

Singtel Investor Day 2018

Bill Chang, CEO, Group Enterprise and
Country Chief Officer Singapore

13 June 2018

Singtel Group Enterprise at a glance



Largest Smart Nation
ICT Partner in Singapore



Top 5 global cyber security
service providers
among Telcos

Best Telco Cloud
Provider in APAC⁴



#1 ICT Provider
in Singapore¹

#1 Market
Leadership²
APAC Enterprise
Data Services

#1
International
IPVPN in APeJ

#1
EVPN and Eline
in APeJ

#1
IPLC in
Singapore³



11

Data Centres



10 Advanced Security
Ops Centres (ASOC)

5 Network Operating
Centres (NOC)



>70 Offices in
>25 Countries

Staff >12,000



> 3,000 Industry Certifications
> 2,000 Cyber Security Experts

1. Gartner IT Services, Apr 2017
2. IDC Telecom Services Database Asia-Pacific 1H2017, Jan 2018
3. Leased line + Eline market revenue for Local Singapore
4. Frost & Sullivan 2016 Asia Pacific Telco Cloud Service Provider of the Year

Group Enterprise : Our 3 Year Vision

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



Cyber Security



Cloud Services



Digital
Capabilities



Analytics/ AI

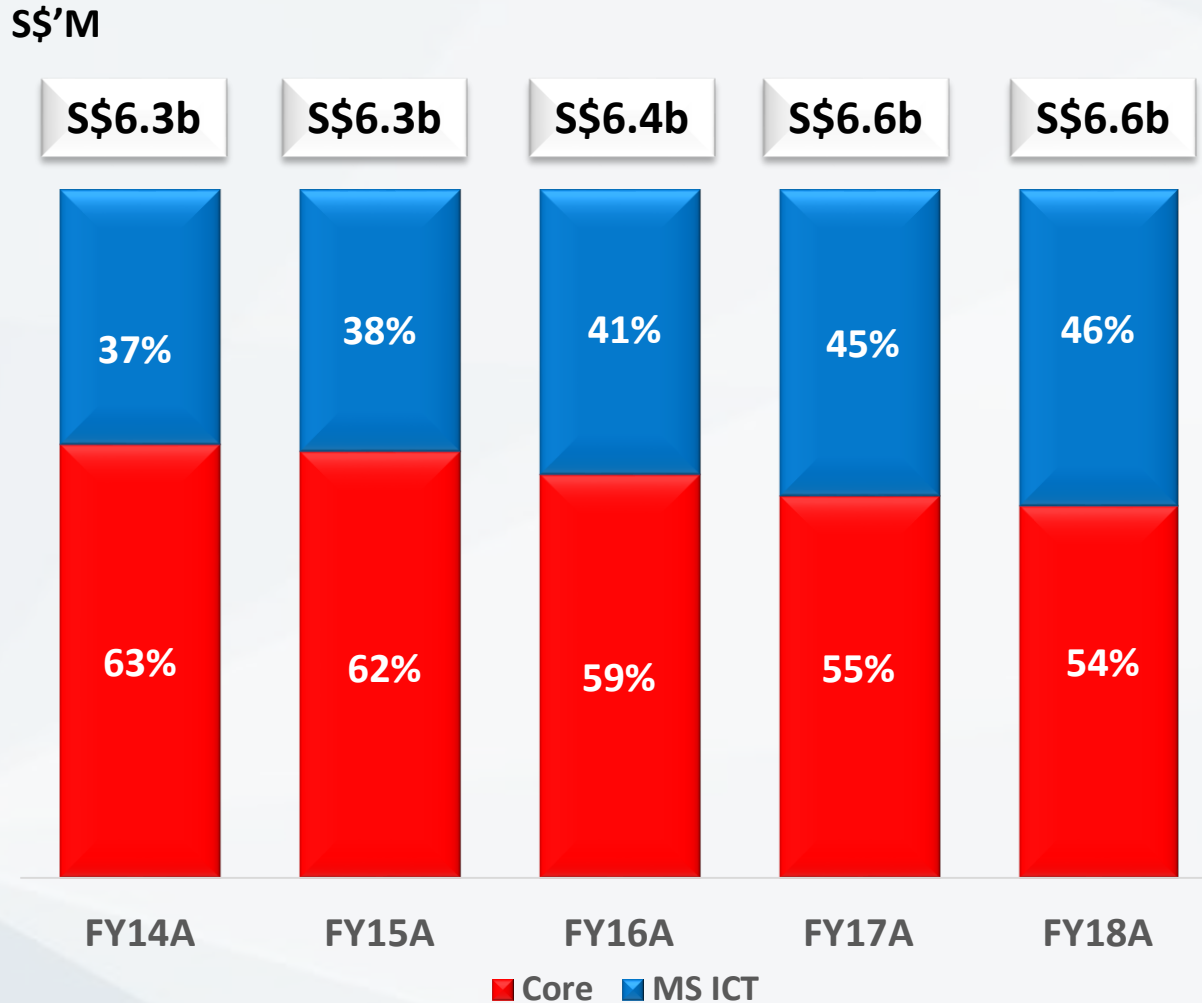


Robotics and
IoT

Our strategic transformation

A		Drive leadership and value creation in core business
B		Accelerate growth engines in Digital and ICT Services
C		Double down on cost transformation as part of DNA
D		Transform into a leading Digital Enterprise in 3 years

Shift in revenue mix towards ICT services



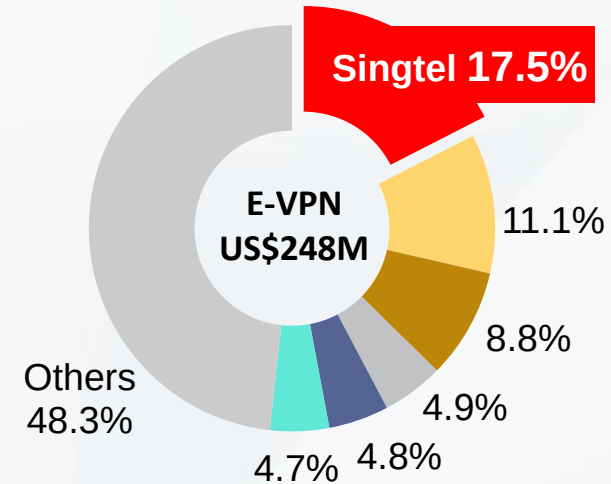
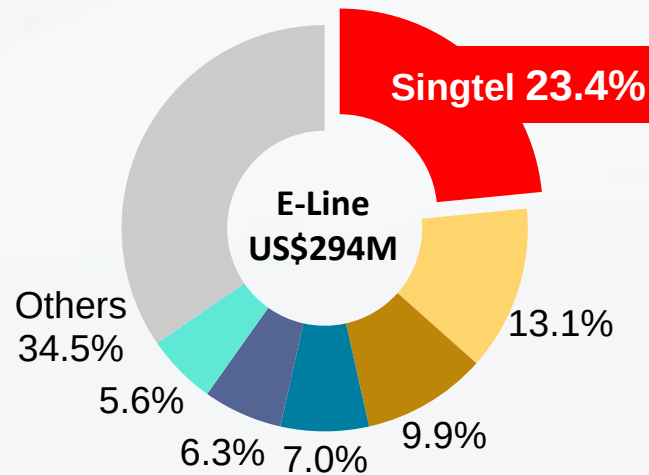
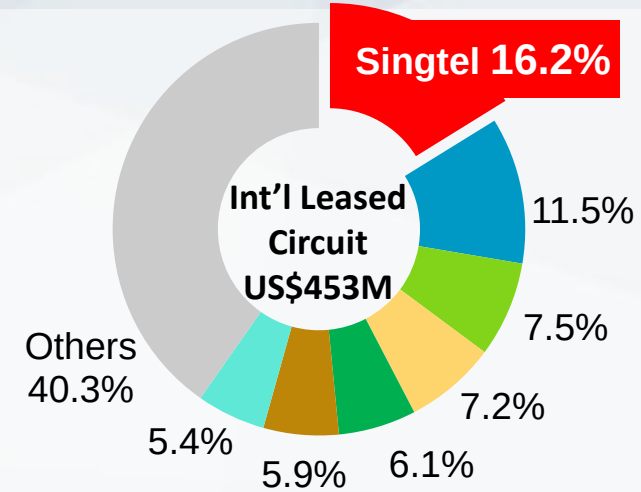
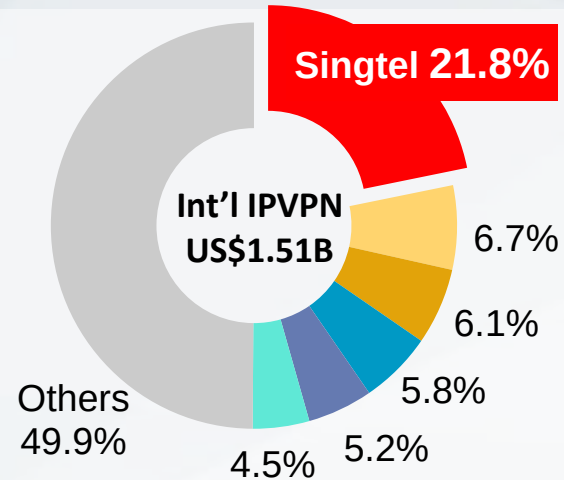
FY18

- S\$3.1B in ICT revenue ~ 46% of revenue
- S\$530M in Cyber Security Revenue

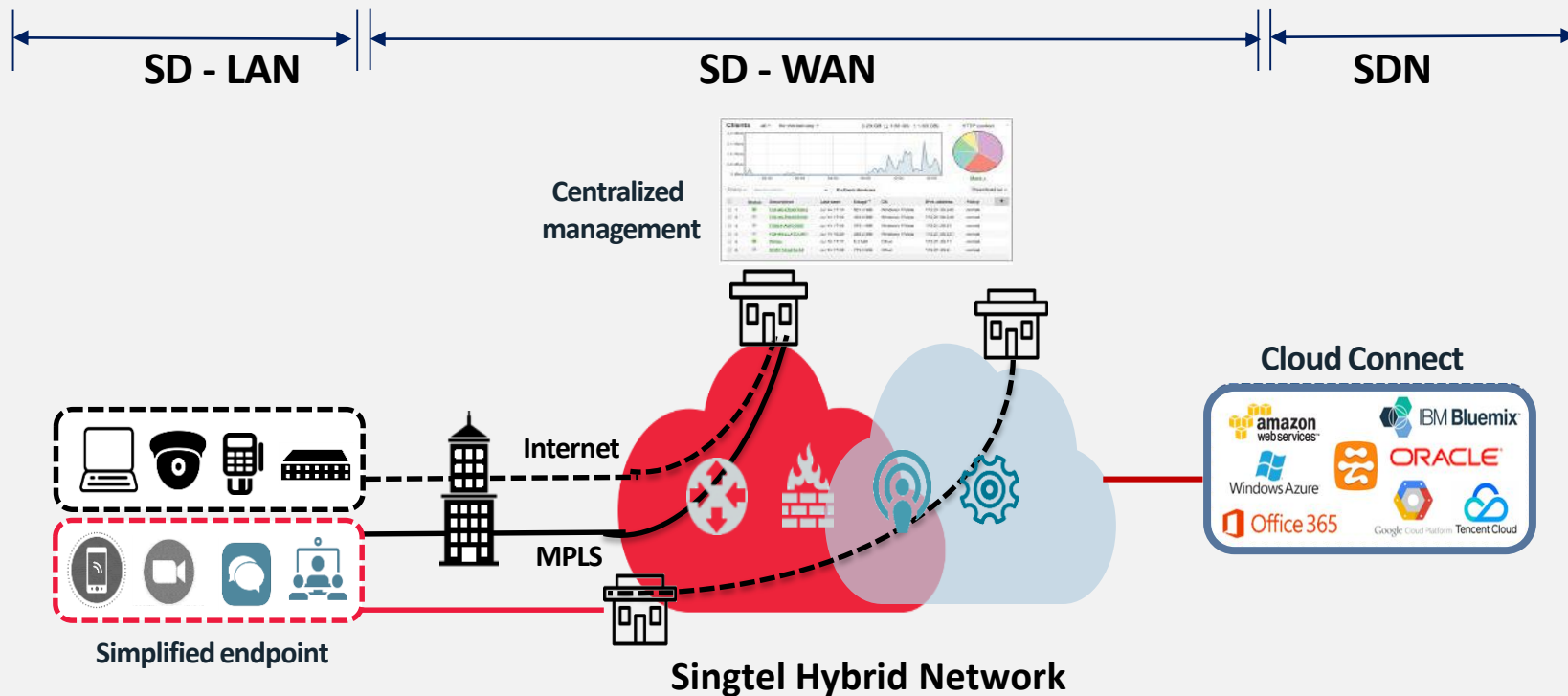
FY19 guidance

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

Leadership in APAC Enterprise data services



Lead in Software Defined Network Services leveraging our network infrastructure and capabilities



Deep Visibility
Simplified central management

Agile Service Provisioning
Minimise footprint, quick deployment and on-demand

Smart Predictive Network
ML/AI driven actionable insights



Telco Cloud Forum Awards 2017
Best Telco Cloud SDN/NFV Project



Asia Telecoms Innovation Summit & Awards
Enterprise Service Innovation (SD Hybrid NW)
Software & Applications Innovation (C+ SD WAN)



Proven Track Record of Smart City and Digital Enterprise Transformation



Public Safety



Citizen Engagement with Smart Apps



Next-Generation Electronic Road Pricing System



Pharmacy Robotic Dispensary



Cyber Defence for Enterprises



Retail Analytics



Smart Urban Infrastructure



Automation & Robotics for Enterprises

Core & Digital capabilities

Cyber Security & OT Security



Cloud Infrastructure



Telco, Video, Social & Customer Data Analytics



Sensors & IOT Management



Geographic Information System



AI, Machine Learning, RPA



Collaboration with Research Institutions to develop local IP, build deep capabilities and drive Innovations.



LAUNCH OF NUS-SINGTEL CYBER SECURITY RESEARCH & DEVELOPMENT LABORATORY

Guest-of-Honour
Mr Teo Chee Hean

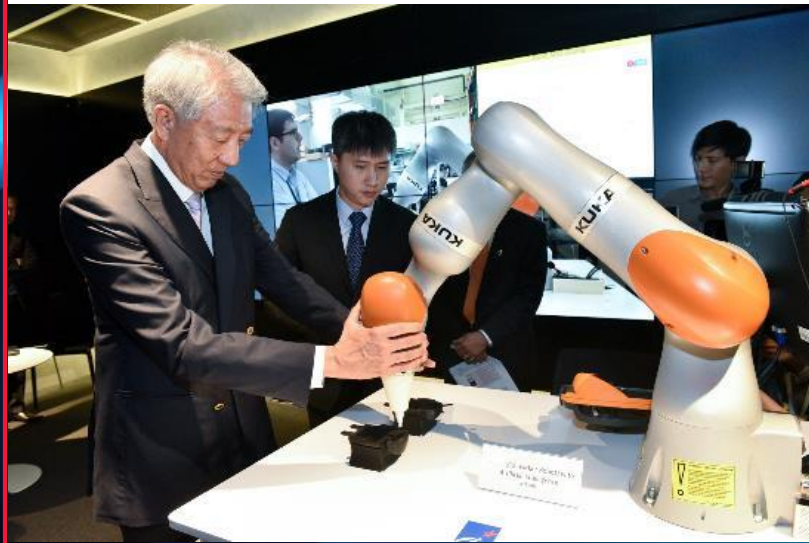
Deputy Prime Minister and Coordinating Minister for National Security
Chairman, National Research Foundation Singapore
October 2016



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

Supported by:

NATIONAL RESEARCH FOUNDATION
PRIME MINISTER'S OFFICE
SINGAPORE



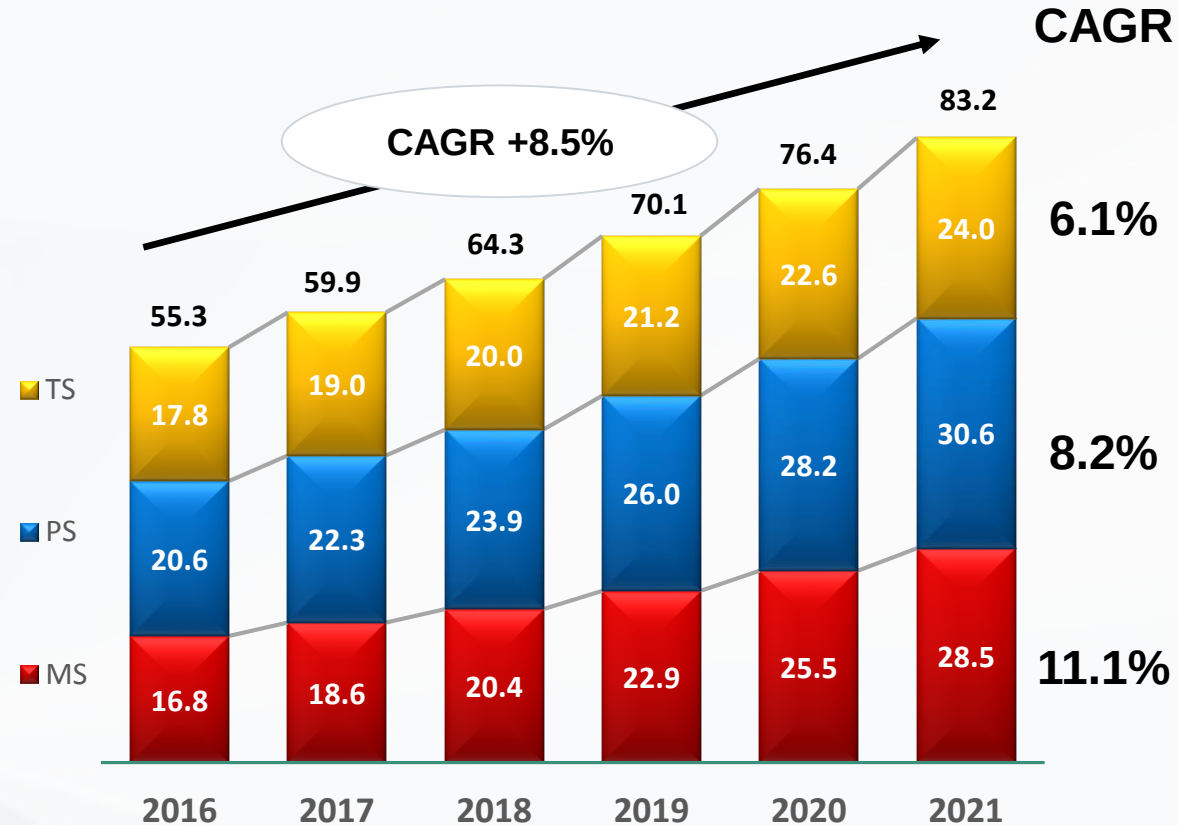
Singtel Cognitive and AI Lab (SCALE@NTU) & Singtel-A*STAR Master Research Collaboration on 4 Dec 17 by DPM Teo Chee Hean



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

Global Cyber Security Market growing at 8.5% annually

in US\$'
billions



4 types of players compete in MSS

Carriers	
System Integrators	
Product Vendors	
Pure-Play MSSPs	

Source: Gartner, Forecast: Information Security, Worldwide, 2015-2021, 4Q17 Update, , 5 February 2018

Chart created by Singtel based on Gartner's Research

MS: Managed Security Service: Remote management and/or monitoring of IT security functions delivered via remote security operations centers (SOCs), not through personnel on-site.

PS: Professional Services includes professional / advisory services to help companies analyze business operations and technology strategies. Include two subsegments: business and IT consulting. Includes Security Testing

TS: Includes Hardware Support and Implementation

Our key cyber capabilities



Global ASOC network and market access



Developing automated Managed Detection & Response platform



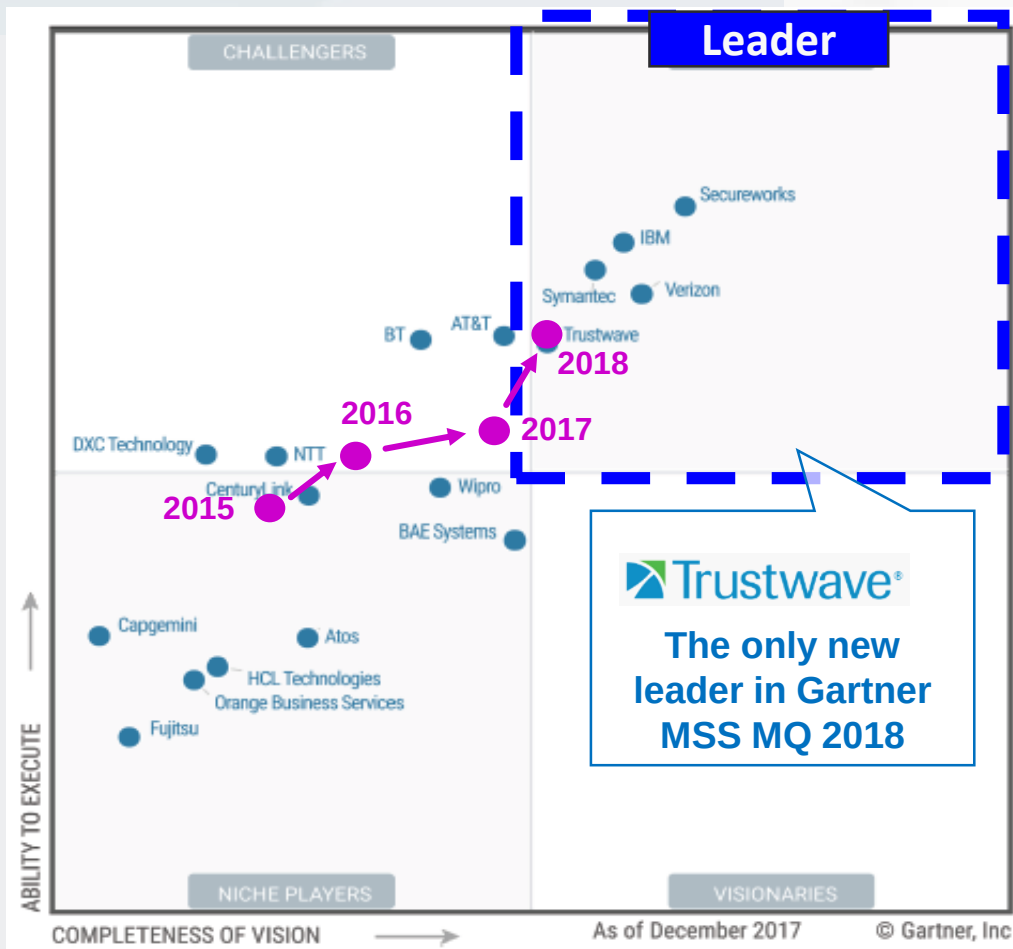
Cyber Security Institute



Leading edge technology ecosystem & R&D investments

We have established a Global Leadership Position in Managed Security ...

TW is a leader in Gartner's 2018 MSS MQ



Highlights from Gartner

*“Trustwave is a competitive provider with both, **proprietary products and services**”*

*“...able to **support a large client base** up to larger global organizations”*

*“Expanded global footprint across APAC and NA via **strategic partnerships**”*

*“Spiderlabs enhances the value of MSS through **integration of threat intelligence data and SpiderLabs' analysts** serving as a higher tier of skills for advanced triage”*

Industry wins and recognition in 2017

Telco | MS

Frost & Sullivan Asia Pacific ICT Awards 2016
Telecom Group of the Year (2016-2017)

NetworkWorld Asia Information Management Awards 2017
Disaster Recovery & Business Continuity (2014 - 2017)

NetworkWorld Asia Readers' Choice Awards
Managed Infrastructure Services (2012 - 2017)

Telco Cloud Forum Awards 2017
Best Telco Cloud SDN/NFV Project

Telecom Asia Awards 2017
Best Managed Services Provider

Asia Communications Awards 2017
Satellite Operator of the Year (2015-2017)

Computerworld Hong Kong Awards 2017
Global WAN Connectivity Service Provider of the Year (2015 - 2017)

HWM + Hardwarezone.com Tech Awards

- Best Mobile Operator – Singapore (2010-2013)
- Best Telco – Singapore (2014 - 2017)
- Best Fibre Broadband Service, Singapore (2010 - 2017)

TMT Technology Awards 2017
Best Mobile Service Provider - Singapore

TMT Global Excellence Awards 2018
Recognised Leader in Telecommunications - Singapore

APAC Insider Singapore Business Awards 2018
Best Mobile Network Operator

Cloud

Frost & Sullivan Asia Pacific ICT Awards 2016
Singapore Managed Cloud Service Provider of the Year (2017)

Cyber Security

Frost & Sullivan APAC Best Practices Awards 2017
Singapore Managed Security Service Provider of the Year (2016 - 2017)

SC Awards 2017
Best Managed Security Service (Trustwave)

Digital

FinTech Innovation Awards 2017
Innovation in Big Data and Analytics Solution (NCS)

NetworkWorld Asia Information Management 2017 AWARDS

NetworkWorld Asia Readers' Choice Excellence Awards
Security-as-a-Service (2012 - 2017)
Regional Security Operations Center

Telecom Asia Awards 2017
Most Innovative Approach to Mobile Security

2018 Gartner's Magic Quadrant for MSS, Worldwide Leaders' Quadrant (Trustwave)



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