	10	332	54	16%
Peru	27.9	1,472	5%	72.7	661	0.91%	2.4	1.1	1,555	24	0%	65	68	741	209	13%
Uruguay	3.3	494	15%	14.0	138	0.98%	0.3	0.1	43	2	0%	22	4	277	0	0%
SAS	101.1	14,512	14%	366.6	4,448	1.21%	1.9	0.6	8,555	108	2%	79	439	13,110	937	11%
Latam	541	60,943	11%	2135.9	29,707	1.39%	2.3	1.1	68,117	756	3%	90	2,642	53,536	16,621	24%

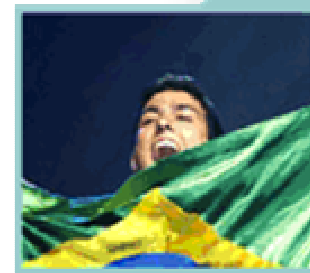
Highlights



Paulo Alberto Macedo Violada

Cisco Networking Academy graduate SENAI, Brasil

- **Gold medal winner**
Olimpiada del Conocimiento
SENAI, August 2004
- **Only representative for Latin**
America in the Finland
WorldSkills 2005
- **Bronze medal winner**
WorldSkills 2005



Government and Community Impact: bridging communities in emergency - NetRiders 2005 and Society: One goal

Background:

- Netriders is an event for Cisco Networking Academy community members and IT students and professionals. The event is meant to stimulate learning and exchange IT knowledge; furthermore, Networking Academy students have the opportunity to participate in networking competitions according to the level they have reached in the program.

The Challenge:

- To design a network and telecommunications solution for the Direction of Emergencies Prevention and Attention (DPAE) of Bogotá in Colombia and The State Civil Protection of Carabobo in Venezuela to attend a national emergency more effectively.

The Benefits

- Bogota and Carabobo now have a design of a reliable telecommunication network, that can be used in the attention of an emergency like an earthquake or flooding.
- Awareness among students and graduates regarding the impact they can have in their community
- Both Bogota and Carabobo now have a very good basis to design an investment project for the construction of the needed networking and telecommunications infrastructure

The Future

- It is expected that DPAE will design the RFP in the near future to open a bidding process in 2006



Netriders Colombia 2005
Bogotá, Colombia

Colombia & Venezuela

Impact on Individuals: First program alumnus to obtain a CCIE certification in Mexico

Background:

- Obtained System and computer engineer title along with CCNA courses at the TEC de Monterrey (Cisco Networking Academy)
- Earned CCNA Certification
- Was chosen as one of 3 Cisco Interns in Mexico
- Continued his education and obtained CCNP certification (self-educated)
- Differentiated himself as a valuable resource at Cisco and was employed as an SE

The Challenge:

- Obtain CCIE certification – Routing and Switching
- Less than 3% of all Cisco certified individuals worldwide make it to the CCIE level

The Benefits:

- After 7 months of hard work, successfully achieves CCIE Routing and Switching Certification

The Future:

- Pursue other CCIE Tracks: Security, Service Provider, Storage Networking and Voice.
- Obtain complimentary skills such as sales and negotiation.



Ramón Viñals
DF, Mexico

Mexico

Impact on Society: increasing females' access to IT training and career opportunities

Background:

- Fundación Belén Educa delivers high school education to youngsters in Chile and is also a Cisco Networking Academy.
- Natalia was one of 10 females who decided to focus her education on Telecommunications among 30 other male classmates of her generation.

The Challenge:

- To penetrate a traditionally male dominated industry, struggling against social prejudice at only 17 years of age.
- To maximize all benefits she could rip with the opportunity she was given to access an IT education

The Benefits:

- Natalia graduated successfully along with 6 other females from HighSchool being the sole one with a clear vision to pursue a career in IT.
- Today she is part of technical support and customer service group for IBM Chile.
- After work, Natalia goes to undergrad school to become an engineer; she is also the youngest student and only female in class.

The Future:

- To continue her education and earn an engineering degree
- Continue differentiating herself as a valuable IT resource in the labor market regardless of the gender



Natalia Peñaloza
Chile

Chile

Social Impact: giving economically and socially challenged youngsters the opportunity for a better future

Background:

- In Brazil youngsters of socially challenged communities have little access to education which condemns them to continue in the circle of poverty.

The Challenge:

- To create an education initiative that will provide youngsters access to an opportunity to break through years of poverty and harms of their social conditions by giving them the formation they need such as IT.

The Benefits:

- Escola de Fabrica has proven how private sector along with government institutions can support social development and its integration to the information economy.
- Sixty male and female youngsters have been selected for this opportunity from the “*Escuela de Enseñanza Media I de Paranoá*”, a school located in a region within *Distrito Federal* with a socially and economically challenged population.

The Future:

- It is expected for these young students to finish their education and exercise their citizenship by joining Society and the Labor Market.



First Group
Escola de Fábrica
Distrito Federal
Brazil

Brazil

Academy Program's Critical Role in Ethiopia's IT-Based Economic Regeneration Plan

- **Africa's first broadband optical network**
- **Supports education, e-health and ultimately prosperity**
- **Massive IT training need**
- **2 Academies today...
100 within a year**
- **Close the Gap partnership**
- **“ICT ... a vital and essential tool for fighting poverty“**

H.E. Prime Minister, Meles Zenawi



2005 Program Highlights - Vietnam

- Launch of Tripartite partnership between UNDP Vietnam, Hanoi Peoples Committee and Cisco Systems
- Ba Vi Women's Rehab Center (*Social Education and Labour centre No.2*) becomes LA for IT Essentials
- First group of students are recovering drug addicts and HIV+



2005 Program Highlights – India & SAARC

- **Memorandum of Understanding (MoU) with Jawaharlal Nehru Technological University > 200 engineering colleges in Andhra Pradesh state**
- **Agreement to implement Networking Academies in 100 Village Knowledge centres across India**
- **MoU with Rajasthan Govt. to introduce ITE in 32 District Computer Education Centres – along lines of the Jordan Education Initiative**
- **New Academy joins in Bhutan to train government employees - 25**



Skills Demand European Study



European Skills Demand Survey

Survey Purpose

- **Assess skills demand and supply**

Considering:

Changed economic environment

Major changes to technology market

Methodology

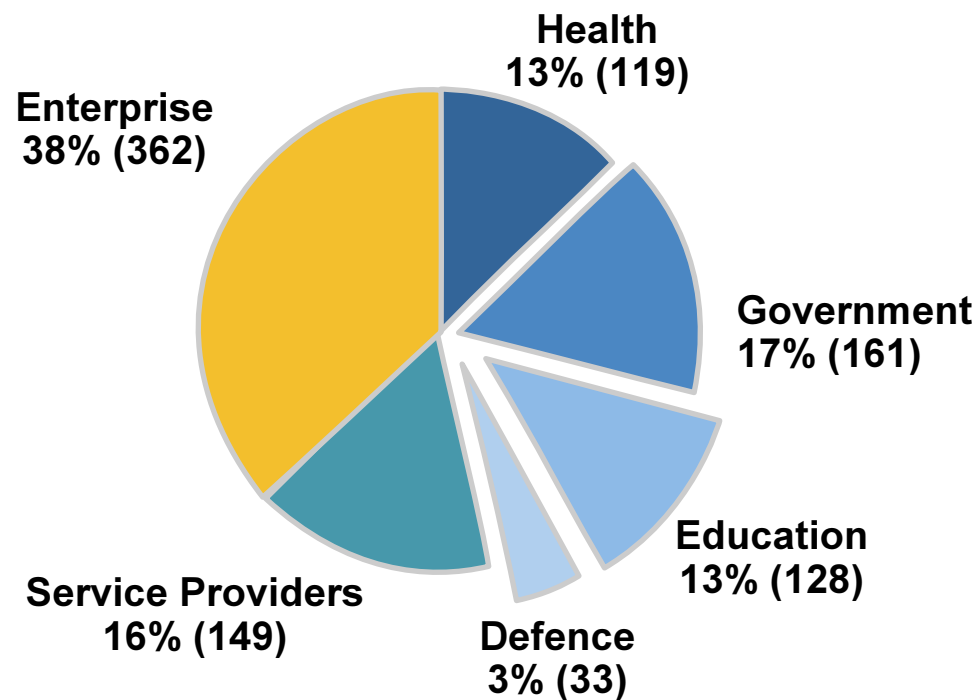
- **950 CIO level interviews**
- **Government, Telecoms, Healthcare, Education and Enterprise**
- **31 countries in Western and Eastern Europe**



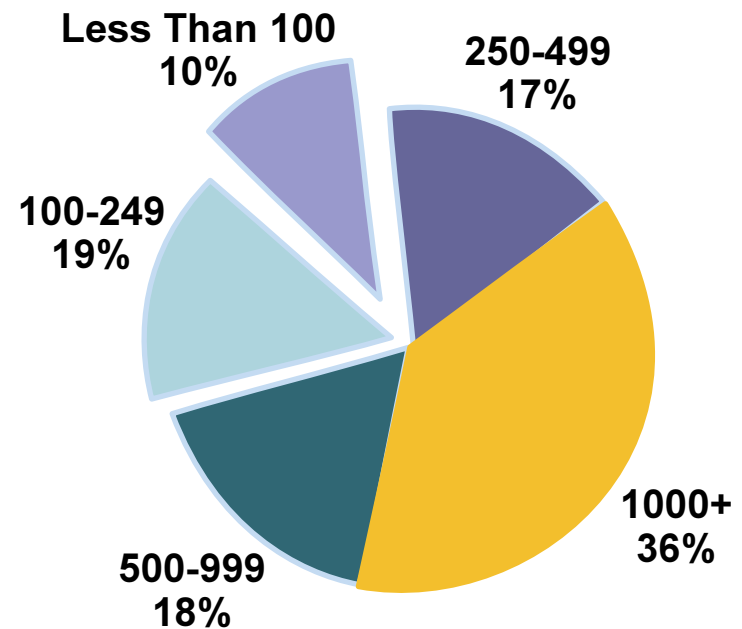
User Survey – Demographics

By Country, Technology, Vertical and Company Size

By Industry



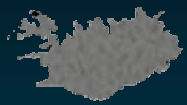
By Size



Source: IDC; Networking Skills in Europe, September 2005

The Advanced Technology Skills Gap Geographic Picture in 2005

- 14%+ Gap
- 8.1%-14% Gap
- Less than 8.1% Gap



Source: IDC; Networking Skills in Europe, September 2005

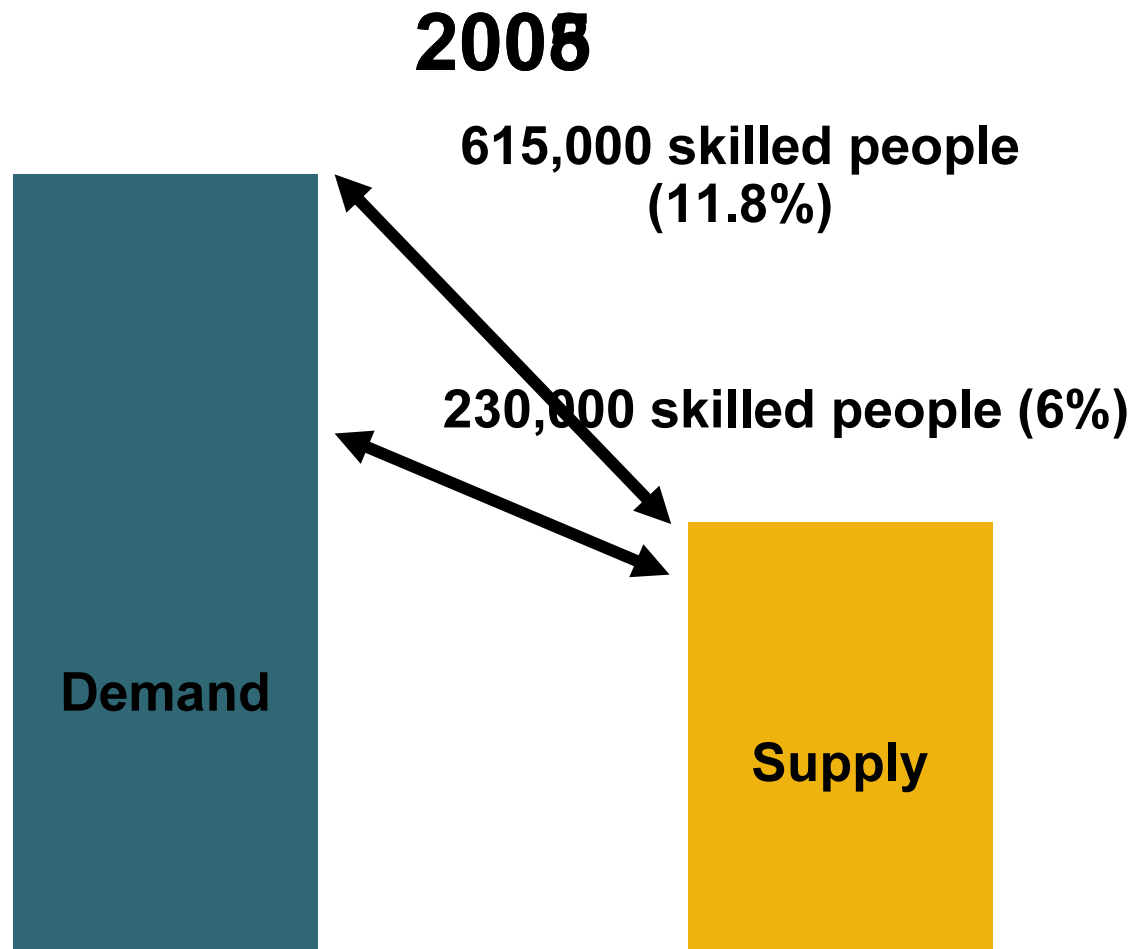
The Advanced Technology Skills Gap Geographic Picture in 2008

- 14%+ Gap
- 8.1%-14% Gap
- Less than 8.1% Gap



Source: IDC; Networking Skills in Europe, September 2005

The Demand/Supply Analysis – All Networking Skills



Source: IDC; Networking Skills in Europe, September 2005

Other Findings

- **70%** of businesses see **Security skills** becoming more important in the future
- **69%** expect **Wireless networking skills** to increase in importance
- **57%** expect **IP Telephony** to increase in important in the future
- **52%** expect **network-centric applications** (such as messaging and video conferencing) and understanding the networks impact on the business to be more important in the future
- **Skills certification** is seen as important by **72%** of organisations, particularly at the time of hiring. This is especially so in **Public sector organisations**.

Source: IDC; Networking Skills in Europe, September 2005

The Latin America Skills Gap Observatory

- **Partnership with UNESCO & The Latin American UNESCO Chair for Networking**
- **Will establish observatory in collaboration with public & academic sectors to track indicators every year**
- **Stage I includes Mexico, Chile, Argentina, Brazil, and Venezuela**
- **Ongoing Workshops**



The Future



The Future

- The market has changed since we launched the Academy Program in 1998
- It is time to re-fresh & evolve the program
- Strategic process underway to build for the future & re-invest in the program.

You may be involved through:

Interviews, questionnaires, direct feedback **...update profile**



Cisco Networking Academy Program



Obrigado!

CISCO SYSTEMS

