





## General Announcement::Singtel Investor Day 2015

## Issuer &amp; Securities

<b>Issuer/ Manager</b>	SINGAPORE TELECOMMUNICATIONS LIMITED
<b>Securities</b>	SINGTEL - SG1T75931496 - Z74
<b>Stapled Security</b>	No

## Announcement Details

<b>Announcement Title</b>	General Announcement
<b>Date &amp; Time of Broadcast</b>	03-Jun-2015 06:40:14
<b>Status</b>	New
<b>Announcement Sub Title</b>	Singtel Investor Day 2015
<b>Announcement Reference</b>	SG150603OTHRC9AX
<b>Submitted By (Co./ Ind. Name)</b>	Lim Li Ching (Ms)
<b>Designation</b>	Assistant Company Secretary
<b>Description (Please provide a detailed description of the event in the box below)</b>	Please see the attached presentation slides on Singtel Investor Day 2015: - Consumer Singapore - Group Digital Life - Consumer Australia - Group Enterprise

<b>Attachments</b>	 <a href="#">SingtelInvestorDay2015-ConsumerSingapore.pdf</a>  <a href="#">SingtelInvestorDay2015-GroupDigitalLife.pdf</a>  <a href="#">SingtelInvestorDay2015-ConsumerAustralia.pdf</a>  <a href="#">SingtelInvestorDay2015-GroupEnterprise.pdf</a> Total size =6268K
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A night-time photograph of the Singapore skyline, featuring numerous illuminated skyscrapers and buildings along the waterfront. The lights from the buildings are reflected in the water in the foreground. A large red circular graphic element is overlaid on the right side of the image, containing the event title and speaker information.

# Singtel Investor Day Consumer Singapore

Yuen Kuan Moon  
CEO, Consumer Singapore

# Singapore Consumer Business

## 4 Strategic Thrusts

- 4G/LTE on 900 MHz spectrum
- Singtel WiFi
- Smart Home
- Next Gen GPON

1

### Extending Network Leadership

3

### Transforming Cost Structure

- Digitized self-help
- Networks shut-down

- Tourist Prepaid SIM
- Wavee, all-in-one communications app
- Roam Like Home data plans
- Differentiated and managed service
- WiFi Mesh
- Service innovation

### Differentiating Through Innovation

2

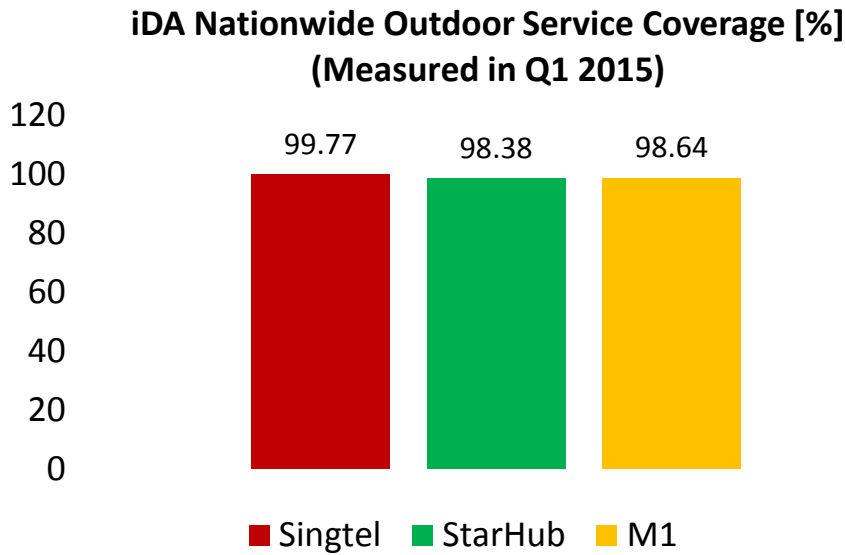
### Enhancing Mobile & Home Profitability

4

- Drive data revenue
- Towards a fully fibre network
- Upsell TV content with new channels

# Extending Network Leadership (Mobile)

Superior 4G service coverage



Leverage 900MHz spectrum to achieve deeper 4G/LTE coverage indoors and underground

Additional 2GB data on Singtel WiFi

>50% of Combo Plan customers are already using Singtel WiFi

Increase Singtel WiFi coverage beyond current 400 access points to 1,000 access points by end FY 2016

Will start charging for excess usage later in the year

Singtel WiFi at more locations



# Extending Network Leadership (Home)

Singtel  
Smart  
Home



Participated in HDB's lab trial, and will proceed to engage in field tests in Yuhua HDB blocks (total: 3,300 units)

Focus is on eldercare, energy and water management

10 Gbps  
GPON Trial



First in Singapore to trial 10Gbps Next Generation GPON on fibre network

# Differentiating Through Innovation (Mobile)

Tourist  
Prepaid  
SIM



Revenue opportunity from >15M tourist arrivals per year

Offers low price options with data allowance over shorter validity period

Wavee



Wavee VoIP Out enables calls over data, from overseas to any Singapore number by 2<sup>nd</sup> half of 2015

Roam  
Like  
Home



Roam Like Home (Malaysia) plan at S\$10/GB was launched in Oct 2014 and contributed to increase in Malaysia data roaming traffic by >2.5x YoY

Roam Like Home (Australia) was launched on Apr 2015

# Differentiating Through Innovation (Home)

Home  
Network  
Specialists



**Home Network Specialist team offers end-to-end service to solve connectivity issues found in larger homes**

- Recommend solutions
- Help optimise WiFi coverage in home
- Installation & maintenance service

WiFi Mesh

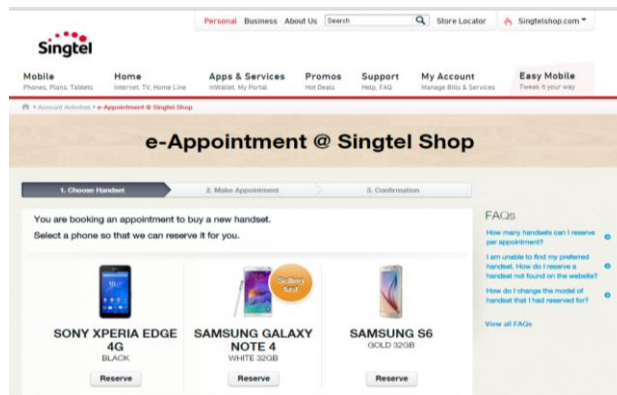


**WiFi Mesh improves coverage for larger homes without need for hardwiring**

**Trials started on 5 May 2015**

# Differentiating Through Innovation (Service)

E-Appointment @ Singtel Shop



**>3k e-Appointments made since launch in Jan 2015**

**Simplified customer journey and shorter waiting time**

Preferred customer care call-back time



**>600 bookings made since launch in Mar 2015**

**Service at their convenience**

New Retail Concept



**A more interactive, immersive and intuitive customer journey**

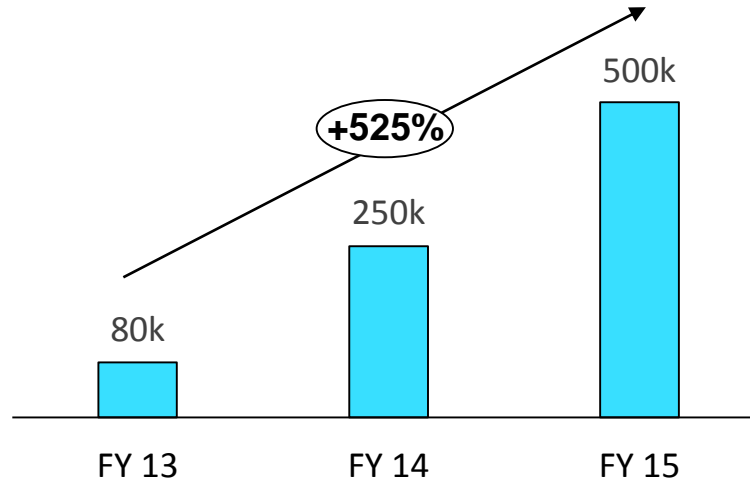
**Pilot shop launched at Causeway Point**



# Transforming Cost Structure

Digitisation & Automation

My Singtel App Monthly Average Active Users ('k)



## Virtual Agent Shirley

- 2.5k questions/day
- Response accuracy of 88%

Enable more transactions on digital channels such as My Singtel App

Networks Shutdown

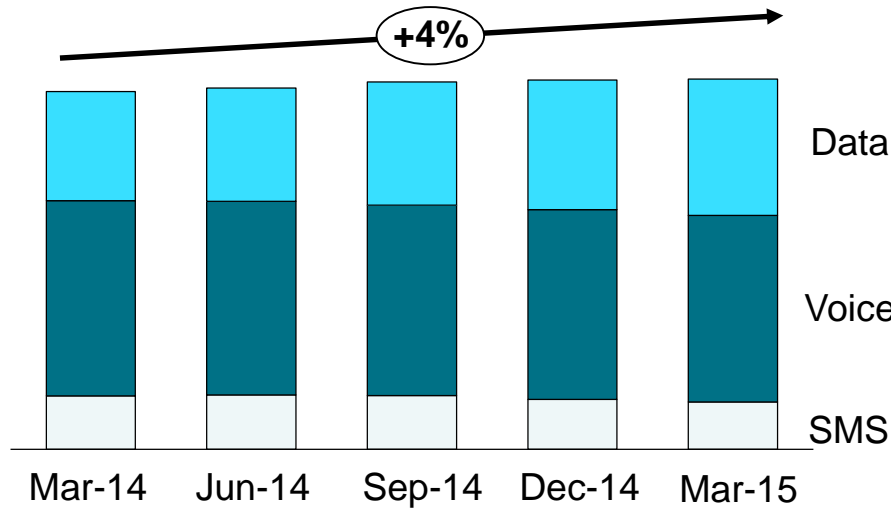


Shut-down of 2G and ADSL networks

# Enhancing Profitability (Mobile)

Driving Data Revenue

Mobile Revenue (ex Roaming) S\$B



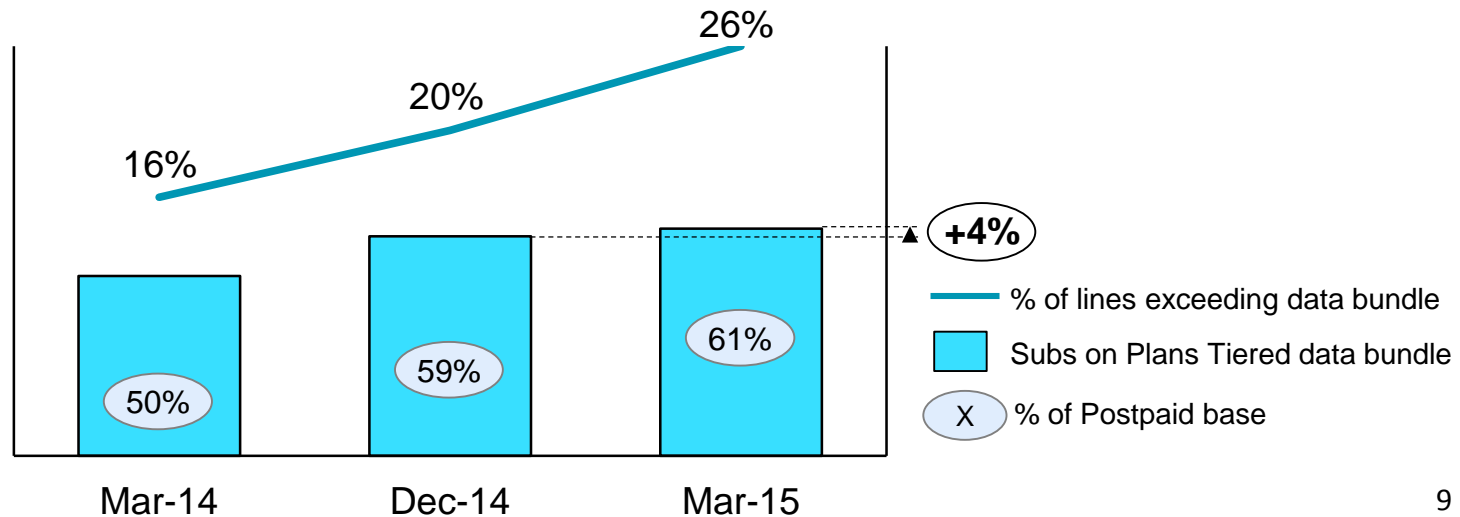
61% of postpaid customers are currently on tiered data plans.

26% exceed their data bundle

Data services contribute to 37% of total postpaid ARPU

Continue to drive prepaid data usage

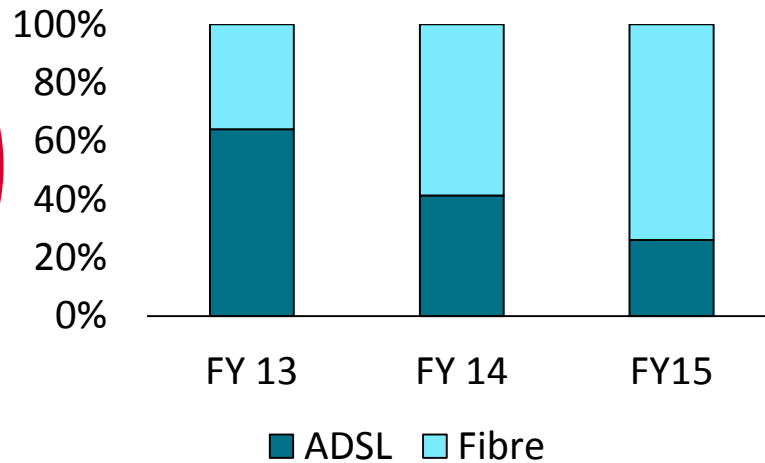
Postpaid customers on Plans with tiered data bundles



# Enhancing Profitability (Home)

Migrating Customers to Fibre

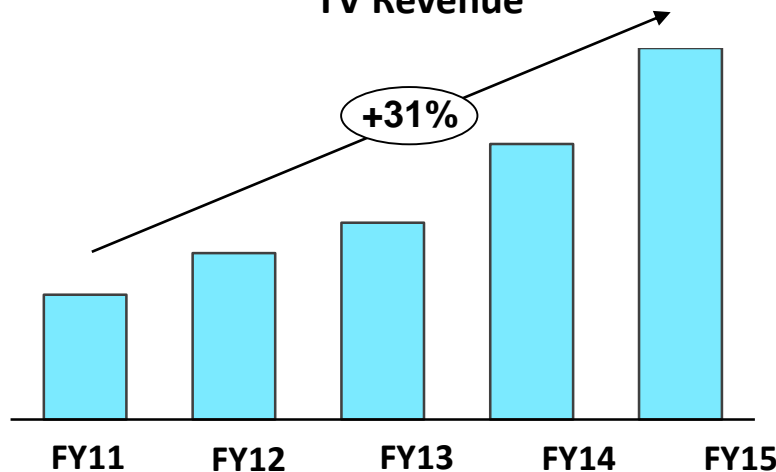
### Broadband Customers Mix ('k)



**>90% of our customers will be on fibre services by end of FY 2016**

Upselling of TV Content

### TV Revenue



**New TV channels drive take-up of content packs, revenue and ARPU growth**



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# **Singtel Investor Day Group Digital Life**

**Samba Natarajan**

3 June 2015

# Agenda

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**INTRO**

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Group  
Digital Life

01

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[a·mo·bee]

02

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**HOOQ**<sup>™</sup>

03

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DataSpark

# GDL was set up to create value for Singtel in two distinct ways



# Key learnings from our GDL efforts so far

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**1** Focus on businesses that can move the needle

**2** Deploy a regular and ruthless discipline to venture management

**3** Focus on key operational metrics in the early stages

**4** Create appropriate balance between sufficient autonomy and central oversight

**5** Do not commit to an initiative without a willingness to “invest to win at scale”

**6** Digital companies require specialized talent



# The result: a three-pronged approach for managing our digital portfolio and innovation capabilities

## Three core businesses

DIGITAL MARKETING

[a.mo.bee]

ADVANCED ANALYTICS

DataSpark

PREMIUM VIDEO

HOOQ™

## Local and OpCo-led portfolio



DIGITAL PAYMENTS



E-COMMERCE 2.0



DIGITAL CALLER ID



HYPERLOCAL



INFOTAINMENT



CONTENT (MUSIC/NEWS)

## Innovation Engine

Singtel  
innov8

- Fund size: **US\$250M**
- 48 investments in 9 countries
- Innov8 has 2 sub-teams with the integration of Lifelabs:
  - Investments: scouting and investments
  - Business Development: liaison between startups and BUs



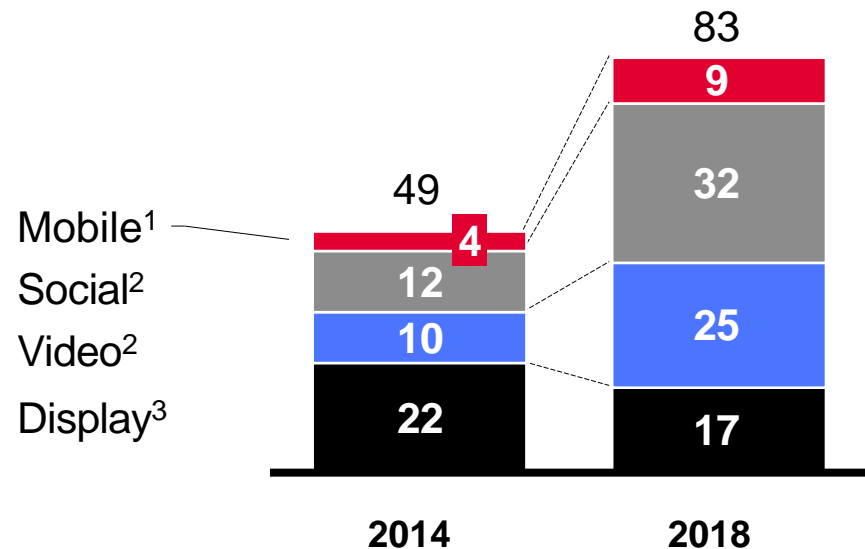
[a.mo.bee]

*(n.)* the company defining digital marketing

# Digital Advertising Market continues to explode

[a.mo.bee]

## Global Advertising Spend By Channel US\$b



## CAGR

15%

27%

25%

-6%

## Key Trends

- Explosive growth in social, mobile and video channels
- Shift from siloed, audience-based to cross-device, user-level targeting
- Desire for more real-time, spontaneous advertising

1 Mobile display; 2 Mobile and Desktop; 3 Desktop display

SOURCE: McKinsey Global Media Report 2013, Magna Report 2013, Business Intelligence, eMarketer

# Amobee's Vision is to be the Leader in Real Moment Marketing Technology



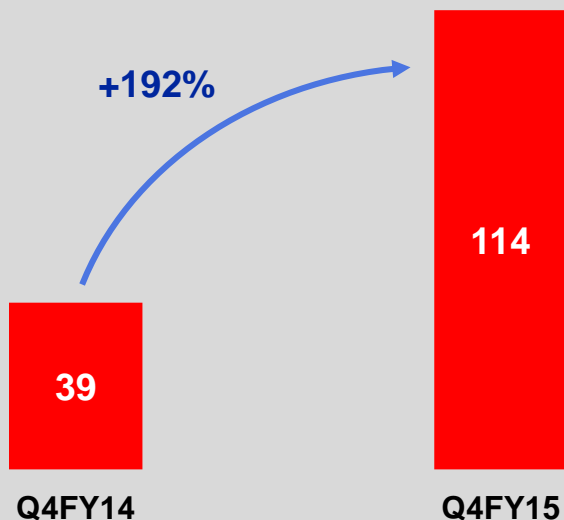
Acquisition of **Adconion Direct** and **Kontera** to offer the most advanced cross channel digital marketing technology platform and solution.



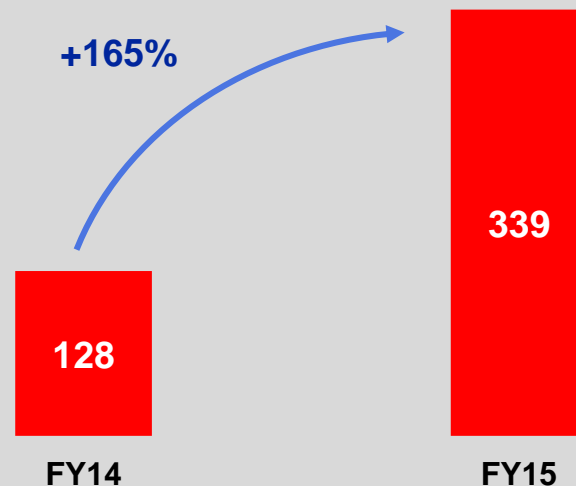
Brand Intelligence  
Activated Media

# Amobee is starting to achieve scale with this strategy

Amobee Q4 FY15 Revenue (S\$m)<sup>1</sup>



Amobee FY15 Revenue (S\$m)<sup>1</sup>



1. Before intercompany eliminations.



**HOSQ**<sup>TM</sup>

## 1.7 billion people Multiple platforms

- >10,000 Hollywood and local movies and TV series
- Multi-device access
- Unlimited viewing via streaming and download
- Market leading low-priced monthly subscription-based video service

### Launched



Philippines

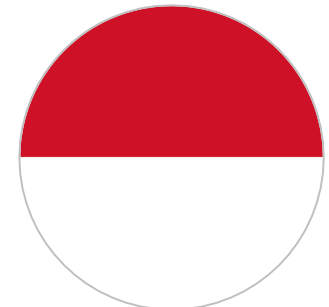


Thailand

### Coming Soon



India

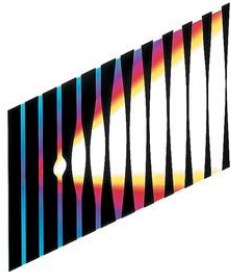


Indonesia

# Joint venture between Singtel, Sony Pictures & Warner Bros.



Let's make everyday better



**SONY**  
PICTURES



- Leverage on the Singtel Group's **550 million** mobile customers
- Major Hollywood studios, providing **premium content**, know-how for content procurement & programming for HOOQ
- Initial share capital of **US\$ 28 million**
- Equity holding of **65% by Singtel**; 17.5% each by Sony Pictures & Warner Bros.



# DataSpark

clarity redefined





Always on,  
always connected

Unrivalled  
richness and  
continuity of  
consumer  
dataset



Finger-tip Geo-  
analytics to see the  
“what”

Quick, easy  
analysis of  
consumer  
behavior, crowd  
movement &  
lifestyle choices



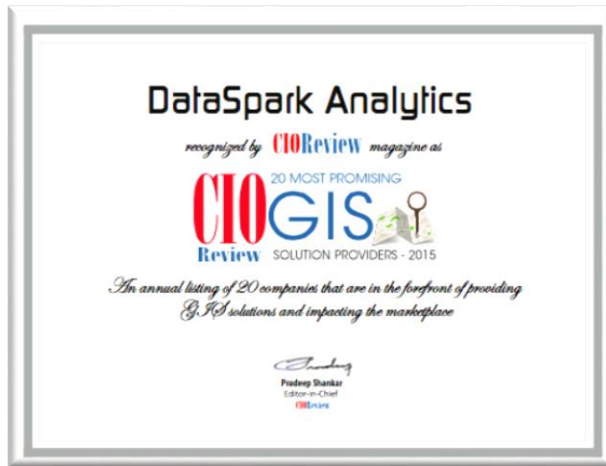
Panel insight to  
uncover the “why”

Fast , accurate  
and represen-  
tative analysis of  
consumer  
attitudes and  
decisions



Market-driven,  
market-tested

Proven insight to  
address wide-  
ranging business  
challenges



Buyer Case Study

Buyer Conversation: DataSpark's Journey in Establishing Analytics Business

Most Advanced Approach to Analytics



### GeoAnalytics software

- **Patent-pending** software to produce mobility intelligence
- Regional Telcos have entered into **multi-year licensing deals** for:
  - Revenue stimulation and retention
  - Operational efficiency/cost optimization
  - New revenue streams

### Insights as a Service

- **Analytics consultancy services** using the insights generated by own GeoAnalytics software
- Engaged by various **Singapore Government agencies** for city and transportation planning

# Conclusion



**SHARPENED FOCUS**



**GROWTH ON GLOBAL  
SCALE AND LONG-TERM  
VALUE CREATION**



**Group  
Digital Life**



**CONTINUAL EXPLORATION  
OF NEW TECHNOLOGIES**



**FINANCIALLY DISCIPLINED**



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3 June 2015

**CONSUMER AUSTRALIA**

**SINGTEL INVESTOR DAY**



Allen Lew  
CEO Consumer Australia

**OPTUS** *yes*

# FY15 HIGHLIGHTS

**TOTAL  
REVENUE:**

**UP  
5%**

**EBIT  
UP 5% ↑**

**EBITDA  
UP 5% ↑**

**MOBILE  
SERVICE  
REVENUE:**

**UP  
3%**

## CUSTOMER GROWTH

- 167K POSTPAID HANDSETS
- 78K PREPAID HANDSETS



- MY PLAN PLUS
- MY PREPAID MONTHLY
- UNLIMITED FIXED BB
- NETFLIX BUNDLES

- 3.5M 4G HANDSETS
- 86% 4G NATIONAL POP COVERAGE<sup>1</sup>
- 3,383 4G MOBILE SITES<sup>1</sup>

## CUSTOMER EXPERIENCE

ONLY TIER 1 TELCO  
WITH POSITIVE NPS



**OPTUS** *yes*



# OUR STRATEGIC FOCUS WILL CONTINUE, BUT WITH SOME FUNDAMENTAL SHIFTS



## Brand, People and Culture

Truly **differentiate** our brand, by leading in customer experience to become  
Australia's most loved, recommended and **Innovative** service provider

Make Optus the best place to work

### SIMPLE PRODUCTS

- **Entertain** our customers with video/entertainment bundles
- Evolve plans to focus on Family plans
- Unlimited broadband plans

### GREAT NETWORKS

- **Enhance** our customers' network experience to take network off the table where it matters to our customers

### BRILLIANT SERVICE

- **Engage** customers through greater personalisation and continue to improve our market NPS

## Building a sustainable Future

Continue to reduce traditional operating costs while investing in Networks and **driving efficiencies**

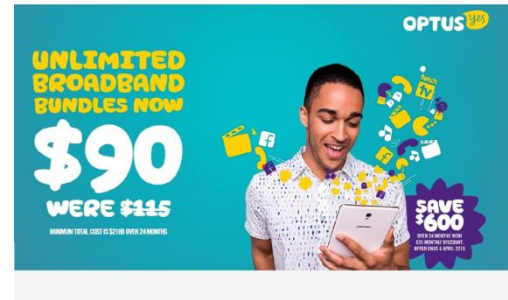
# DELIVERING WHAT CUSTOMERS WANT, IN A SIMPLE WAY



## FAMILY DATA SHARING



## UNLIMITED BUNDLES



## DIGITAL CONTENT



# MAJOR AREAS OF FOCUS:



## 1. NETWORKS

### IN MOBILE

#### 1 - Coverage

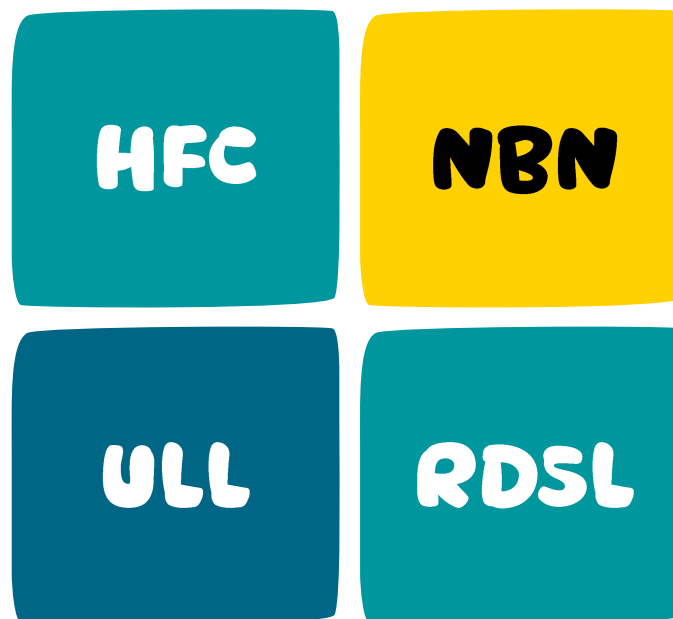


#### 2 - Capacity

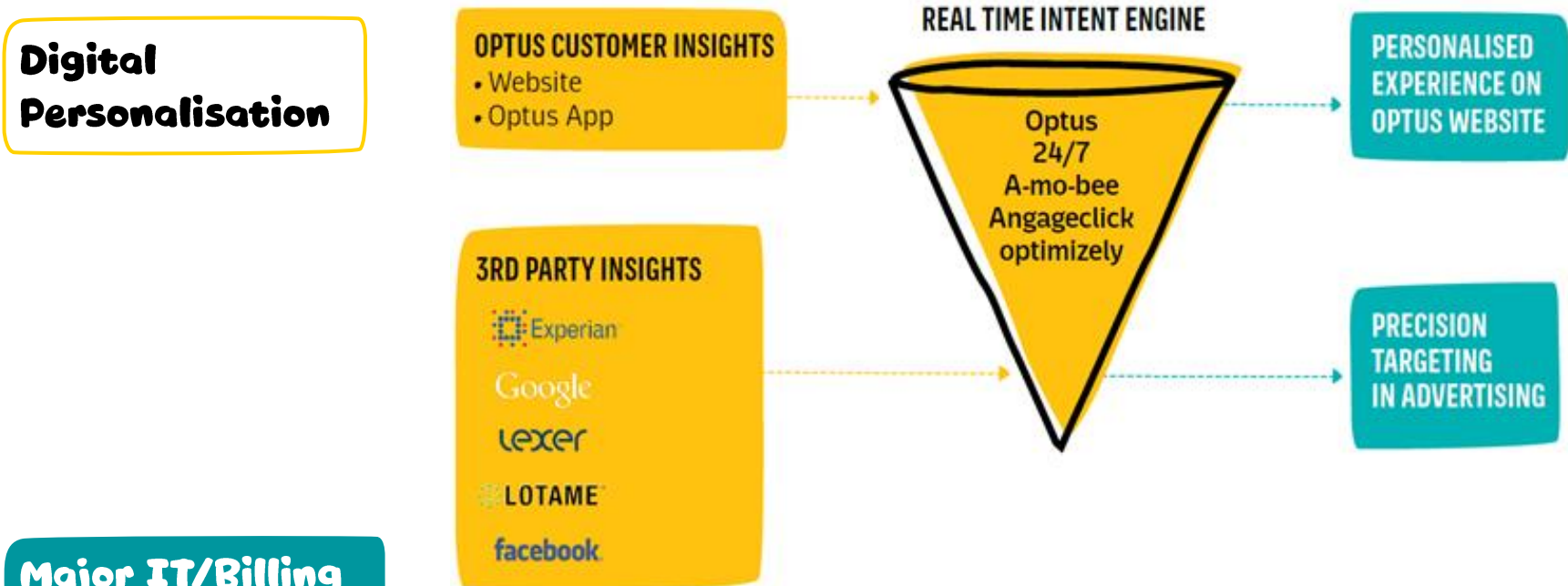
- Trialling small cell technology
- Upgrading capacity on public sites
- 1800MHz and 2300Mhz for 4G capacity
- 3G capacity upgrades

### IN FIXED

Investing with a clear objective by network type



## 2. DELIVERING BRILLIANT SERVICE THROUGH A DIGITAL FIRST STRATEGY AND ENHANCED PERSONALISATION



### Major IT/Billing transformation

#### Single platform

- ✓ Replaces 54 systems for Consumer Australia with one integrated platform
- ✓ Greater productivity with reduced info transfers between systems

#### Digital first

- ✓ Increased online capability for sales and service
- ✓ Social media integration
- ✓ Greater process automation

#### Simpler products

- ✓ Simplify rate plans
- ✓ True bundling of products and services on one bill

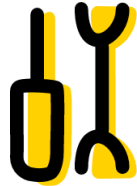
#### One view of the customer

- ✓ No matter what touch point

# 3. COST OPTIMISATION AND ENHANCING EFFICIENCY IN THE ORGANISATION



**DRIVE ONLINE**



- ✓ Increase self serve transactions
- ✓ Increase digital bill take-up
- ✓ Increase online sales mix for Mobile, Fixed and Prepaid recharge

**RETAIL STORES**



- ✓ Improved productivity with use of technology
- ✓ Implementation of labour management systems and tools

**CUSTOMER CARE**



- ✓ Reduction in average handling time
- ✓ Eliminate calls

**SAVINGS**



- ✓ Short term savings driven by rent, energy, vendor support and warehousing
- ✓ Long term reduction in cost per subscriber

# 4. DRIVING INNOVATION INTO OUR MARKET POSITIONING



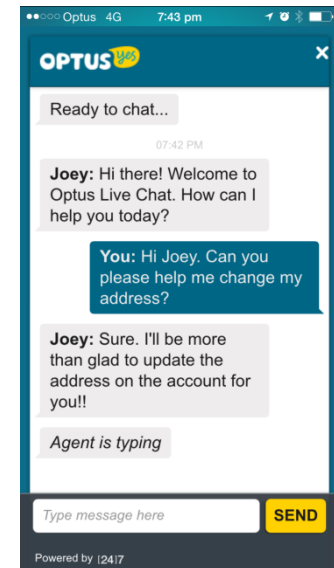
## ENHANCING MY OPTUS APP



## 2300MHZ WBB



## IVR TO CHAT



# 5. TRANSITIONING INTO LOCAL AREA EXECUTION, ESPECIALLY OUTSIDE CAPITAL CITIES



## ALIGNED APPROACH ACROSS OPTUS

- Assessing the potential at a local-market level
- Aligning with Mobile and Fixed network rollouts
- Understanding and leveraging key customer buying behaviour and socio-demographics in the local market

## LOCALISED MESSAGES AND EXECUTION

The image shows a screenshot of a Facebook post from Optus. At the top left is the Optus logo with the word 'yes' in a yellow circle. To its right is the text 'Optus Sponsored · 🌐'. In the top right corner is a 'Like Page' button. Below the header is the text 'FetchTV World Packs gives you entertainment from all corners of the globe.' The main content is a large graphic with a colorful, patterned background. The graphic features the text '19 HINDI CHANNELS WITH FETCH TV' in large, bold, yellow and white letters. At the bottom right of the graphic are the logos for 'OPTUS yes' and 'fetch TV'. Below the graphic is the text 'No more FOMO. Choose great world packs like Hindi & Pinoy after you've signed to our Entertainment Bundle, incl. Optus TV & Fetch.Broadband plan.' At the very bottom is the URL 'OPTUS.COM.AU/LANDINGPAGE'.

# Singtel Investor Day

Group Enterprise

Bill Chang

CEO, Group Enterprise





# Group Enterprise at a Glance

Group Enterprise  
FY15 Revenue<sup>1</sup>



**S\$6.2b**

**+2.1%**

AU Enterprise  
Improved  
Performance

EBITDA: **+1.7%**

Mobile : **+5%**

Customer  
Experience

SG

**+2**<sub>pp</sub>

AU

**+5**<sub>pp</sub>



**S\$2.4b**  
**+7%**  
GE  
ICT Revenue



ASOC

SURF@NCS



**Growth Engines  
Momentum**

1. Operating revenue excluding fibre rollout and maintenance

# Leadership in Singapore and Asia Pacific

Singapore Enterprise  
Operating Revenue

**s\$4.5b**  
**+4.5%**

**#1**

**Market Leadership in Singapore**

International Data in Asia Pacific  
Domestic Data  
DC & Hosting, Enterprise Cloud, Enterprise Mobility  
Business Services

**Investing in  
next-generation  
network technologies**

Software-Defined  
WAN Pilot with  
Customers

**Infrastructure  
Investments**

Submarine Cables  
• FASTER & SEA-ME-WE 5

HK Data Centre

Advanced Security  
Operations Centre

**Large infrastructure  
outsourcing for  
the Singapore  
government**



# Example of how Singtel enables end to end ICT solutions for a leading financial information provider

Provide integrated & secured managed connectivity services to >300 locations in APAC region

Data Centre hosting of applications and services

Integrated & regional enterprise mobility solutions and services

# Improved performance in Mobility and ICT & MS for AU Enterprise

FY15 Operating Revenue<sup>1</sup>

A\$1,543m

+0.4%

FY15 EBITDA<sup>2</sup>

A\$300m

+1.7%

Improvements in our  
Customer Experience

Net Promoter Score

+5.2 pp



ICT &  
Managed Services

A\$m

+4.3%

+11.4%

144

160

523

545

Q4 FY14

Q4 FY15

FY2014

FY2015

Mobile

A\$m

+5.3%

+7.4%

65

70

270

285

Q4 FY14

Q4 FY15

FY2014

FY2015

1. Excludes small and medium business segment which is reported under Australia Consumer

2. Comparatives have been restated for certain adjustments; included A\$10m of writeback of provisions in December 2013 quarter

# Optus Business provides integrated ICT services to support Westpac Banking Corporation's regional aspirations

## WESTPAC BANKS ON OPTUS FOR INTERNATIONAL GROWTH, MOBILE AND CONTACT CENTRE TRANSFORMATION

9 May 2014, 2:09 pm

Optus has announced today a new five year deal with Westpac to provide domestic mobile network and managed services and, for the first time, delivering Westpac's international services and contact centre transformation



**5** year contract to provide **managed communications infrastructure & international data services** to serve offices in Asia Pacific, New Zealand, the U.K. and the U.S.

**Provide service management to >13,000 mobile devices** across Westpac's fleet in Australia

**Transform Westpac's contact centre operation** to enable it to respond to changing customer expectations

# Optus Business provides managed WiFi and analytics solutions to deliver differentiated digital experience for Scentre Group's customers

## SCENTRE GROUP AND OPTUS PARTNER TO ROLLOUT AUSTRALIA'S LARGEST SHOPPING CENTRE WIFI NETWORK

26 February 2015, 12:16 pm

Scentre Group and Optus today announced a partnership that will offer Westfield shoppers a new level of digital connectivity, with a national rollout of a state-of-the-art WiFi service across 21 Westfield shopping centres



- 5** year partnership to provide
- **WiFi solution** with advanced **location analytics**
  - enablement of **personalised content** for subscribers
- in 21 Westfield Shopping Centres

- National rollout follows successful pilots at two Westfield Shopping Centres
- Attracted **~3,000 sessions per day** at each centre
  - **Lengthened average stay in-centre by 12%**

# Turbo-charging our 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

# Accelerating our cyber security capabilities

## EXPERTISE

Security professionals



>1,000 Security Professionals

## TECHNOLOGY

Global partner, technology & start up ecosystem



**ASOC**  
Security Incident and  
Event Monitoring

5 Global  
SOCs

9 Engineering  
Centres



**CYBER  
COMPETENCY CENTRE**  
R&D, Incubation and Cyber Range



# Growth in Enterprise Cloud

More than 70  
agencies onboard  
Singapore  
G-Cloud



Optus Business  
selected to be part of  
**Australian Federal  
Government's  
Cloud Panel**



**Strategic Partnerships**



**Acquired Ensysst**  
to bolster our cloud  
professional & managed  
services capabilities

# Momentum in Smart and Safe City

## SURF@ NCS

– living lab to test smart city innovations



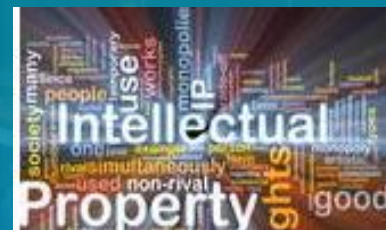
Develop vibrant **technology eco-system** to co-create smart city solutions



Sino-Singapore Guangzhou Knowledge City

Xiamen Municipal Bureau of Information Technology

**Strategic partnerships** in the region to develop smart cities



Developing and hardening **Intellectual Property** to scale

# Innovative Smart & Safe City solutions developed by NCS

## Intelligent SURF Centre (ISC) Innovations



## Little India Safe City Project



## Transportation: Digital Traffic Red Light Solution



## Healthcare: Automated Pharmacy Dispensing



... and many more

# Our strengths in Asia Pacific are exemplified by our industry wins



**Computerworld  
Readers' Choice Awards 2014**  
Unified Communications Software Suites  
Data Centre and Hosting  
Managed Connectivity and Managed Services



**Asia Communications Award 2014**  
Project of the Year - G-Cloud



**SingTao Daily IT Square Editors' Choices  
HK Awards 2014**  
Best Managed ICT Service Provider



**ComputerWorld HK Awards 2014**  
IT Outsourcing and Managed Services -  
SingTel



**Australian Business Awards 2014**  
Service Excellence Award - Optus  
Brand Excellence Award - Optus

READERS' CHOICE  
PRODUCT EXCELLENCE  
AWARDS 2014



**NetworkWorld Asia Readers' Choice  
Product Excellence Awards 2014**  
Managed Infrastructure Services  
*Managed Security Services*



**NetworkWorld Asia Information  
Management Awards 2014**  
Best in Disaster Recovery & Business  
Continuity - SingTel  
*Best in Security as a Service - SingTel*



*Best Partner Award*



*Top RSA SecureWorld Partner*



**Land Transport Excellence Awards 2014**  
Best Collaboration Partner Award for  
MyTransport.SG



**SiTF Awards 2014**  
SGH Automated Pharmacy Dispensing  
System (APDS)



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