

# 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

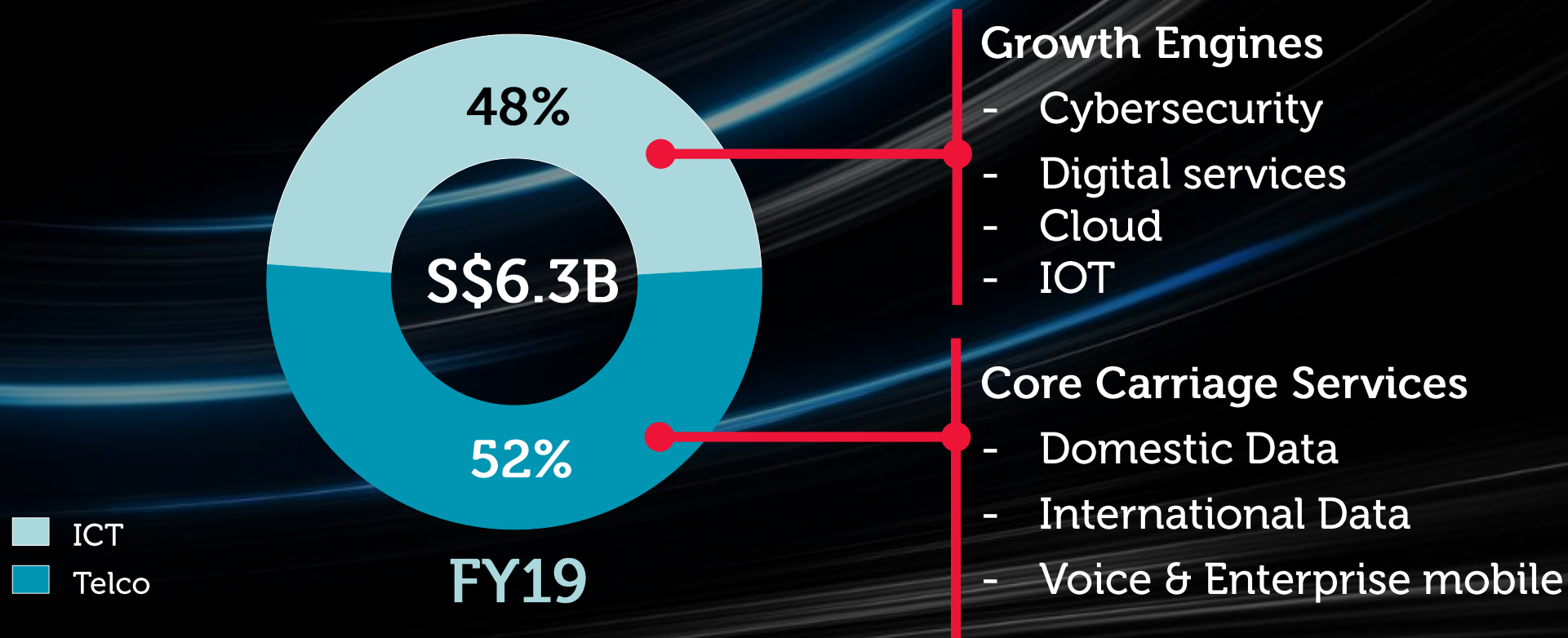
Drove digital transformation for capabilities and cost efficiencies

Cautious business environment

Transition of mega-deal projects

Digitalisation of enterprises and government

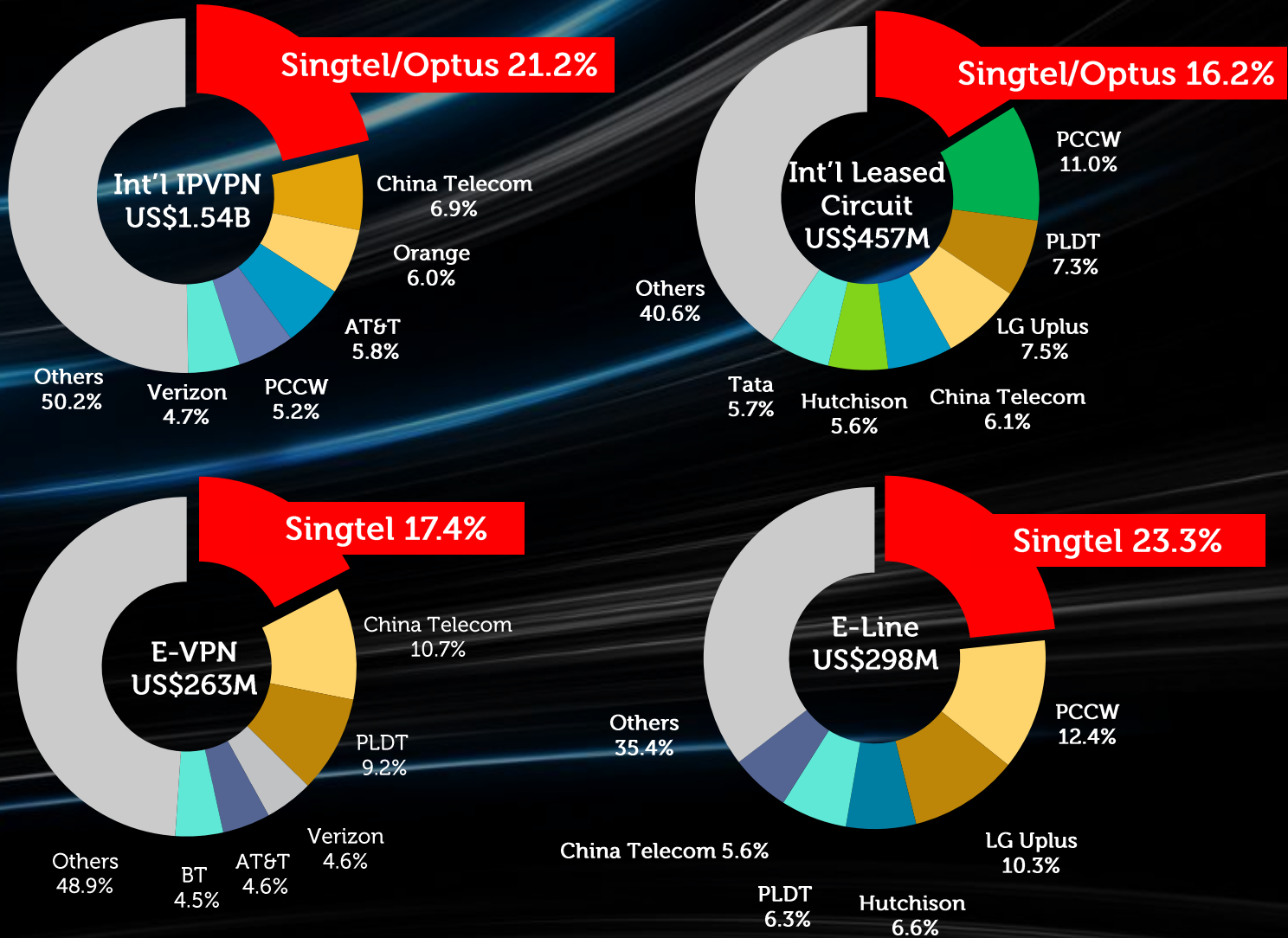
# Shift in revenue mix towards ICT services



## FY20 guidance

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

# Leadership in the Core



Source: IDC Telecom Services Database Asia-Pacific1H2018, Jan 2019

# Leadership in Singapore IT Services market



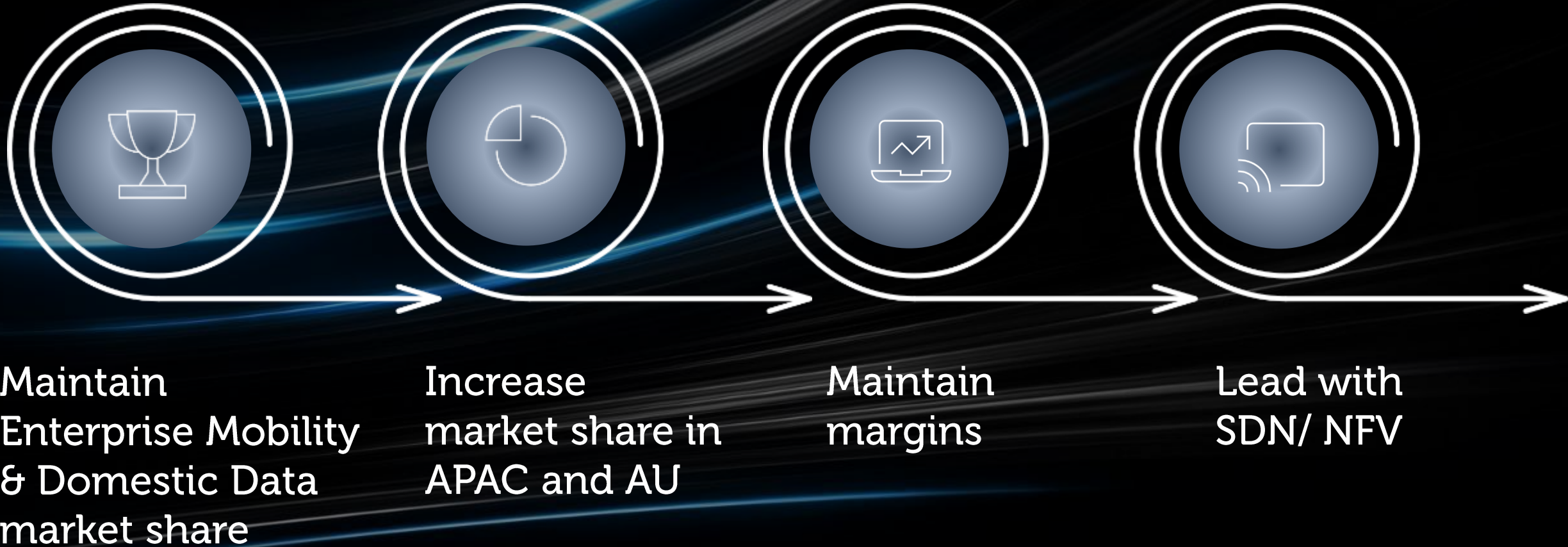
**13.6%**  
Market share

**# 1 player for overall IT  
Services market in  
Singapore**

## 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

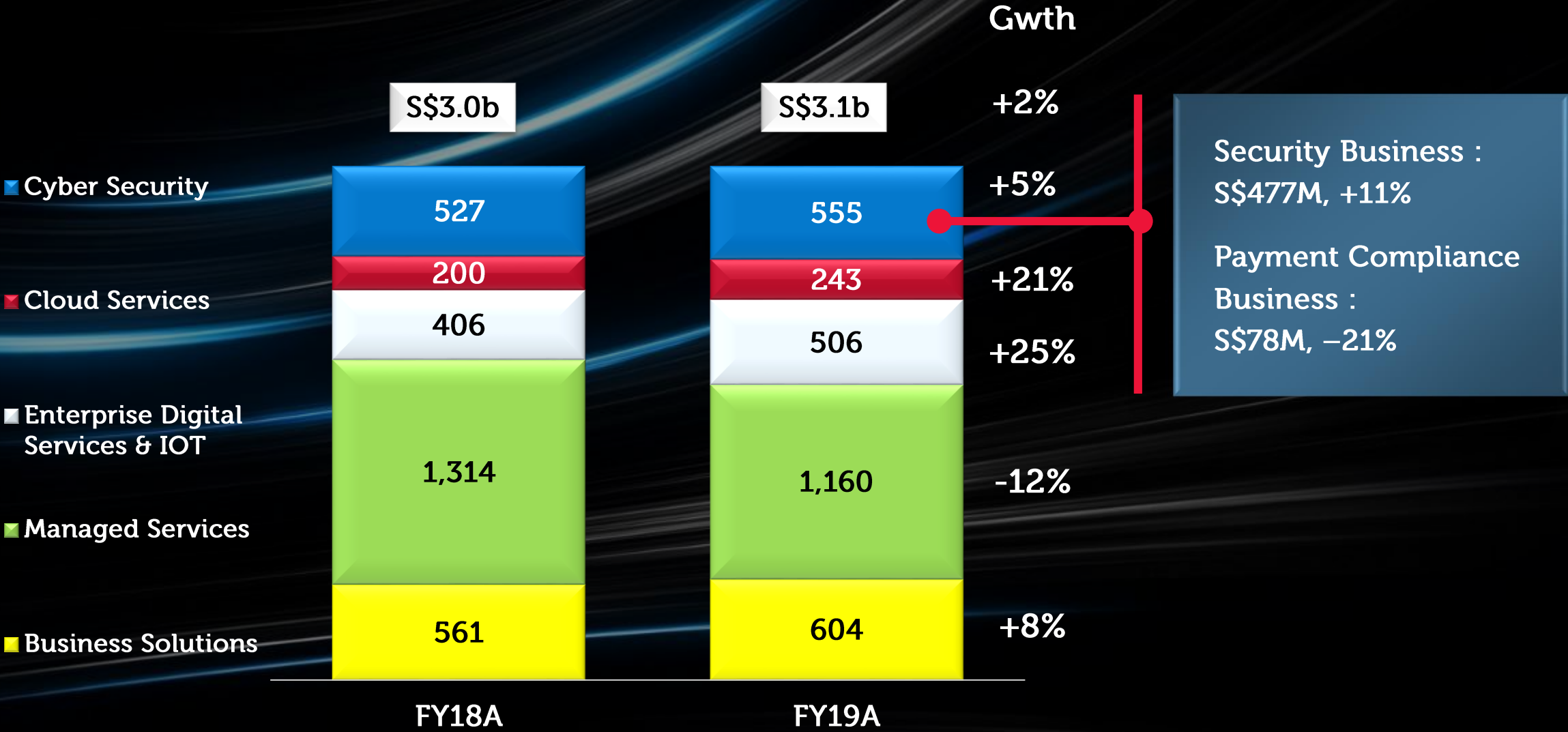


# Digital & Cost Transformation



- 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



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



SC Awards 2019 Best Managed Security Service (Trustwave)



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



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



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



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



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**

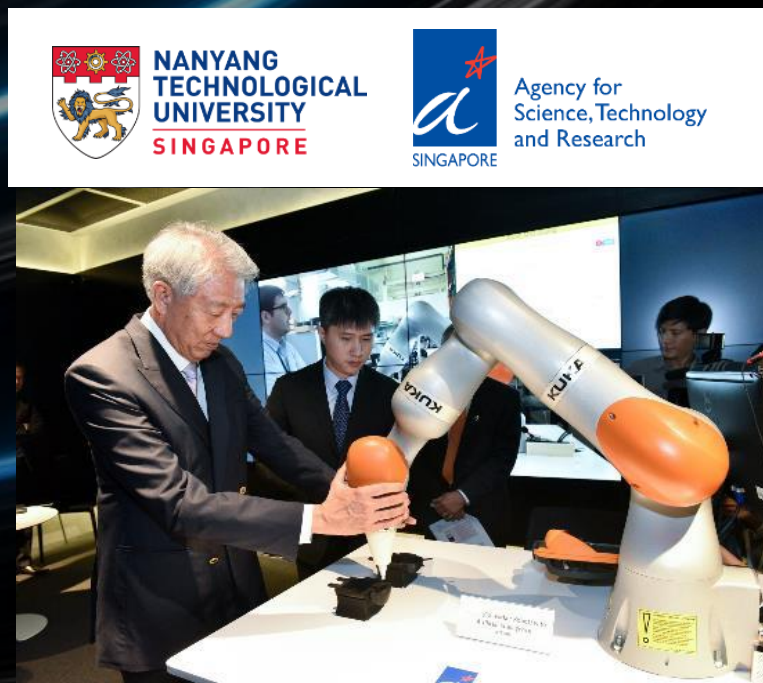
Increase penetration in **commercial accounts**

# 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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