

# Singtel Singapore Investor Day 2023

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# Singtel Singapore was formed on 1 June 2023

Revenue<sup>1</sup>

**S\$4B**

EBITDA

**S\$1.5B**

EBIT

**S\$0.9B**

**4.3m**

Mobile customers<sup>2</sup>

**46%**

Mobile customer market share<sup>2</sup>

**>870k**

5G subscribers<sup>3</sup>

**43%**

Fixed broadband market share<sup>2</sup>

**84%**

Dom Data market share<sup>4</sup>

**19%**

Intl IP VPN market share<sup>4</sup>

- Combined consumer and enterprise businesses into a singular operating company
- Market leader in connectivity in Singapore serving consumers & enterprises
- World-class network infrastructure with many world's firsts (e.g., 5G coverage, 5G slicing deployment, etc.)
- Regional data centres, subsea cables, satellite carrier and 5G Paragon businesses now come under Digital InfraCo

# It was a necessary move to strengthen our position in an uncertain market



## Headwinds



**Continued price competition in mobile and broadband**

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**Shifting product mix in consumer & enterprise businesses**

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**Macroeconomic outlook dampening consumer & enterprise spending**

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**Continued cord-cutting in TV and fixed line**



## Tailwinds



**Further travel recovery as China reopens**

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**Continued demand for Home connectivity for hybrid work**

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**Increasing pace of digitalisation fuelling enterprise demand**

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**Growth in connected cars with EV revolution**

# Key imperatives for Singtel Singapore consolidation



**Establish One Singtel in Vision and Way of Working**

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**Strengthen market leadership**

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**Create a simplified, agile organisation**

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**Unlock synergies, optimise cost, reinvest for growth**

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**Future-proof Singtel through capabilities and talent**

# Continue to build on and rejuvenate the core Consumer business

## Rejuvenate the core

**Drive 5G adoption** while developing new, innovative use cases



NDP 2022 Livestream



F1 Network Slicing



SOBS MRT Concert



Singapore Motorcross Beach Race



Maximise **roaming recovery**



Continuously drive **broadband upgrades**



**All-in-one** entertainment provider



Bringing the **best of Singtel**, serving customer needs 360°

# ... while developing new growth areas & differentiating customer experience

## Expand beyond



**Deepen** collaboration with GxS



Develop **new B2B2X business models** that contribute to the core

## Drive signature customer service & experience



**Strengthen customer loyalty & capture acquisition** with a holistic rewards proposition

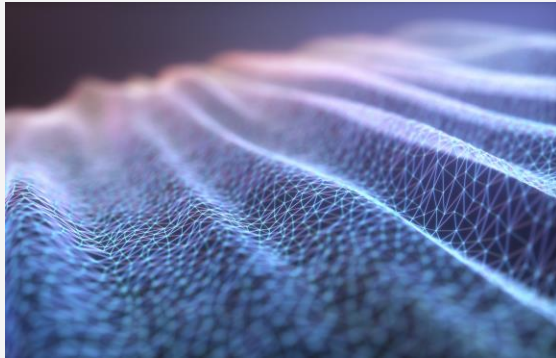


**Differentiate** with value-added services & flexible bundling options



# Accelerate digital transformation and innovation in Enterprise

## Reinvigorate the Core



- Innovate in domestic data solutions
- Deliver Quantum-safe Network
- Drive enterprise upgrades to 5G
- Lead in SD-WAN
- Grow international data

## Capitalise on growth trends

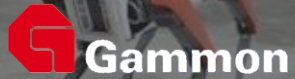


- Create multi-product platform
- Accelerate enterprise 5G adoption
- Invest in network centric services and solutions
- Accelerate growth in IOT in connected cars and devices

# 5G is a key differentiator in leading and shaping the Enterprise market

## Government

Smart Construction Solutions



Autonomous robotics with 3D Lidar, MR overlay with BIM, & livestream drones

Autonomous Environment Service Vehicle



Tele-driving & real-time video streaming to run AESVs on 5G

Disaster Site Management



Tele-op robotics for surveillance, casualty identification, & patient monitoring

Drone-enabled Remote Inspections



Real-time live video streaming and remote site inspections on 5G MEC

## Security

5G Integrated Command Centre



5G-enabled video analytics for Singapore's largest 3D digital twin

## Transport

5G Aviation Testbed



5G initiatives to boost manpower productivity & operation capabilities

## Medical

Enhanced Surgery & Clinical Care



5G Holomedicine using mixed reality for 3D MRIs

5G@SENTOSA

GOVTECH SINGAPORE



## Industries 4.0

Advanced Manufacturing



Real-time video streaming for defect detection, AR remote assistance

EV Trials



Meta Factory with smart manufacturing, EV battery subscription service, connected cars

5G Sandbox



5G Industrial use case test bed and sandbox

## Smart Retail



Singtel launch of Singapore's first 5G-enabled smart retail showcase

## Innovations & Partnerships

intel | Singtel



Singtel with Intel to launch a 5G multi-access edge compute incubator



Singtel partners with Microsoft to rollout Microsoft Azure MEC solutions over 5G

Singtel | SAP



Singtel & SAP, to develop Intelligent Edge Aggregator (IEA) solution



# IOT for connected cars and devices are poised for growth locally and regionally

19%

APAC emerging market  
CAGR (excl. China)

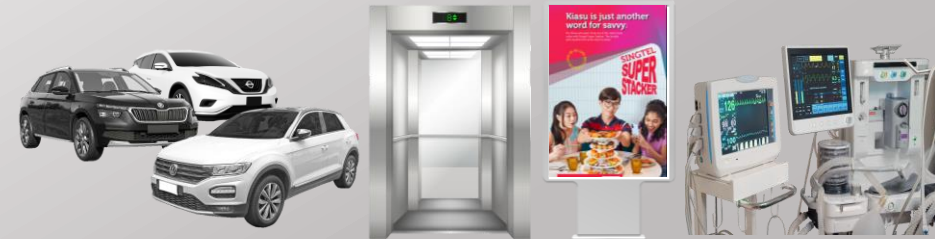
USD  
\$6.2B

APAC IOT market size by  
2025 (excl. China)



Singtel, together with Bridge Alliance is positioning ourselves to be the Regional Aggregator for Multi-domestic play in “connected X<sup>1</sup>”

One SIM but  
multi-domestic profile



- 1 Single provider for multi-domestic service in the region
- 2 Single contract and operational contact
- 3 Unified service platform for all connectivity management

