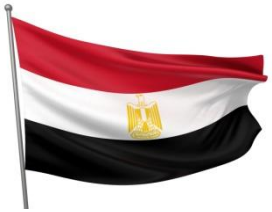

Egypt Expo

Massimo Migliuolo

Vice President
GTM – Emerging Market

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Transformation Begins with a Vision…

- Enable a national infrastructure empowers citizens, government, and businesses
- Connecting the catalysts of a nation's growth on a common *intelligent information network*

* Information and communications technologies

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Source: Cisco IBSG, 2008

The New Normal

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What is The New Normal? Technology and Business Decentralization

Business/Financial
- Globalization
- Scale → speed
- Productivity

Society
- Digital Divide
- Mobility
- Consumer-driven
- Green

Administration
- Compliance
- Governance
- Policy
- Security

Technology
- Continuous connectivity
- Real-time information
- Web 2.0 and richer content/applications

Competitive
- Empowered employees
- Consumers demanding more
- Borderless enterprise

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The Need to Build Broadband Equity

"While global business may be mobile, communities are not. Communities everywhere have the same goal: to be a place where people can raise their children and give those young people enough economic opportunity to allow them to stay and raise children of their own. "

Intelligent Community Forum, http://www.intelligentcommunity.org/

"To date, broadband has been deployed unevenly, with lower-cost, higher-income areas receiving access first. … In fact, such market forces will continue to deprive low-income and rural areas of broadband access, without government intervention ."

"Framing a National Broadband Policy," Dr. Robert Atkinson, President of Information Technology and Innovation Foundation, a Washington D.C. based technology policy think tank.

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Broadband Economy: Catalyst for Social and Economic Development

- Increased productivity is a major driver of development and growth
- Productivity gains are achieved through social inclusion, extending access to services across all levels of society, and increasing attractiveness to residents and investors
- Ubiquitous broadband promises greater socioeconomic development for:

Education	Safety and security
Health	Transportation
Government	Living and doing business

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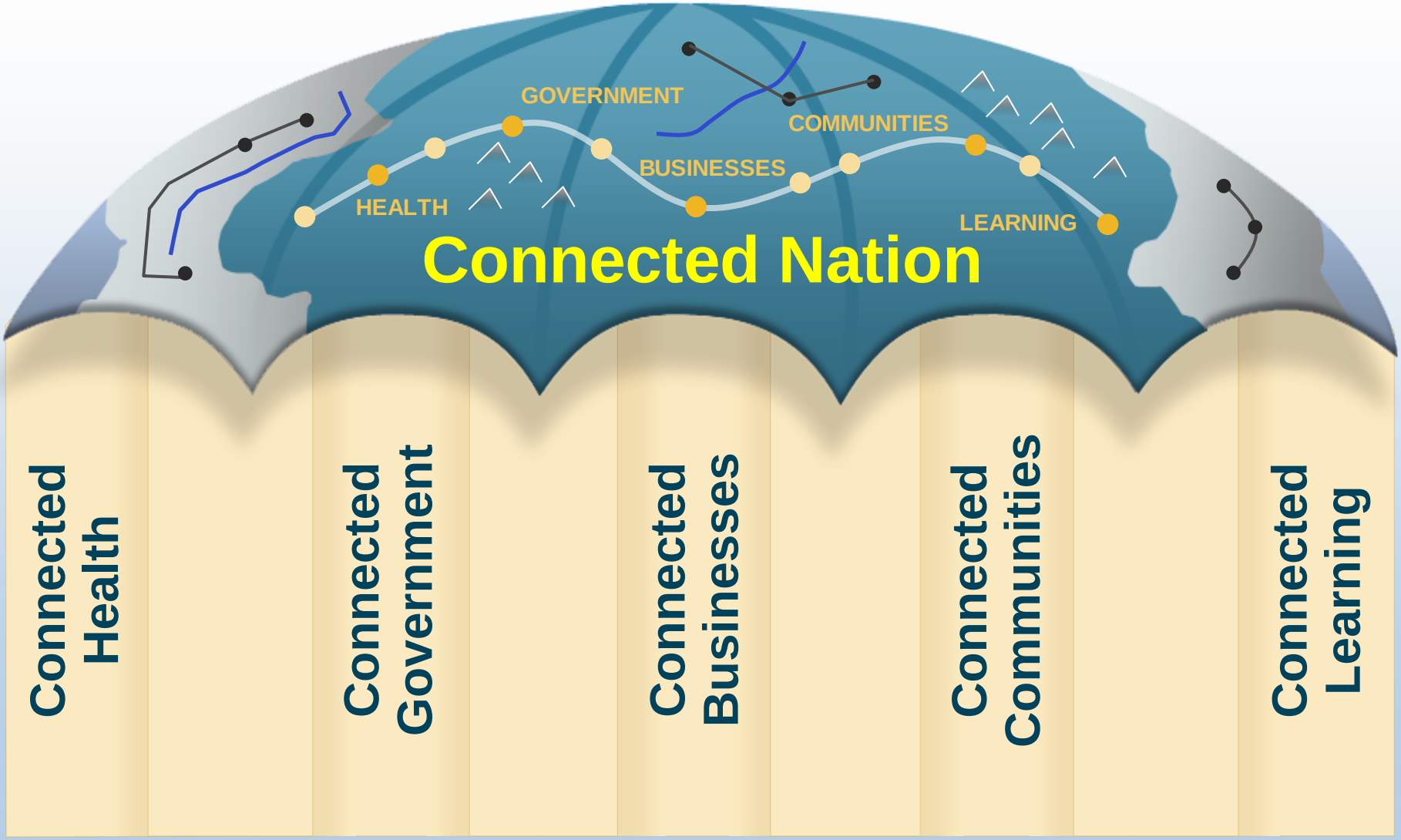
…That Leads to a Connected Nation



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Source: Cisco IBSG, 2008

Broadband: Bigger than Telco…
It's the Country's Enabler

- The public sector is between 40 – 50 percent of GDP
- The sector is challenged by bureaucracy and inefficiency:

  Example: 152 days to start a company in Brazil – 2 days in Australia – 33-47 days in Russia

- Results show the public sector can enjoy at least a 1.5%* productivity gain per year
- In just a few years, this gain is greater than total telecom market
- NET NET: The Country Case is far more significant than the Telco business case

- Doing the math—assume GDP at US$1,300B:

3-year cumulative productivity benefit for the public sector =	**US$ 59 M**
Typical size of the total telecoms market at 3% of GDP** =	**US$ 39 M**
Typical 3 year NGN investment by Incumbent operator *** =	**US$ 35 M**

Sources: * WEF 2006; **OECD—sample of Emerging Markets with Telecoms representing 3% of GDP; ***CSFB average of incumbent NGN investment rates (invest/sales ratio at 30%)

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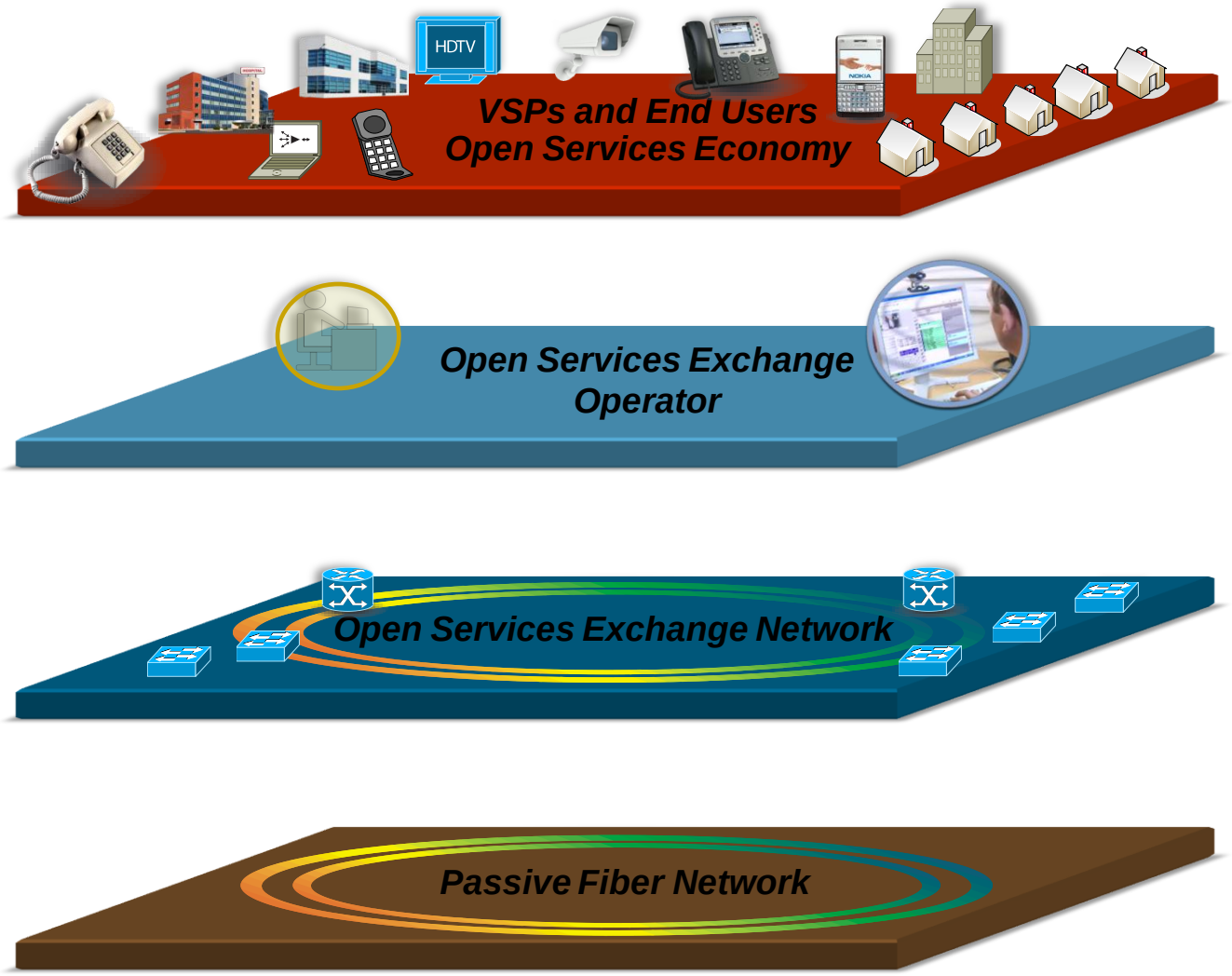
Evolve The Operating Model to enable Broadband as the 4th Utility



AppStore open economy in which customers can offer and purchase services on equal terms

Services Exchange connecting users to services

Lean, live and intelligent network

Passive Infrastructure layer leveraging right of way and Utility economics

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Broadband is the 4th Utility !

…driving many applications…affordability and accessibility are key

Entertainment	Productivity/ Business	Government	Information & Communication
▪ Streaming Music ▪ Video Streaming ▪ IPTV ▪ DVB ▪ Video on demand ▪ HD video downloading ▪ Online gaming ▪ EPG ▪ Gambling ▪ Virtual world	▪ Collaboration ▪ Emailing ▪ Virtual world ▪ Web browsing ▪ File Sharing ▪ Data Backup ▪ Telecommuting ▪ TelePresence ▪ Cloud computing ▪ Remote Surveillance ▪ Building control management	▪ E-Government ▪ Digital TV channels ▪ Remote Education ▪ Collaborative workspace ▪ Online public services ▪ Disseminating public information ▪ Medical File sharing ▪ Remote Diagnosis ▪ Telemedicine	▪ News ▪ Web 2.0 services ▪ Instant Messaging ▪ Social networking ▪ Family Calendars ▪ Photo & Video albums

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Virtual Classroom - Project Lakshya

- TelePresence made it all possible by bringing the teams closer together and demonstrating the power of technology and its benefits and advantages to society.

- Lakshya has established five remote learning centers and has a target of 20 centers by 2010.
- Physics, computing, accountancy and English language skills classes held via WebEx.

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Connected Hospital Solution

- Increase Hospital/Doctors/Patients (teacher/student/parents) experience
- Replicate in 40.000 Hospitals in Brazil

- Cost rationalization
- Process improvement and simplification
- Innovation

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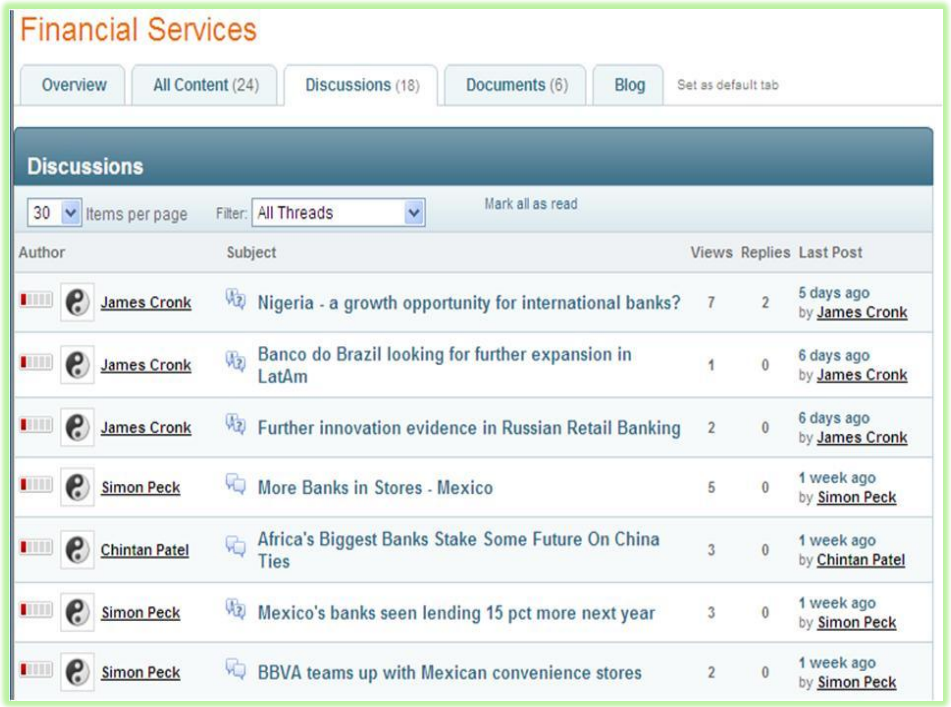
Change Management



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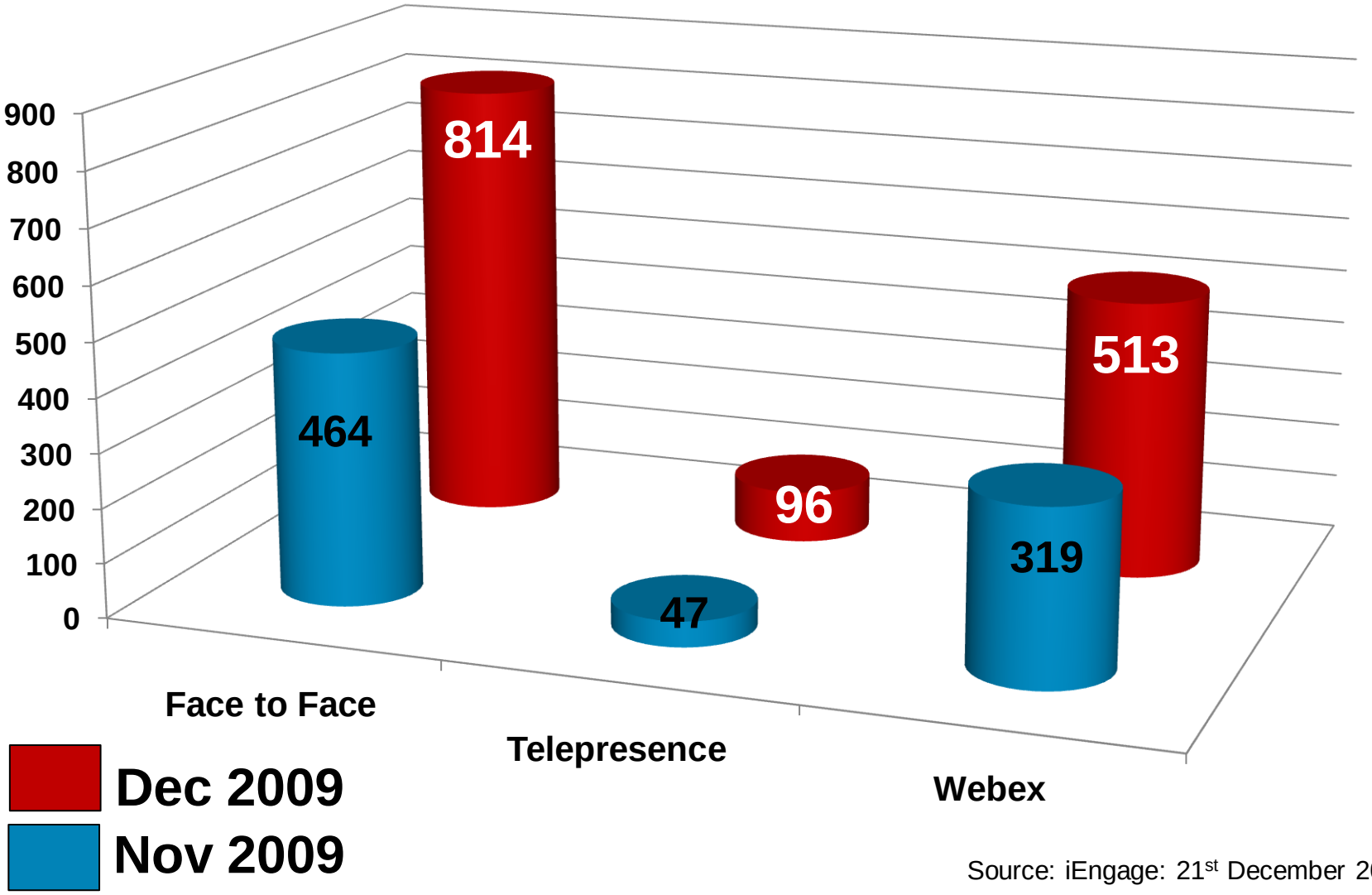
The Impact:
More Time with Customers



Source: iEngage: 21st December 2009

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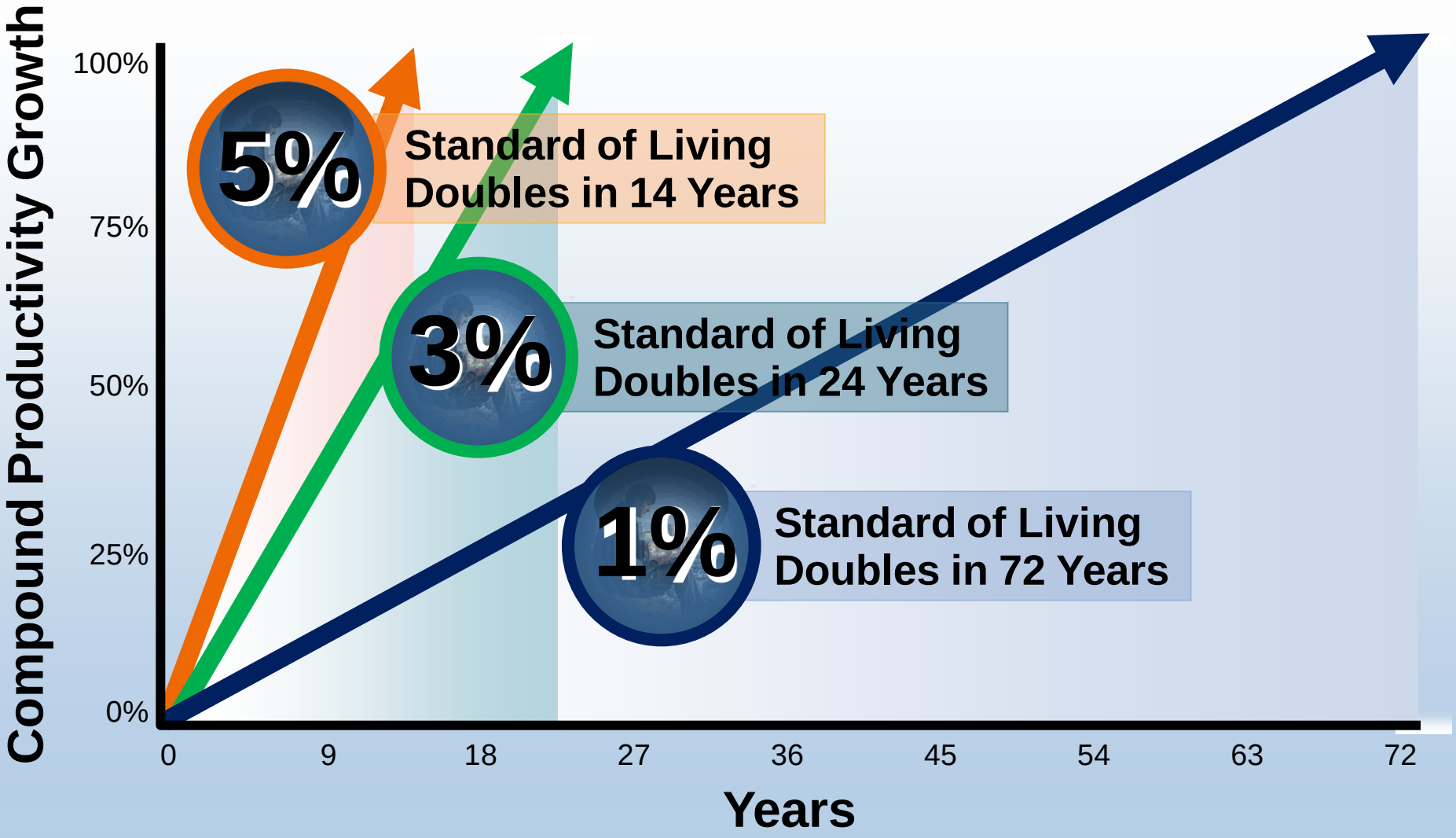
National Productivity Drives Standard of Living



Source: Net Impact Study, 2002; adapted by Cisco IBSG, 2007

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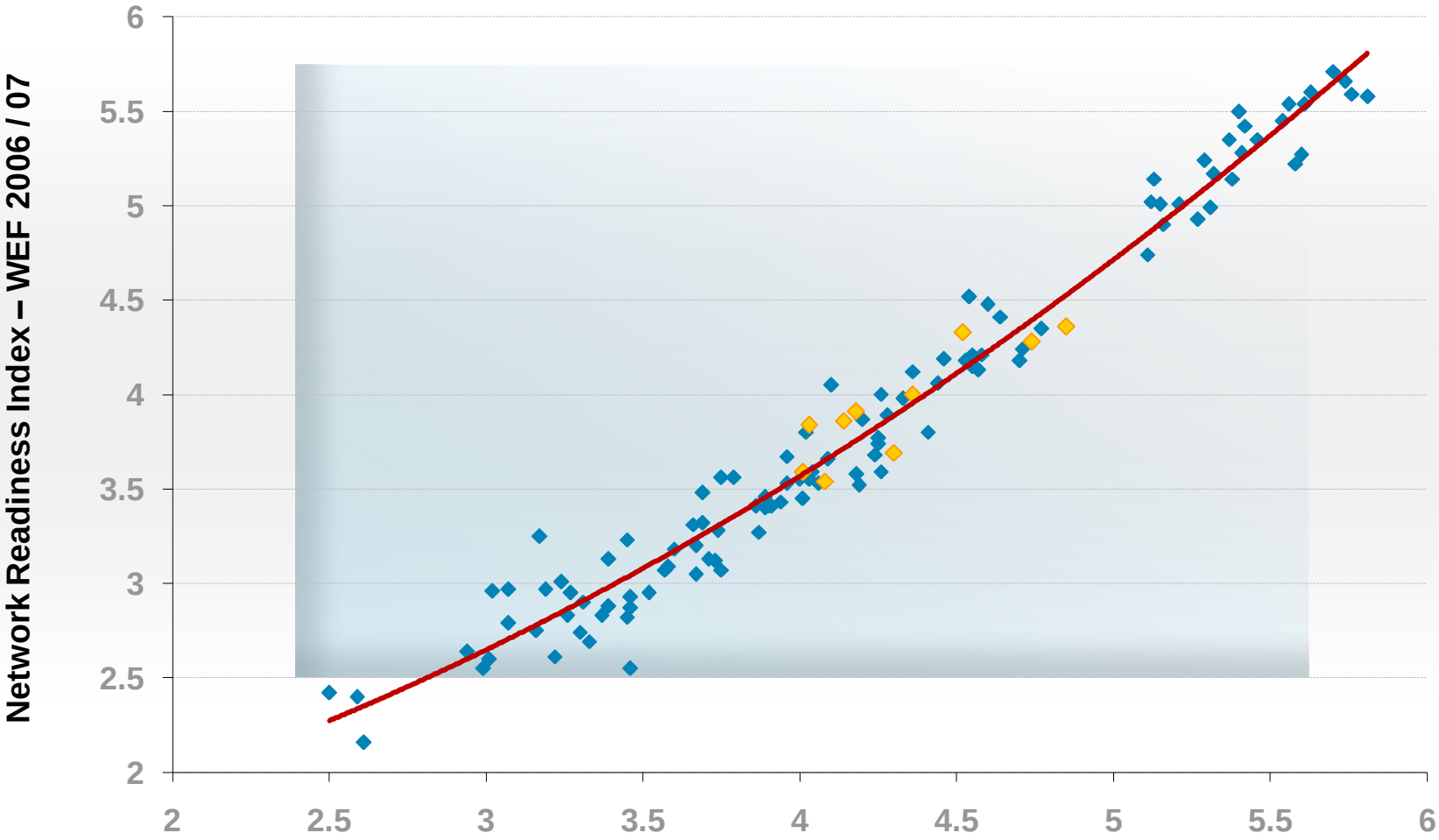
Network Readiness Drives Global Competitiveness



Source: World Economic Forum, INSEAD (2006)

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The Opportunity is... Now!

- Egypt is one of the few countries that managed to post respectable GDP growth in 2009. BAS-ML expects 4.5% growth in fiscal year 2009 and 4.2% in 2010".
- Africa has the fastest mobile growth in the world, which is 65% year on year according to some statistics.
- Africa was also the first continent on the world where mobile phones outnumbered fixed telephone lines
- Africa GDP Forecasted to grow 5.5% * Souce (AFDB)

Bank of America - Merrill Lynch Report - 17 September 2009

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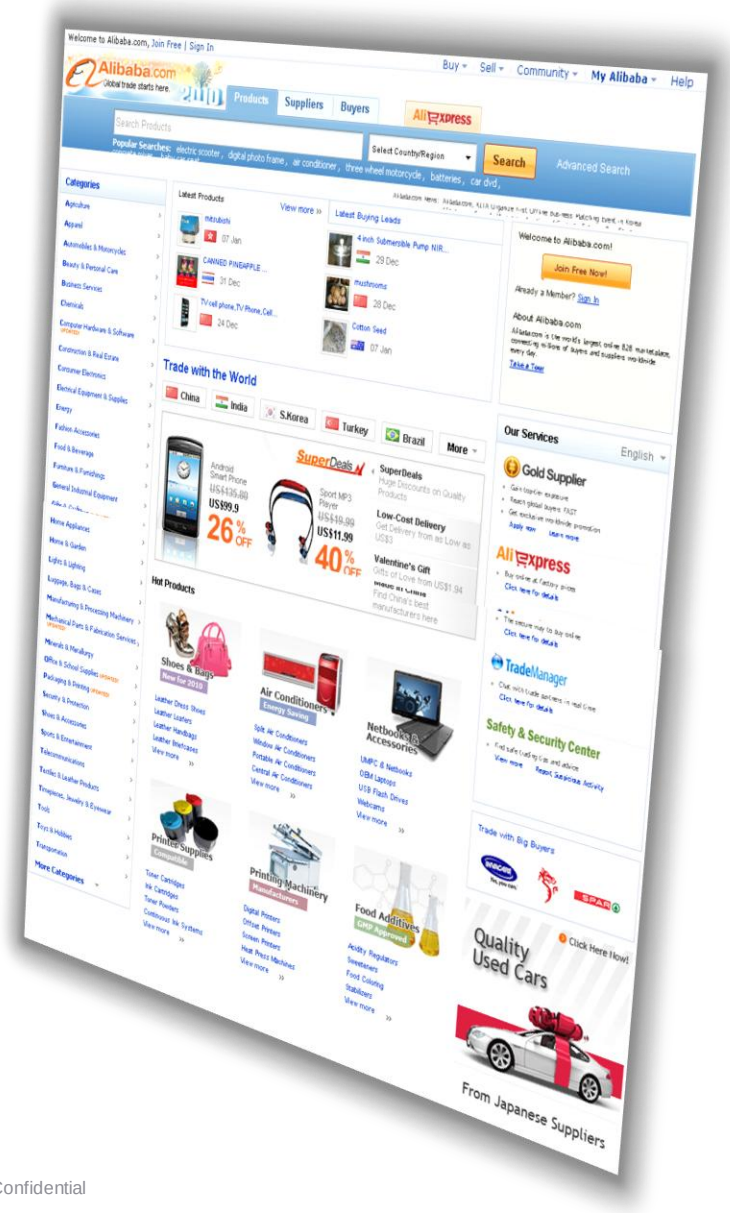
Business without Boundaries: Alibaba.com

- B2B Global online marketplace matching sellers and buyers; online business, technology, marketing services.
- 1.1 M New jobs in last 3 years
- 42 million registered SMBS from 240 countries



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March 28-31 • Bahrain

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1800+ attendees expected from Europe, Middle East, Africa and Asia

at the Bahrain International Circuit, home to the Gulf Air Bahrain Grand Prix

- **Event under the patronage of HRH, The Crown Prince of Bahrain**
  - **Travel -** 50% flight discounts on Gulf Air and discounted hotel rates for all attendees
  - **Visas -** Waiving visa fees and providing fast lanes through customs
  - **Entertainment** - A special night kindly hosted by the Bahrain Ministry of Culture & Information

- **200+ sessions delivering innovation technology content covering Cisco's core technologies solutions and architectures:**
  - 168 breakout sessions split across 8 technology tracks
  - 17 technical seminars – whole day session focused on one technology solution (March 28)
  - 24 customer case studies
  - Walk in Labs & Cisco Career Certification
  - Unique keynote program staging holographic TelePresence & Cisco corporate guest speakers

- **World of Solutions Exhibition –** Cisco together with 45+ strategic partners showcase the latest in innovative technology solutions
- **IT Insights Program** – Addressing IT managers & business decision makers
- **Meet the Engineer** – Ability to discuss technology challenges with 300+ Cisco experts
- **Innovation Awards** – Honoring outstanding achievements that truly embrace innovation

knowledge
s power

Conference Information & Registration Website:
www.cisco.com/go/cisconetworkers/bahrain2010

Technology is here. Broadband, Video and Collaboration are ready. Skills are in place.

Together we can make it Happen!

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CISCO

Policy & Technology are Drivers of Change

PUBLIC POLICY

Energy

Education

Entertainment

Healthcare

Transportation

Urban Development

TECHNOLOGY

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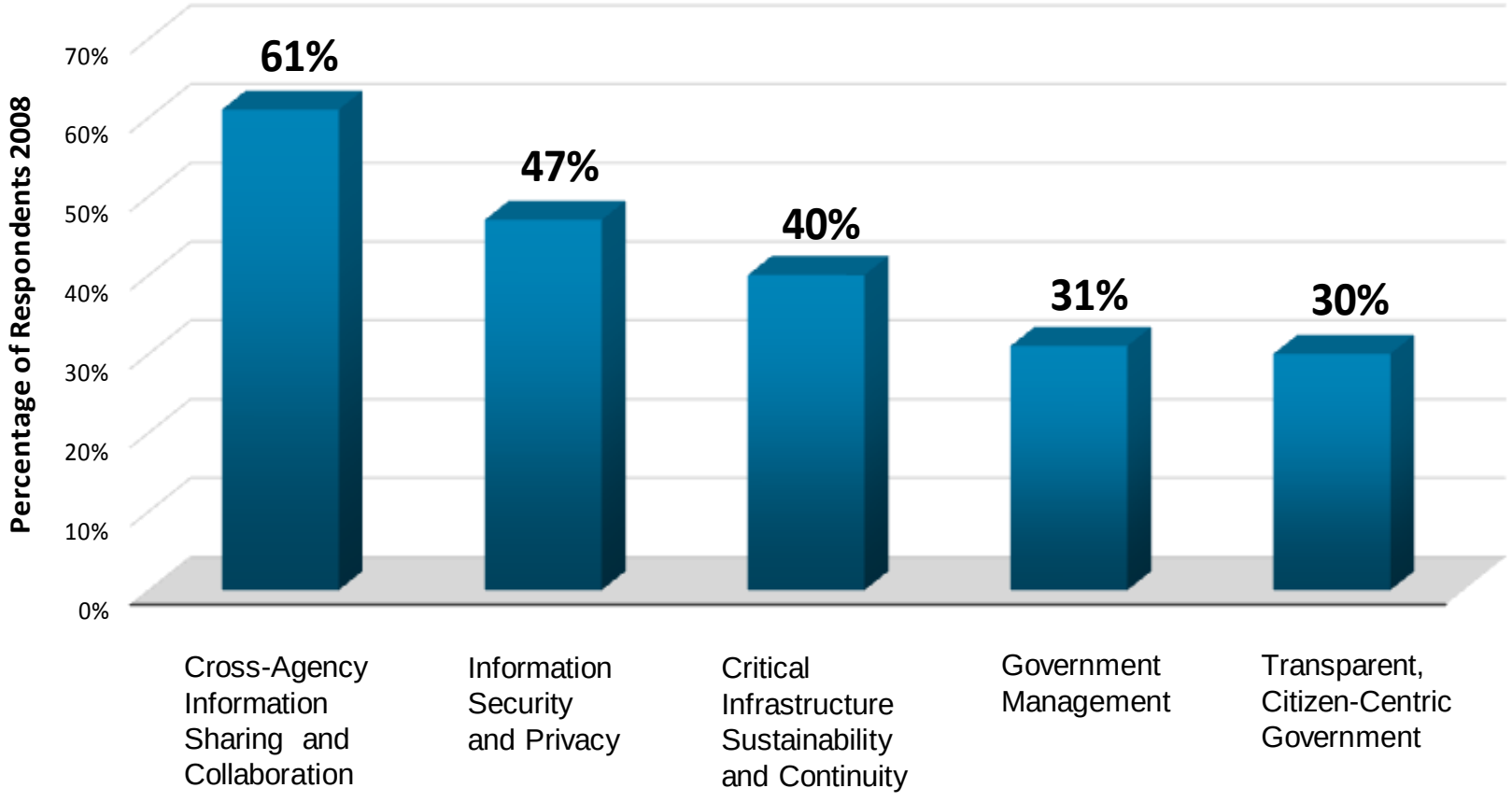
Where is IT's Greatest Impact on Government?

Federal CIO Survey Question:

Where will investments in technology have the greatest impact on the performance of government?



Source: AFFIRM, December 2008

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