



APICTA • ASOCIO • 2009
Asia Pacific Digital Innovation Summit
Melbourne Australia 14 - 17 December 2009
Innovation, collaboration & trade for a digital future

MELBOURNE

Kumar Parakala
KPMG
(India)





SOURCING ADVISORY

Asia-Oceania vision 2020: Enabling IT leadership through collaboration

An ASOCIO report prepared with KPMG in India

ADVISORY

1. Purpose and objective of the report

2. ASOCIO member countries

3. Background: The importance of Asia-Oceania

4. ICT development in Asia-Oceania

5. ASOCIO Member economies: A diverse set

6. The Collaboration Theory

7. Collaboration Opportunities

8. The Role of ASOCIO

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Background Purpose and Objectives

The report aims to develop a **Collective Vision** for the IT enabled services industry in **ASOCIO Member Economies for 2020**, and to highlight how **Collaboration** among these economies can help **Achieve** this vision

Vision for 2020

- The report looks at transformation in the ICT space in the next decade.
- It highlights trends and prospects for the region today, that will set the tone for future expectations for ICT industry growth by 2020.

IT enabled services potential

- It attempts to develop a collective vision for the IT enabled services industry in the region to illustrate the potential for growth (does not cover hardware and communications).

Collaborative growth imperative

- It outlines the necessity of collaboration across the region in all the areas of the IT eco-system, including industry, academia and governments.
- It emphasizes how collaboration can play a key role, helping countries in the region build on collective strengths and overcome shortcomings mutually, to grow faster than they would expect to grow in isolation.

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ASOCIO

The member associations



Australia



Japan



Singapore
Singapore infocomm
Technology Federation
Singapore



Vietnam
vinsa
Vietnam



বাংলাদেশ কম্পিউটার সমিতি
BANGLADESH COMPUTER SAMITY
The ICT Industry Association of Bangladesh

Bangladesh



Malaysia



한국정보산업연합회
The Federation of Korean Information Industries

Republic of Korea



Cambodia



Hong Kong



New Zealand



Sri Lanka
FITISS



Laos PDR

NASSCOM®

India



Pakistan



Chinese Taipei
CISA

MIDAS/MONITA

Mongolia



Indonesia



Philippines



Thailand



Myanmar



Nepal

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Background

The growing importance of Asia-Oceania

Asia-Oceania to become the **largest** regional economy by **2020**:

	Now*	2020
GDP	Asia's share in world GDP: 35.7% Average Per Capita Income: USD 4,775	Asia's share in world GDP: 43.2% Average Per Capita Income: USD 8,476
Trade and Investment	Asia's share in world exports: 27%	Asia's share in world exports: 35%
Population	59% of worlds working age population (15 – 64 years) in Asia	India and China to add 120 mn and 65 mn by 2020

...and **ICT development** is **vital** for the region to achieve this **dominance** in the world economy

Note: * Indicates the most recent figures available
Source: EIU Foresight 2020, Monetary Authority of Singapore, KPMG Analysis

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ICT development in Asia-Oceania

Asia-Oceania: An important supplier and consumer market

Role as a consumer

Expanding regional role of ICT

- **Low penetration** and **rapid economic growth** to fuel demand
- Recognizing the role of ICT in **social development**
- ICT is expected to serve as a **powerful tool** for developing economies to face **globalization**

Role as a producer and supplier

Asia's emergence as a major producer & supplier of ICT

- ICT-producing sector expected to witness strong growth given **Asia's capabilities**
- **Asia role** in international **sourcing** of services **to rise**, which has prompted many developing countries in Asia to try and **develop** a **competitive advantage** in this field

Though ICT growth rates are expected to soar, the region faces **Global, Regional and Industry specific Challenges**

Note: * Includes ASOCIO Member economies only

ICT development in Asia-Oceania

Looking at challenges that impact the rise of ICT

These challenges impact the overall growth of the ICT industry in the region.

Includes :

Industry Challenges

People challenges in the ICT industry are around HR issues including:

Process is importance in this sector and involves looking at:

Challenges related to **Policies** include the lack of:

Availability of skills

Governance

Government support

Recruitment

Risk management

Pro-business policies

Retention

Security

Favorable regulations for the industry

Attrition

Intellectual Property Rights (IPR) framework

...some of the challenges, however could **lead** to **Opportunities**

ICT development in Asia-Oceania Opportunities in 2020

Asia-Oceania's **capabilities** provide the region the opportunity to service **75 percent** of the global IT enabled services demand

The region is expected to account for **31 percent** of global demand

Asia-Oceania, the leading supplier will see increasing opportunities in:

Healthcare
Education
Technology Convergence
SMEs
GreenIT

Increasing demand is expected from segments such as:

Wireless
e-Governance
WIFI
e-Commerce
s-Commerce

The **access** to these opportunities, however, depends on the **characteristic capabilities** of each Asia-Oceania member economy

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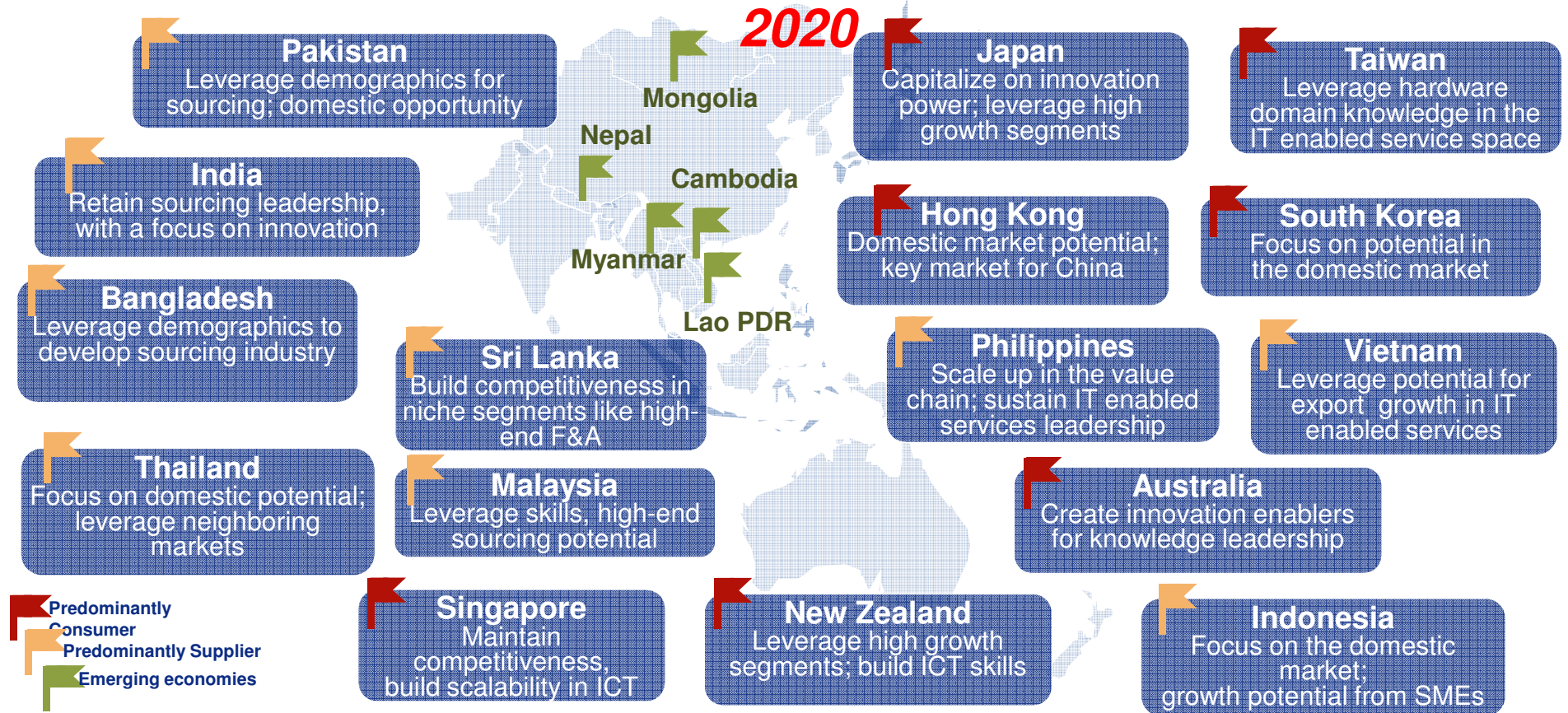
5. Collaboration Opportunities

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ASOCIO Members

A diverse set of economies in one region makes case for collaboration

Key *IT enabled services priorities* for Asia-Oceania economies in 2020



...these priorities enable economies to tap their potential to the *maximum*

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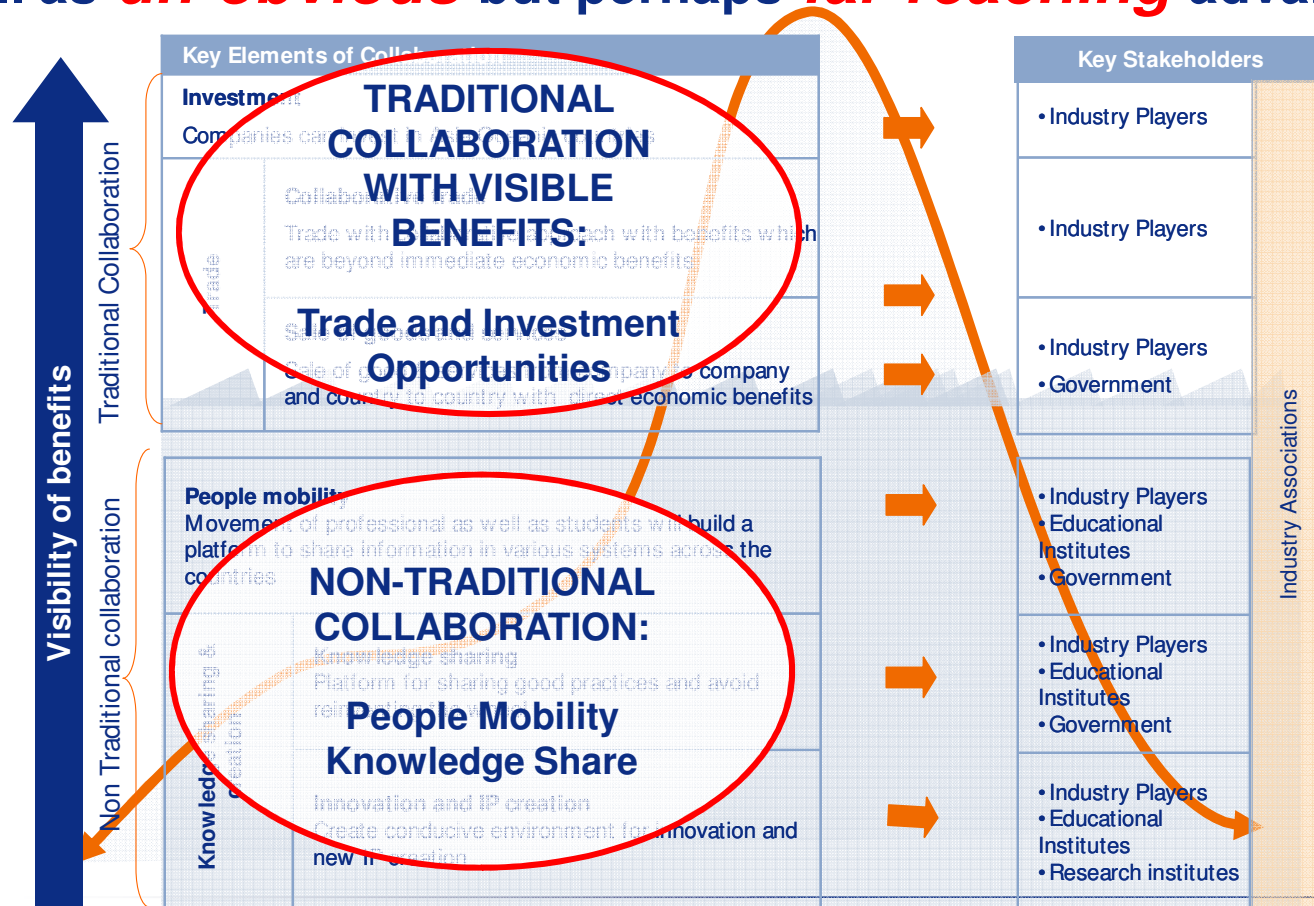
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Collaboration The Iceberg theory

Collaboration is like an **iceberg** with **visible** and **obvious benefits** as well as **un-obvious** but perhaps **far-reaching** advantages



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Collaboration Immense opportunities

Collaboration is essential for Asia-Oceania to achieve a **leadership** position in IT enabled services **by 2020**

Diversity in the region presents immense opportunities for collaboration

Opportunities

Illustrative

- Collaboration between companies with complementary domain / market skills
- Collaboration towards greater innovation and R&D, knowledge services
- Strategic acquisitions among ASOCIO member economies
- Knowledge sharing in areas such as:
 - e-governance adoption
 - protection of intellectual property rights
 - use of technology in development
 - Talent management
- Student / professional exchange programs for specific ICT skills

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Role of ASOCIO Making collaboration work

ASOCIO has played a key role in **bringing together** representatives from the ICT industry in various Asia-Oceania countries in the **past 25 years**

The stage is now set for a new **collaborative agenda** for the **next 25 years**

Collaboration through growth **under the umbrella** of **ASOCIO** can **enable** member economies to **achieve** each economy's **Vision 2020** in a **seamless** fashion

ASOCIO can play the role of a **Visionary** and **Catalyst**, alongside being a Facilitator



In conclusion A Recap of the Key Takeaways from the Report

- Asia-Oceania is set to command a rising role in the global dynamics by 2020, which is expected to lead to a massive, positive impact on the ICT industry in the region.
- Despite a number of challenges, there are immense opportunities that the region could tap into and leverage ICT-led growth.
- Countries in the region are highly diverse, and this diversity becomes the biggest driver for collaborative growth – each country is unique and has something to bring to the table.
- Mature economies in the region will have a larger role in providing ICT-leadership and facilitating knowledge transfer, they in turn have much to gain from collaboration.
- ASOCIO will have to play a key role in facilitating collaborative growth in the region over the next decade due to its pan-regional presence.

Contact details

Kumar Parakala

COO, Advisory, KPMG in India

Global Head of Sourcing Advisory

Chairman, Australian Computer Society (ACS)

Email: kumar@kpmg.com

www.in.kpmg.com



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Dan E Khoo
WITSA
(Malaysia)



Asia Pacific Digital Innovation Summit

Melbourne

December 16, 2009

Dan E Khoo, WITSA Chairman



World Information Technology and Services Alliance

www.witsa.org

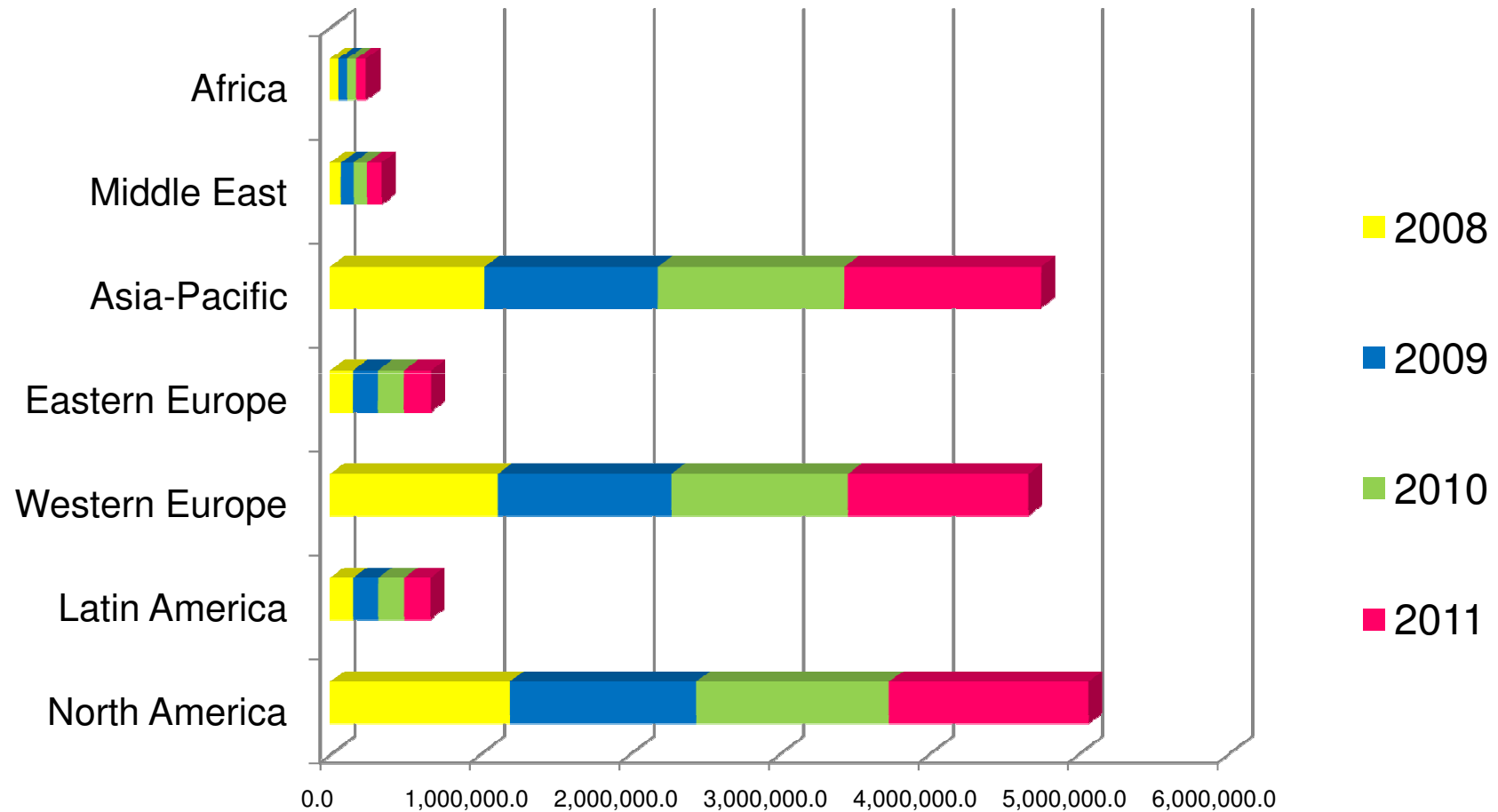


Total ICT Spending by Region

Region	2008	2009	2010	2011
North America	1,199,410.3	1,245,447.5	1,288,428.0	1,332,665.1
Latin America	153,121.6	166,543.7	171,630.8	174,024.4
Western Europe	1,120,410.1	1,158,149.0	1,179,820.9	1,205,121.8
Eastern Europe	152,397.9	164,847.2	172,326.6	179,433.5
Asia-Pacific	1,032,375.6	1,156,511.2	1,244,815.8	1,310,974.0
Middle East	73,316.1	82,234.9	89,345.2	95,057.5
Africa	55,348.4	58,250.4	60,310.4	62,189.6
Total	3,786,380.0	4,031,983.9	4,206,677.7	4,359,465.9

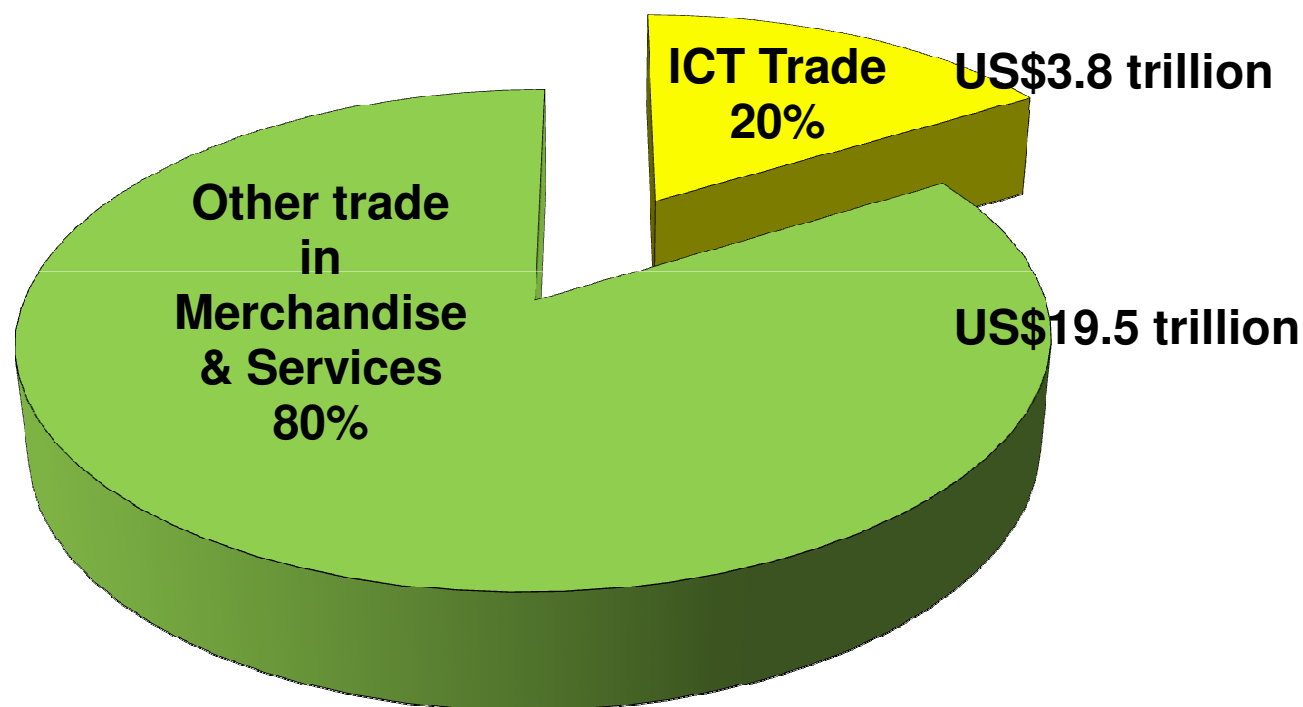
Source: Digital Planet 2008 (updated in Q3, 2009)

Total ICT Spending by Region



Source: Digital Planet 2008 (updated in Q3, 2009)

ICT Trade as a Component of Total Global Trade 2008



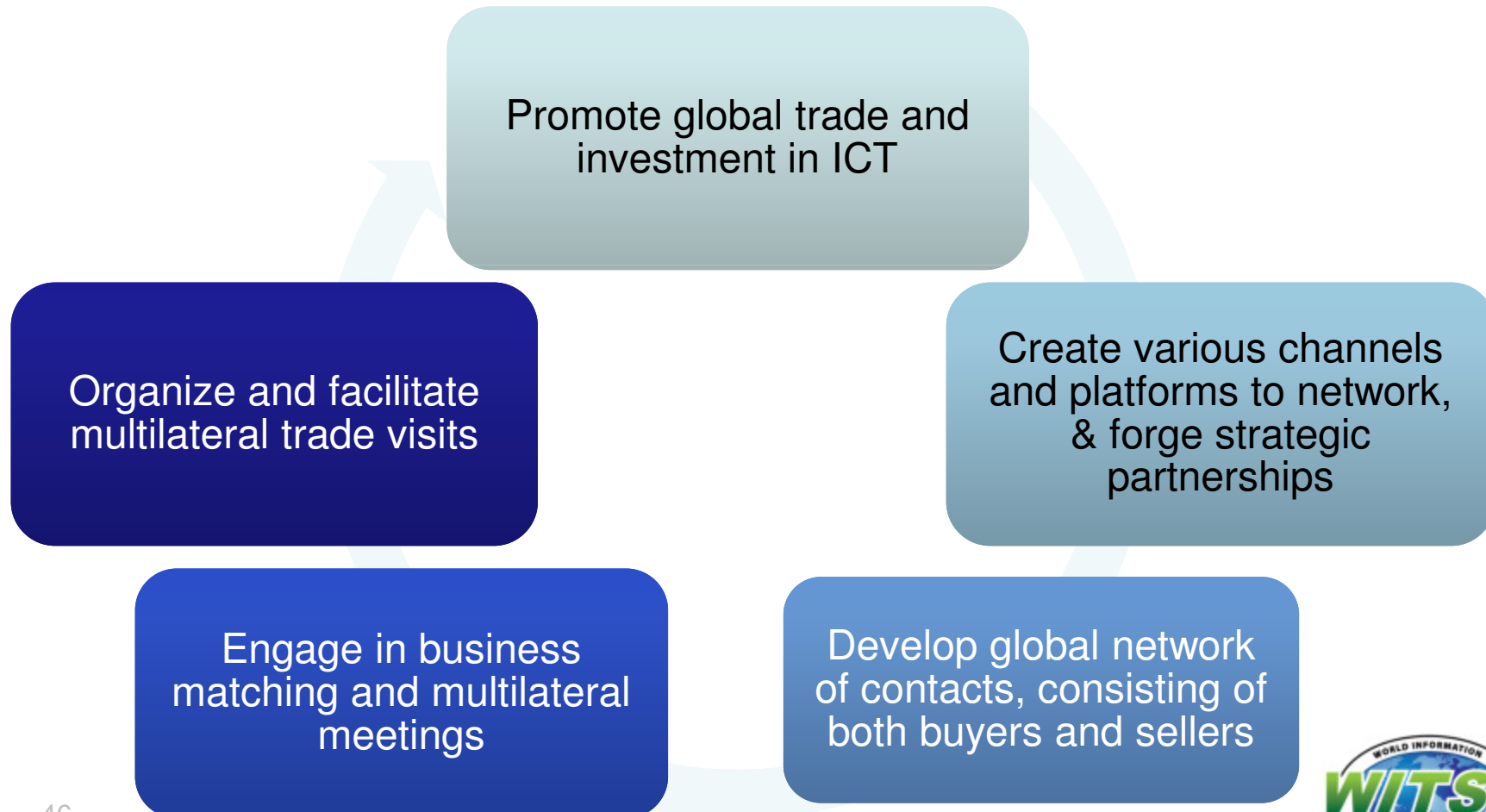
Sources: World Trade Organization & Digital Planet

New Trade Facilitation Facility by the World Bank. Rapid response unit and funding for trade facilitation projects. Initial \$40 million reserve.

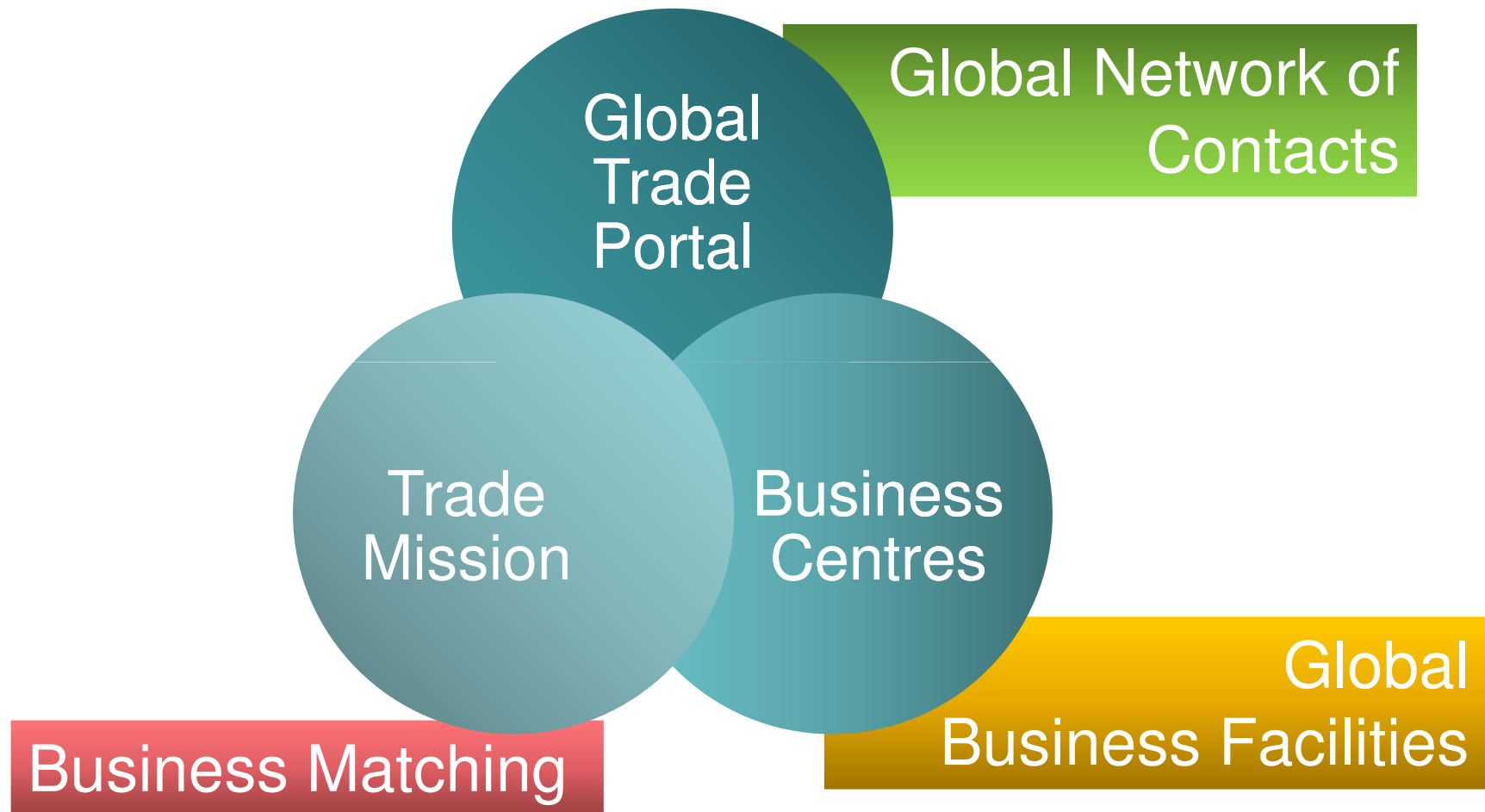
Source: World Bank Crisis Response *presented in GPPS 2009, Bermuda*

WITSA Global Trade Committee

Established in September 4, 2008



WITSA Global Trade Committee





GLOBAL TRADE



WITSA Business Matching System...
enhancing your global network of contacts

Business Matching System

Username:

Password:

Remember me next time.

[Forgot Password?](#)
[New Registration](#)

STATISTICS

2637 registered companies
1962 registered members

Latest registered companies:

PUSTAKA NEGERI SARAWAK
STROVI SDN BHD
N-CUBES SDN BHD



WITSA BUSINESS MATCHING

Interested to explore for more business opportunities?

Looking at spring-boarding your business overseas?

If yes, WITSA Business Matching system can help you. From profiling your company, seeking business opportunities to requesting for meetings and communicating with other users, this system will help you in your urge to grow your business.

[Find out how to get started here.](#)



WITSA BUSINESS CENTERS

Looking for meeting facilities overseas?

Trying to minimize cost and to expand your business overseas?

WITSA Business Centers around the world, offer you the ability to conduct business meetings with minimal cost.

[Check out the WITSA Business Centers here](#)



WITSA TRADE MISSION

Interested to attract foreign investment to your business?

Keen to seek new business opportunities overseas?

WITSA Trade Mission provides you a platform to learn about the overseas market as well as trade and investment opportunities, through field trips and visitation programs. This trade mission will also help you to profile your company, products and services to potential buyers and investors.

Visit: <http://globaltrade.witsa.org/Login.aspx>



THANK YOU



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John Grant Data#3 & AIIA (Australia)





Asia Pacific
Digital Innovation Summit

Australian Innovation

John Grant - Chair

Australian Information Industry Association



“Anti-Obama sentiment brewing on internet as Tea Party threatens boilover”

Australian Newspaper Monday 14th December 2009



**We live in interesting
times.....**



...innovation...



Global Competitiveness 15

Country/Economy	GCI 2009–2010		GCI 2008–2009
	Rank	Score	Rank*
Switzerland	1	5.60	2
United States	2	5.59	1
Singapore	3	5.55	5
Sweden	4	5.51	4
Denmark	5	5.46	3
Finland	6	5.43	6
Germany	7	5.37	7
Japan	8	5.37	9
Canada	9	5.33	10
Netherlands	10	5.32	8
Hong Kong SAR	11	5.22	11
Taiwan, China	12	5.20	17
United Kingdom	13	5.19	12
Norway	14	5.17	15
Australia	15	5.15	18
France	16	5.13	16
Austria	17	5.13	14
Belgium	18	5.09	19
Korea, Rep.	19	5.00	13
New Zealand	20	4.98	24



R&D as % GDP

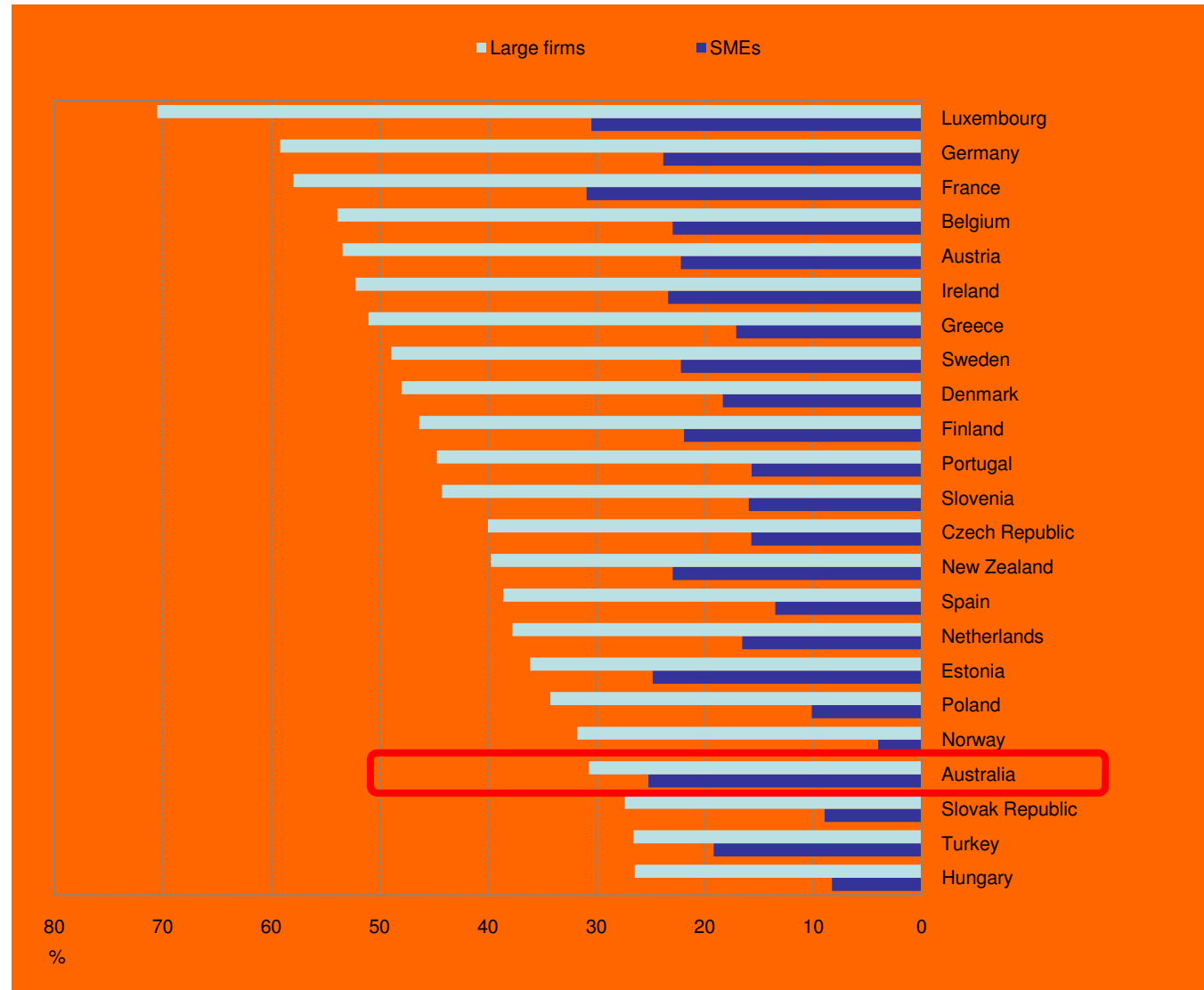
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Rank	Countries	Amount	
# 1	Togo:	8.4%	
# 2	Sweden:	3.8%	
# 3	Israel:	3.7%	
# 4	Japan:	2.8%	
# 5	Korea, South:	2.7%	
# 6	Switzerland:	2.6%	
# 7	United States:	2.5%	
# 8	Germany:	2.3%	
= 9	France:	2.2%	
= 9	El Salvador:	2.2%	
# 11	Iceland:	2.1%	
# 12	Netherlands:	2%	
= 13	Denmark:	1.9%	
= 13	Egypt:	1.9%	
# 15	United Kingdom:	1.8%	
= 16	Australia:	1.7%	
= 16	Norway:	1.7%	
= 16	Canada:	1.7%	
= 19	Austria:	1.6%	
= 19	Belgium:	1.6%	
= 21	Ireland:	1.5%	
= 21	Slovenia:	1.5%	



Product innovation

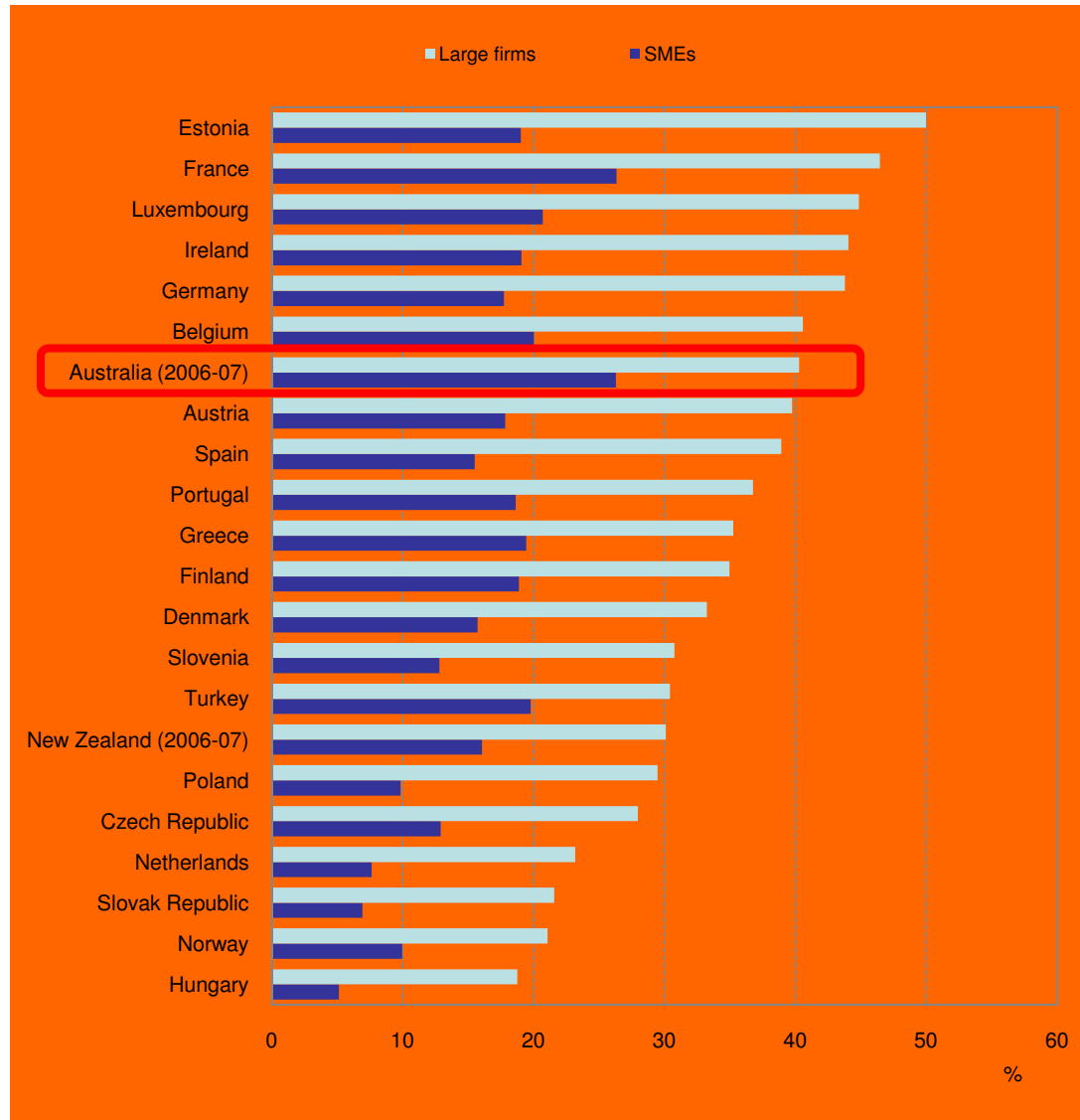
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Process innovation

7





NBN: 21st Century Broadband



Building
broadband
for all
Australians





venturousaustralia

*building strength
in innovation*



INNOVATION **N** INNOV

Powering **I**deas

An Innovation Agenda
for the 21st Century



How will we respond?



Talk the talk



Talk the talk ...technology first!



Walk the talk ...technology first!



Thank you...

**and enjoy the
summit!**



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Sinmahat Kiatjanon Customs Department Thailand (Thailand)



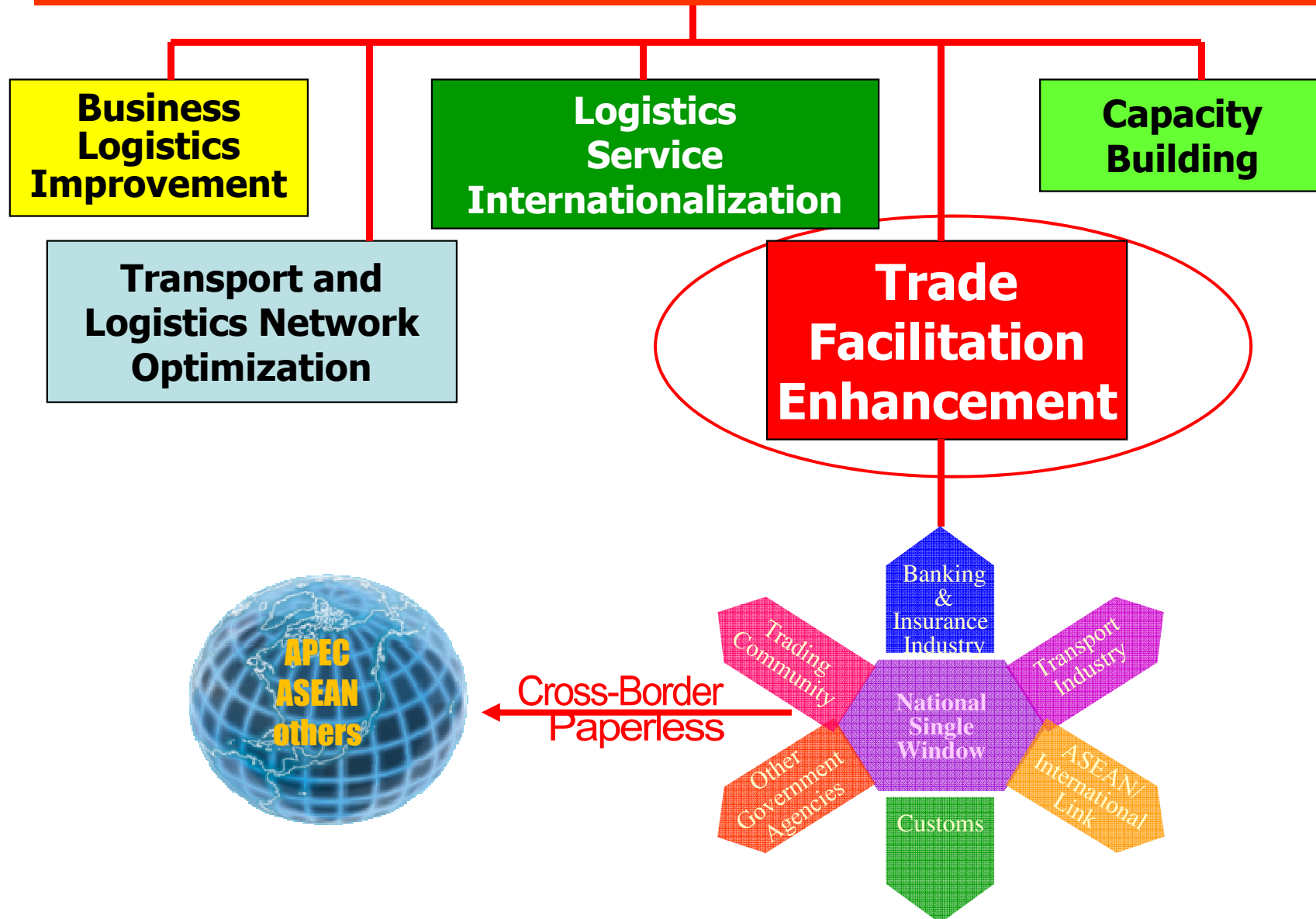
**ASOCIO General Assembly and ICT Summit
Melbourne, Australia, 16th December 2009**

**E-Governance
(eCustoms and National Single Window)**

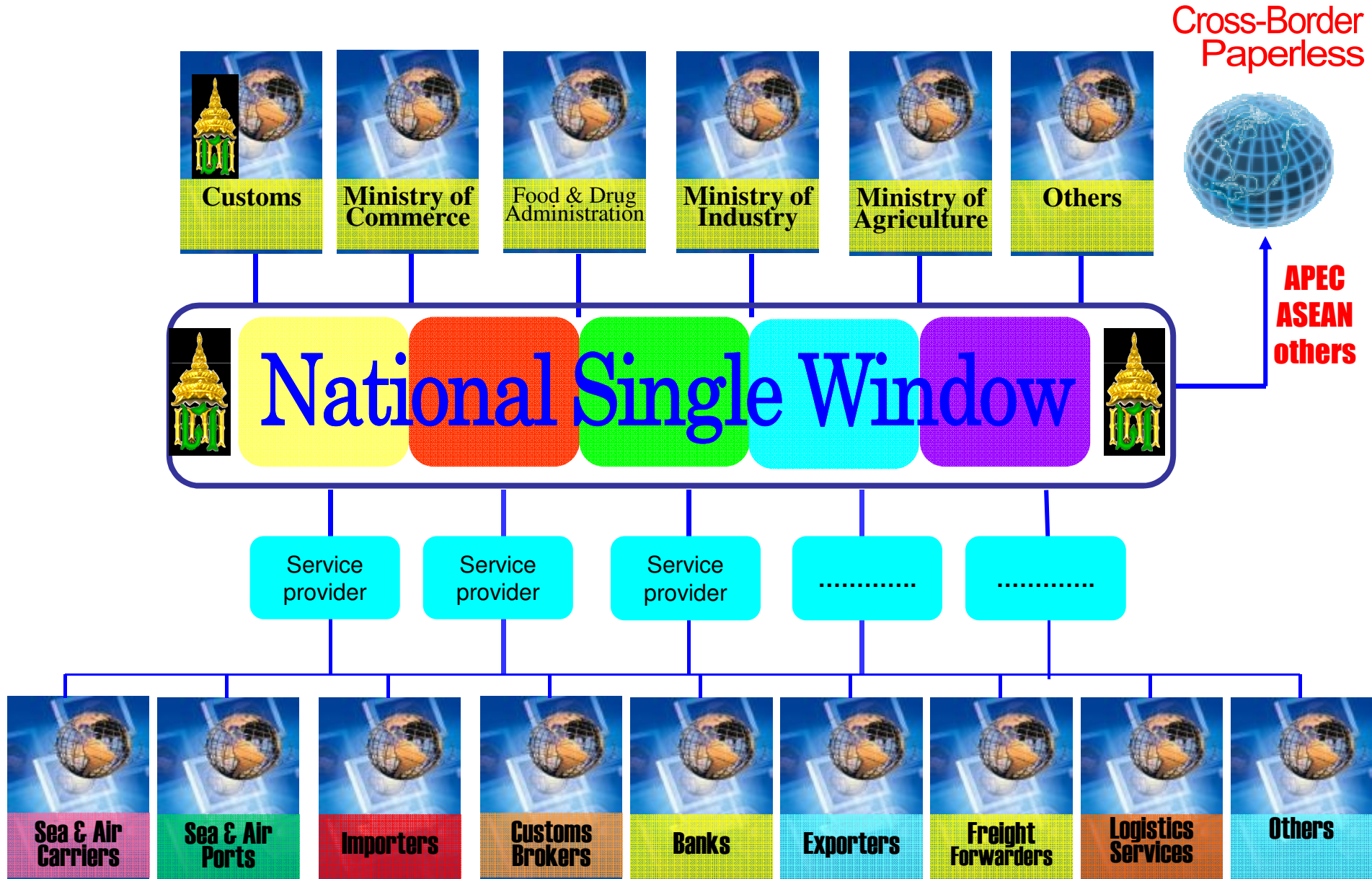


Mr. Sinmahat Kiatjanon
sinmahat@customs.go.th
Royal Thai Customs

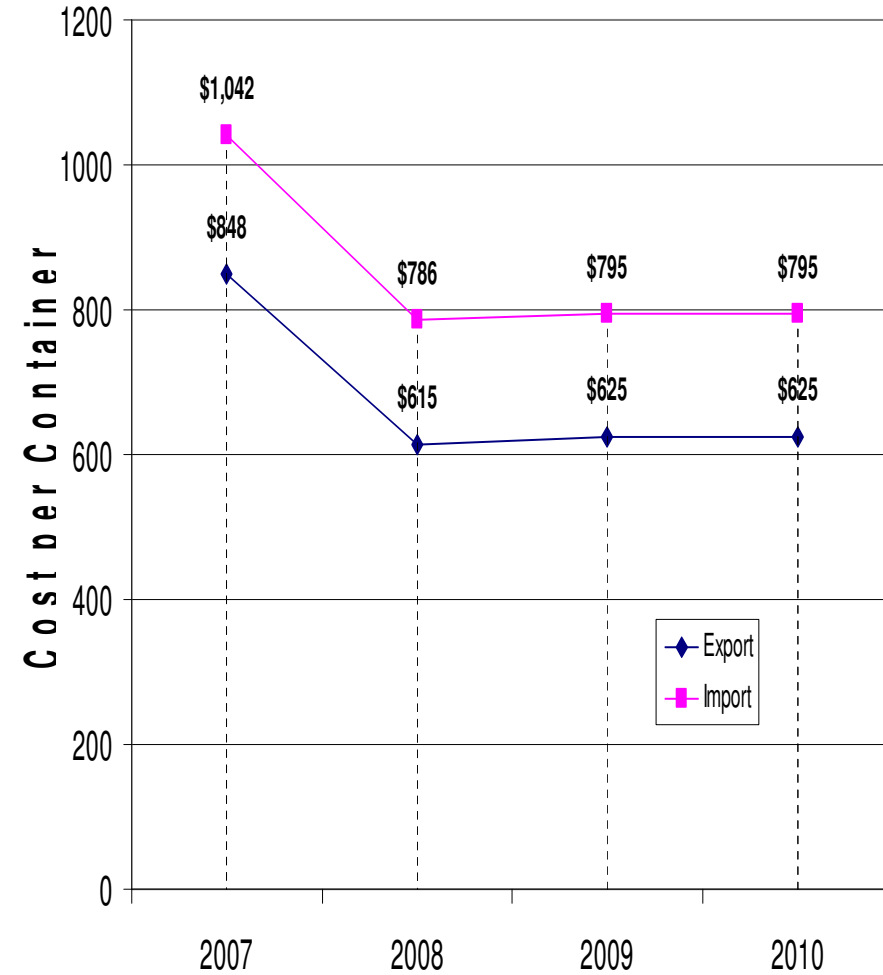
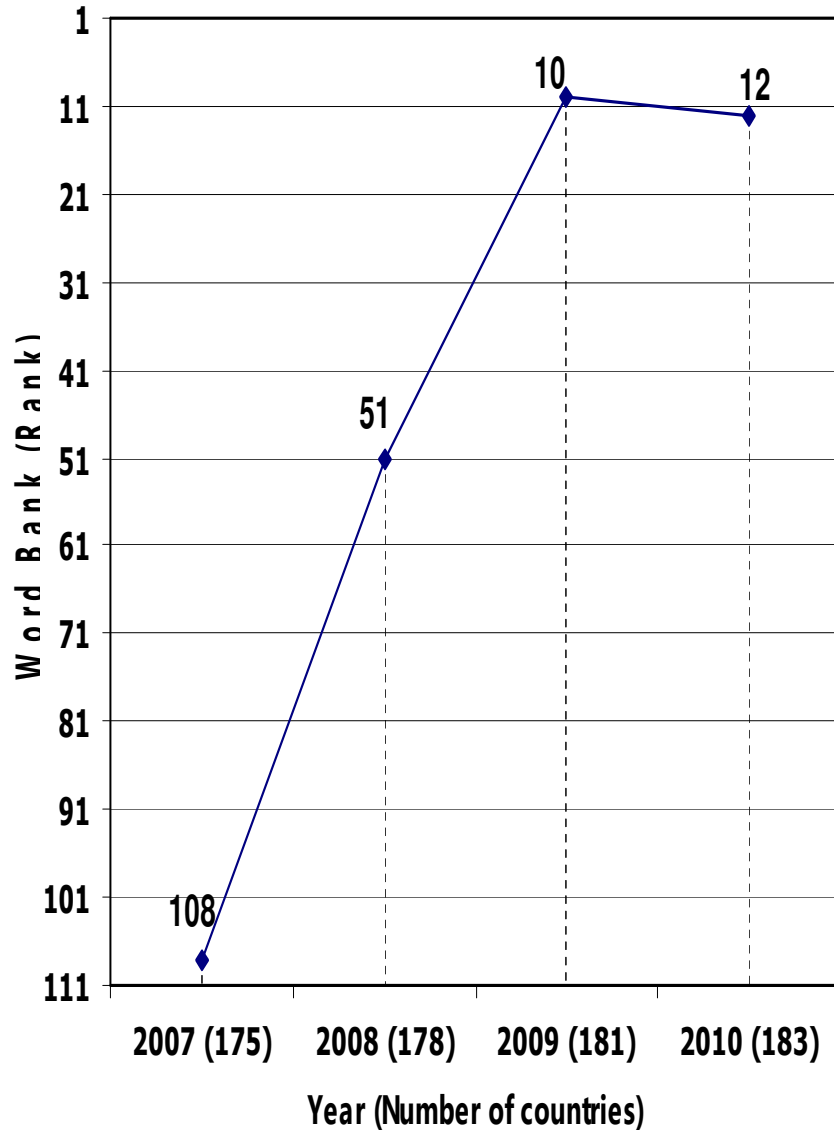
Thailand's Logistics Development Strategy (2007 – 2011)



Thailand National Single Window



Trade Facilitation & Cost Reduction (Thailand)



Source: World Bank

Conclusion

Benefits

Better Service

Easy Communication

**Anywhere, Any Time
Access**

Increased Efficiency

Financial Savings

**Better Laws and
Regulation**

**Increased
Transparency**

**Increased
Satisfaction**

Opportunities

High Growth of ICT

Growth of Consultant

Growth of Outsourcing

Participation

Resource sharing

**Better Capacity
Building**

Better Competitiveness

Ease of Doing Business



Thank you



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Stephen Lau
HP Enterprise Services /
Privacy Commissioner
(Hong Kong)



Data Privacy and Corporate Governance

Stephen Lau

Stephen.lau@hp.com

Adviser, HP Enterprise Services and

Former HK Privacy Commissioner for Personal Data

ASOCIO/APDIS 2009

Melbourne

Personal Data Protection a Global Issue

- Increasing societal affluence (70's)
- Advances in computers, digital storage and telecommunications (80's) leading to
- Exponential growth of personal data collected, transmitted and exploited
- The internet going critical and the advent of eCommerce (90's)
- **The aftermath of 9/11 (00's) and**
- **Explosion of Identity theft/fraud(00's) and data breaches leading to**
- **Heightened consumer expectations**

Federal Trade Commission Identity Theft Survey Report (2006)

- A total of 3.7 percent of American adults indicated that they had discovered they were victims of ID theft in 2005. This result suggests that approximately **8.3 million U.S. adults** discovered that they were victims of some form of ID theft in 2005.

DATA BREACH A GLOBAL PROBLEM!

Data Breach

Hard Costs to Corporate

- **Financial penalties imposed by regulators**
 - Nationwide (UK) \$1.5M Choicepoint (US) \$15M
- **Other penalties imposed by regulators to demonstrate the weaknesses are addressed**
- **Compensation payments in commercial and class action lawsuits**
- **Loss of customers/ corporate partners**
- **Costs of crisis management, damage control, notification, review and retrofit of information systems, policies and procedures.**
- **Payment for credit monitoring services for affected individuals**
- **Legal and administrative expenses in defending litigation**

Data Breach

Soft Costs to Corporate

- **Diminution of brand and reputation**
- **Loss of client trust**
- **Loss of competitive edge**

Personal Data Protection A Corporate Responsibility

Personal Data Protection should be viewed not just as a COMPLIANCE issue, but also as a BUSINESS issue as a

BUSINESS IMPERATIVE

BUSINESS DIFFERENTIATION and

COMPETITIVE ADVANTAGE

Build a corporate culture protecting information and respecting privacy

- **It is essential that personal data privacy protection become a corporate priority throughout all levels of the organization**
- **Appoint a privacy officer and form a multi-departmental privacy team**
- **Develop an information and privacy protection policy based on the universal personal data protection principles and compliance with relevant privacy laws**
- **Build and sustain a culture to protect information and respect privacy through education, technology, processes and procedures**
- **Senior Management and Board of Directors' commitment is critical, with privacy compliance part of management performance evaluation**

Make Privacy a Business Imperative

- **Gain a competitive advantage**
- **Enhance trust and consumer confidence**
- **Keep existing customers –attract new ones**
- **Minimize the risk of a privacy breach and the high costs associated with them**



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Hong-Wei (Howard) Jyan
Executive Yuan Taiwan
(Taiwan)





From e-Government towards e-Governance

Howard Jyan

Senior System Analyst,

Howard@rdec.gov.tw

Research, Development, and Evaluation Commission

The Cabinet, Taiwan (R.O.C.)

August 6, 2009

National ICT Plans

E-Taiwan



2002-2007



2005-2008

U-Taiwan



2008-2009



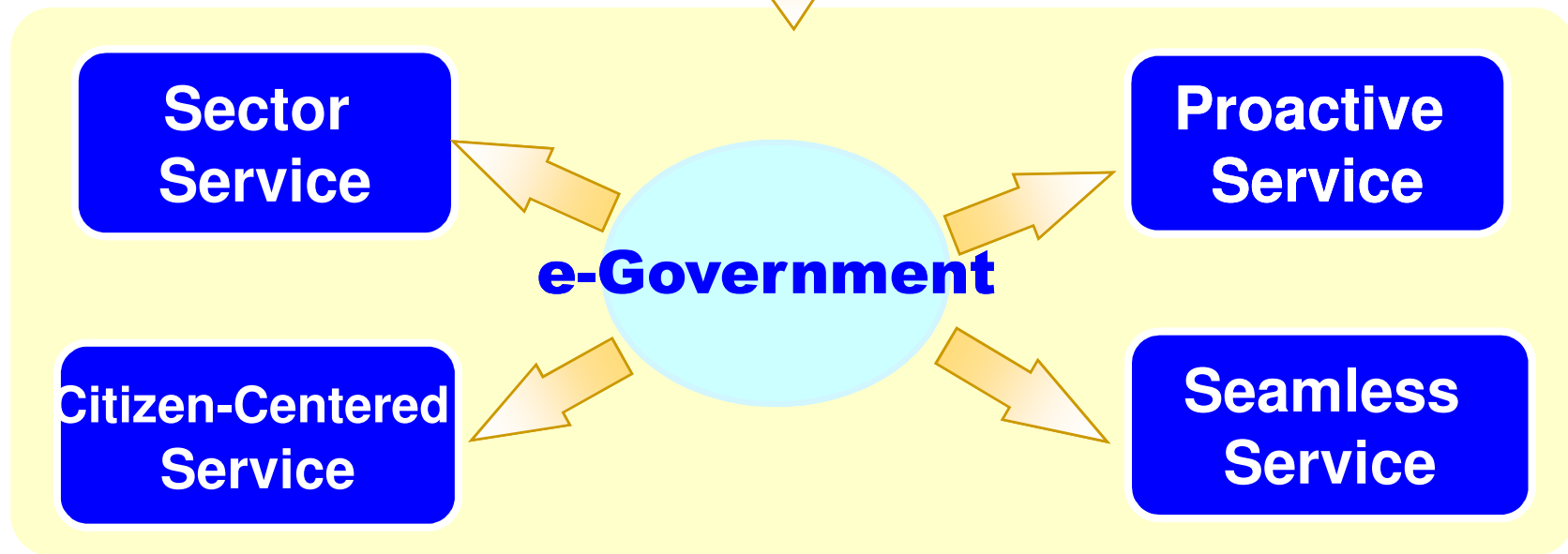
2009-2016



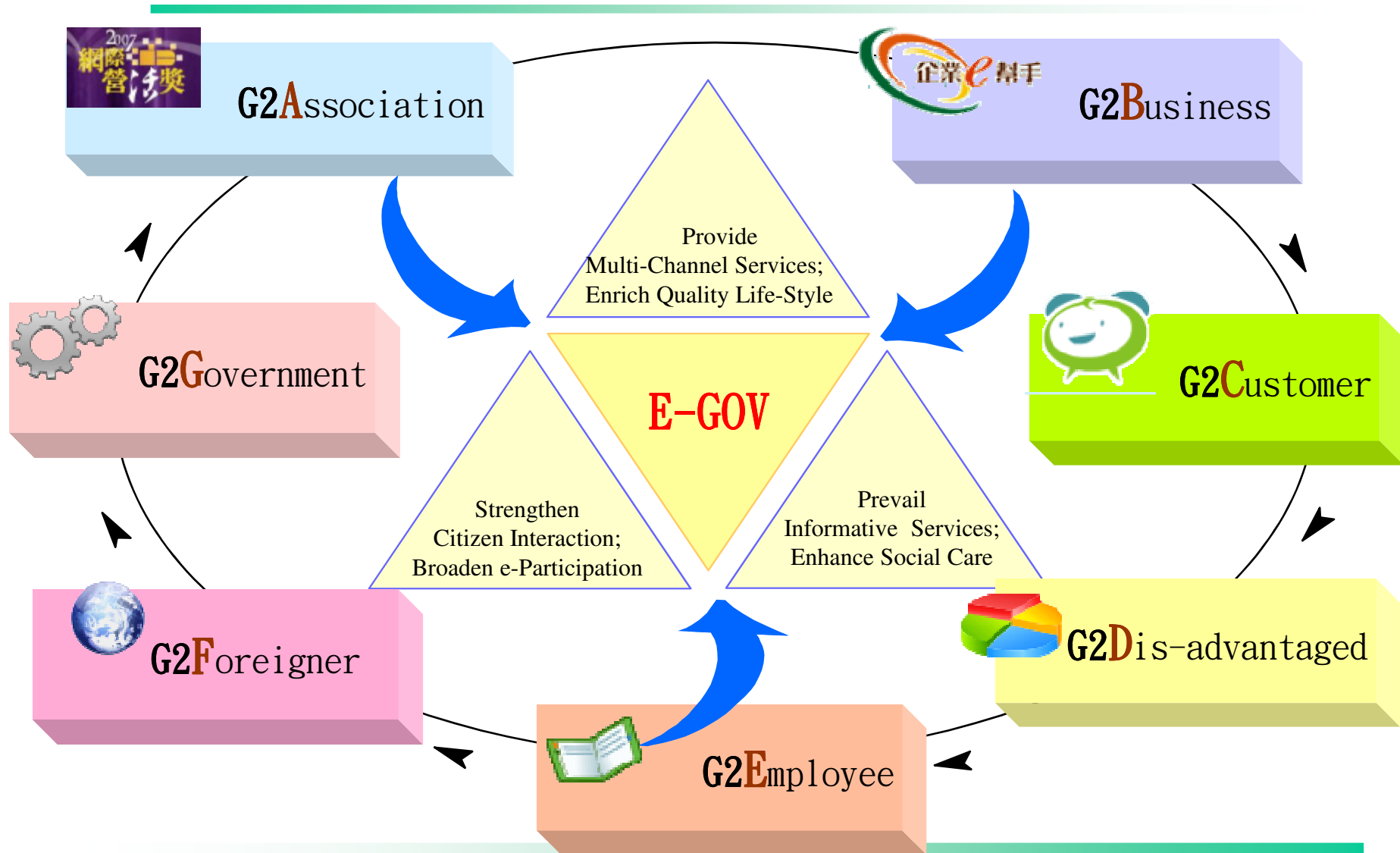
Intelligent e-Government

Intelligent Taiwan

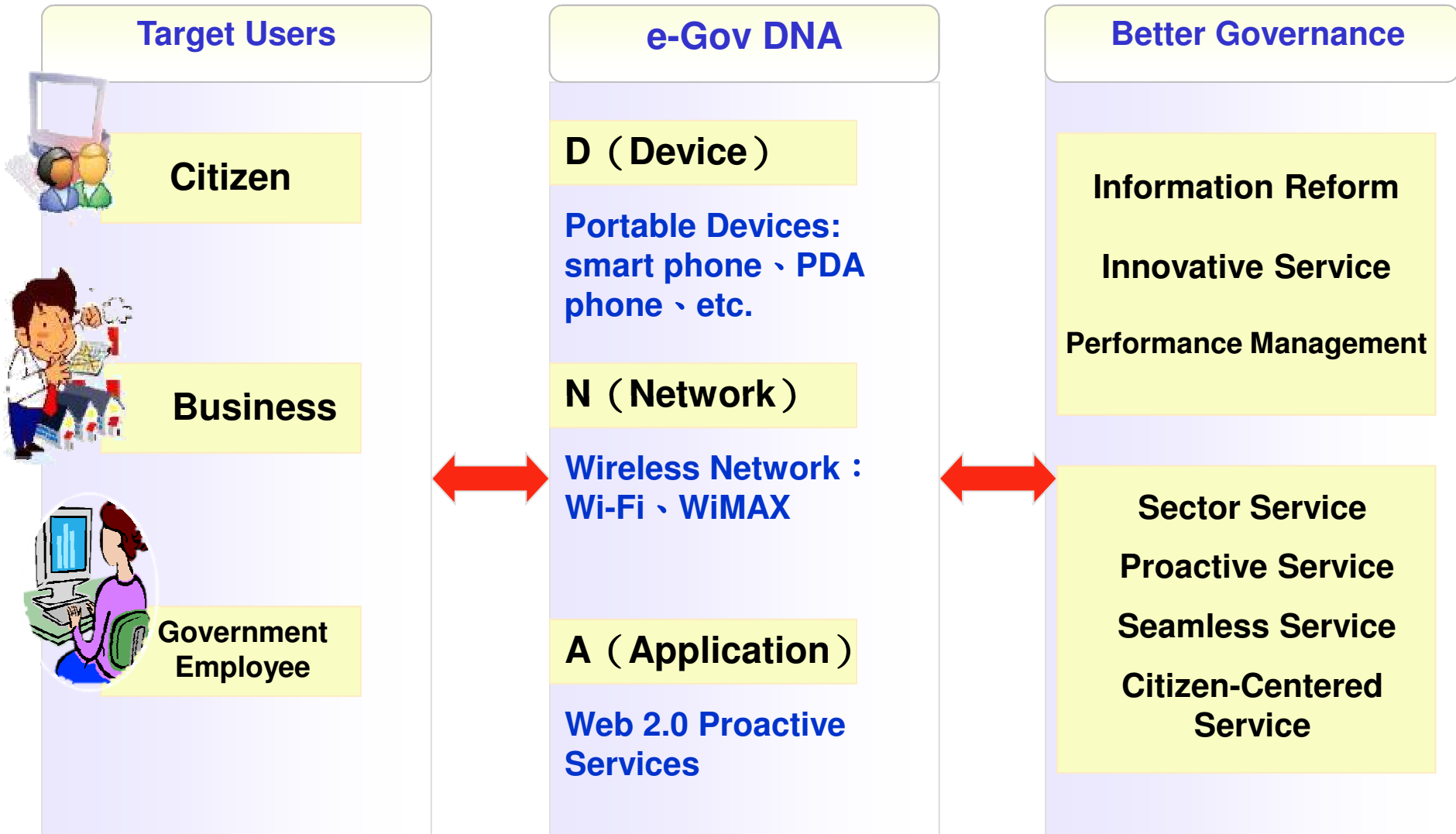
Web 2.0 、 Economic Revitalization 、 Green IT...



G2A to G2G Segmented Services



Conclusion



Welcome to

