



TRANSFORMATIONAL PROJECTS - THE VENDOR ROLE

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October 2010



AGENDA

APAC - Centre of Global Growth

Transformational Projects

- National Broadband Networks
 - iN2015 Singapore
- Connected Communities
 - Incheon Free Economic Zone Korea
 - Iskandar Malaysia

The Role of Vendors in Setting Strategy

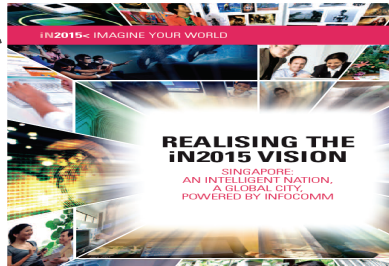
- Risk and Opportunities

Is it worth it ?

APAC 21ST CENTURY GROWTH ENGINE

APAC growth 2011/12*

- Average : 7%
- China : 9.5%
- India : 8%



Major Transformational Projects

Driven by

- Rapid Urbanization
- Global Competition
- Tourism and Gaming
- Government Policy
- Broadband Enablement



ISKANDAR
MALAYSIA



*IMF Regional Economic Outlook April 2011

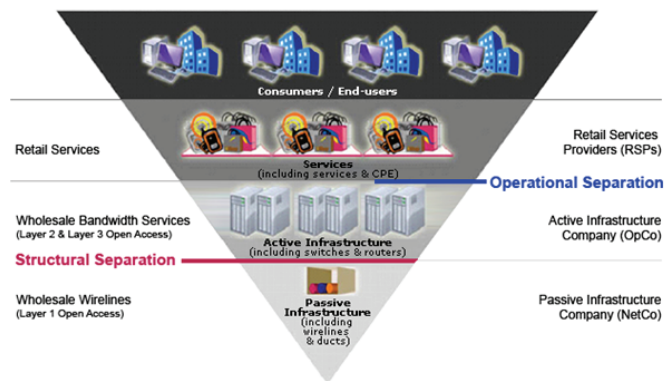
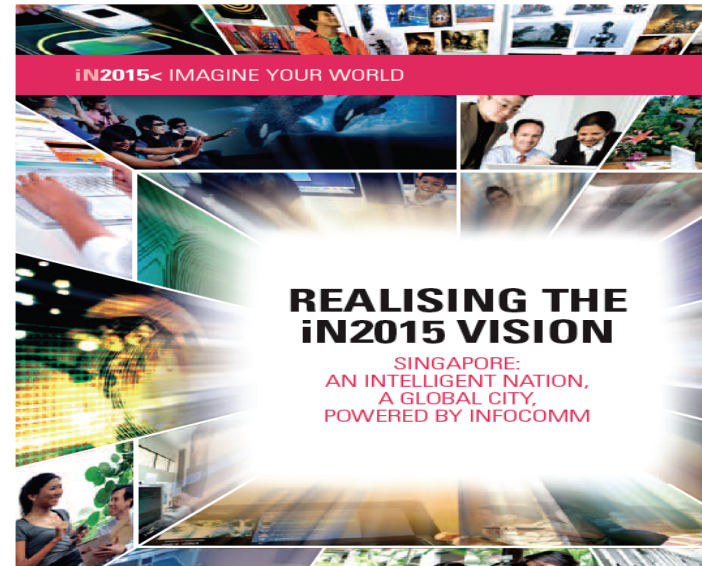
NATIONAL BROADBAND– IN2015 SINGAPORE

iN2015 Government Infocom Masterplan :

- Transformation of key economic sectors, government and society through more sophisticated and innovative use of infocomm
- Via an ultra-high speed, pervasive, intelligent and trusted infocomm infrastructure

Provide Global Competitive Advantage

- National BB Initiative – NGNBN
- Nation Wireless Initiative wireless@sg
- \$2B Government funding
- Netco – Opco –RSP
 - Functional separation



CONNECTED COMMUNITIES – IFEZ KOREA

Incheon Free Economic Zone

- Creating Digital Cities – Songdo

International Business District (IBD)

- Developed by Gale International and Korea's POSCO E&C, this master-planned metropolis is a model of sustainable, city-scale development and innovation.
 - 1500 Acres
 - 350 Buildings
 - 100 Million sq ft of real estate
 - \$10B Investment

Incheon Free Economic Zone (IFEZ)

▪ **Songdo**
A special economic zone with trade, distribution, enterprise concentration, and technological innovation combined.

DEVELOPMENT SIZE:
63.6 million square yards

PLANNED POPULATION:
252,000

DEVELOPMENT TIME:
2002-2020

PERFORMANCE:
14 cases, total 25 billion dollars

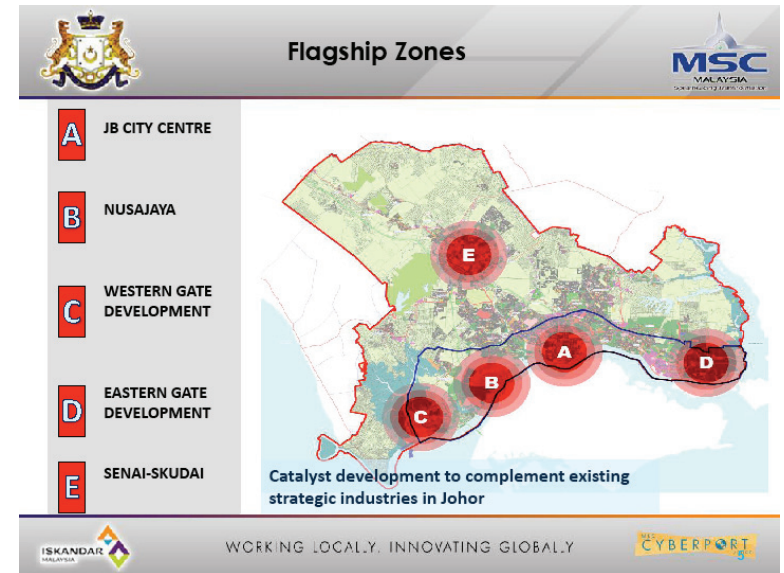
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World City Expo 2009 Incheon, Korea

CONNECTED COMMUNITIES - ISKANDAR



- Development region three times the size (2,217 sq km) of Singapore, including the city of Johor Bahru
- Lead Developers -Iskandar Regional Development Authority (IRDA) and the Khazanah Nasional-driven Iskandar Investment Bhd.
- Modelled after the Pearl River Delta Economic Zone
- Five "Flagship Zones" in total land area are identified as developmental focal points
- To date, USD\$25bil of investment – 41% Foreign Investment



NETWORK & IT VENDOR INTELLECTUAL PROPERTY

Global Presence

Mutli-sector Experience

- Enterprise, Service Provider, Government
- Fortune 500 Installed Base

Vertical Experience

- Healthcare, FSI, Defence etc.

Extensive Investment in R&D

- 5-10% of Annual Revenue

Financial Services

Consulting Services

- Fee or Free

JUNIPER
NETWORKS

IBM

NetApp™

hp

HUAWEI

f5®

EMC²

CISCO

vmware™

Alcatel-Lucent

ORACLE®

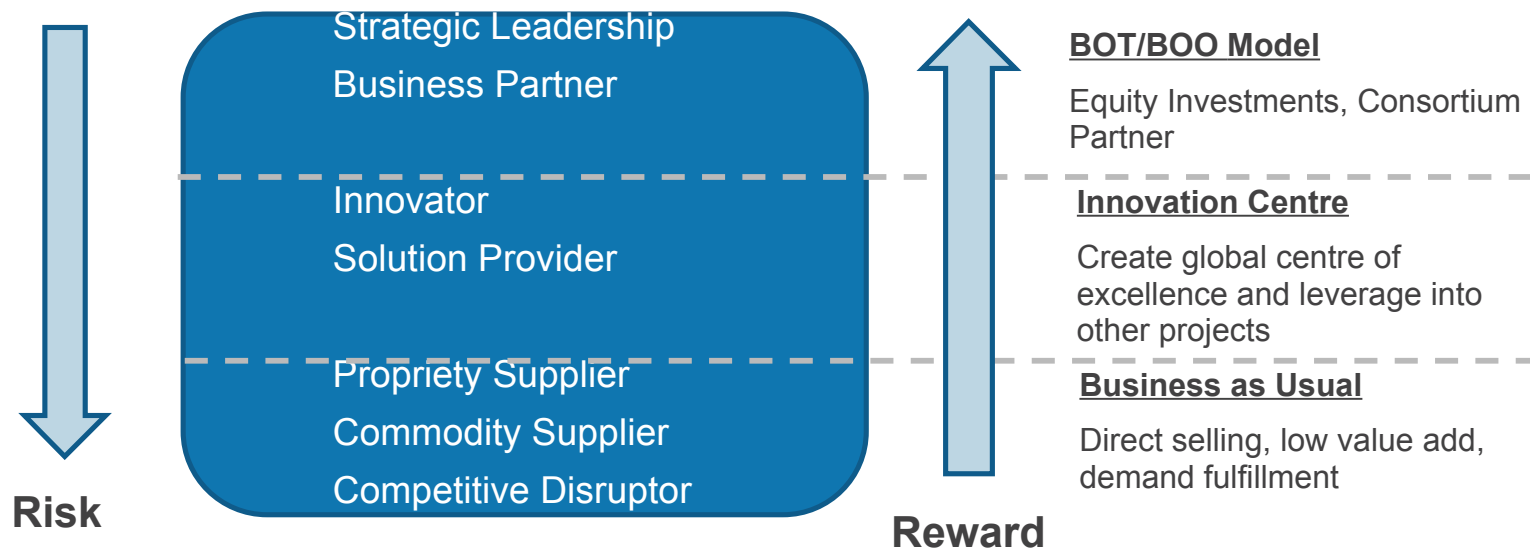
BROCADE

Alcatel-Lucent

ERICSSON

MEGA PROJECTS - GOLD MINE OR BLACKHOLE






What is the role of Vendor in Mega Projects ?



IS IT WORTH IT ?







PROS



-  Creates Strategic Partnerships with Customers
-  Risk and Reward Sharing
-  High Potential Return on Product and Services
-  High Profile Reference
-  Replicable Business Models & Architectures

CONS



-  Low Hit Rate
-  Expensive – Low ROI
-  Deferred Revenue Recognition
-  New Business models conflict with existing models
-  Core vs. Context
-  Can Result in Loss of IP

SUMMARY





everywhere

BIO

Allan Young has recently joined Juniper Networks as Director of Systems Engineering, after spending 12 years with Cisco Systems, the last seven in Asia.

Most recently Allan was CTO and Director of Systems Engineering for Cisco Systems in Asia and led Cisco's systems engineering team, which comprised of over 150 pre-sales engineers covering Indonesia, Korea, Malaysia, Philippines, Singapore, Korea, Thailand and Vietnam.

He has worked extensively across Asia and been involved with a number of major service provider and enterprise customers. He directed a small architectural team focused on creating strategic solutions and new business models.

In addition, Allan chaired Cisco's APAC Systems Engineering Council and was responsible for setting the overall vision, strategy and execution plans for the Systems Engineering team.

He joined Cisco Australia in 1999, as a pre-sales Engineering Manager where he was responsible for the Southern Region pre-sales engineering team. He relocated to Singapore in October 2004.

As a researcher in academia in the late '80s, Mr Young was involved in the establishment of the Australian Academic and Research Network. His last role in the academic field was as Director of Information Technology at Swinburne University, a pioneer in the use of Internet technologies in the learning environment.

Mr Young has also worked for Fujitsu and ANZ Bank, before joining Cisco. He has a Bachelors and Masters Degree in Digital Electronics from the Royal Melbourne Institute of Technology.

ABSTRACT

Asia Pacific is the fastest growing region in the world with China expected to overtake the US as the world's largest economy before 2030. Across the region from Indonesia to Korea, we are seeing transformational change, in many parts driven by rapid urbanization, global competition and broadband technology.

Major transformational projects such as the Incheon Free Economic Zone and Singapore's NGNBN are joint government private sector initiatives, relying heavily on vendor knowledge, technology and experience.

Is it the role of a vendor to develop and shape transformational strategy ? What are the pros and cons, is it a true partnership, or a marriage of convenience, often resulting in considerable investment, high risk and no guarantee of success.

The presentation will consider these questions within the Asia context and how these translate in the Australia environment and the role that Juniper takes in influencing and shaping broadband strategy.

CULTURAL REORIENTATION



MELBOURNE



MELBOURNE



Swiss Man May Be Caned for Singapore Graffiti

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