

One Africa:

How Collaboration Is Changing The Continent

Cisco Kenya Expo , 28th -29th of June 2011

Pim Versteeg, VP, Emerging Markets, Central



Multi Billion
Capturing
Dollar
a
OPPORTUNITY
Compelling
by 2013

The True Size of Africa?

Larger than the
USA, China, India,
Japan and all of
Europe combined



A young woman with dark, curly hair, wearing a vibrant, multi-colored striped shawl and a red beaded necklace. She is looking slightly to the left with a serious expression. The image is cut out with a white, hand-drawn style border.

**Over
1 Billion People**



Dozens of African
countries have GNI
Tenth largest
and still growing
Unprecedented growth
Economy
than China



One Africa



Driving GROWTH



by Connecting
221 million new
consumers by 2015

A photograph of three young girls in a rural setting, smiling and playing with a rope. The girl in the center is wearing a floral top and a patterned skirt, while the girl on the right is wearing a white top and a colorful skirt. The background shows a dirt path and a building with a corrugated metal door.

Enabling the Next Generation of Entrepreneurs'

A silhouette of a camel and a person walking in a desert at sunset. The sun is low on the horizon, casting a warm orange glow. In the background, the Great Pyramids of Giza are visible. The camel is in the foreground, and the person is walking behind it, holding its lead. The text "Unleashing Africa's True Potential" is overlaid on the image.

Unleashing Africa's True Potential



Africa to produce
13% of global oil
by **2015**

The background of the slide is a photograph of a savanna landscape. In the foreground, a large elephant with prominent tusks stands in a field of dry grass. To the left, there are several acacia trees. In the far background, the snow-capped peak of Mount Kilimanjaro rises against a clear blue sky. A white, torn-paper-style border separates the sky from the rest of the image.

400 million

**subscription mark surpassed in
Africa mobile- phone market**



— **Telecommunications**
growth to capture
\$12- 15 billion
by 2012 in broadband
& mobility —



— Africa has **110 Million**
internet subscribers today

Cisco's Vision is to enable
200 Million by 2013 —



What an Unprecedented Opportunity



31 Cities

contribute $\frac{1}{4}$ (\$430B)

towards Africa's GDP



Imagine a Truly Connected Africa

The Power of the
Network as the Platform



One Africa

**Connecting Governments
Connecting Business
Connecting Health
Connecting Education**

Changing the Way We Work, Play, Live and Learn

A scenic photograph of a mountain range at dusk or dawn. The sky is a deep blue, and the mountains are partially covered in snow and shrouded in mist. A bright yellow line graph is overlaid on the image, starting from the left, rising to a peak, dipping slightly, then rising again to a higher peak before trending downwards. The word "Driving Growth" is written in large, white, sans-serif font across the lower half of the image. Behind the word "Driving", the word "Momentum" is written in a large, bold, yellow font, which is partially obscured by the white text of "Driving".

Driving Growth

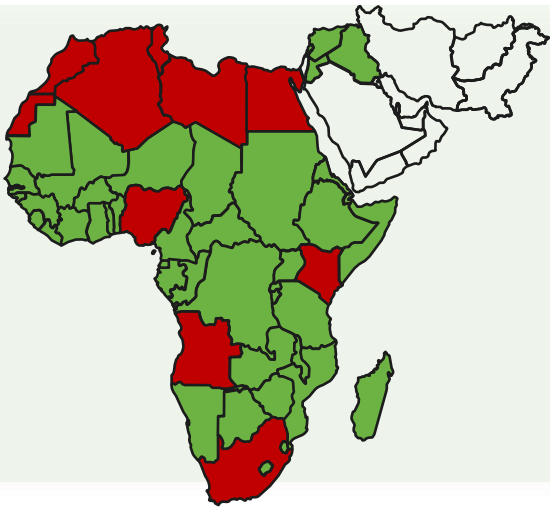


Together we are
building the

Bridge of the Future

A wide-angle photograph of the Nairobi skyline, featuring the Kenyatta International Convention Centre (KICC) on the left, the clock tower in the center, and the tall, modern skyscraper on the right. The city is situated behind a body of water, with a yellow wavy line separating the skyline from the text below. The sky is blue with scattered white clouds.

Kenya's Time is Now

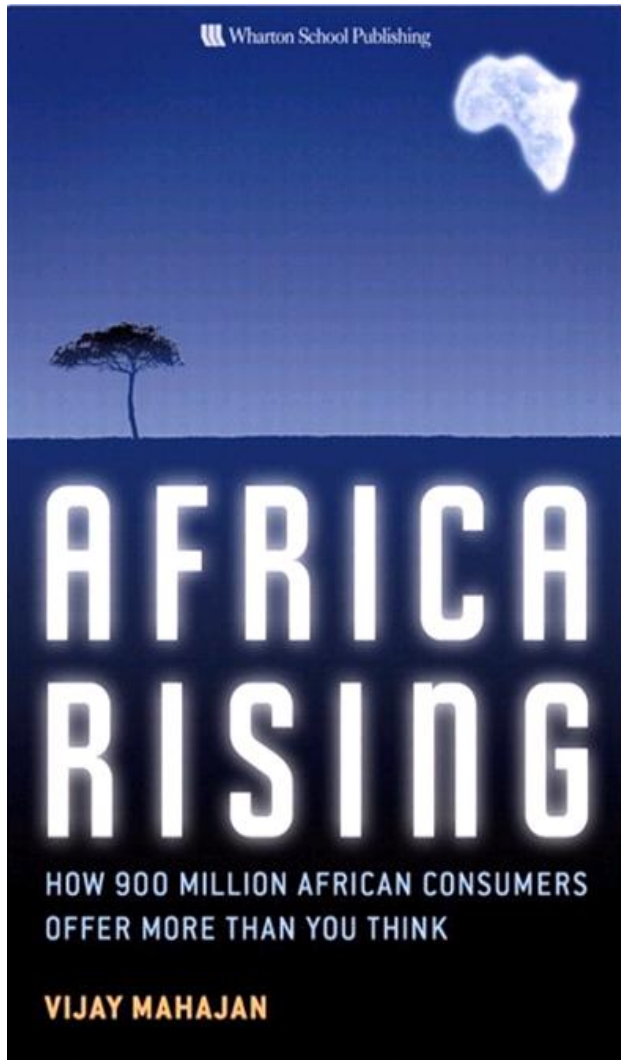


How Collaboration is Changing the Continent

Pim Versteeg, Vice President Cisco Systems, Emerging Markets Central
Kenya Expo
June 28th, 2011

Why Africa ? And Why the Time is Now ?

- 900M Consumers
- 10th Largest Economy in the World at \$978B, ahead of all the BRIC Economies.
- Richer than India on the basis of GNI
- Number of active mobile subscriptions in Africa crossed the half-a-billion mark in 3Q10
- Africa accounted for 10% of the world's mobile subscriptions at end of 2010
- By 2015, there will be 265 million mobile broadband subscriptions in Africa
- There will be almost 360 million users of mobile-money services on the continent by 2014



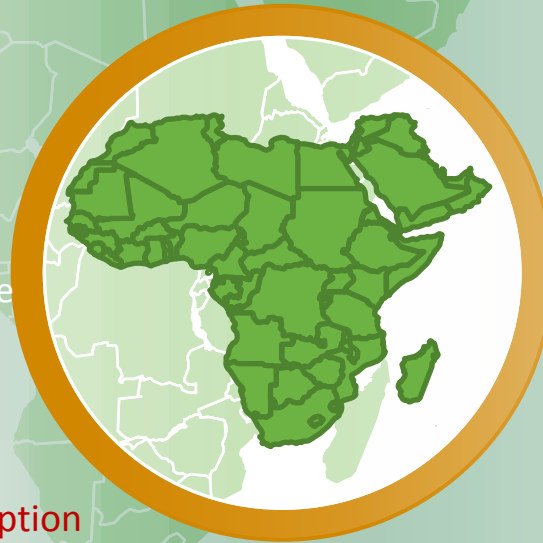
Why One Africa's Time is Now:

Well Positioned for Growth

Africa Indicators

- One of the most Diversified Economy in the world
- Strong Macroeconomic Performance during recent years
- High population growth rates
- Rapid urbanisation
- Millennium Goals 2030: Be competitive economy with a high quality of life

64% of the population ages between 0-24 years, will boost Private Consumption & Drive Technology Adoption



GDP Growth

5.4% in 2010 compared to 4.5% in 2009
Despite the Global Financial crisis

GDP per Capita

GDP growth faster than population increase GDP per capita to \$2,979 (2009) compared to \$3320 (2012) currently

Investments

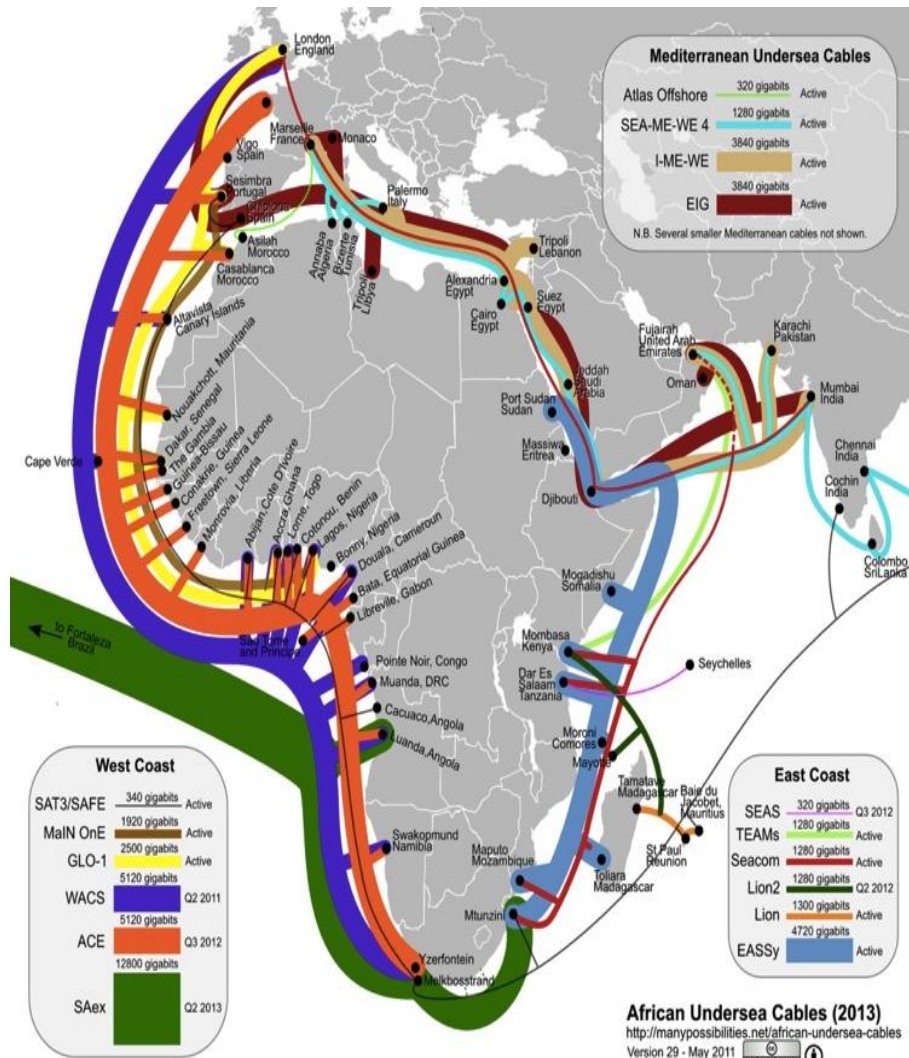
Deepening financial markets

World Bank's RCI Program

Cisco's continued Investment in Region



One Africa: Connected Submarine cables are Driving Opportunities In Every Vertical Markets



- Cables terminating in coastal key cities driving consumer demand and growth
- 400M middle-class population driving consumer demand and shaking up key industry players
- ICT Demand in every vertical Market
- S+CC and Cloud opportunities emerging
- By 2015, video will become very popular, with the majority of users on SD video
- An average of 31 IM message a month will be sent by 2015, 19% more than 2010.

Where Are We Now?

The Strategic Inflection Point: A Definition



“An Event That
Changes The Way
We Think And Act.”

Andy Grove, Founder of Intel.

Inflection Mega Trends



- Deployment of ubiquitous IP networks
- Expansion of networked consumer devices
- Movement to unified communications
- Advancement of highly-scalable, low-cost compute
- Convergence of networks, computing and storage
- Appetite for new applications
- Economic recovery yields technology refresh

Collaboration in Africa: Video Driving Dynamic Ways We Communicate & Collaborate

- More global dispersed, so how do we get everyone on the **same page and stay connected.**
- Organisations more complex, and need **innovative model** to support their changing business
- **Operational Excellence** is top of mind around the world- faster, better, more competitive is the mandate.

Collaboration no longer a nice to have... It's a **MUST** have



Charlie Jones



Jonah Feldman



Karin Acosta

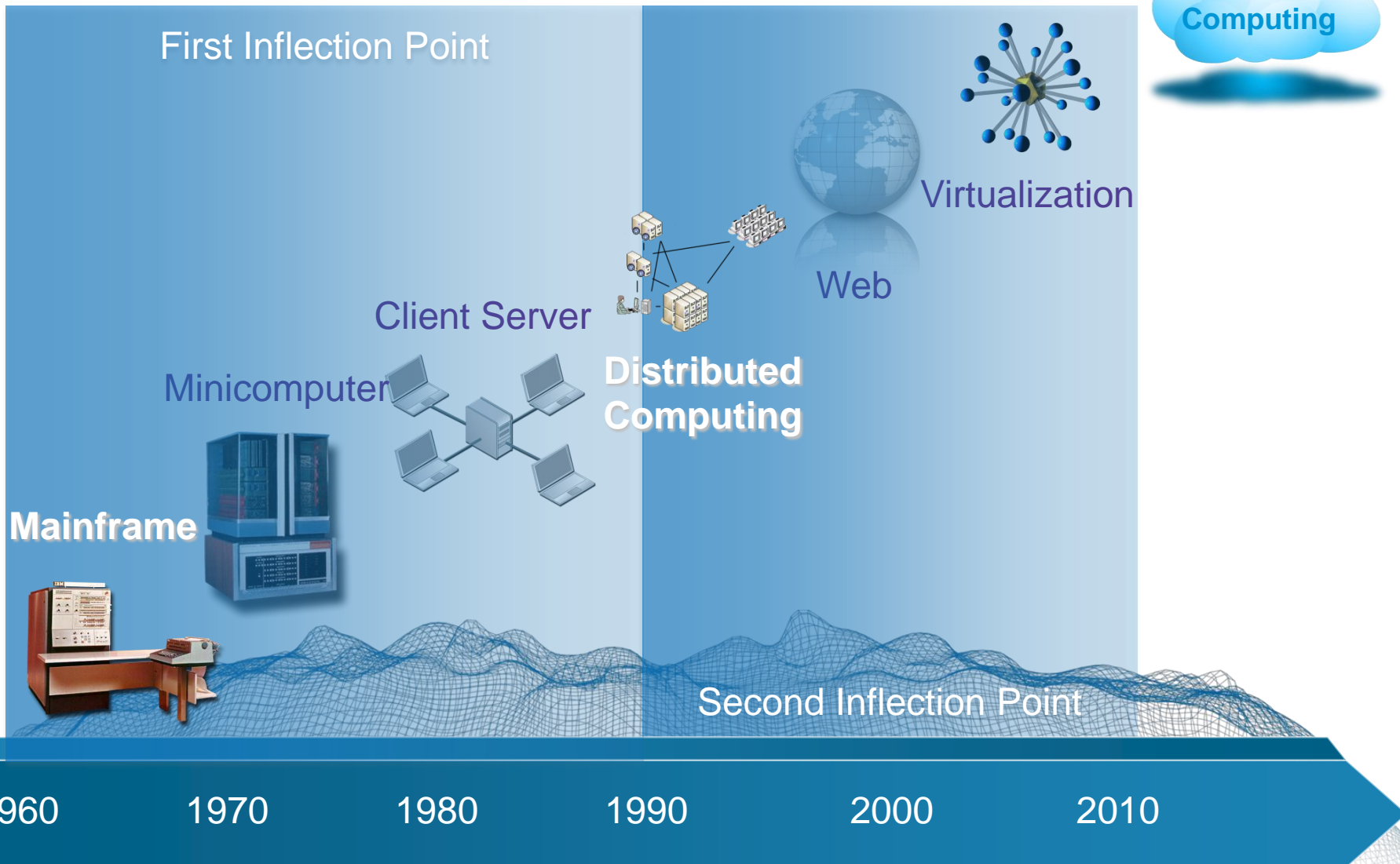


Liz Parker-Owen

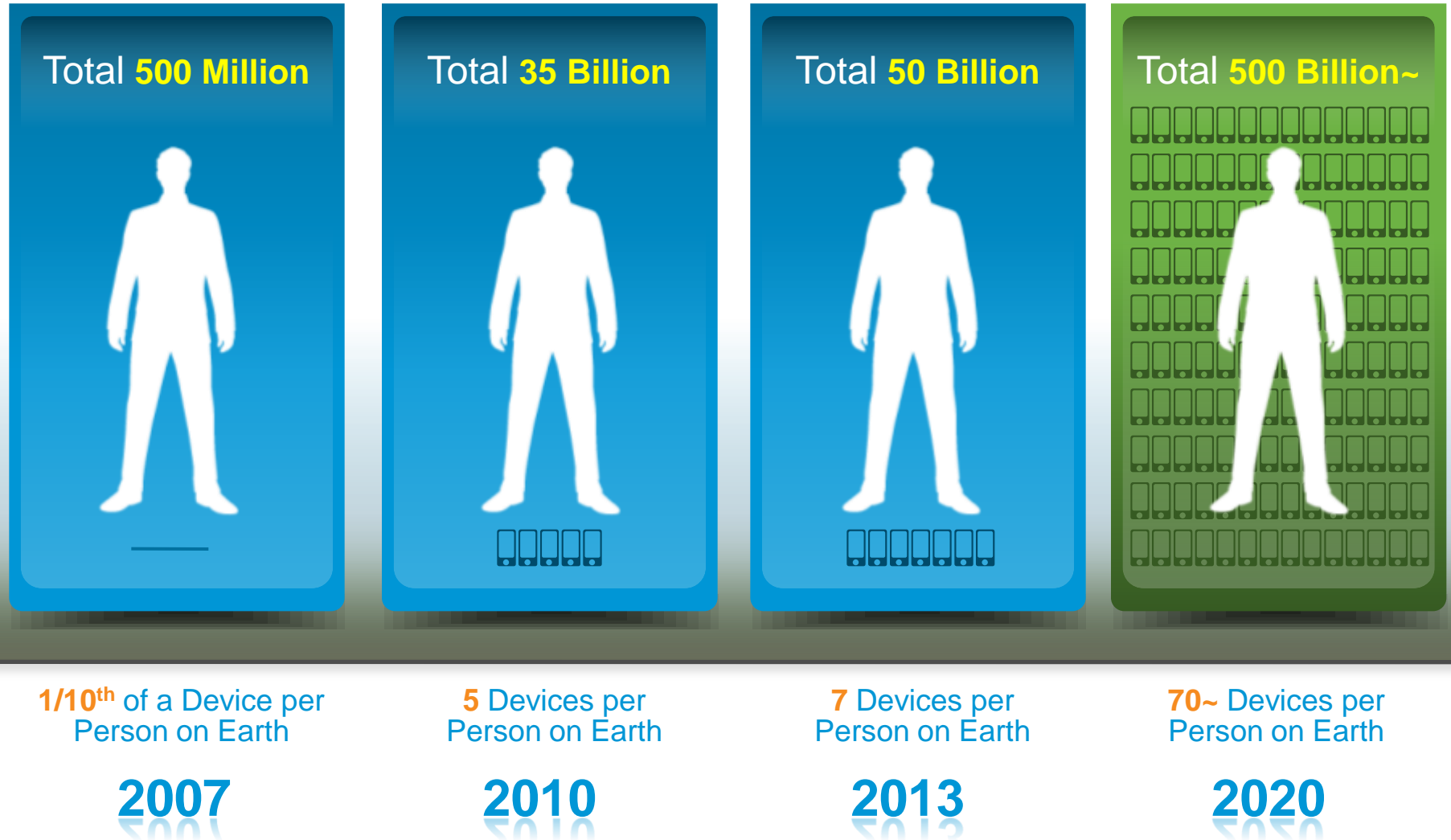


Rajiv Deepthi

Data Center Inflection Points



Growth of Connected Devices



Source: Forrester Research, Cisco IBSG

Cisco's Cloud Strategy

Essential Infrastructure for Building Clouds



For customers to build and operate public or private clouds

Solutions for Deploying Cloud Services



For customers to deploy fully-tested, best-of-breed cloud services

Innovation to Accelerate Use of Clouds

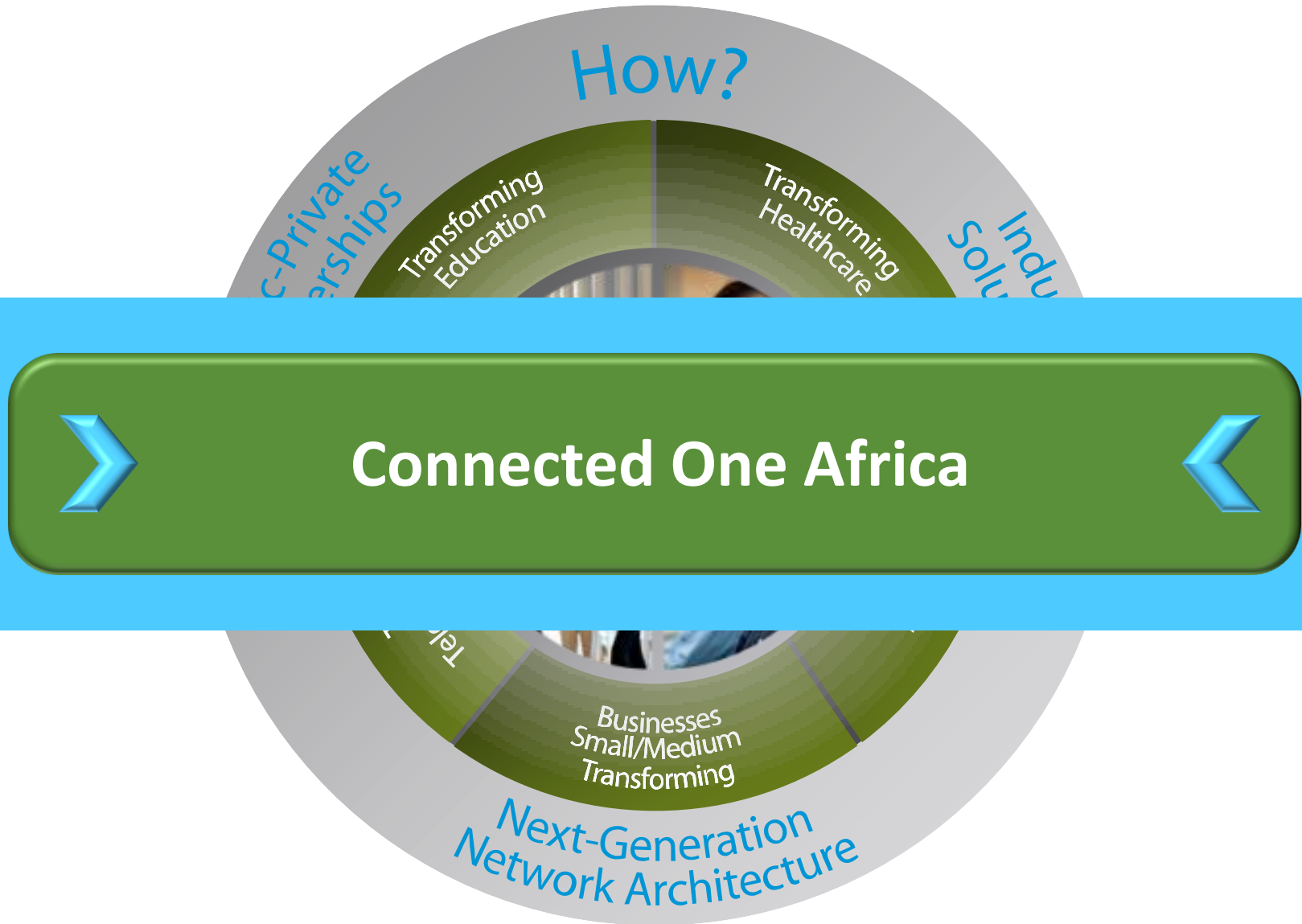


For users to access and collaborate using secure cloud services

What Our Customers Wish For:



Where to Begin to Transform Africa?



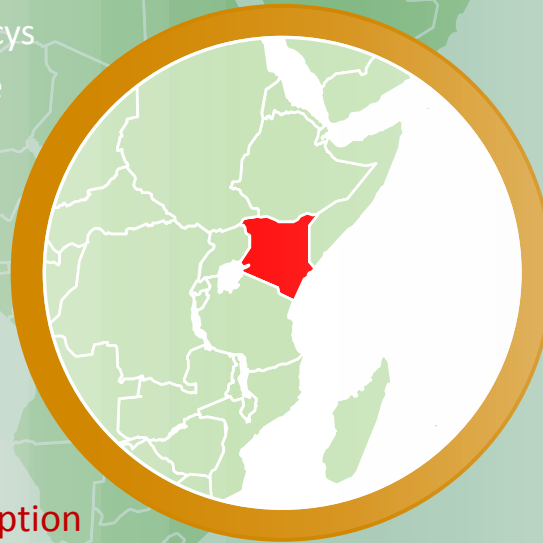
Why Kenya's Time is Now:

Well Positioned for Growth

Kenya Indicators

- Increasing diversification away from agriculture
- Business Friendly Environment & Policies
- Millenium Goals 2030: Be competitive economy with a high quality of life
- Strategically advantageous location
In the east African Community
- Kenya will benefit from the increased integration of this community

64% of the population ages between 0-24 years, will boost Private Consumption & Drive Technology Adoption



GDP Growth

5.7% in 2011 compared to 5.0% in 2010
Forecast to increase to 6.5% in 2012

GDP per Capital

GDP growing faster than the population
GDP per capita is forecast to increase from \$1,616 in 2010 to \$1,866 in 2013

Investments

Deepening financial markets
Kenya is to tap International Financial Markets and fund long term projects



Kenya & Emerging Africa : Connected Submarine cables are Driving Opportunities In Every Vertical Markets



Source: EMBD Strategy & Risk, EMBI, EIU & IMF June 2011 and Informa Telcom and Media, May 2011

- Becoming a Knowledge 'Export' Economy
- Center for Excellence in region
- Driving Job Creation and high skilled workforce
- Infrastructure Investment to connect Rural areas and increase access
- Demand in various services such as Transport, Construction, & specialised Education

Expansion of Kenya & Emerging Africa's Networked Consumer



- Growth of GDP
- Content Explodes Beyond Email
- Anytime, Anywhere Access
- Consumers Drive Innovation
- Emergence Of Rich Media
- Adoption of Social interaction



Appetite for New Applications in Kenya & Emerging Africa



- Location Based Applets
- New Forms Of Interaction
- Analytics And Behavioural Analysis
- New Development Frameworks
- Development Clouds
- Software As A Service

What does Kenya's Future Hold?

Positioned for Growth and being the Center of Excellence in Africa





Together
we are making
One Africa
a reality





Capturing the Opportunity



TISA Computer Training
Guiding Rules
Please observe the following to ensure an effective learning experience
© 2008 Cisco

Enabling

Country Transformation



And Driving Growth

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Kenya's Time is Now

Thank you.



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