

# Group Enterprise Investor Day 2019

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# Our Vision

To be the key enabler of smart cities & digital enterprises with deep capabilities



Cyber  
Security



Liquid  
Infrastructure



Data  
analytics/ AI



Cloud



IoT | 5G

# FY19 maintaining competitiveness against headwinds

Maintained lead in core despite carriage erosion

Grew ICT contribution

Changed customer engagement to maintain competitiveness

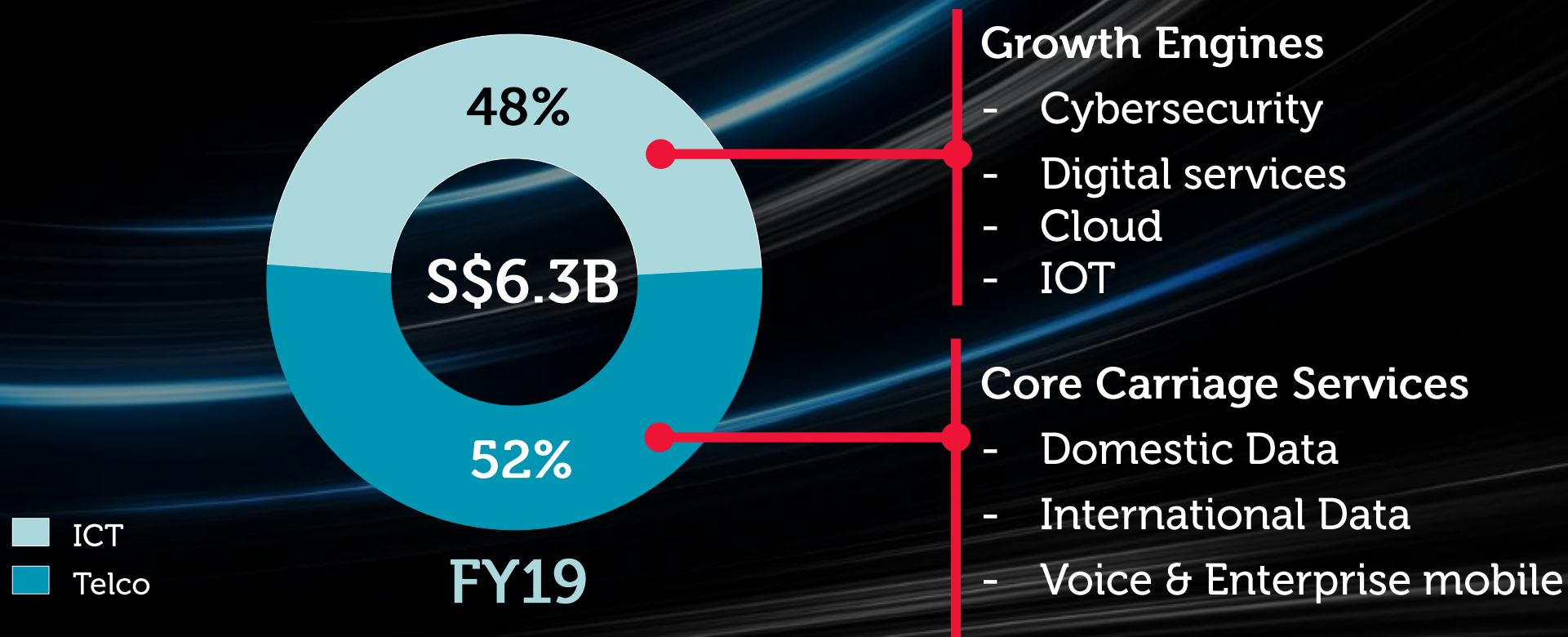
Drove digital transformation for capabilities and cost efficiencies

Cautious business environment

Transition of mega-deal projects

Digitalisation of enterprises and government

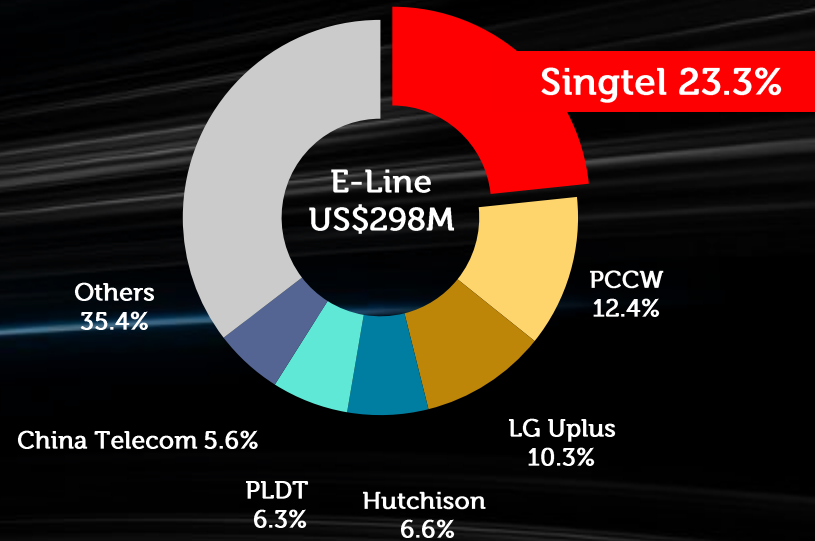
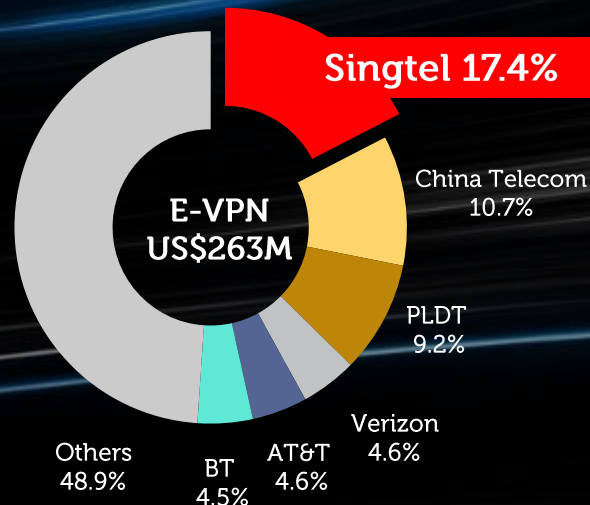
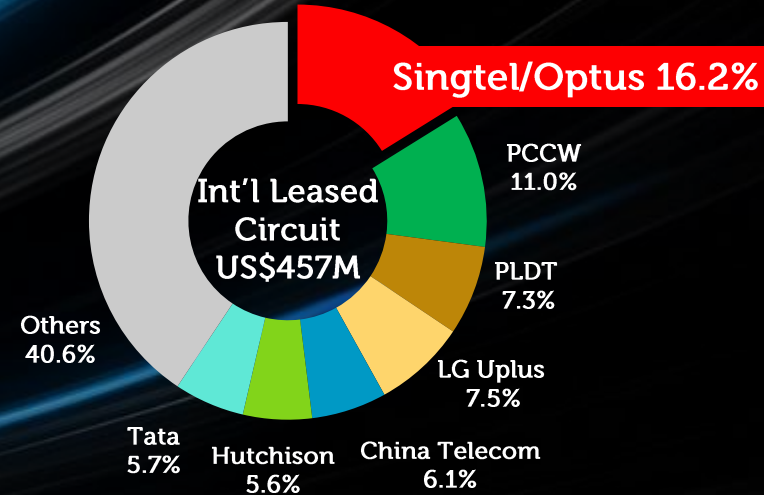
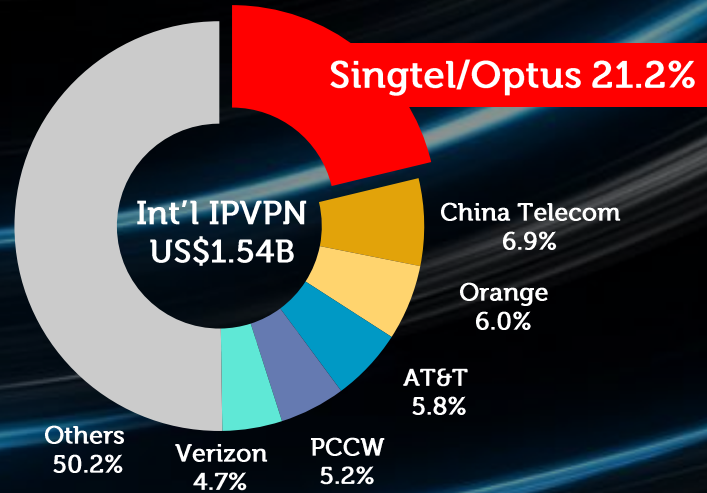
# Shift in revenue mix towards ICT services



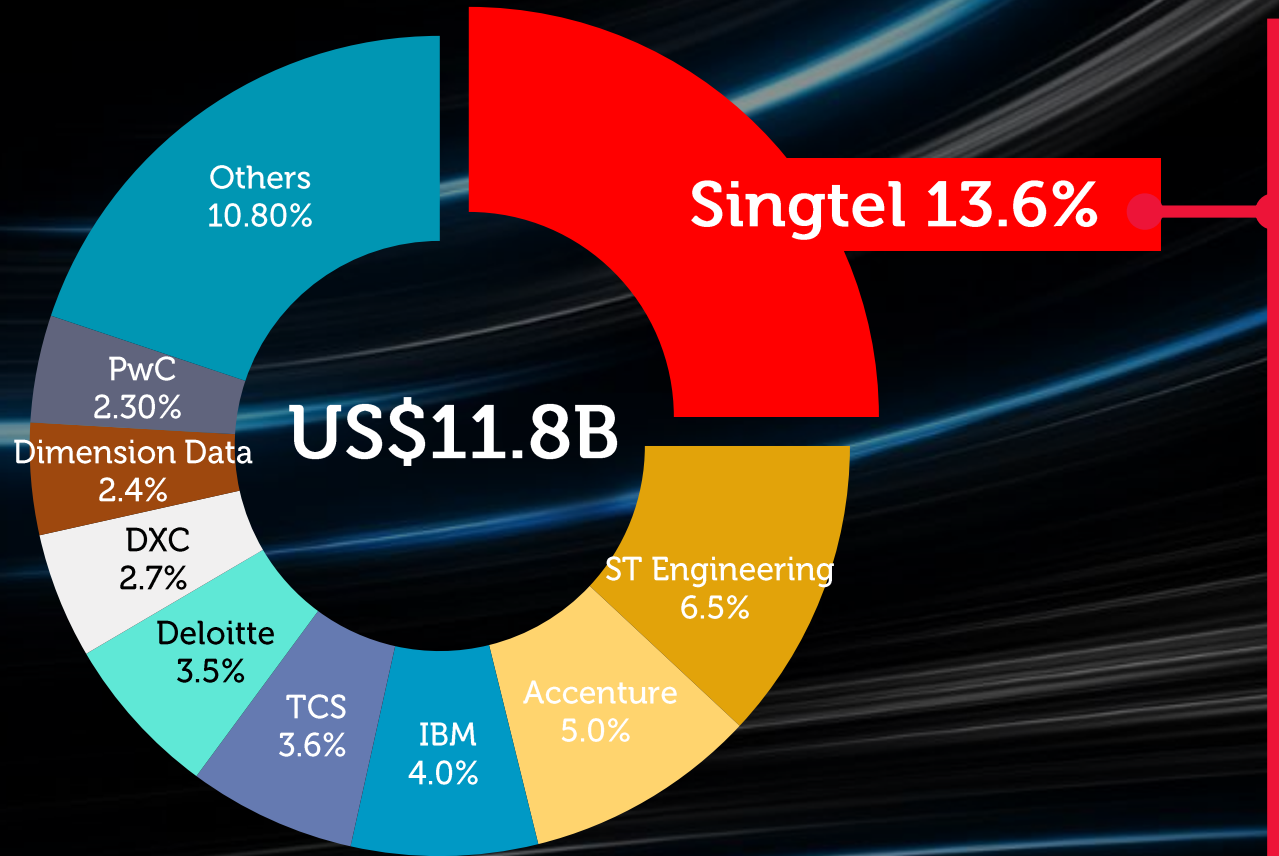
## FY20 guidance

ICT to grow low single digit, with cyber security to grow by low teens

# Leadership in the Core



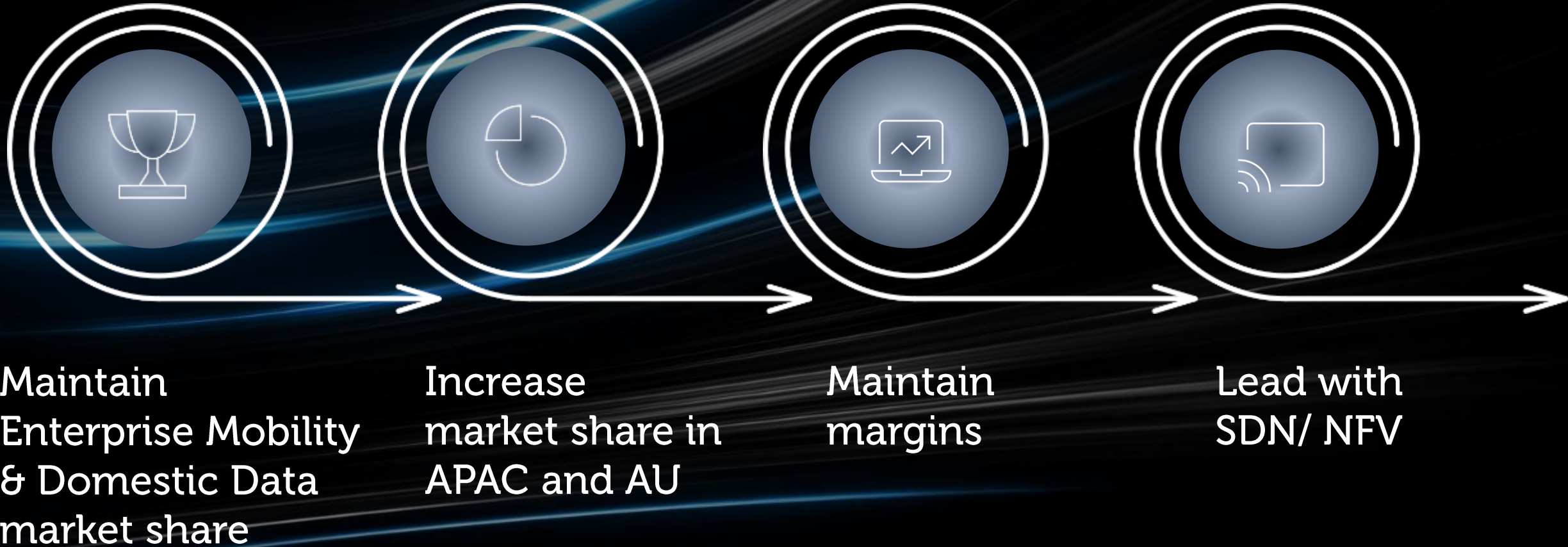
# Leadership in Singapore IT Services market



## Singtel Ranking 2018 (by market share %)

|    |                      |       |
|----|----------------------|-------|
| #1 | Government           | 34.4% |
| #1 | Education            | 54.8% |
| #1 | Healthcare Providers | 15.3% |
| #1 | Banking & Securities | 14.2% |
| #2 | Transportation       | 11.6% |
| #3 | Comms, Media & Svcs  | 4.7%  |

# Defend Core

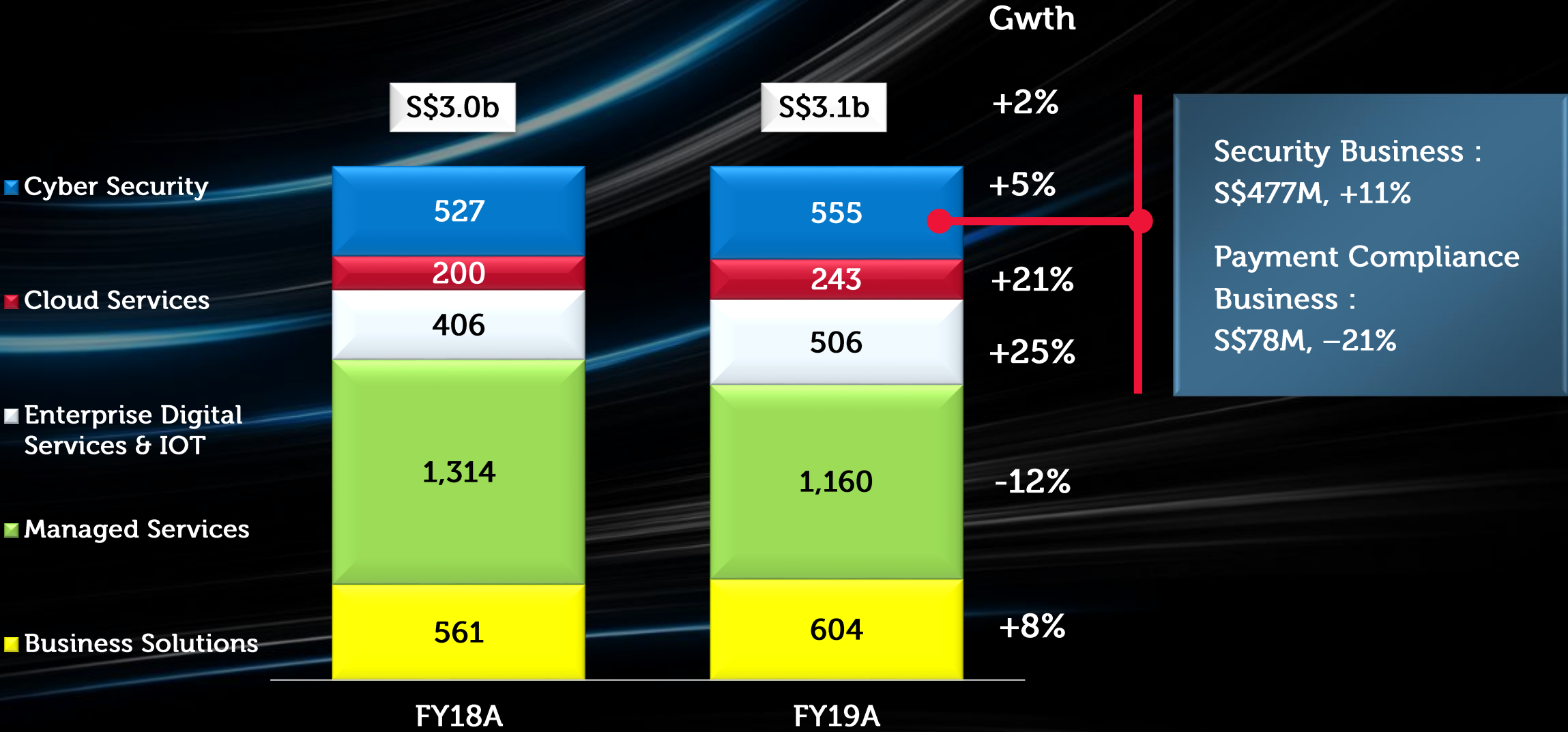


# Digital & Cost Transformation



- 1 Faster revenue turn on with 30-40% cycle time reduction
- 2 Predictive Incident Engines auto-healing network fault tickets
- 3 Bots auto-handling customer services
- 4 Digital enablement of our workforce

# GE ICT Revenue



Numbers are in constant currency

# GE Growth Engines



**+11% YoY**

Focusing on MSS,  
Consulting professional  
services and Trustwave  
products



**+21% YoY**

Focusing on secure  
hybrid cloud services



**+25% YoY**

Expand into commercial  
segments, targeted regional  
countries and focused digital  
domains

# 1 Security Business – Increase momentum

Grow  
Enterprise Business  
in **AMS & EMEA**

Continue to  
**improve EBITDA**

Shift **APJ** product  
portfolio to  
**Managed Security  
Services (MSS)**

Focus on **core  
offerings** MSS and  
Trustwave products

# Industry-leading Managed Security Services



**2019 - A Leader**

**Magic Quadrant - Managed Security Services, Worldwide**  
**Gartner**



Frost & Sullivan APAC Best Practices Awards 2018  
 2018 Southeast Asia Managed Security Service Provider of the Year



Frost & Sullivan APAC Best Practices Awards 2018  
 2018 Singapore Managed Security Service Provider of the Year



2018 IDC MarketScape: Asia/Pacific Managed Security Services 2018 Vendor Assessment Leaders Position (Trustwave)



IDC MarketScape U.S. Incident Readiness, Response, and Resiliency Services 2018 Vendor Assessment - Beyond the Big 5 Consultancies Leaders Position (Trustwave)



SC Awards 2019 Best Managed Security Service (Trustwave)



NetworkWorld Asia Information Management Awards 2018 Security-as-a-Service



Asia Communication Awards 2018 Cyber Safe Award - Singtel Managed Security Services



IT Pro Corporate Choice 2018 Managed Security Service Provider of the Year

Gartner, Magic Quadrant for Managed Security Services, Worldwide, Toby Bussa et al., 02 May 2019  
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# 2 Cloud as foundation for Digital transformation

**Azure & AWS**  
**practice** delivering  
professional &  
managed services

Securing **hybrid**  
**cloud**  
**environments**

**Infrastructure**  
services to Cloud  
partners in APAC  
region

Cloud management  
**platform**

# Industry-leading Cloud Services

## ICT Awards

APAC Managed Cloud Services  
Competitive Strategy,  
Innovation & Leadership

2018

FROST & SULLIVAN

## Winner

Best Cloud-based Service

2018

telecomasia

## Winner

Virtualisation and  
Cloud Infrastructure

2018



# 3 Accelerating Enterprise Digital Services

Capture **public sector digital** opportunities



Expand **regionally**

Develop **digital capabilities and skills**

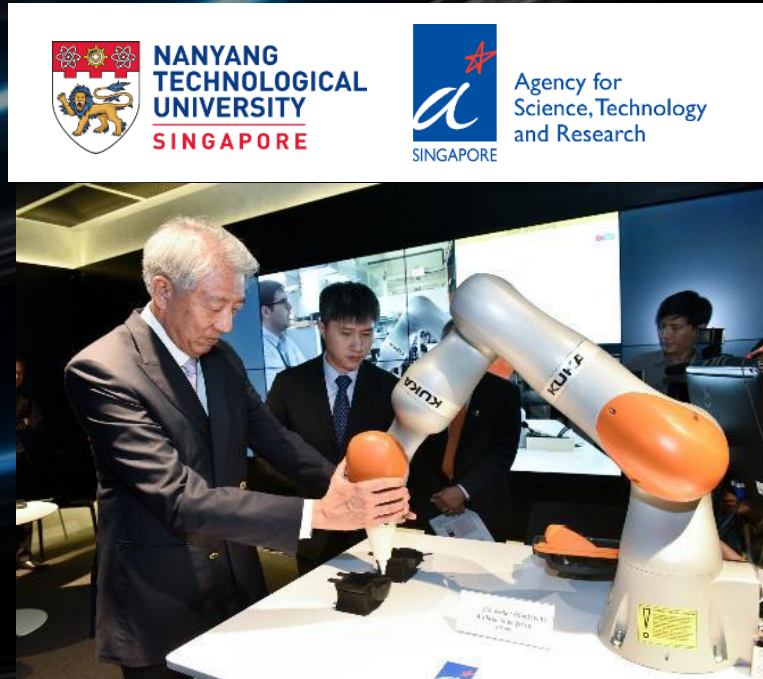
Increase penetration in **commercial accounts**

# Collaboration with Research Institutions to develop local IP, build deep capabilities and drive innovations



NUS-Singtel Cyber Security Research and Development Laboratory in Oct 16

Supported by: **NATIONAL RESEARCH FOUNDATION**  
PRIME MINISTER'S OFFICE  
SINGAPORE



Singtel Cognitive and AI Lab (SCALE@NTU) & Singtel-A\*STAR Master Research Collaboration on 4 Dec 17 by DPM Teo Chee Hean



Advanced Remanufacturing and Technology Centre (ARTC) as 47<sup>th</sup> member to focus on Industrie 4.0



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