

# Middle East, Africa, Russia & CIS: Investing for Long Term Growth

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14<sup>th</sup> January, 2014

# Cisco Growth Drivers...

## Driving Growth Now

Cloud

Mobility

Video

Emerging  
Markets

Services

Software

Security

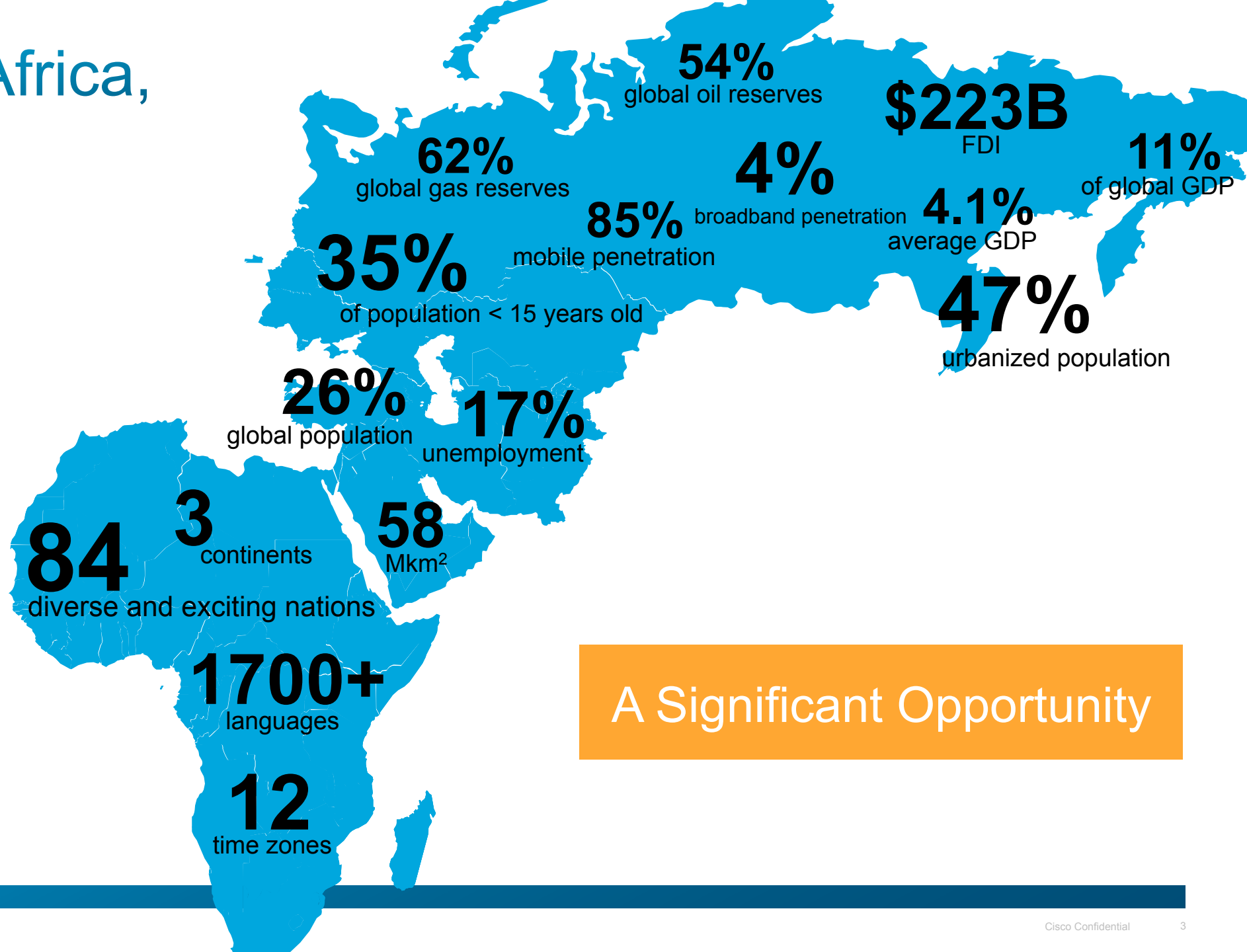
Collaboration

## Future Growth

Internet of  
Everything

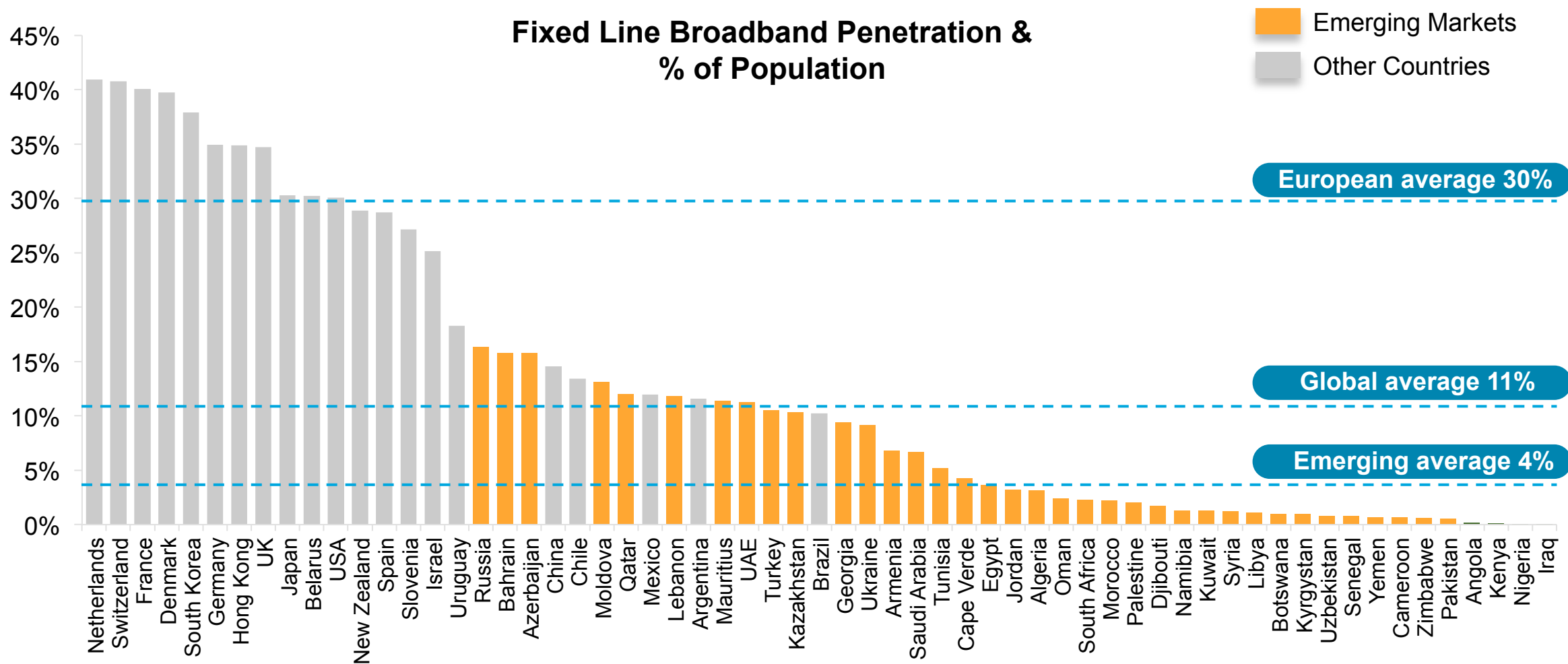
## Invest for Growth

# Middle East, Africa, Russia & CIS



A Significant Opportunity

# We Have A Significant Opportunity





Macro Economic  
Environment

GDP Size & Growth

Political Environment

Business Environment

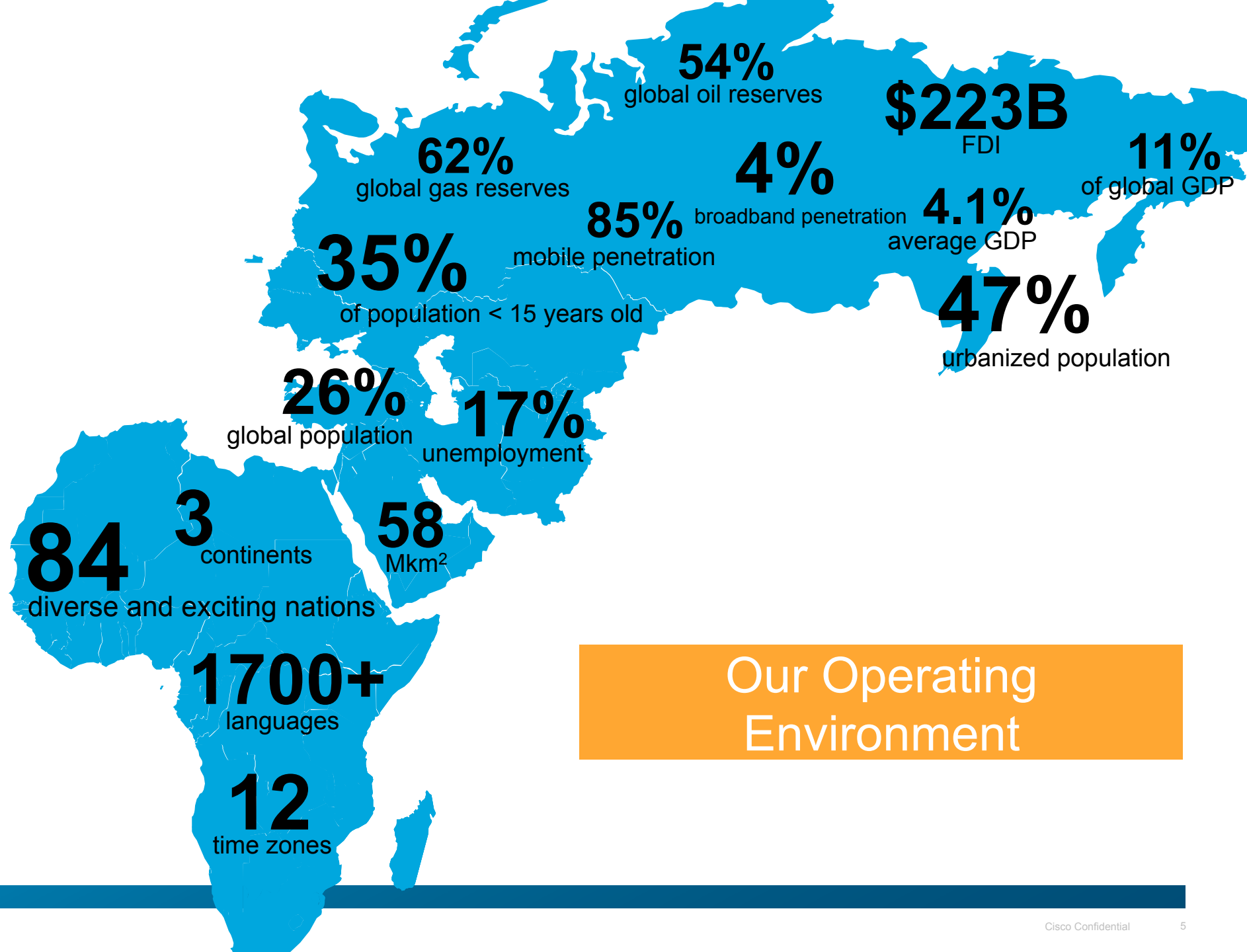
Regulatory Environment

IT Market Size & Growth

IT as % of GDP

Critical National  
Infrastructure (CNI)

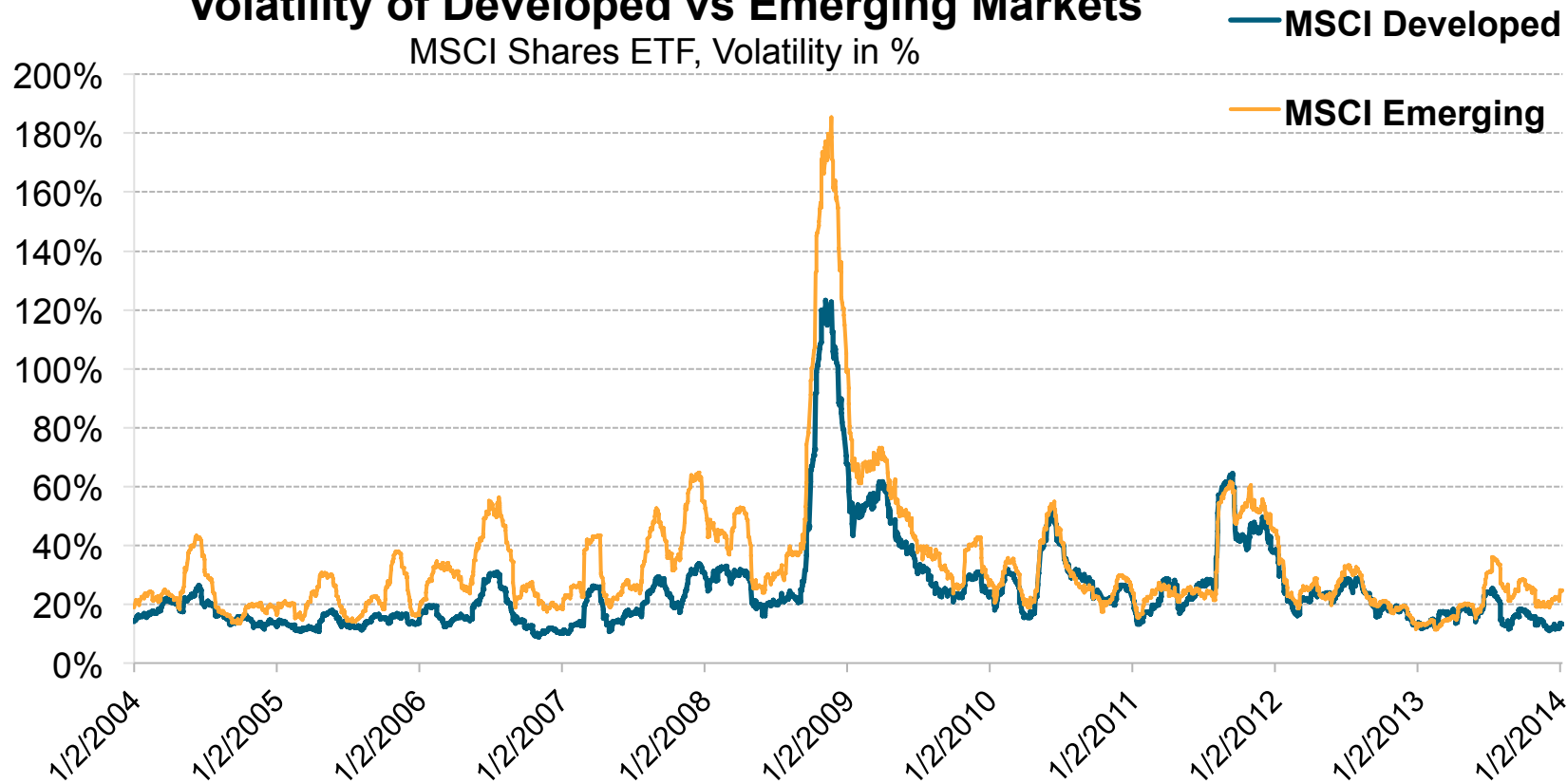
Talent



# Risk vs Return ... Investing For The Long Term

## Volatility of Developed vs Emerging Markets

MSCI Shares ETF, Volatility in %



- Companies expect a higher return from Emerging Markets
- At the same time we all have to expect higher risk and volatility
- Our customers expect us to have the capability to support them across even the most challenging markets
- We have taken a long term view to invest to build these capabilities

**There is a direct correlation between growth and volatility**  
**Over the last decade this equates a multiplier of 1.35 for both growth and volatility**



# How We Address Our Markets





# Closer To The Customer



- 3 cross-functional Cisco teams, living and working in the Regions that they support
- Closer to customer – in the language and time zone of our customers

# How We Prioritise Our Markets

Major Markets

Hub Countries

Partner-Led

Early Stage Investment  
Countries

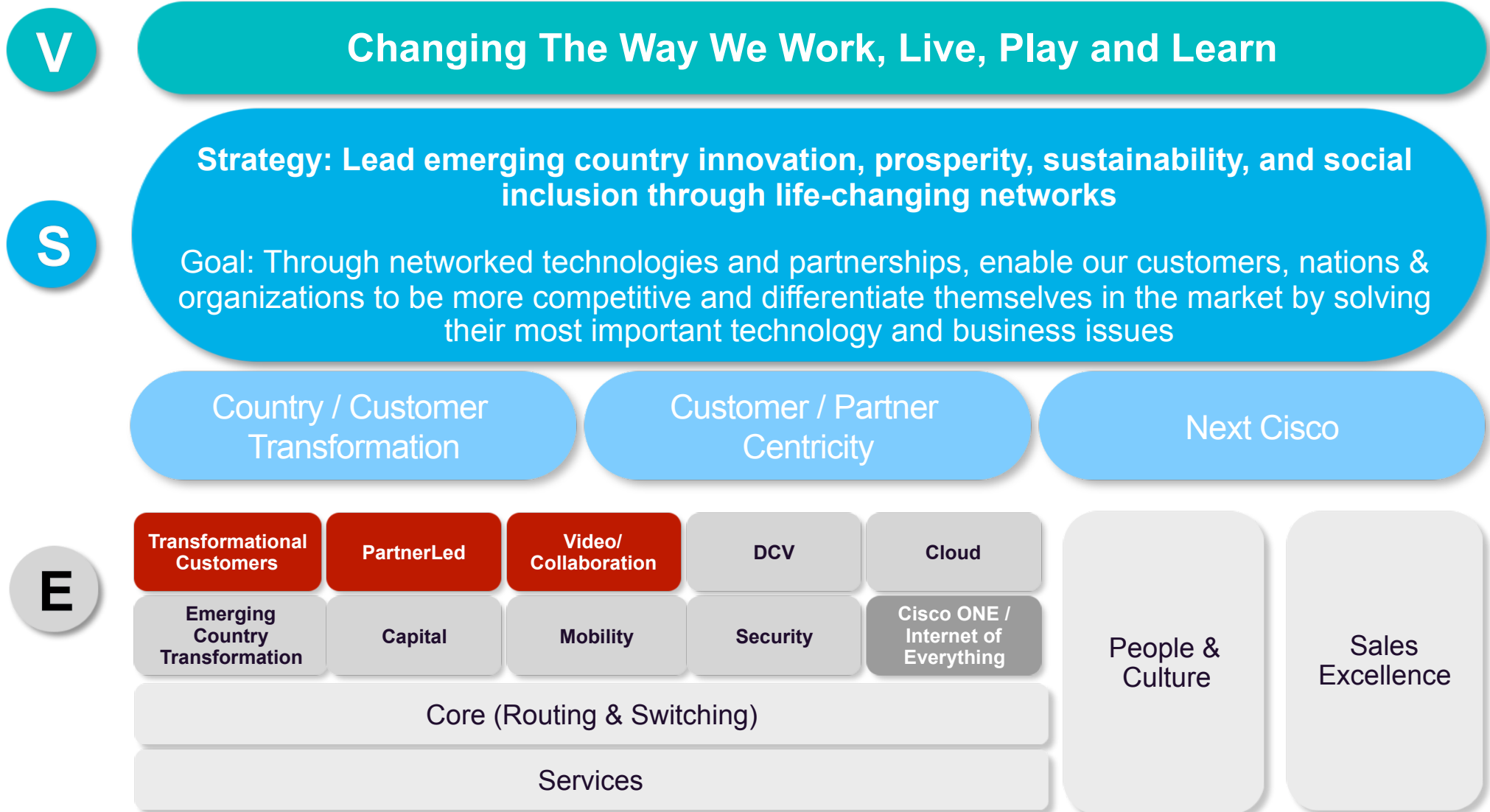




# Vision, Strategy & Execution



# Middle East, Africa & Russia CIS: Vision, Strategy and Execution





Physical Security

Data Centre

Mobility

Video / Collaboration

Cloud

New Consumption  
Models

Internet of Everything

Cyber Security

Network Refresh



Market Trends

Physical Security

Data Centre

Mobility

Video / Collaboration

Cloud

New Consumption  
Models

Internet of Everything

Cyber Security

Network Refresh

- End to End video surveillance solution for a CIS country's presidential elections
- City Wide CCTV (120,000+ cameras) in one of Russia's largest cities
- Connected Stadium solution for a National Football Federation for 28 stadia, covering e-ticketing, public safety and security

Physical Security

Data Centre

Mobility

Video / Collaboration

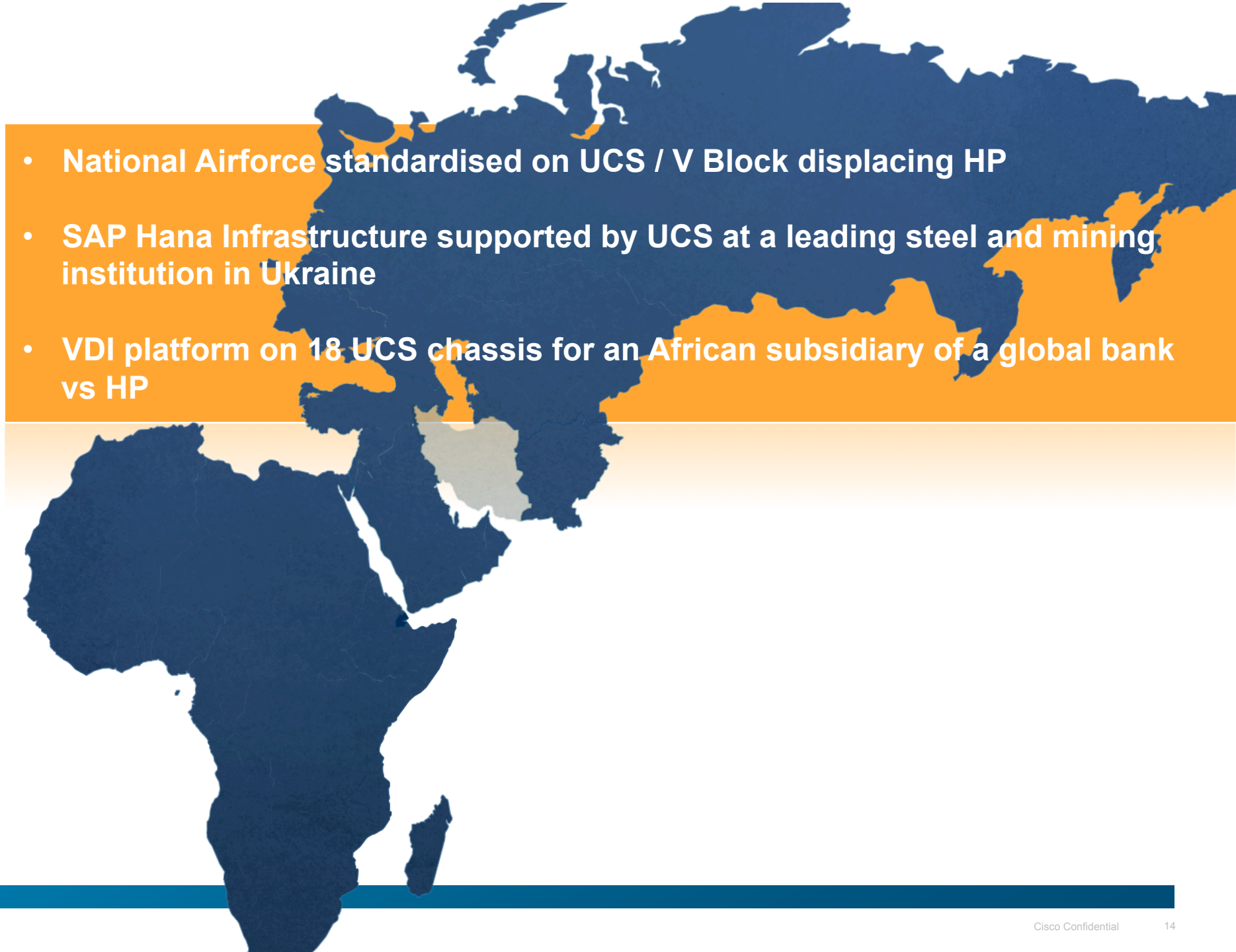
Cloud

New Consumption  
Models

Internet of Everything

Cyber Security

Network Refresh

- 
- **National Airforce** standardised on UCS / V Block displacing HP
  - **SAP Hana Infrastructure** supported by UCS at a leading steel and mining institution in **Ukraine**
  - **VDI platform on 18 UCS chassis** for an **African subsidiary** of a global bank vs HP



Physical Security

Data Centre

Mobility

Video / Collaboration

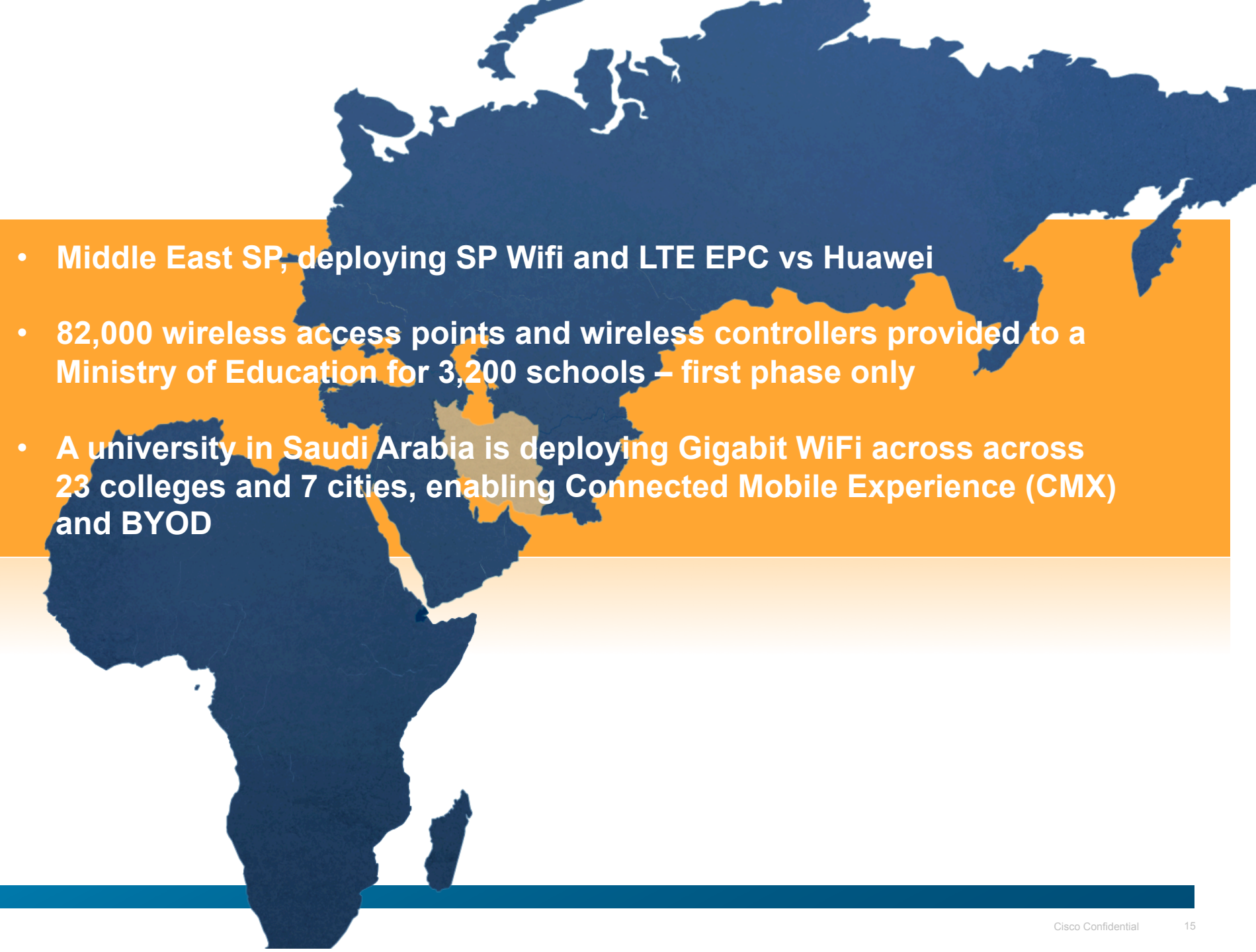
Cloud

New Consumption  
Models

Internet of Everything

Cyber Security

Network Refresh

- 
- Middle East SP, deploying SP Wifi and LTE EPC vs Huawei
  - 82,000 wireless access points and wireless controllers provided to a Ministry of Education for 3,200 schools – first phase only
  - A university in Saudi Arabia is deploying Gigabit WiFi across across 23 colleges and 7 cities, enabling Connected Mobile Experience (CMX) and BYOD

Physical Security

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Mobility

Video / Collaboration

Cloud

New Consumption  
Models

Internet of Everything

Cyber Security

Network Refresh

- 
- One of the largest petrochemical manufacturers in the world has deployed 50 immersive TP rooms to enhance collaboration and communication
  - End to end collaboration solution to support national Connected Justice systems, that enable remote testimony, rolled out in multiple countries
  - 40,000 user collaboration win against Microsoft in an African Service Provider
  - Collaboration solution for 10,000 students at new female campus for one of the oldest universities in Saudi Arabia, able to scale to 80,000 students

Physical Security

Data Centre

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New Consumption  
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Cyber Security

Network Refresh

- 
- **BYOD trend has led to end-to-end security deployments in financial institutions in every major country**
  - **STUXNet and Shamoon virus led to major outages in oil and gas companies across the Middle East, leading to the deployment of pervasive security solutions**
  - **Content security wins across SPs and verticals in every major country**



Physical Security

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Network Refresh

- 
- **Large pan-African bank standardises complex multi-vendor network for 3,500 employees in 33 countries**
  - **One of the largest oil companies in Africa with 120,000+ employees selected a Cisco converged multiservice MPLS platform for entire company, across Upstream, Downstream, Transportation and Marketing**
  - **Libyan SP rebuilds IPNGN network choosing Cisco vs Juniper, ALU and Huawei**



Leadership Cadre

Rotation

Early in Career /  
Internships

CSAP & CNAP

NetAcademies &  
Netversity

Employee Value  
Proposition

Inclusion & Diversity

Giving Back Culture

Best Place to Work



People & Culture

C-Scape

14-15 January 2014 | Bedfont Lakes, UK

