

Investor Day 2016

31 May 2016



Group Enterprise FY2016 Highlights

Group Enterprise FY16 Revenue



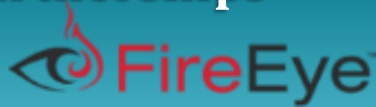
SGD

6.4B, +2.6%¹

Tech Partnerships



Check Point
SOFTWARE TECHNOLOGIES LTD.



vmware®



paloalto
NETWORKS



CISCO™



Hewlett Packard
Enterprise



Growth Engines
Momentum

Group Enterprise ICT FY16 Revenue

SGD

\$2.65B, +10.2%



End-to-end
telecommunications and managed IT
services

GTM Partnership



Globe



ROGERS™ inmarsat

1

APAC Core
Carriage
Market

Market Share
Leadership²

1. Exclude Fiber rollout and maintenance

2. Full-year increase in market share from 1H2014 to 1H2015. Source: IDC Telecom Services Database Asia-Pacific 1H2015

Strong Core Business Performance

Industry Recognition

Recognised as the leading Asian Next Gen Telcos in APAC for 3rd consecutive year

Source: IDC MarketScape: Asia/Pacific Next-Generation Telcos: Telecom Services 2015-2016 Vendor Assessment

Awarded Service Provider of the Future at IDC's Asia/Pacific Telecom Summit 2015

Source: Asia/Pacific Telecom Summit 2015: IDC expects 2016 to be the Year of Platforms, 24 Nov 2015



2016 Frost & Sullivan Asia Pacific ICT Award



Telco Cloud Service Provider of the Year

Telecom Group of the Year

SG Enterprise Data & Internet Revenue

+4.8% YoY

Driven by strong demand for international data

Market Leadership

#1 International IPVPN in APEJ

#1 EVPN and Eline in APEJ

1 IPLC in Singapore

1 Domestic Data in Singapore

Source: IDC Telecom Services Database Asia-Pacific 1H2015

Helping SME to grow and be more productive



1st SME week
in Singapore
29 Oct – 1 Nov
2015



myBusiness
Apps, Insights and Opportunities for your business



Payslip



MYOB
Premier
Online



Shopify



Google
Drive



Turbo charge Growth Engines

Cyber Security



To be a leading global managed security services provider

Enterprise Cloud



To be a leading trusted enterprise cloud service provider in Asia Pacific

Smart & Safe City



To be the lead partner for Singapore's Smart Nation program and leverage it to address Smart Cities program in the region

To be a leading global managed security services provider

EXPERTISE

Ramping up Cyber
Security Talent



TECHNOLOGY

World Class technology
ecosystem



ASOC

A Network of ASOCs
Advanced Intelligence and
Threat Monitoring Centres



CYBER COMPETENCY CENTRE

Cyber Security Institute (CSI)

Singtel Cyber Security Institute Capabilities



Singtel Group CEO Chua Sock Koong speaking at the launch of the Singtel Cyber Security Institute. PHOTO: SINGTEL

The Straits Times
26 Apr 16



Singtel opens cyber-security institute

Dr Yasuda
Speaking at the
opening of
Singtel Cyber
Security
Institute
- Singapore must
keep up its
cybersecurity
capabilities
- Singtel Cyber
Security Institute
will help to
train the next
generation of
cybersecurity
professionals
- Singtel must
be able to meet
the challenges
posed by digital
economy
- Singtel must
be able to
attract talent



26 Apr 2016

Singtel unveils institute to train firms in cybersecurity skills

The Business Times 26 Apr 16

Singtel opens facility to test, train cybersecurity skills

ZDNet 26 Apr 16

Singtel combats cyber crime with the opening of its Cyber Security Institute

Singapore HardwareZone 26 Apr 16

Singtel launches cyber security institute to train experts for the region

Techgoodu 26 Apr 16

Singtel wants to train Singaporean companies in cyber security

TechIn Asia 26 Apr 16

Singtel Cyber Security Institute launched to provide enterprises with more realistic training against cyber attacks



Lian He Zao Bao 27 Apr 16

Singtel unveils first-of-its-kind Cyber Security Institute

HRM Asia 27 Apr 16

Singtel opens cyber security institute in APAC

MIS-Asia 27 Apr 16

SingTel launches Cyber Security Institute

Nikkei 27 Apr 16



Cloud Business FY2016 Highlights

Enabling Enterprises in their Digital Transformation Journey with Singtel Managed Cloud Services



Security



Interoperability



Manageability

Enabling Hybrid Clouds

**Cloud Lifecycle Services
Advise, Transform and Manage**

**Cloud Operating Model
CloudOps, Agile, Automation**

Government Cloud Business



Partnerships



AliCloud MAP
Marketplace Alliance Program

Microsoft Azure

**Frost and Sullivan APAC
ICT award**



**Telco Cloud Service
Provider of the Year**

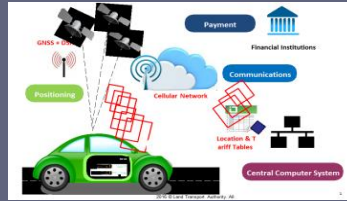
Enabling a Smart & Safe Nation

Iconic projects

Individual Learning Portfolio Portal



Next-Gen Electronic Road Pricing System



Source: LTA website

Smart Estates Management Platform



Automated Pharmacy Dispensing System



Smart Campus



myTransport App



Analytics in Shopping Malls



Smart Infrastructure



Core capabilities

Mobile, Wifi, Video,
Social & Customer
Data Analytics



Intelligent Command
& Control



Cyber & OT
Security



Agile
Computing



Transforming our land transportation sector

LTA to roll out next-generation ERP from 2020, NCS-MHI to build system for \$556m

The Straits Times (Digital), 25 Feb 16



NCS-MHI clinches \$556M deal for roll out of satellite-based ERP

Yahoo! Finance Singapore February 25, 2016
Yahoo (Digital), 26 Feb 16

Next-generation ERP system was more than a decade in the making



ERP gantry along Eu Tong Sen Street. TODAY file photo

The new satellite-based Electronic Road Pricing system that will cost over half a billion dollars and will be operational from 2020 has been more than a decade in the making.

Today (Digital), 25 Feb 16



- Next Generation ERP system is a multi-year contract for a duration of 8.5 years, expected to be progressively rolled out from 2020
- A new road pricing system based on Global Navigation Satellite System (GNSS) technology
- NCS is the consortium lead to integrate the overall system and solution while MHIES-A will provide the intelligent On-Board Unit (OBU) and roadside infrastructure. Over the years, the consortium has developed advanced capabilities in Global Navigation Satellite System (GNSS), mobile applications, digital transformation and an open platform for value-added services.

hot news

Switch to road pricing based on distance 'only a matter of time'

SINGAPORE - The awarding of a contract for the next-generation satellite-based Electronic Road Pricing (ERP) system signals that it is a matter of time before the current system is replaced.



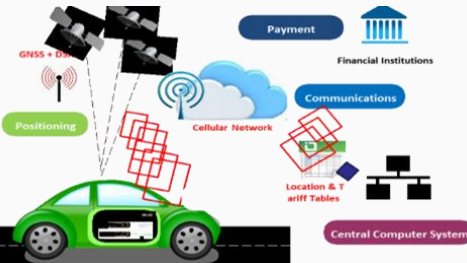
The current ERP gantry along Eu Tong Sen Street. TODAY file photo

TODAY • FRIDAY 26 FEBRUARY 2016

New ERP system 'will offer flexibility in charging'

AMANDA LEE leeagaping@mediacorp.com.sg
SINGAPORE - Motorists reacted to the impending roll-out of a new satellite-based Electronic Road Pricing (ERP) system.

Today (Print), 26 Feb 16



Source: LTA

NO PLANS YET TO TWEAK PRICING REGIME, SAYS AUTHORITY

Satellite-based ERP system to be rolled out from 2020

LTA awards S\$556m tender for world's first second-generation system that paves the way for distance-based road pricing

VALERIE KOH valeriekohsf@mediacorp.com.sg

Today (Print), 26 Feb 16

tion Electronic Road Pricing (ERP) system using satellite technology, as the Land Transport Authority

System Asia (MHIES-A). The new system, which will be rolled out progressively from 2020, paves the way for distance-based road pricing, but the authorities stressed yesterday that there are no



Channel NewsAsia Singapore Business Tonight (TV Broadcast) 25 Feb 16

Group Enterprise - Priorities

Drive Profitable Growth in the Core



- Drive market share leadership in Singapore Telco & IT
- Grow market share in Australia
- Differentiate and increase lead in APAC

Turbo-Charge Growth Engines



- Accelerate global growth for cyber security
- Deliver regional Cloud offerings with deepened capabilities
- Position to be the key partner for Singapore's Smart Nation

Transform Operating Model



- Optimise cost and increase clock speed
- Develop Talent
- Differentiate with Customer Experience

Our strengths in Asia Pacific are exemplified by our industry wins

Awarded Service Provider of the Future at IDC's Asia/Pacific Telecom Summit 2015

Source: Asia/Pacific Telecom Summit 2015: IDC expects 2016 to be the Year of Platforms, 24 Nov 2015

Recognised as the leading Asian Next Gen Telcos in APAC for 3rd consecutive year

Source: IDC MarketScape: Asia/Pacific Next-Generation Telcos: Telecom Services 2015-2016 Vendor Assessment



ComputerWorld Singapore Customer Care Awards

- Telecommunications Services (2008-2015)
- VOIP/ IP Telephony Systems (2015)



ComputerWorld Singapore Customer Care Awards

- System Integrator (2014-2015)



Frost & Sullivan 2016 Asia Pacific Telecom Group of the Year



Frost & Sullivan 2016 Asia Pacific Telco Cloud Service Provider of the Year



ComputerWorld Readers' Choice Awards

Best Managed Connectivity Services (2006-2015)

NetworkWorld Asia Information Management Awards

- Best in Security as a Service (2012-2015)
- Best in Disaster Recovery & Business Continuity (2014-2015)

NetworkWorld Asia Readers' Choice Awards

- Best in Managed Infrastructure Services (2012-2015)
- Best in Managed Security Services (2014-2015)



Asia Communications Awards 2015 Satellite Operator of the Year



ComputerWorld Hong Kong Awards 2015

Best Global WAN Connectivity Service Provider of the Year



World Communications Awards 2015

Best Enterprise Service: Managed Hybrid Network





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