

Amazing things
happen when we
dream big.

Group Enterprise
SingTel Investor Day

3 June 2014

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Emerging Businesses

SingTel Group Enterprise businesses consists of

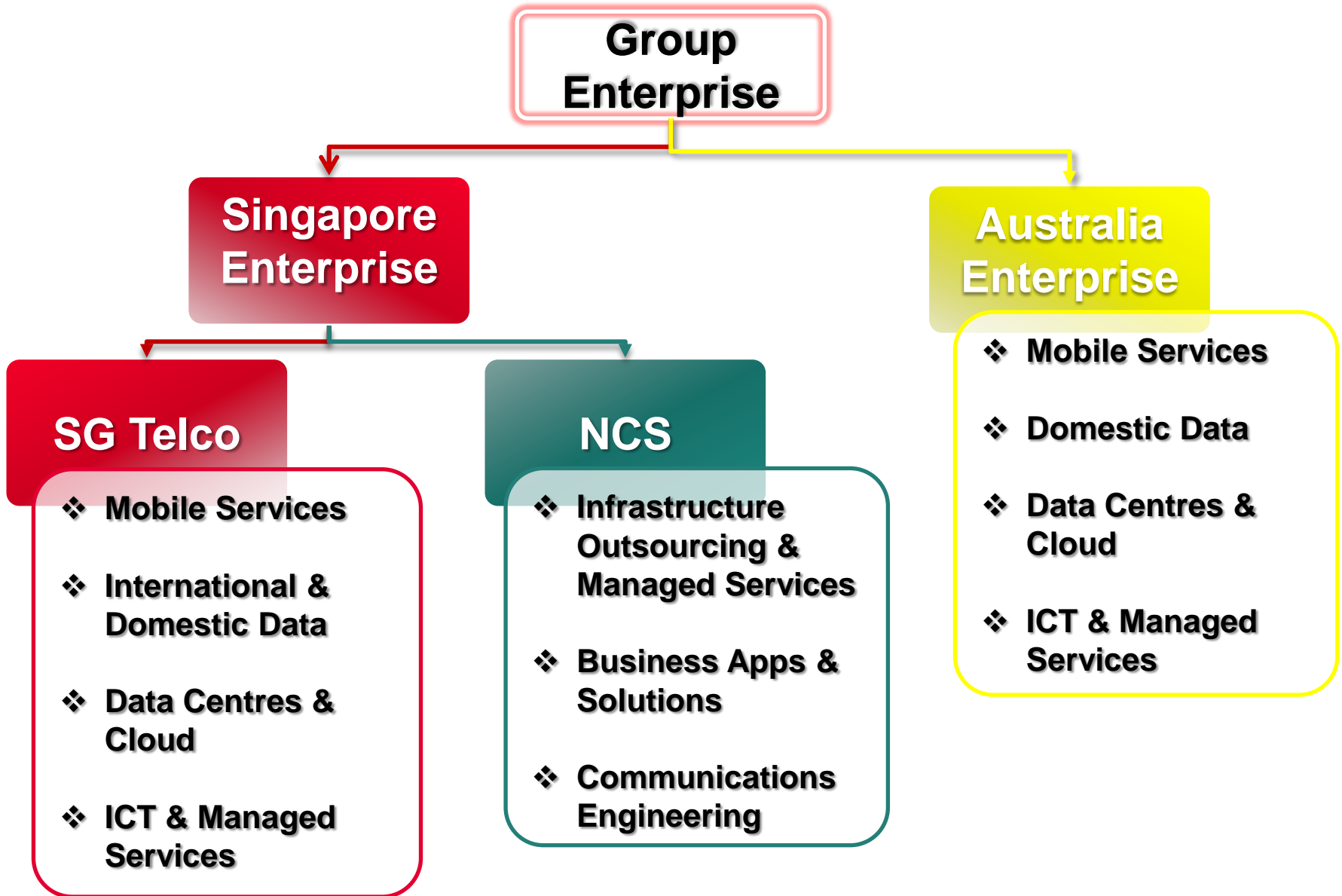


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Emerging Businesses

Market leadership in all International Data products in Asia Pacific



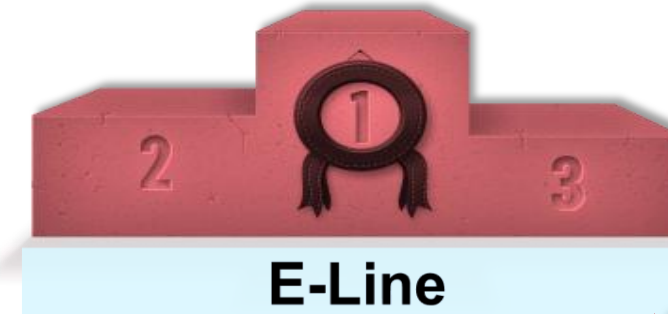
International IPVPN



Int'l Leased Circuit*



E-VPN



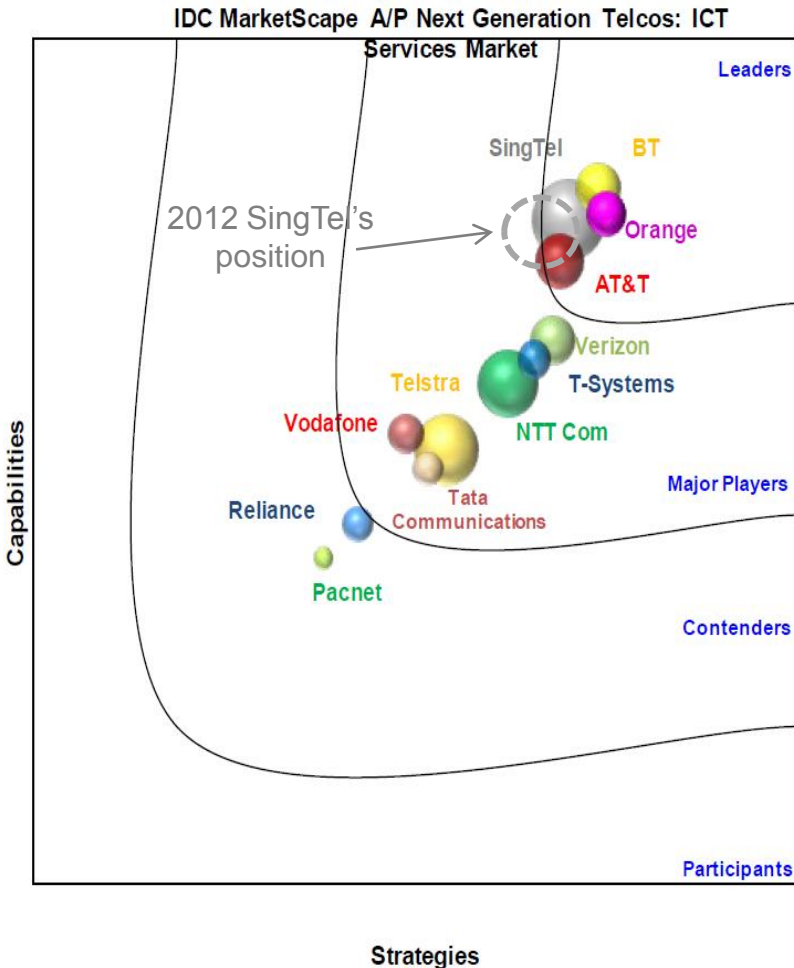
E-Line

**Providing businesses with reliable and "best-in-class"
managed connectivity across APAC**

* International Leased Circuit consists of TDM and E-Line

Asia Pacific leader for Telco Managed and ICT services

Telco & Managed Services Leadership¹



Key Strengths¹

- Strong capabilities in enterprise mobility and capabilities in M2M, big data & analytics
- Wide range of industry-specific solutions
- Strong cloud capabilities

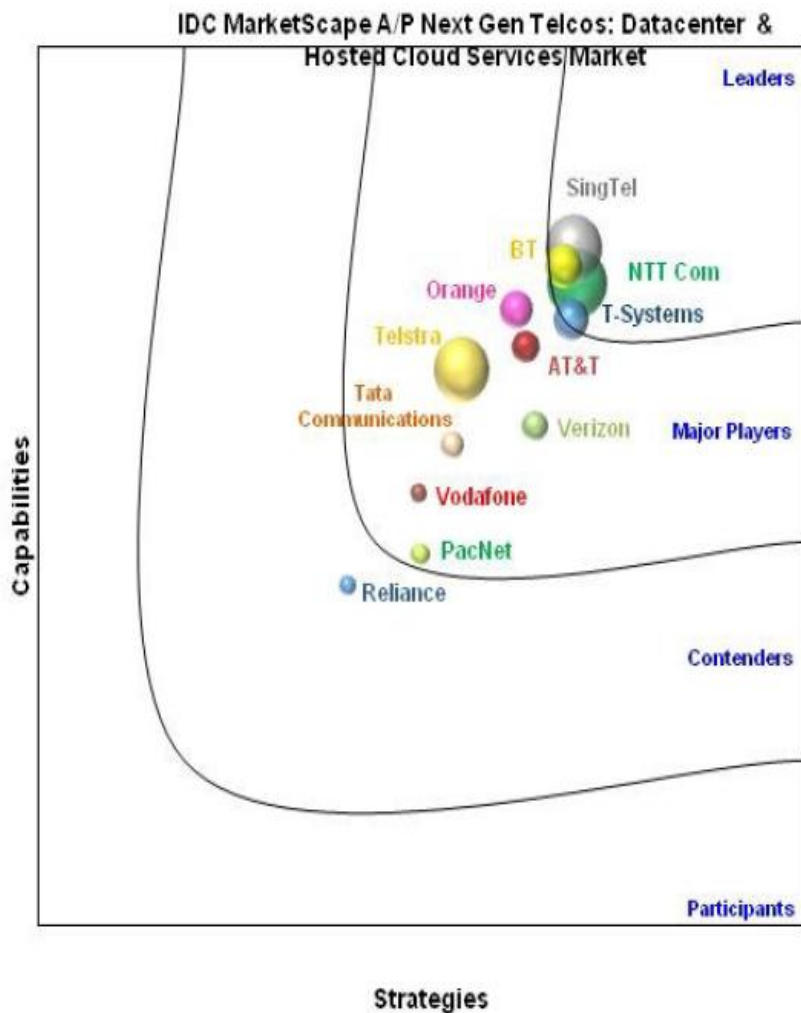


SingTel has improved its positioning in the leaders quadrant, maintaining its position as one of the leaders in the AP telco's ICT services space in this IDC MarketScape..... As a result of its deep coverage and service consistency within China and India, **the provider has been winning connectivity contracts into multiple sites in the two emerging countries.**”

IDC, 2013-14

Recognition for strong capabilities in Data Centre (DC) and Cloud in Asia Pacific

Leadership in DC & Hosted Cloud¹



Key Strengths¹

- Wide range of data centre services including hosted cloud solutions
- Capabilities in delivering government cloud
- End-to-end cloud capabilities including brokerage service

“ The provider (SingTel) has a suite of DC services including **co-location, green IT services, DC management & hosted cloud deployments**. It also has **capabilities in on-premise private cloud deployment, DC consolidation & cloud migration assessment service**. ”

IDC, 2013-14

Gaining momentum and scale in Cloud services

Trusted cloud service provider with scale

> 375,000

Cloud users adopted SingTel cloud services

Increasing adoption of G-Cloud by government agency

>20

Government agencies migrated to G-Cloud

myBusiness: Largest SaaS marketplace for SMEs

~25%

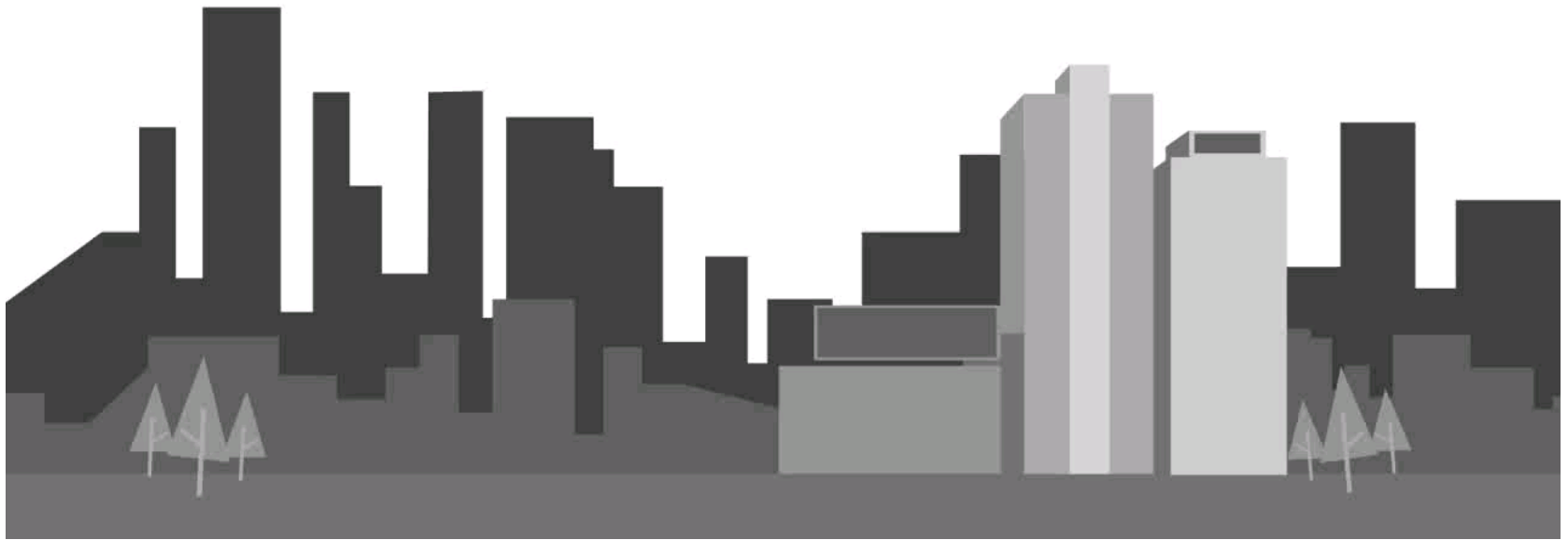
SG SMEs are part of myBusiness community

myBusiness being recognised by industry professionals



Gold Award – Best Digital Content

myBusiness – Singapore's largest SME community, driving increased productivity and lower cost



Delivering a tailored suite of ICT services that enhance RWS's communication needs



SingTel wins \$21mil RWS deal

Thu, Nov 05, 2009
The Straits Times

 Print-friendly  Email a friend

SINGAPORE Telecommunications has clinched a seven-year, \$21 million contract to equip all 1,800 rooms in the Resorts World Sentosa's chain of six hotels.

Besides providing state-of-the-art interactive in-room multimedia entertainment system and high-speed wireless Internet access in the 490 ha integrated resort, it will also provide RWS with location-based mobile advertising capabilities and an innovative fleet management system to enhance its VIP limousine services.

Announcing the deal in a statement on Thursday, SingTel said it has developed a next-generation multimedia solution that will provide hotel guests with a powerful and exciting in-room entertainment system.

1 Won a contract worth S\$21mn:

- ✓ *Local and international leased lines, internet lines, high speed internet access, IPTV, MIO content, mobile & network services*

2 Provided customers with:

- ✓ *24x7 round-the-clock monitoring via Network Operation Centre*
- ✓ *Reliable & scalable connections to various internet sites*
- ✓ *Secure authenticated access to internet by users*

Deploying Telco and IT services for a Global Payment Technology company regionally

1

> S\$120mn contract

✓ Covering Telco, Data Centre & Managed Services

2

Delivering over 450 sites across 16 countries in Asia Pacific

3

> 10K sqft of private vault at the state of the art Tier 4 KCTC2 Data Centre

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Emerging Businesses

NCS is a market leader in Business Services and a trusted partner for the Singapore Public Sector

#1 market leadership in business services¹ in SG

Continue to **project thought leadership & partner government agencies** in their transformation

Providing end-to-end service offerings through competency centres and industry solutions

Managing large scale infrastructure services for the government

One of three companies awarded to provide **facilities management services for government agencies**



Helping governments & citizens benefit from technologies



Administrative & healthcare systems from birth

- Birth Registration System
- Electronic Medical Record System
- Nation-wide Vaccination Program

Efficient education systems on robust ICT infrastructure

- 1-to-1 Computing
- Web-based e-Assessment Platform
- Cloud-based Learning Content & Apps
- Intuitive Collaboration & Social Learning

Seamless access to personalised Govt & Lifestyle Services

- Tax e-filing
- my CPF
- Real-time public transport info – MyTransport.SG
- Flight Information Display

Facilitate quality healthcare in the golden years

- Personal Health Dashboard
- One-stop Health Information Portal



Enabling national use of ICT to improve efficiency & accessibility of government services

Government Cloud & Shared Service Infrastructure



- **Government Shared Services:** Supporting and developing the roadmap to help agencies transfer systems and e-services costs effectively to a usage-based private cloud platform.

E-government Consulting



- **NCS Digital Nation Architecture Framework** for strategic e-govt IT planning has been successfully applied to help many countries develop their e-govt blueprint.
 - Sri Lanka
 - Kuwait
 - Fiji
 - Vietnam
 - Pakistan
 - Oman
 - Saudi Arabia
 - Thailand



Implementing key ICT projects such as School SOE & leading in adoption of cloud technologies to drive next generation learning experience

School Standard Operating Environment

- Consolidation of ICT into **a single operating environment (School SOE)** for greater efficiency
- **Provision of around 120,000 seats** comprising a computing device, network connectivity & support services for all government & government-aided schools. **The seats cater to 40,000 teachers/administrative staff & 500,000 students**

- **Tertiary institution:** Network infrastructure for 1-to-1 computing
- Enable students to **self-learn** from external resources, hold **online interactions**, and **collaborate** with international students

1-to-1 Computing



Chinese Language Learning

学中文

[xuézhōngwén]

Learn Chinese

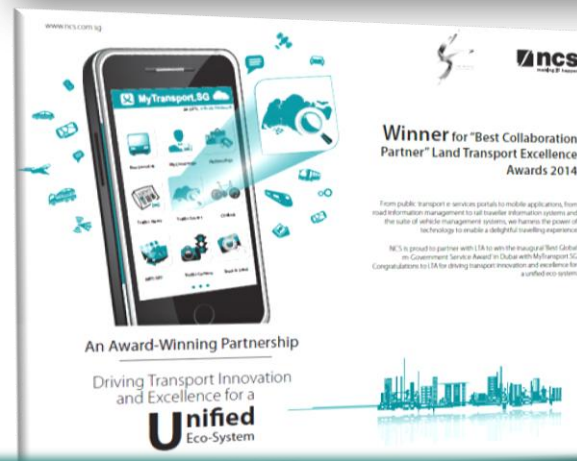
- **Chinese language learning** in over 300 schools using our **Voice Analytics and Cloud based technologies**



Playing a key role in shaping the transport landscape in SG with development of innovative systems and e-portals



- **Real-time traffic info and alerts** for commuters & motorists
- PPP model creates **commercial eco-system** to market to the larger motoring community
- Won several awards:
 - Mob-Ex Gold Award (Best App/Content)
 - W3 Silver Award (Mobile App)
 - EMA Visionary Award (Navigation App)



MyTransport.SG has won numerous awards with its innovative app and web portal



Developing public health systems to enable efficient operations, improved patient care, and sharing of health information

Health Datahub



- **A Consolidated Data Store Platform:** To consolidate data from multiple sources and healthcare subsystems
- An **integrated platform** for **in-depth analytics**

Closed Loop Inpatient Medication Management System



- Automated entire prescription and medication process for inpatients to **ensure high avoidance of drug errors**
- Achieve the 4 “rights” at the hospital wards i.e. **Right Medication, Right Dose, Right Patient, Right Serving Time**

Creating solutions for real-time energy usage tracking and response to environmental crisis

Empowering Smart Utilities



- **Smart Utilities** – an end-to-end solution that handles all major elements of utility distribution, including billing, customer care and meter data management
- **Combines flexibility, efficiency and smart insights** to drastically cut cost-to-serve

Energy Management Dashboard



- **Cloud based Energy Management** – just need a web browser or mobile device to track the energy use in NCS building
- Dashboard gives **detailed analysis of energy consumption patterns**

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Optus Business - a challenger in the marketplace

Strengths of Telco & IT capabilities under one roof

- Integration of Alphawest & Uecom into Optus



- Become a **single integrated ICT** organisation
- **Align with NCS in Australia** to deliver business application services
- **Stronger focus on medium-sized businesses**
- Establish **6 Centres of Excellence**

Iconic wins across various industries

Optus scores \$60m contract with Virgin Australia

The telco will deliver the services over its managed data network

Stephanie McDonald (CIO) | 09 October, 2013 10:47



Optus signs \$29m contract with Department of Agriculture

Telco will provide Internet-based network connections

Hamish Barwick (Computerworld) | 06 September, 2013 14:05



Optus tapped for UGL's AU\$30m managed services contract

Summary: Optus has secured a five-year AU\$30 million contract to provide managed IT and mobile services for engineering company UGL.

Delivering innovative Managed Services for an engineering MNC across APAC....



“SingTel Optus deal with UGL underlines its strength in Asia-Pacific.....”

Ovum Research
Adrian Ho, Principal Analyst

1 Won a contract worth A\$30mn

- ✓ Managed ICT services, mobility, broadband and M2M capabilities



2 Mobility solutions connecting >8,000 UGL employees across APAC

- ✓ New smartphones devices & applications to engineers



3 Delivered innovative solutions to:

- ✓ Enhance planning & decision making
- ✓ Reduce operating costs



...while continuously being a trusted service provider of ANZ, a regional leading bank



“This strategic partnership offers increased value in service quality, management control and increased capability to connect and support our accelerated business growth into the region”

ANZ Bank
Alistair Currie, COO

Optus Business and Singtel ink \$530m contract with ANZ Bank

Telcos to provide global data network, contact centre, mobility and collaboration services to the bank's business operations

Stephanie McDonald (CIO) | 12 September, 2013 10:02

1 **Second-term renewal contract worth A\$530mn**
✓ Domestic & international data, mobility, collaboration, contact centre services & managed services



2 **Underpin ANZ's connectivity & service delivery spanning over 29 countries in APAC**

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Emerging Businesses

Leveraging on our core Telco assets & accelerate growth in emerging businesses



- APAC market size ~S\$9.6bn¹ by 2017
- Customers demand “1-stop” service provider for connectivity & managed services
- Leverage leadership position in managed connectivity & managed services in Asia Pacific

- APAC market size ~S\$1.7bn¹ by 2017
- More complex and targeted threats creating a new cyber ‘battleground’
- Leverage strong managed network & redundancy and security ICT practice



- APAC market size ~S\$6.6bn¹ by 2017
- Increasing cloud adoption for both large and medium-sized enterprises
- Leverage data centre assets, cloud SI & consulting capabilities and reputation of G-Cloud in Singapore

- Increased urbanisation in Asia Pacific
- SG’s Smart Nation aspiration & Chinese government’s smart cities implementations
- Leverage system integration, analytics capabilities to deliver safe and smart cities solutions



¹ Source: SingTel internal analysis

SingTel's strengths across APAC region are further exemplified with various industry recognitions



- **Distinguished Winner**
MyTransport.SG, LTA
- **Merit Winner**
eBooking Appointment, ICA
- **Merit Winner**
NS Portal, Mindef



- **Best Enterprise Service**
Connectivity as a Service
- **Best SME Services**



- **NCS beConnect Bronze Award**
- **MyTransport.SG for LTA**



- **Best Data Centre and Hosting Services Provider**
SingTel EXPAN Hosting Svc
- **Best Managed Connectivity Services Provider**
SingTel Managed Connectivity & Managed Services



- **Best in Security as a Service**



- **Best Mobile Operator**
- **Best Provider of Mobile & Fibre Broadband Service**



- **Communications Ambassador of the Year**
- **Satellite Provider of the Year**
- **Community Contribution**



- **Best Carrier Ethernet Business Application**

Key Takeaways



1

Drive continued market leadership in core products in SG Telco across APAC region

2

NCS continues to lead in public sector and enable Safe & Smart Cities solutions

3

Optus being the challenger in Australia with integrated ICT capabilities

4

Accelerate growth in Emerging Businesses

