



FROST & SULLIVAN

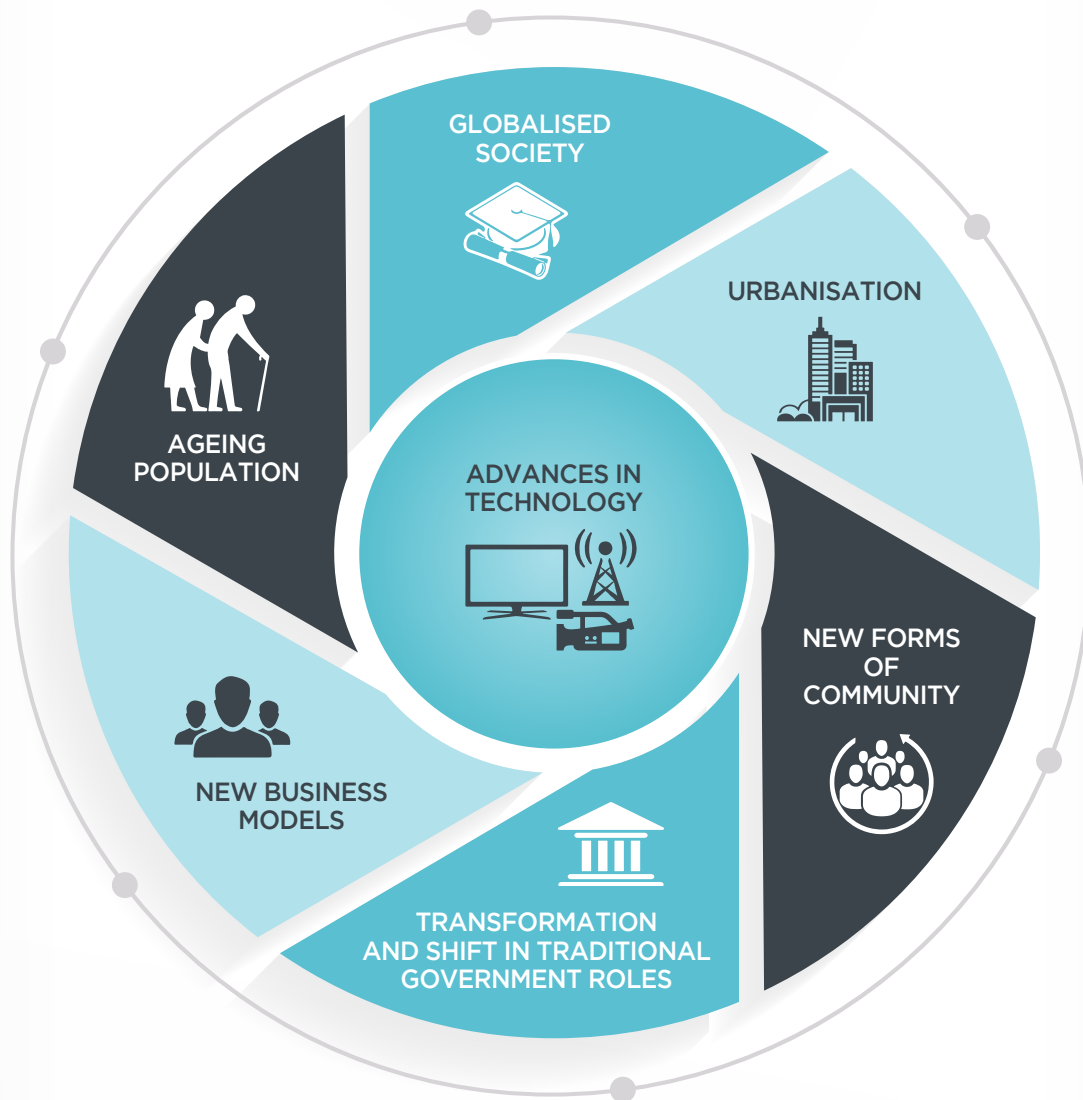
PUBLIC SECTOR & GOVERNMENT PRACTICE

*Innovative strategies to enable
transformational economic development
and growth*

WHAT IS THE FUTURE ROLE OF GOVERNMENT?

NEXT GENERATION GOVERNMENTS ARE USING
REVOLUTIONARY APPROACHES TO TACKLE CONSTRAINTS

MEGA TRENDS AFFECTING GOVERNMENT ROLE



OUTSOURCING OF GOVERNMENT FUNCTIONS

THE OUTSOURCING
CHAIN

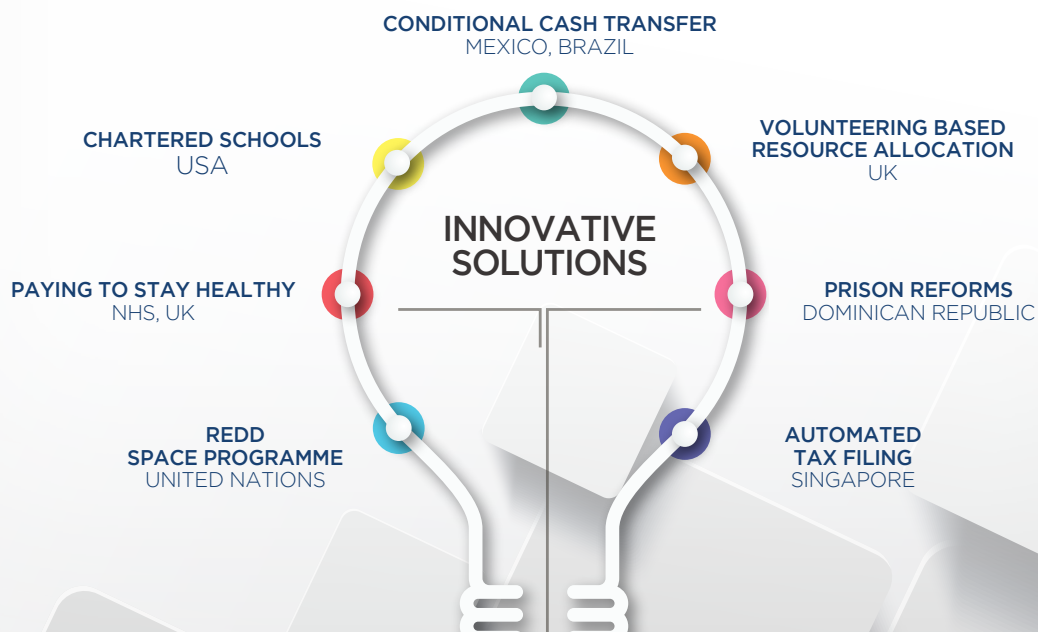


BY 2050, GOVERNMENTS WILL BE FLUID WITH ROLES AND RESPONSIBILITIES RESIDING WITH DIFFERENT STAKEHOLDERS



- For all pillars of society, the role and scope of the government will transform
- Policies and ideas could come from anywhere
- Implementation, execution and monitoring will be increasingly outsourced
- Government will retain the sceptre of authority

NOVEL SOLUTIONS FOR GOVERNMENT FUNCTIONS



WHY FROST & SULLIVAN?

**A POWERFUL COMBINATION OF PUBLIC SECTOR EXPERTISE AND
INDUSTRY DOMAIN KNOWLEDGE ACROSS 14 INDUSTRIES**



OUR PUBLIC SECTOR & GOVERNMENT PRACTICE TEAM



Presence across geographies, in-depth expertise in focus areas

Frequently featured in international media and economic development conferences

Diverse background of specialists in public administration, political science, business, economics, finance and engineering

Advisory committee comprising of global thought leaders from leading universities and institutions concerned with public policy

Leverage on our industry experts through our Growth Partnership Service and our interactive workshops and webinars

WITH A STRONG GLOBAL PRESENCE, OUR PUBLIC SECTOR & GOVERNMENT PRACTICE IS THE PARTNER OF CHOICE FOR GOVERNMENT ORGANISATIONS WORLDWIDE

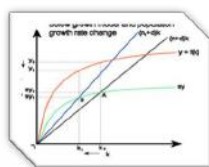


SINGAPORE • MCI • MTI • MPA • EDB • ACRA • JTC • HSA • MDA • IDA • HPB • BCA • Spring	AUSTRALIA/ NZ • Austrade • Govt. of South Australia • NZTE	RUSSIA • Pskov Admin • Puschino Admin	PAKISTAN • Department of Higher Education	INDIA • Jute Council • NCSM
EU/UK • SDI • EC • TEKES • GIZ • British Council • IDA • Swedish Embassy	MALAYSIA • EPU • MATRADE • MIDA • MDeC • IRDA	CHINA/ HONG KONG • OGCIO • OFCA	JAPAN/ TAIWAN • MOD • III • IDBI	INDONESIA • BKPM • BP Batam
BRAZIL • APEX BRAZIL • SEDE, BH • GDF	TANZANIA • Govt of Tanzania	SOUTH AFRICA • Coega Devt. Corp. • Saldanha Bay IDZ	ECUADOR • RDP • Ministerio Coordinador de Sectores Estrategicos	PHILIPPINES • Tourism Promotion Board

KEY AREAS OF ENGAGEMENT WITH GOVERNMENT ORGANISATIONS:



Infrastructure Planning



Economic Modelling



Industry Roadmap



Manpower Development



Organisational Transformation



Investment & Trade Promotion



Security & Defence



Policy & Regulations



Stakeholder Surveys

PAST ENGAGEMENTS AND PROJECTS WITH GOVERNMENT CLIENTS



INFRASTRUCTURE PLANNING

Kyakphyu Port and Industrial Park: Myanmar
Belo Horizonte Mixed Use and Industrial Park, Brazil
Brasilia Regional Masterplan, Brazil
Makassar Residential and Business Park: Indonesia
Pushchino Biotech Park, Russia
Pskov Special Economic Zone, Russia
Lahore Knowledge Park, Pakistan
Kelantan ICT Park, Malaysia

Biotech Park, Malaysia
Ecer Centre of Excellence, Malaysia
Jurong Fishery Port, Singapore
Zelenograd Microelectronics Cluster, Russia
Batam, Bintan and Karimun SEZ, Indonesia
Sabah Agricultural Corridor, Malaysia
Cheongbuk Aerospace Park, South Korea
Manabi Petrochemical Park, Ecuador
Jeneponto Industrial and Business Park: Indonesia

Petrochemical Park, Brunei
Perak Industrial Corridor, Malaysia
Logistics Park, Vietnam
Hyderabad Aerotropolis, India
MRO Park and Aerotropolis, Thailand
Subang Airport City, Malaysia
Textile Park, China
Impact of Highway Tolls, Malaysia
Port of Singapore



INDUSTRY ROADMAP

WORLD BANK GROUP

- SME Development Roadmap

RUSSIA

- Economic Development Plan - Puschino
- 10 years Development Plan - Pskov

BRAZIL

- 10 years Economic Development Plan - Belo Horizonte
- 50 years Economic Development Plan - Brasilia

SINGAPORE

- Arts, Media and Design Industry
- Infocomm Manpower
- Solid Waste Management
- Geo-spatial industry
- Construction Technology

MALAYSIA

- National Green Technology Roadmap
- Logistics Sector Roadmap
- Automotive Industry Roadmap
- National Exports Promotion Plan
- Services Liberalisation Roadmap

INDONESIA

- Economic Development Plan
- 15 years Economic Development Plan - Riau Islands

SOUTH KOREA

- ICT Roadmap
- Foreign Talent Acquisition Roadmap

HONG KONG

- Develop Hong Kong as a Regional Data Centre Hub
- Roadmap to Facilitate the Landing of Submarine Cables in Hong Kong

MYANMAR

- O&G and Chemical storage



ECONOMIC MODELLING

INDUSTRY IMPACT:

Singapore: IPTV industry impact
Malaysia: Creative industries
Thailand: MICE Industry
Singapore: Offshore Trading
India: Science Museums

POLICY/INITIATIVE IMPACT:

European Commission: Innovation Programmes
Australia: Manufacturing Promotion
Malaysia: Service Sector Liberalisation
Malaysia: New Road Toll
Singapore: Impact of Regulations on Healthcare Industry

POLICY/INITIATIVE IMPACT:

Philippines: Earthquake
Malaysia: GSP Withdrawal from trade
Singapore: Food security risks and impact



INVESTMENT PROMOTION

INVESTMENT ROADMAP



INVESTOR QUALIFICATION



INVESTMENT PROSPECTUS



EVENTS & ROAD-SHOW



BUSINESS MATCH-MAKING



POLICY/REGULATORY ANALYSIS

DEVELOPMENT:

Singapore: Policy framework for freelancers in creative industries
Malaysia: Incentive Based Regulatory Framework for Telecom sector

BENCHMARKING:

Malaysia: Telecom policy benchmarking
Russia: Benchmarking of SEZ incentives and regulations

IMPACT ASSESSMENT:

Singapore: Review of Building Maintenance and Management Strata Act
Australia: Impact of support programs for manufacturing sector

IMPLEMENTATION:

Singapore: Capex Validation for monopoly player
Tanzania: Transformation plan for electricity regulator



CONDUCTING STAKEHOLDER SURVEYS

SATISFACTION/ FEEDBACK:

Malaysia: Crime & Corruption survey - 27,000 respondents
Indonesia: Investor satisfaction - 250 businesses
Singapore: Pro-business orientation of 26 government agencies - 4000 enterprises

QUALITATIVE

Singapore: Customer satisfaction for various regulators
India: Customer interaction improvement for utility provider

BEHAVIOURAL:

Singapore: Workplace safety and health practices - 400 respondents
Malaysia: Child care practices - 400 respondents
Indonesia: Early education purchase - 400 respondents

PSYCHOGRAPHIC:

Singapore: Security Topics - 45,000 respondents
Malaysia: Study on Effectiveness of Mandatory Disclosure Requirements in Influencing Sound Financial Decisions - 450 respondents



ANALYSING DEFENCE STRATEGIES

AREAS OF EXPERTISE

PLATFORMS:

- Civil and Military Rotary Wing
- Military Fixed Wing
- Military Land Vehicles
- Unmanned Aerial Systems (UAVs)
- Military Naval Vessels

TECHNOLOGY:

- Training & Simulation
- C4ISR
- Civil and Military GNSS Services

SERVICES:

- Military Support in Service Platforms
- Military Support in Service Systems

SAMPLE PAST PROJECTS

Defence Capability Benchmarking for a North Asian Country

Technology Roadmap for 9 Defence Technologies

Master plan and Investment Promotion for Defence Manufacturing SEZ



ENABLING MANPOWER DEVELOPMENT

Demand
Forecasting

Manpower
Profiling

Salary
Benchmarking

Industry
Skills
Development
Strategy

Technology
Strategy
for Training

TOURISM:

Singapore,
Thailand

ICT:

Singapore,
Malaysia,
Pakistan

CREATIVE INDUSTRIES:

Singapore

FOREIGN WORKERS:

Malaysia

GEO-SPATIAL:

Singapore

AEROSPACE:

Malaysia

OVERALL:

Korea



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