SIMPOSIUM MATLUMAT GEOSPATIAL KEBANGSAAN KE 14

Economic Transformation and the value of Geospatial

17 March 2014

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PEMANDU

PEMANDU
PERFORMANCE MANAGEMENT AND DELIVERY UNIT

National Transformation Policy
TOWARDS VISION 2020

TRANSFORMASI
UNTUK SEMUA

1Malaysia
(People First, Performance Now)

Government Transformation Programme

Economic Transformation Programme

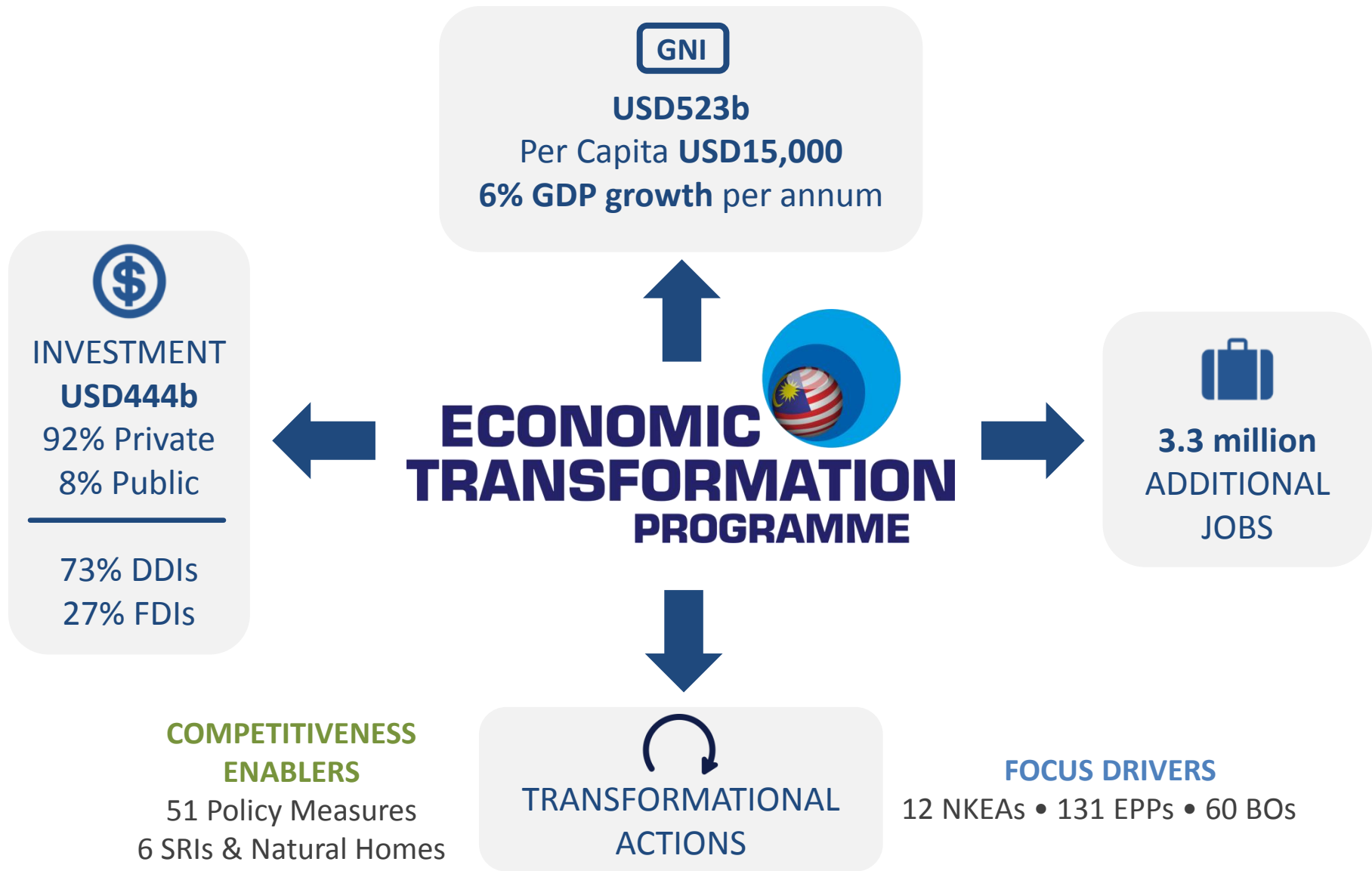**Political** Transformation Programme

10th & 11th Malaysia Plan

NEW ECONOMIC MODEL
Making Us A **Rich Country**
For **Everyone** & For **A Long Time**

ETP's TRUE NORTH

GNI

USD523b
Per Capita **USD15,000**
6% GDP growth per annum

INVESTMENT
USD444b
92% Private
8% Public

73% DDIs
27% FDIs

ECONOMIC TRANSFORMATION PROGRAMME

3.3 million ADDITIONAL JOBS

COMPETITIVENESS ENABLERS
51 Policy Measures
6 SRIs & Natural Homes

TRANSFORMATIONAL ACTIONS

FOCUS DRIVERS
12 NKEAs • 131 EPPs • 60 BOs

To become a
HIGH-INCOME NATION,
We NEED:

COMPETITIVENESS **+** **FOCUS**

"ENABLERS" to ensure competitiveness

"DRIVERS" to ensure focus on high-impact areas

6 SRIs

Strategic Reform Initiatives

12 NKEAs + 7 NKRAs

National Key Economic Areas
National Key Result Areas

Overall NKEA RESULTS

KPI MET

	2011	2012	30 DEC 2013
	123%	118%	100%*
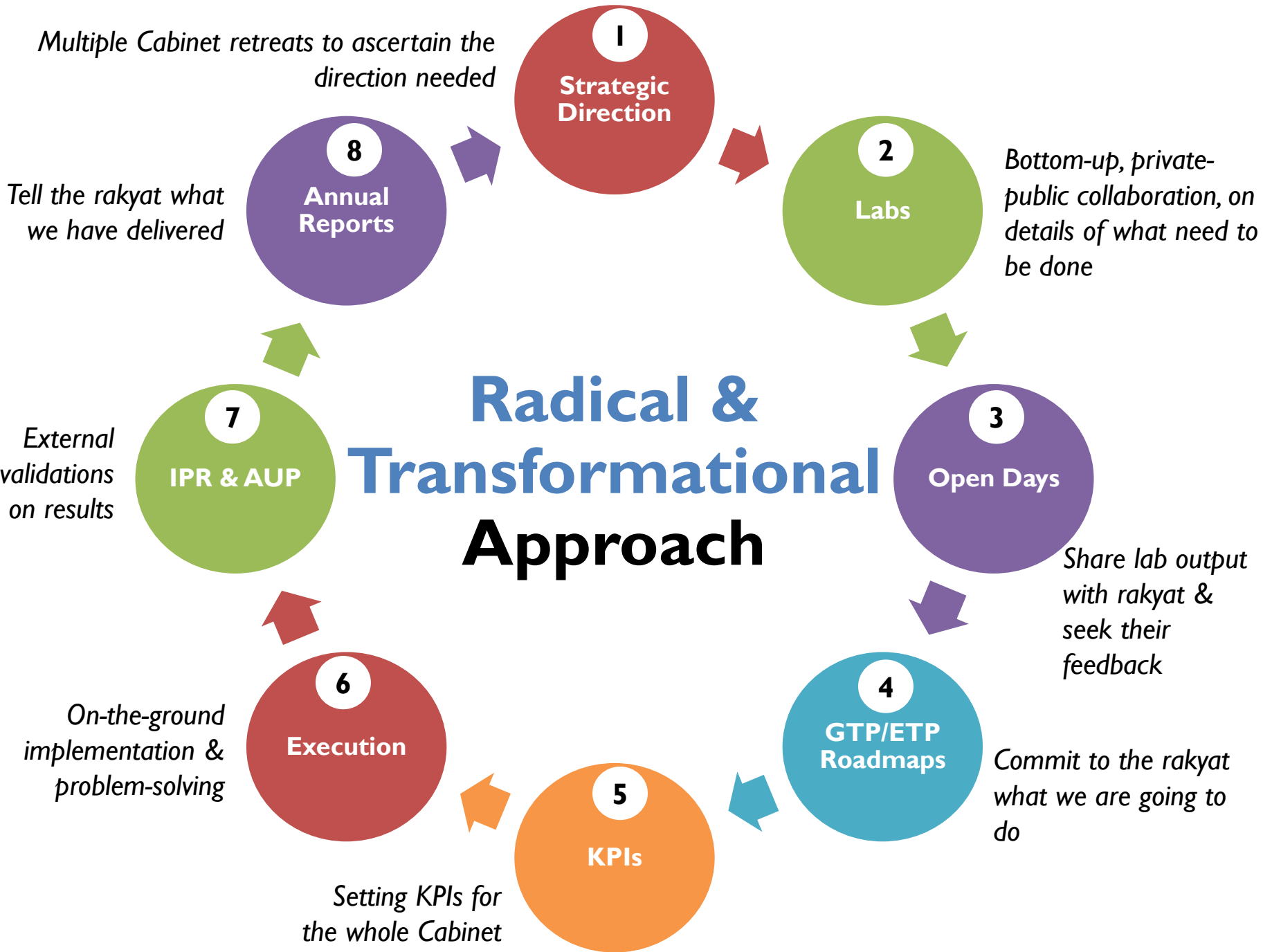
Oil, Gas & Energy

Healthcare

Electrical & Electronics

Education

Communications Content & Infra

Tourism

Greater Kuala Lumpur

Financial Services

Business Services

Agriculture

Wholesale & Retail

Palm Oil & Rubber

*Not final

Progress TO DATE

2011
110 PROJECTS
Investment
RM179.2b
GNI in 2020
RM129.5b
Jobs
313,741

2012
39 PROJECTS
Investment
RM32.1b
GNI in 2020
RM6.6b
Jobs
94,702

2013
47 PROJECTS
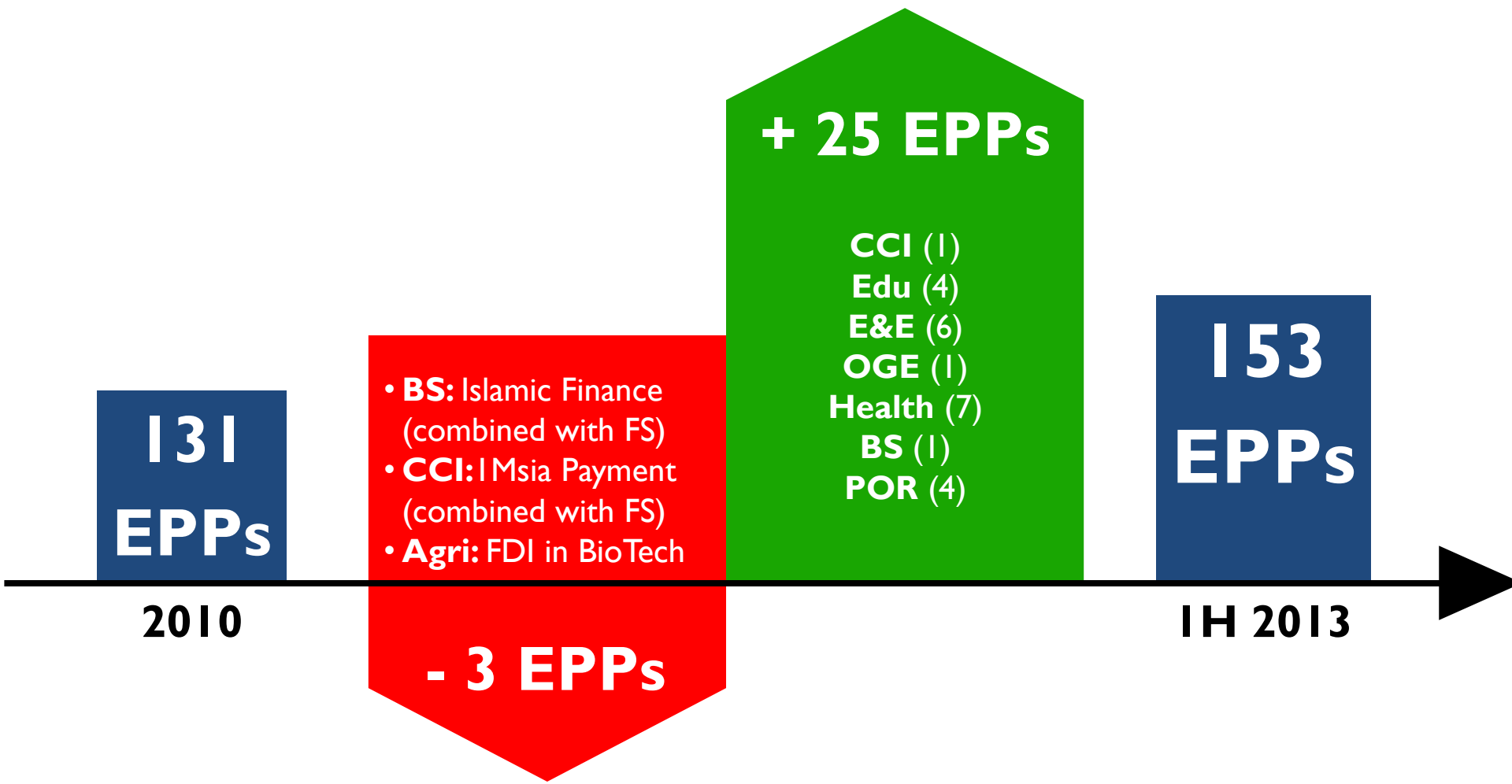Investment
RM8.0b
GNI in 2020
RM7.4b
Jobs
29,373

INVESTMENT
RM219.3b

GNI
GROSS NATIONAL INCOME
RM143.5b

JOBS
437,816

ETP is a
LIVING DOCUMENT

131 EPPs

2010

- 3 EPPs

- **BS:** Islamic Finance (combined with FS)
- **CCI:** 1Msia Payment (combined with FS)
- **Agri:** FDI in BioTech

+ 25 EPPs

CCI (1)
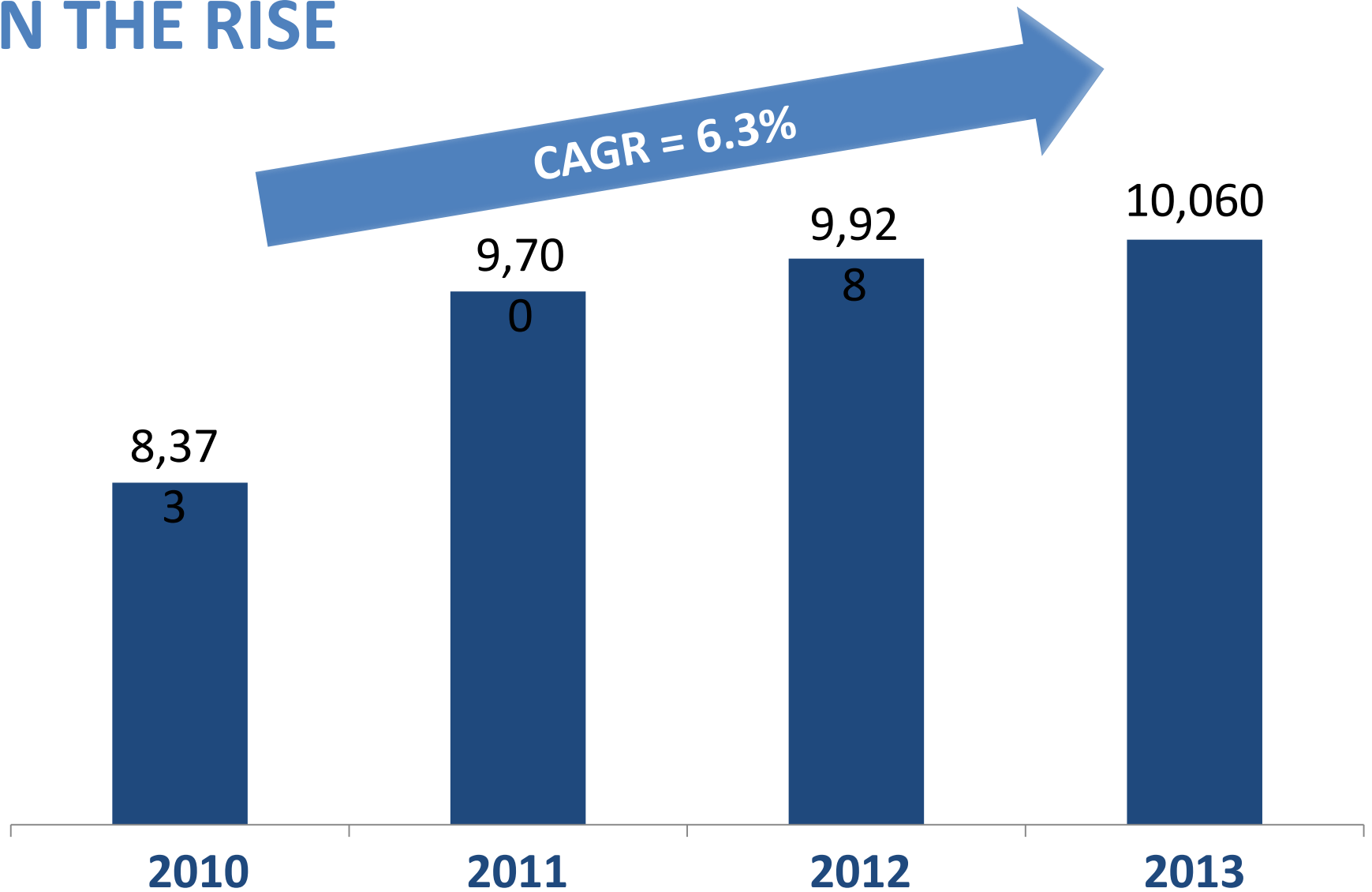Edu (4)
E&E (6)
OGE (1)
Health (7)
BS (1)
POR (4)

153 EPPs

1H 2013

BENCHMARKING

GNI Per Capita
ON THE RISE

CAGR = 6.3%

2010	2011	2012	2013
8,373	9,700	9,928	10,060

NKEA Share Of GNI

(in RM billion)

Gross National Income

■ NKEA ■ Non-NKEA

RM862.6b

RM905.4b

RM949.3b

70.5%

255.7

606.9

68.7%

284.4

621.0

73.4%

252.4

696.9

2011

2012

2013
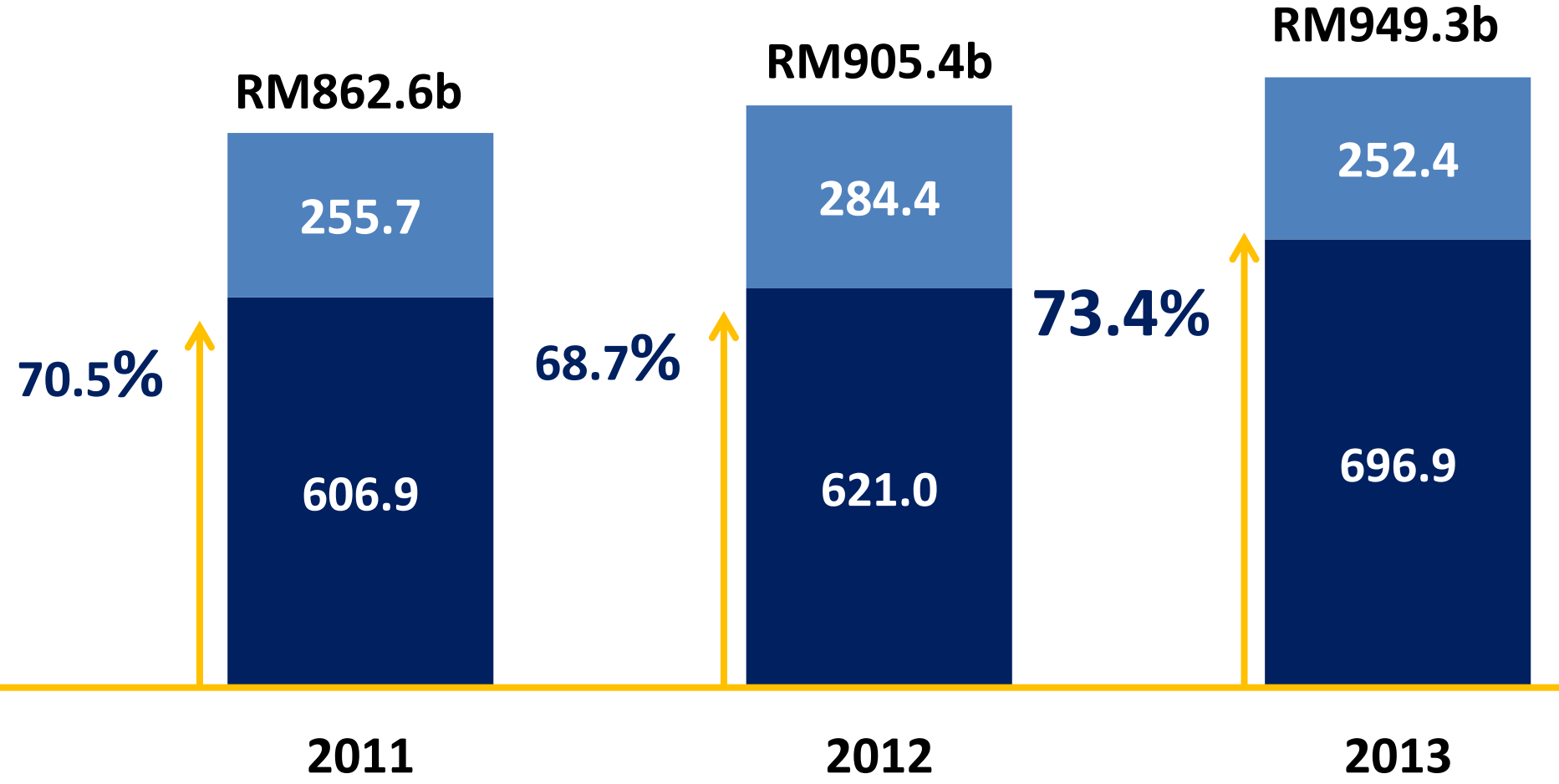
Source: Department of Statistics

1.3M NEW EMPLOYMENT
In NKEA Universe

Employment (million)

	2010	2011	2012	YTD 2013
Upper segment	4.67	4.81	4.82	5.10
Lower segment	7.23	7.47	7.90	8.56
Percentage	60.8%	60.8%	62.1%	62.7%
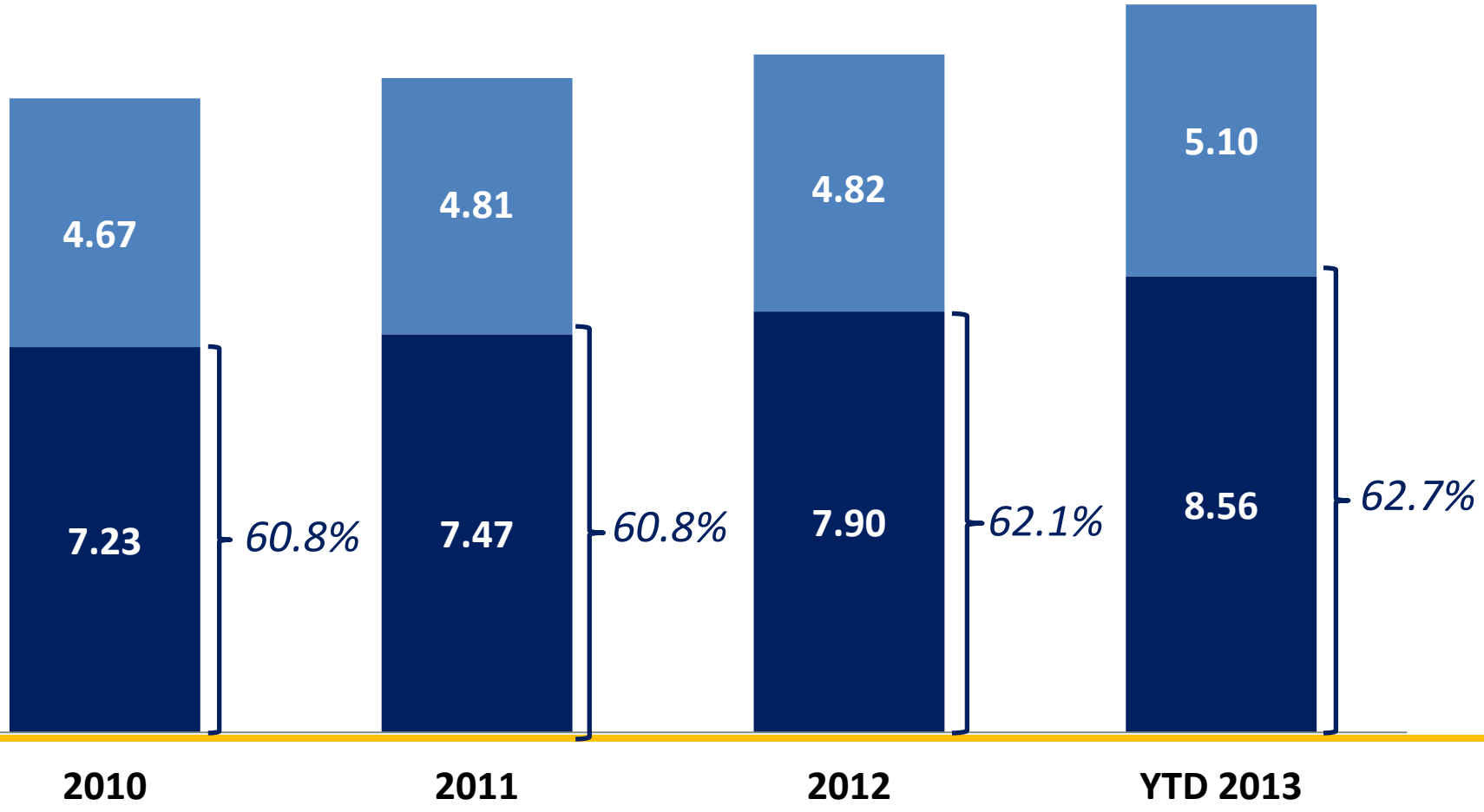
STRONG REALISATION
Of ETP Investment
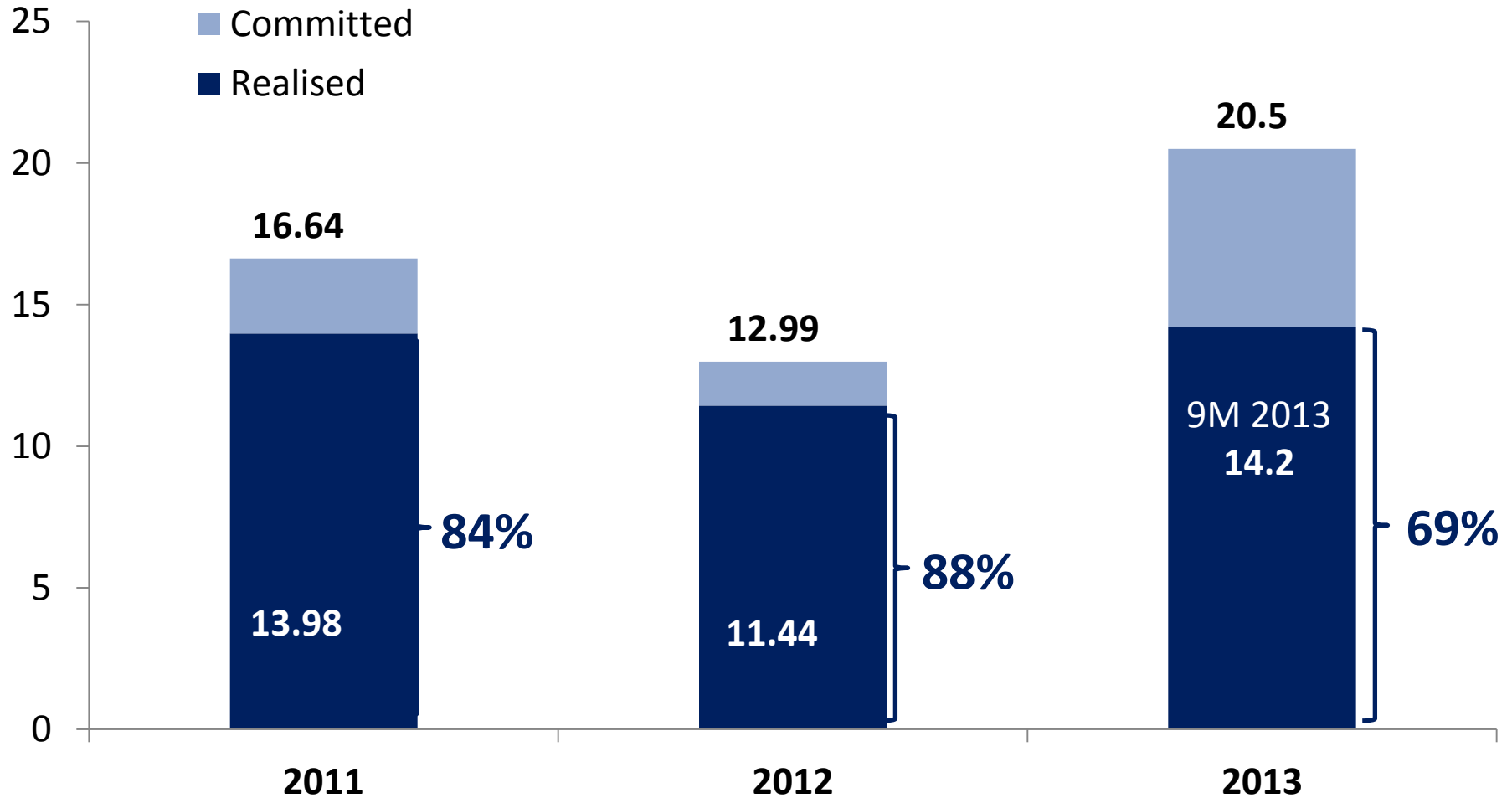
538.9B
Approved Investment Post-ETP

10MP ANNUAL TARGET **RM148B**

Year	Value
2006	111.3
2007	148.9
2008	137.0
2009	104.9
2010	105.6 (ETP LAUNCH)
2011	154.6
2012	167.8
2013	216.5

Legend: 2006 2007 2008 2009 2010 2011 2012 2013

Source: MIDA
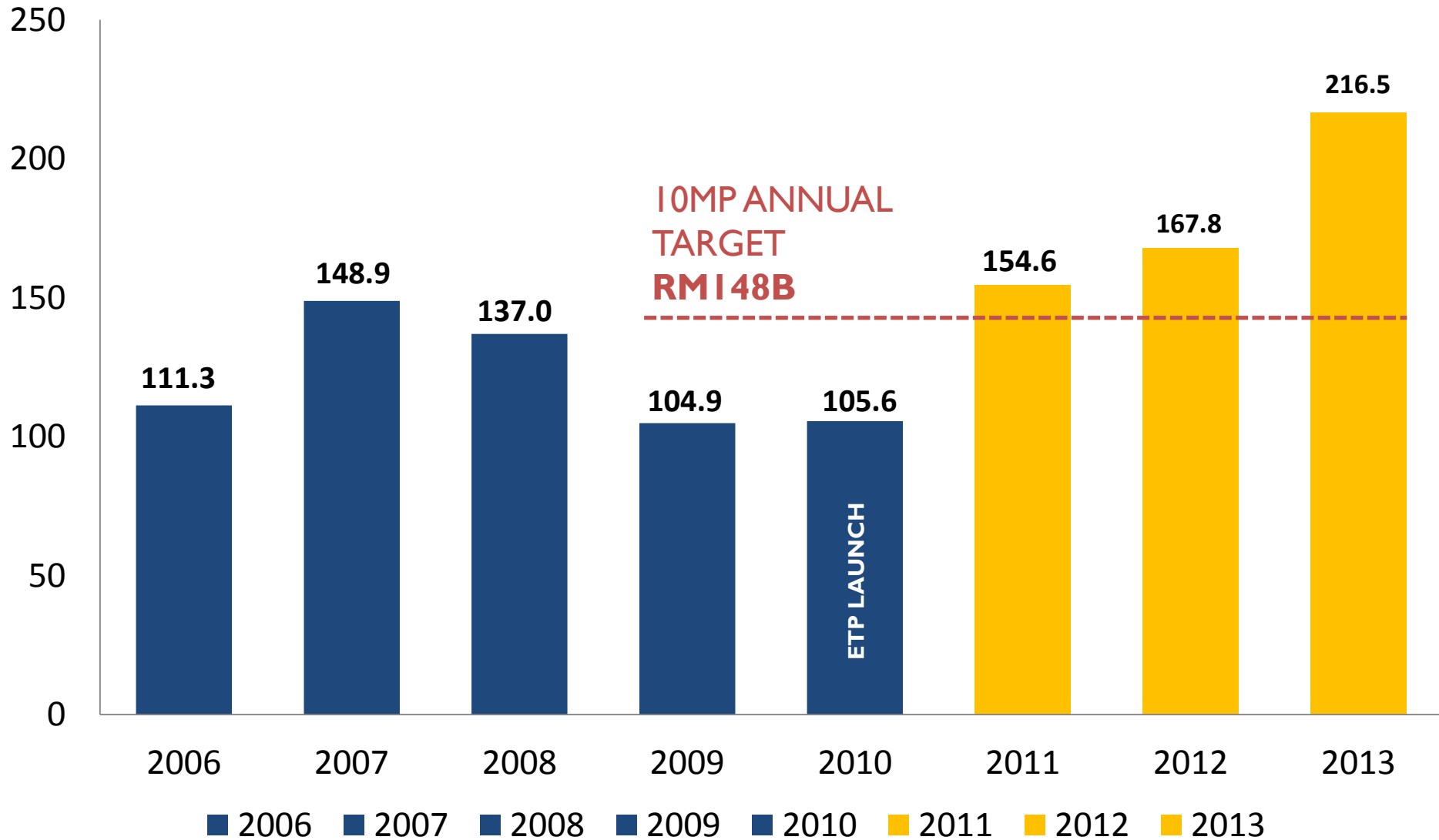
Private Investment
EXCEEDING TARGETS

■ **Target** ■ **Actual** ▬ ▬ **NKEA share**

In RM billion

2011

9.3% {
86b (Target)
94b (Actual)

NKEA SHARE
RM68.2b
(72.6%)

2012

9.6% {
127.9b (Target)
140.2b (Actual)

NKEA SHARE
RM85.7b
(61.4%)

2013

8.6% {
148.4b (Target)
161.1b (Actual)
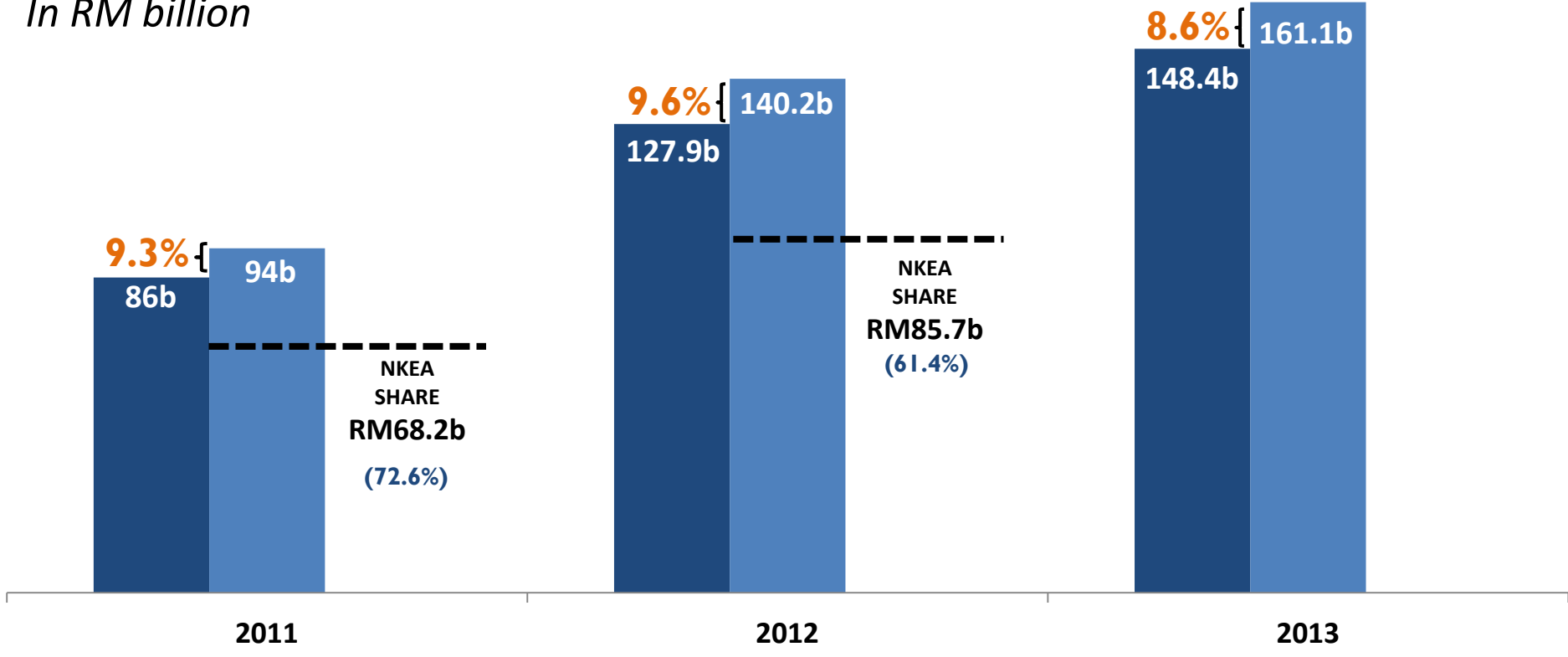
Actual investment figures are based on SNA 2008 after the rebasing exercise conducted in 2012

Source: Department of Statistics 2013

DISCIPLINE OF ACTION

ETP Governance Structure
TO ENSURE DELIVERY

ETP BRIEFINGS / ANNUAL REPORTS

BI-ANNUAL, ANNUAL

ECONOMIC COUNCIL

WEEKLY

NKEA Steering Committee

MONTHLY

Investment Committee

BI-MONTHLY

EPP / BO owners

DAILY

SECRETARIAT

PEMANDU
PERFORMANCE MANAGEMENT AND DELIVERY UNIT

EPU
ECONOMIC PLANNING UNIT
PRIME MINISTER'S DEPARTMENT, MALAYSIA

PEMANDU
PERFORMANCE MANAGEMENT AND DELIVERY UNIT

Lead Ministries

MITI
MALAYSIA

MIDA
MALAYSIAN INVESTMENT DEVELOPMENT AUTHORITY

RESPECTIVE MINISTRIES / EPP OWNERS

COMMUNICATIONS TODAY

Let's talk about social media… for a while…

… perhaps a long while

http://www.youtube.com/watch?v=GDLU5Y8fmzk

A look at recent history – 10 years ago

Face book didn't exist

Twitter was a sound

The Cloud was in the sky

4G was a parking place

LinkedIn was a prison

Applications were what you sent to colleges

Thomas Friedman – NY Times Columnist & Pulitzer Prize winning author

What goes online, stays online!

Technology adoption rate

Social technologies have been adopted at record speed
Time to reach 50 million users

ILLUSTRATIVE

50 million users

Radio	38 years
TV	13 years
iPod	4 years
Internet	3 years
Facebook	1 year
Twitter	9 months
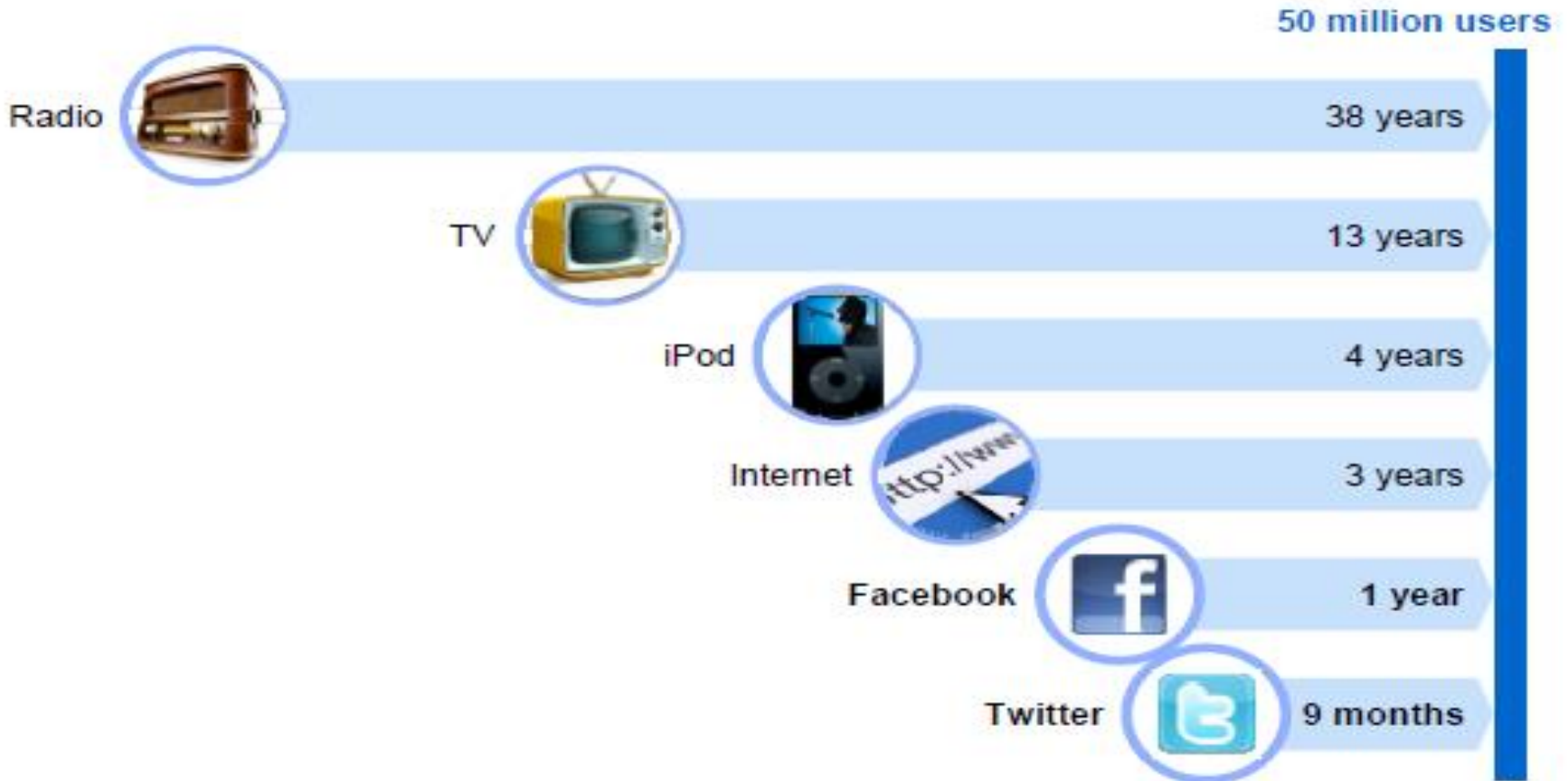
SOURCE: Various press reports

What goes online, stays online!

Now... social media galore

Getting information off the Internet is like taking a drink from a fire hydrant.

Mitchell Kapor
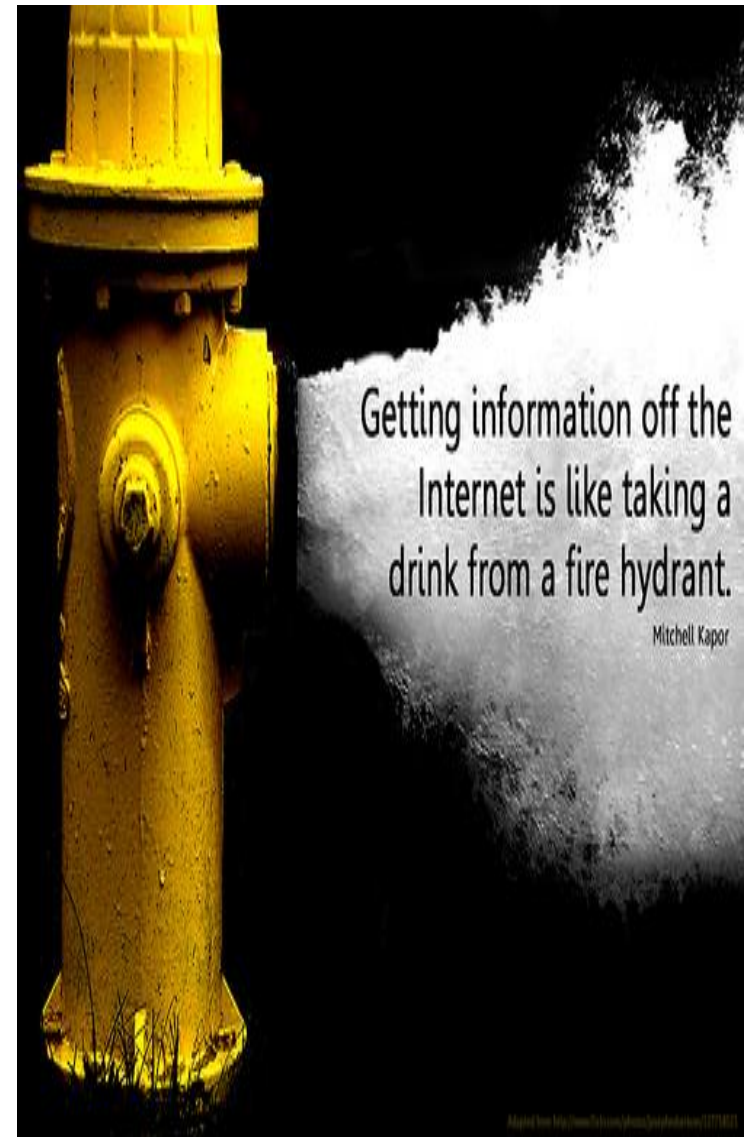
What goes online, stays online!

Social media landscape today

- Social media technologies or platform take on many different forms
- Mobile social media that runs on mobile devices is slightly different from traditional social media as it incorporates new factors such as the current location of the user (location-sensitivity) or the time delay between sending and receiving messages(time-sensitivity)

FredCavazza.net

How do people access the content?

- 4 screen strategy – smart tv, computer, tablet, smartphone

Access Devices

- Devices are technology agnostic, using broadband & other transport technologies deliver content

Wired technology

Wireless technology

Satellite technology

Malaysia

Internet population
Malaysia population - 26,160,256
64.7% of Malaysian use the Internet. Internet users - 16,900,000

64.7%

Top 5 social media channels

Facebook
14,000m Page views
75.5% Reach

Blogspot
170m Page views
42.4% Reach

WordPress
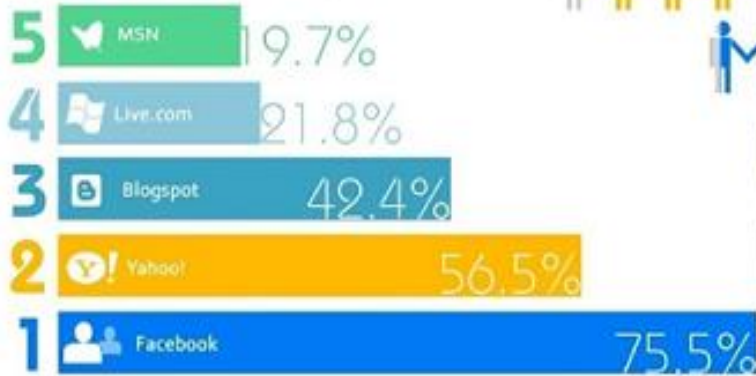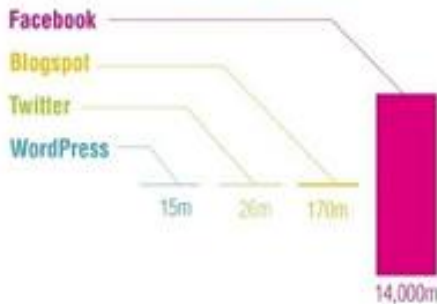15m Page views
16.1% Reach

Twitter
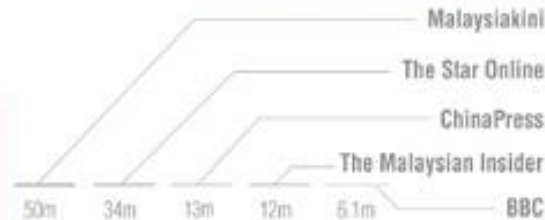26m Page views
7.6% Reach

Metacafe
5.1m Page views
5.6% Reach

Top 5 websites (% Reach)

5 MSN — 19.7%
4 Live.com — 21.8%
3 Blogspot — 42.4%
2 Yahoo! — 56.5%
1 Facebook — 75.5%

Social media

Facebook
Blogspot
Twitter
WordPress

15m 26m 170m

14,000m

Mainstream media

Malaysiakini
The Star Online
ChinaPress
The Malaysian Insider
BBC

50m 34m 13m 12m 6.1m

2011

GENDER

Top 3 States (Female)
1. Kelantan 54.2%
2. Sarawak 50.37%
3. Putrajaya 50.1%

46.1%
of Internet users
in Malaysia are
FEMALE

53.9%
of Internet users
in Malaysia are
MALE

Top 3 States (Male)
1. Selangor 58.0%
2. WPKL 55.7%
3. Negeri Sembilan .. 54.2%

Source: MCMC Household
Use of Internet Survey, 2011

EDUCATIONAL ATTAINMENT

of all Internet users

40% possessed **High** Education
28% Possessed **Medium** Education
6% possessed **Low** Education

None 1%
Still in school / university 35%
Low Education — PRIMARY 1% SECONDARY 2% PMR 3% — 6%
Medium Education — SPM/SPMV 23% STPM 6% — 28%
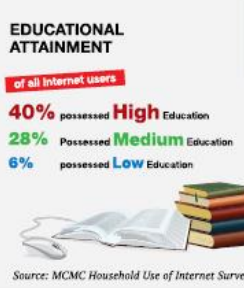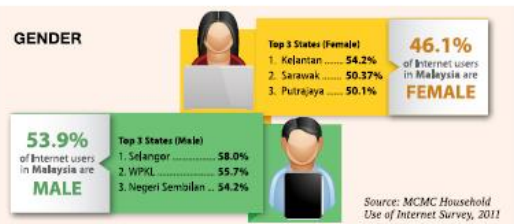High Education — DIPLOMA 15% ADVANCED DIPLOMA/ DEGREE 25% — 40%

Source: MCMC Household Use of Internet Survey, 2011

2012

DEMOGRAPHICS: GENDER/AGE

56.4%
of Internet Users
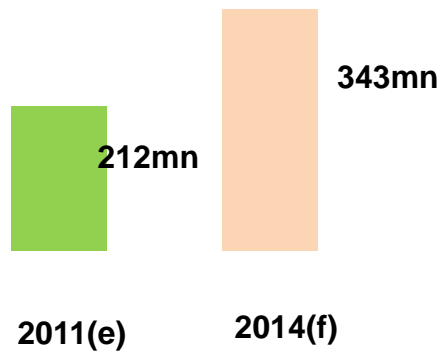in Malaysia are
MALE

43.6%
of Internet Users
in Malaysia are
FEMALE

Period: March 2012

Challenge #1: Fixed Broadband and 3G/LTE options for high speed access *(easy access)*

Fixed Broadband

3G/LTE

343mn

212mn

2011(e)

2014(f)

1bn

466mn

2011(e)

2014(f)
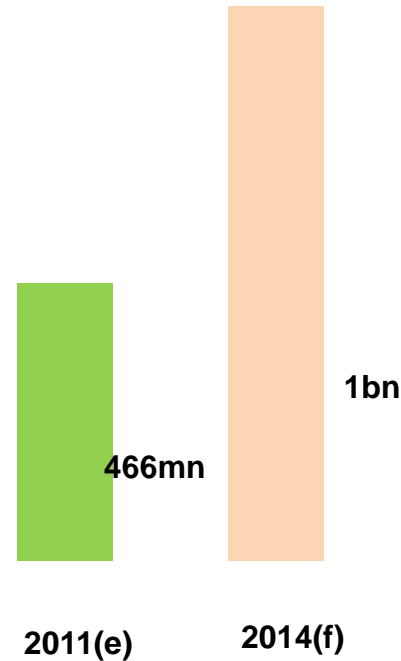
- **Stability is best via fixed broadband**
- **Fixed broadband market continues to grow in Asia Pacific region despite of the heavy penetration of 3G/LTE.**
- **MBB through dongles will touch 41mn in 2011 and reach around 100mn by 2014**

Challenge #2: Mobile Platforms hitting the mass across smartphones and tablets
(information on the go)

Global Trends

~ 480mn
Tablets

~ 380mn

Netbook PCs

Smartphones

Desktop PCs

2011 (e)

Asia Pacific Trends

~ 150mn

~ 155mn

Netbook PCs

Tablets

Desktop PCs

Smartphones

2011 (e)
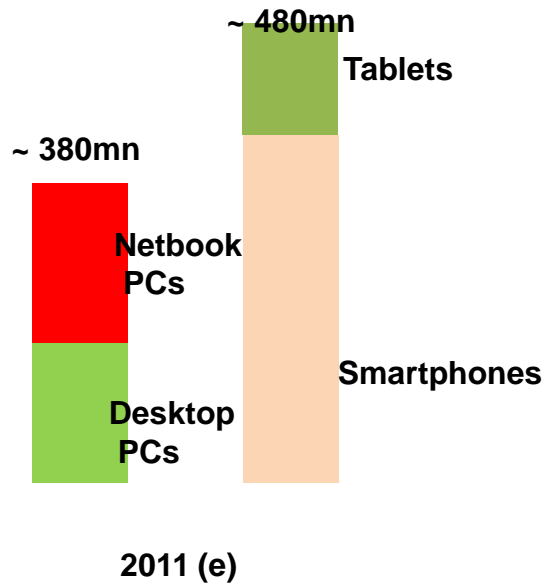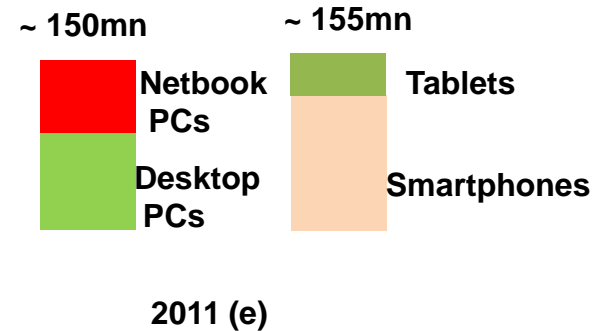
- **Globally in Q4 2010, smartphone & tablet shipments exceeded desktop & PC shipments**

- **In the Asia Pacific region, we expect the shift to happen by end of Q4 2011**

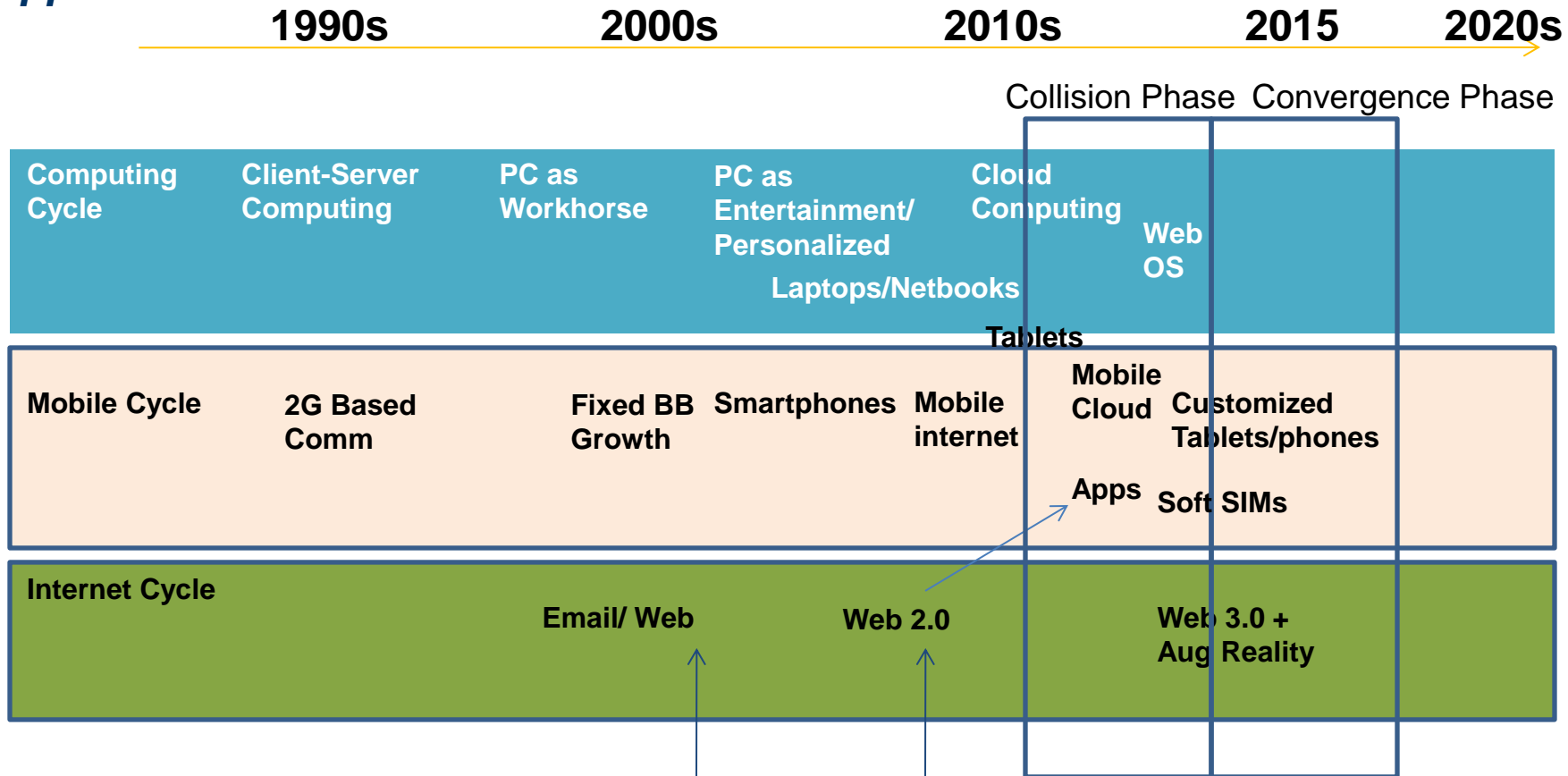# Challenge #3: <u>Platform play</u> provides opportunity for reach

3 ecosystems are converging in the mobile computing ecosystem with diverse approaches

	1990s	2000s	2010s	2015	2020s
			Collision Phase	Convergence Phase	
Computing Cycle	Client-Server Computing	PC as Workhorse	PC as Entertainment/ Personalized	Cloud Computing	Web OS
			Laptops/Netbooks		
			Tablets		
Mobile Cycle	2G Based Comm	Fixed BB Growth	Smartphones	Mobile internet	Mobile Cloud	Customized Tablets/phones
				Apps	Soft SIMs
Internet Cycle		Email/ Web	Web 2.0		Web 3.0 + Aug Reality

Digitization – Digital content overtook analog content

Video overtook static pages

Mobile devices sold> Fixed devices

Graph not to scale

Challenge #3: Platform play ensure richness
(why would you need to buy and build??)

		Apple's platform	Google platform	
Communication Platforms	Facebook	Inhouse?	??	Skype (Acquired)
Entertainment Platforms		Itunes /app store	Youtube	Xbox/PS3 Hulu ?
Information Platforms (monetized by ads)	Akamai		Google	Microsoft?
Commerce Platforms	Visa	NFC enablement	NFC enablement	PayPal Operator alliance
Participation/SNS Platforms	Facebook		Google +	Twitter ?
Experience Platforms – OS + Web	MS-Nokia?	iOS	Android	RIM (Acquired?)

Challenge #4: Real use driven by <u>enterprise social networking</u> *(easy access to information; accepto*
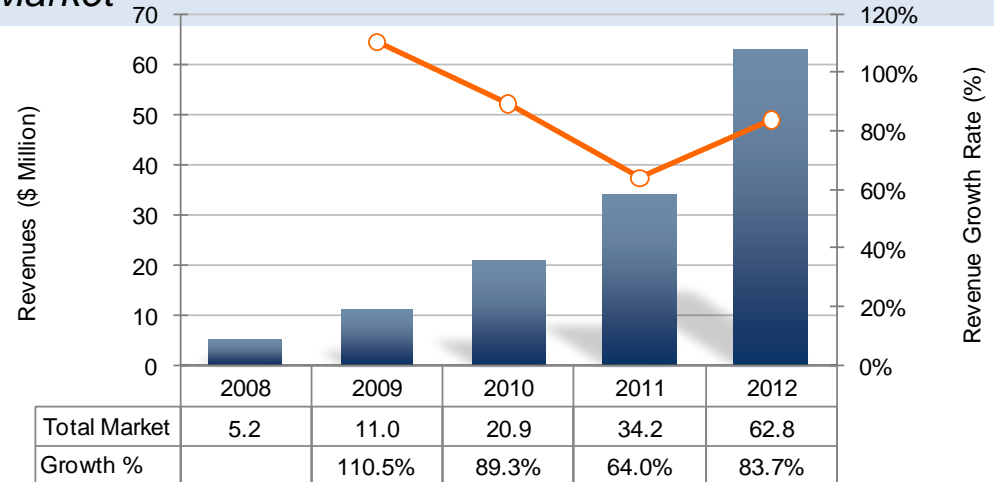
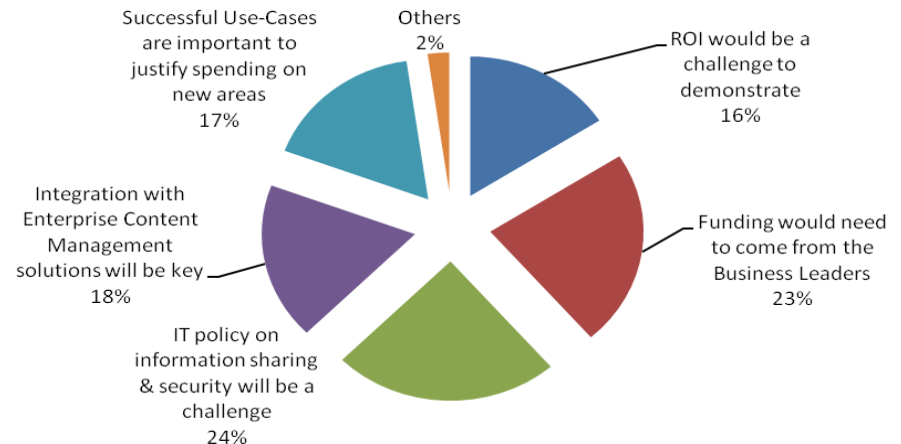**Enterprise-grade solutions for Social Collaboration emerging in the market**

Market adoption saw sharp increase in 2012

Access to info beyond just healthcare givers
Direct access into the system; hence issue organization & security

Asia Pacific Enterprise Social Networking Software Market

	2008	2009	2010	2011	2012
Total Market	5.2	11.0	20.9	34.2	62.8
Growth %		110.5%	89.3%	64.0%	83.7%

Challenges with Social Collaboration Adoption

Successful Use-Cases are important to justify spending on new areas 17%

Others 2%

ROI would be a challenge to demonstrate 16%

Integration with Enterprise Content Management solutions will be key 18%

Funding would need to come from the Business Leaders 23%

IT policy on information sharing & security will be a challenge 24%

Challenge #5: "Internet of Things" as more and more devices, equipment and gadgets get connected *(connected faster; any time any where; NOW??)*

The Home Network	Mobility on steroids	Internet of things

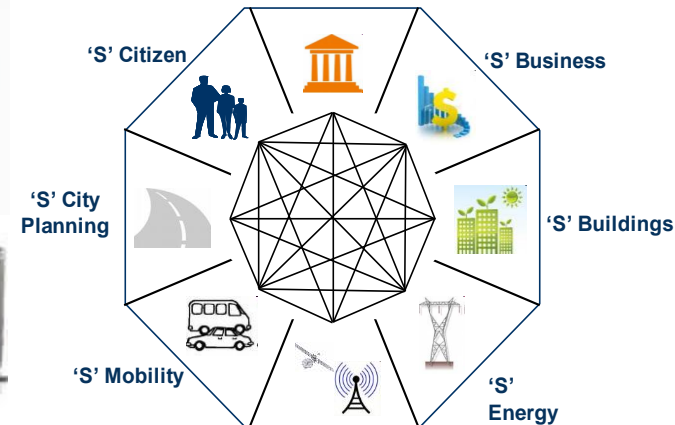**The Home Network**
- 8-10 Devices per home
- Universal Remote

6 bn

Mobility on steroids
- 5-6 Devices per individual
- Touch as the default input mechanism

30 bn

Internet of things

'S' Citizen · 'S' Business · 'S' City Planning · 'S' Buildings · 'S' Mobility · 'S' Energy

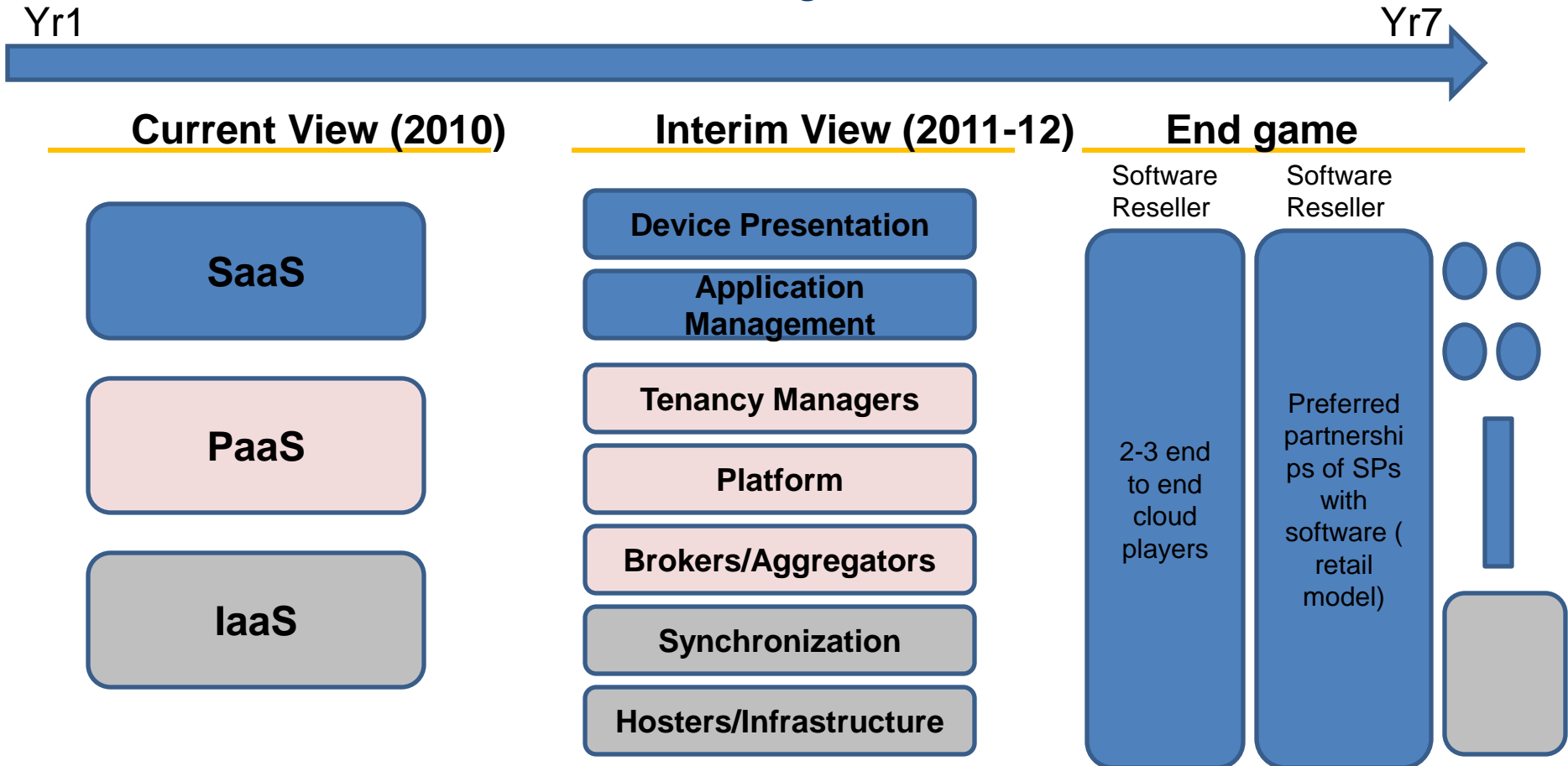- 500 per sq km
- Smart cities

44 bn

- Rapid commercialization of enabling technologies
- Demand for such services in select sectors driven by productivity requirements

Challenge #6: Cloud computing is set to become mainstream. <u>Platform-as-a-service (PaaS)</u> next big thing *(Willingness to share?)*

The cloud value chain will disintegrate and consolidate later

Yr1 → Yr7

Current View (2010)

- SaaS
- PaaS
- IaaS

Interim View (2011-12)

- Device Presentation
- Application Management
- Tenancy Managers
- Platform
- Brokers/Aggregators
- Synchronization
- Hosters/Infrastructure

End game

Software Reseller

2-3 end to end cloud players

Software Reseller

Preferred partnerships of SPs with software (retail model)

Source: Frost & Sullivan

Challenge #7: Big Data and Analytics will see a boom *(deduction on ICT??)*

Data is expected to increase dramatically over the next decade; Data from machine communication is expected to exceed social media in the next half decade
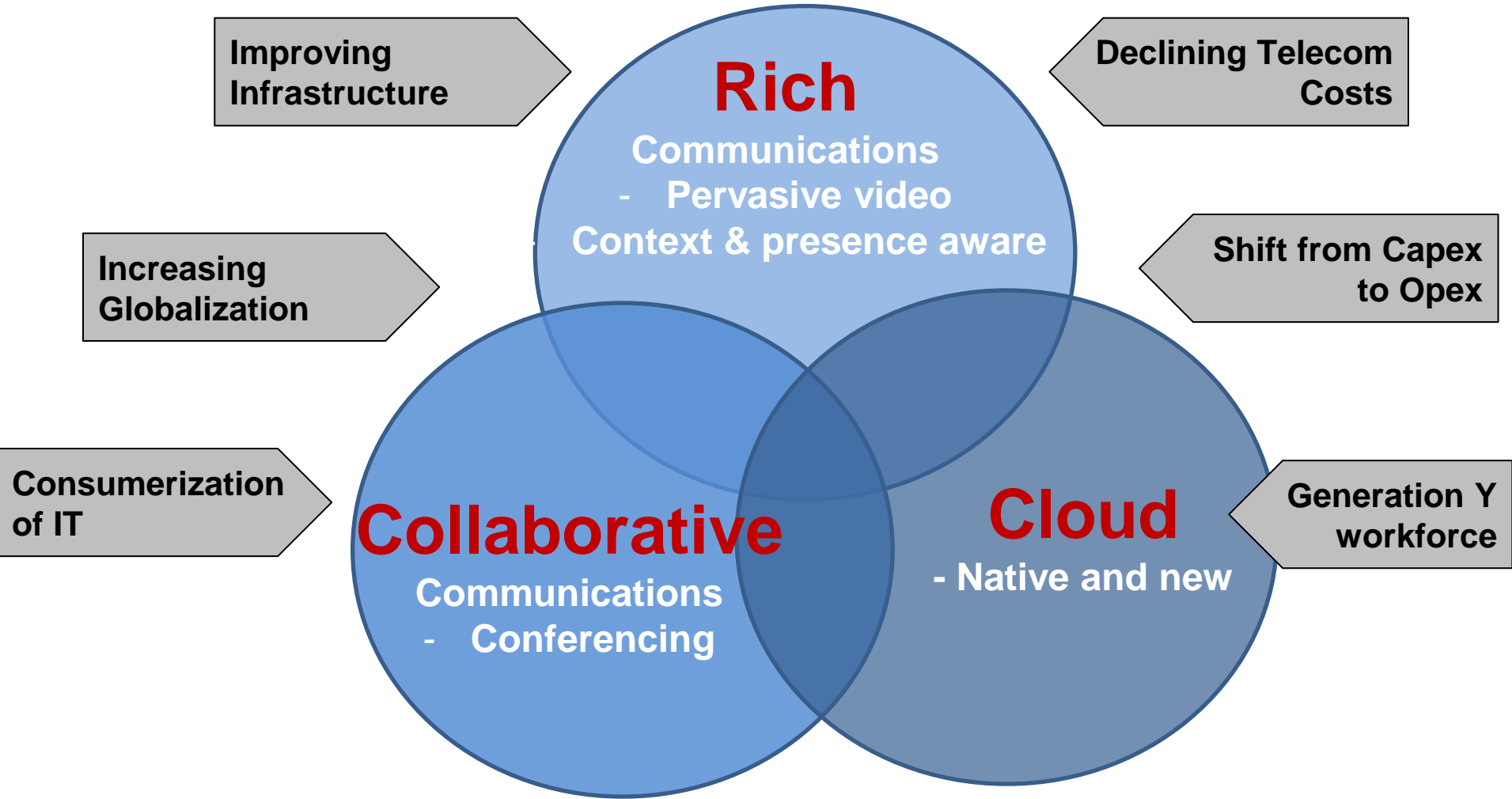
Growth Areas @ Analytics
- **Queries,**
- **Reporting, analytics,**
- **Advance analytics,**
- **CRM analytics,**
- **Data warehouse generation**
- **Organization financial / strategy analytics**
- **In-line and predictive analytics**
- **Move more towards cloud**

Big Data

- Contextual Mining
- Network performance & Utilization
- Operations Research
- Sentiment Analysis & Text Analytics
- Industry Specific Solution
- Security

Challenge #8: Enterprise communications be more collaborative and increasingly move towards the cloud (services???)

Improving Infrastructure

Declining Telecom Costs

Rich
Communications
- Pervasive video
- Context & presence aware

Increasing Globalization

Shift from Capex to Opex

Consumerization of IT

Collaborative
Communications
- Conferencing

Cloud
- Native and new

Generation Y workforce

What else for Geospatial?

Opportunity

Description

1

Governance

- Technology for governance
- Evidence for enforcement
- Acceptance of people

2

Commercial

- Demand for information
- Micro granular information
- Commercial models??

3

Money

- Acceptance of PPP model??
- Priority of resources
- Behaviour on procurement
- Maintenance principle

Doing
("Action")
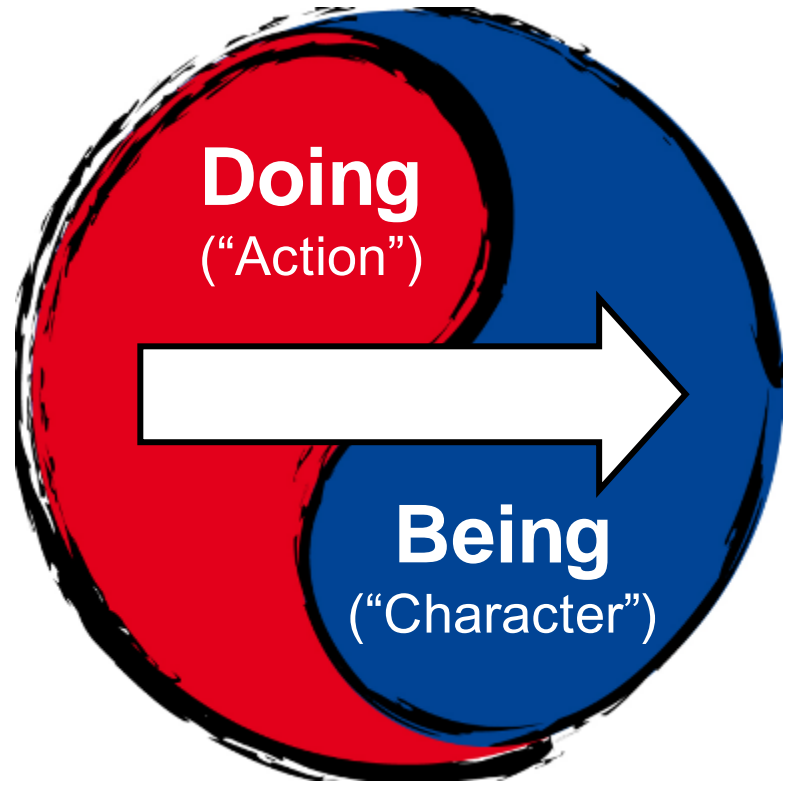
Being
("Character")

Transformational:
Changing the 'being' by 'doing'

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