

View 'General Announcement' Announcement - SG140603OTHRILB

Issuer & Securities

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SINGAPORE TELECOMMUNICATIONS LIMITED

Securities

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Announcement Details

Announcement Sub Title

SingTel Investor Day 2014

Announcement Reference

SG140603OTHRILB

Submitted By (Co./ Ind. Name)

Lim Li Ching (Ms)

Designation

Assistant Company Secretary

Contact Details

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Effective Date and Time of the event
Price Sensitivity

No

Description (Please provide a detailed description of the event in the box below)

Please see the attached presentation slides on SingTel Investor Day 2014:

- Group Enterprise
- Group Digital Life
- Group Consumer
- Singapore Consumer
- Australia Consumer

Attachments

For Public Dissemination

SingTelInvestorDay2014-GroupEnterprise.pdf
 SingTelInvestorDay2014-GroupDigitalLife.pdf
 SingTelInvestorDay2014-GroupConsumer.pdf
 SingTelInvestorDay2014-SingaporeConsumer.pdf
 SingTelInvestorDay2014-AustraliaConsumer.pdf

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Amazing things
happen when we
dream big.

Group Enterprise
SingTel Investor Day

3 June 2014

Bill Chang
CEO, Group Enterprise

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Overview of Group Enterprise (GE)

2.

SG Enterprise: SG Telco

3.

SG Enterprise: NCS

4.

AU Enterprise

5.

Emerging Businesses

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Emerging Businesses

SingTel Group Enterprise businesses consists of

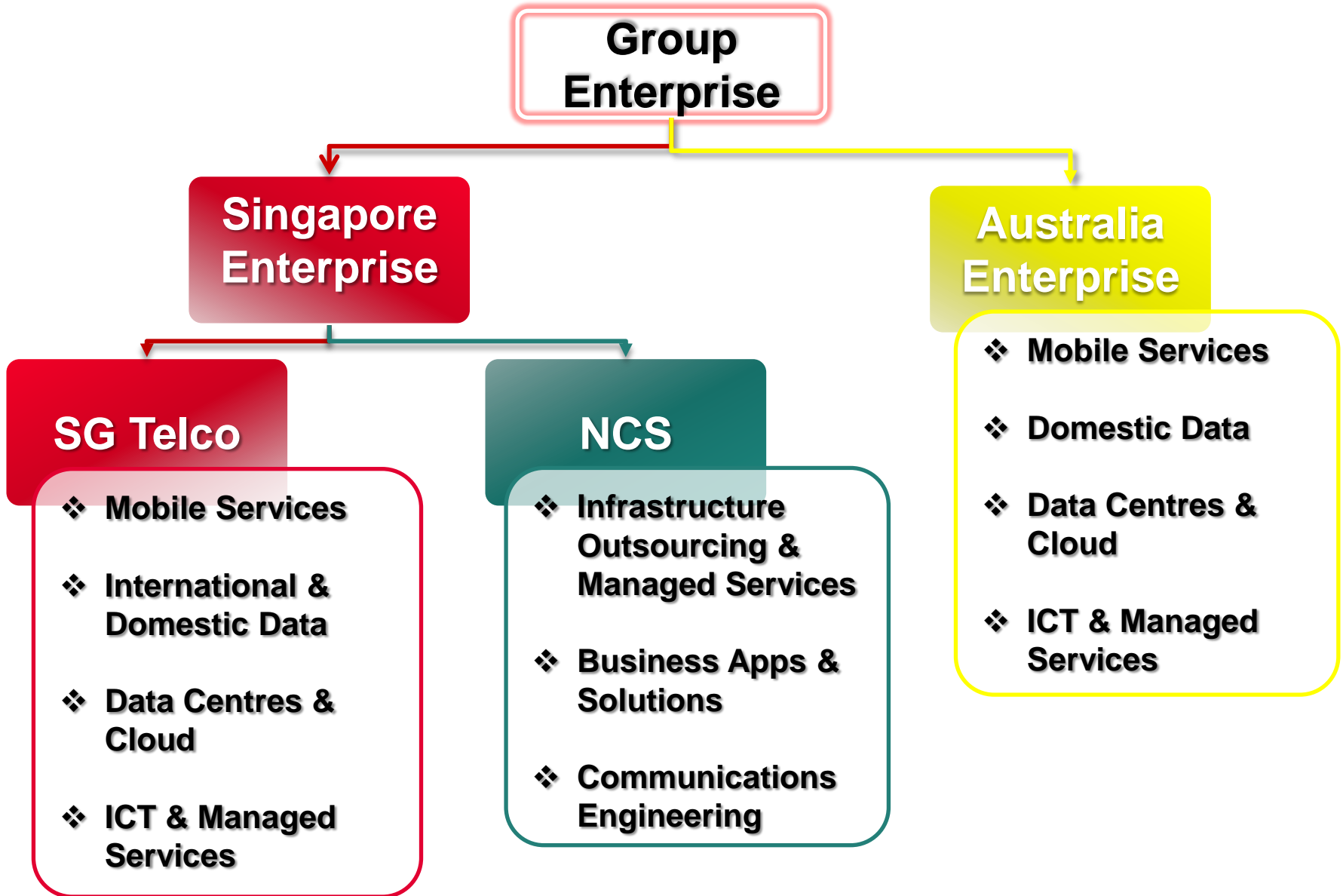


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Emerging Businesses

Market leadership in all International Data products in Asia Pacific



International IPVPN



Int'l Leased Circuit*



E-VPN



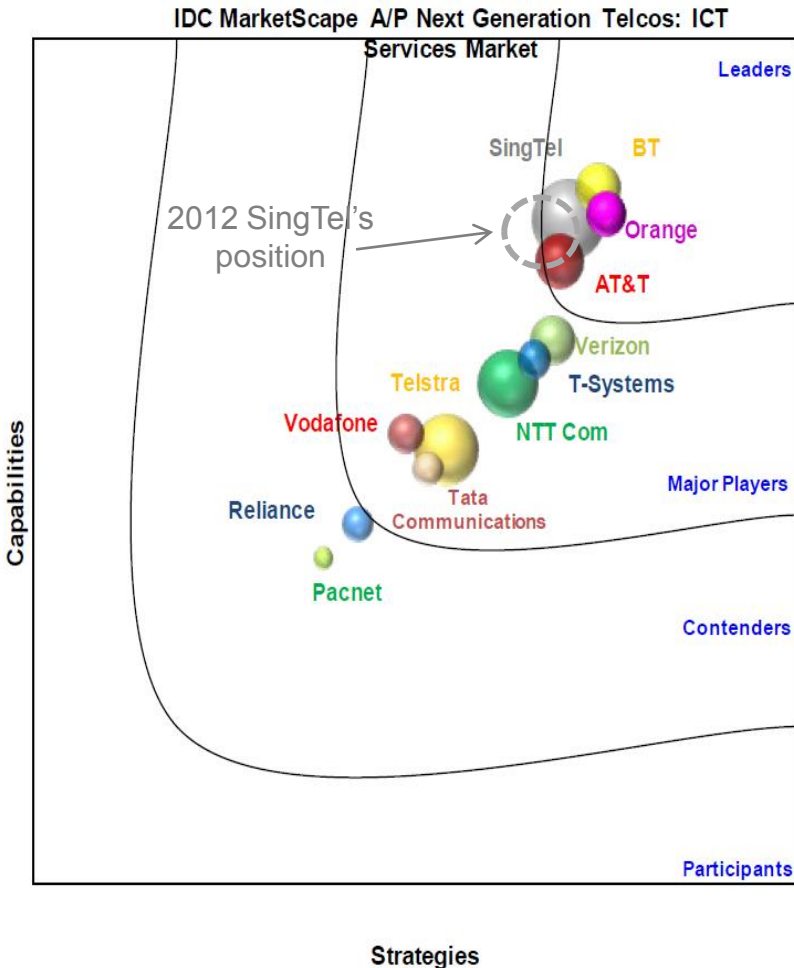
E-Line

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

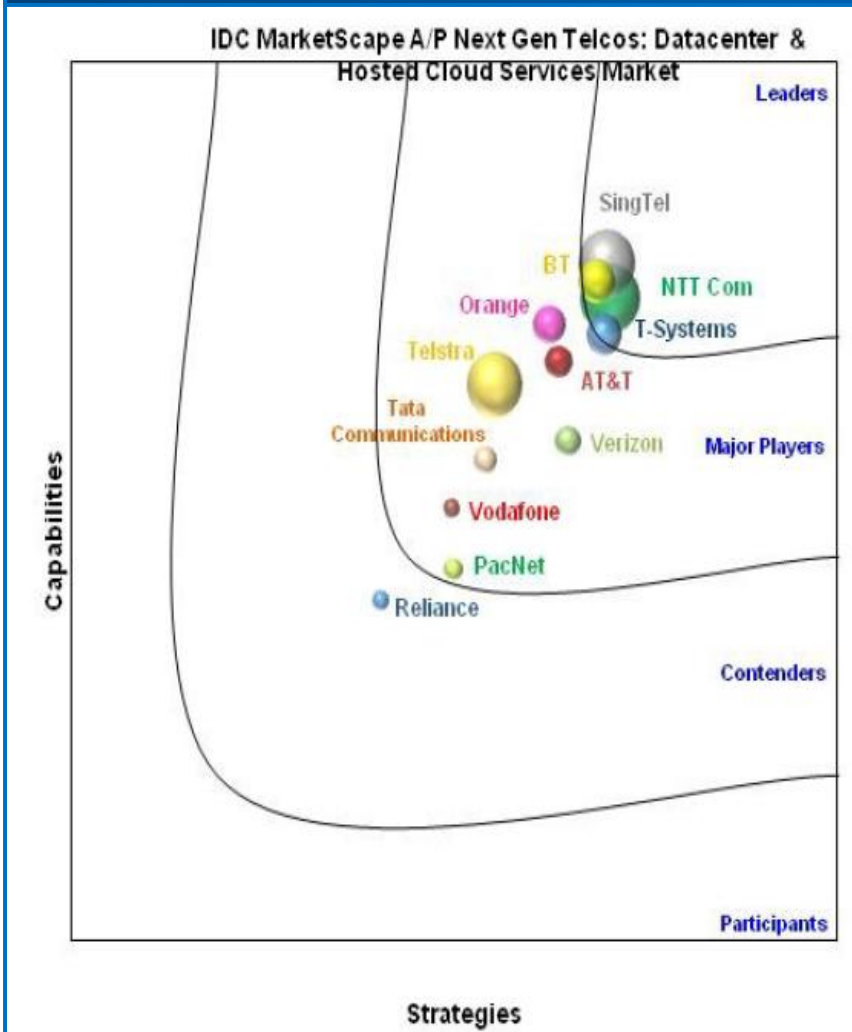


SingTel has improved its positioning in the leaders quadrant, maintaining its position as one of the leaders in the AP telco's ICT services space in this IDC MarketScape..... As a result of its deep coverage and service consistency within China and India, **the provider has been winning connectivity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

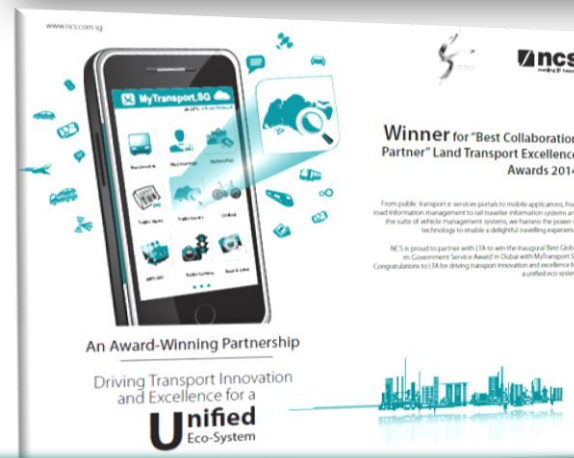


Playing a key role in shaping the transport landscape in SG with development of innovative systems and e-portals

MyTransport.SG



- **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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Emerging Businesses

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





**Amazing things
happen when we
dream big.**

Group Digital L!fe

SingTel Investor Day

3 June 2014

Allen Lew

CEO Group Digital L!fe

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Agenda – boldly creating value by focusing on 3 opportunities in mobile internet

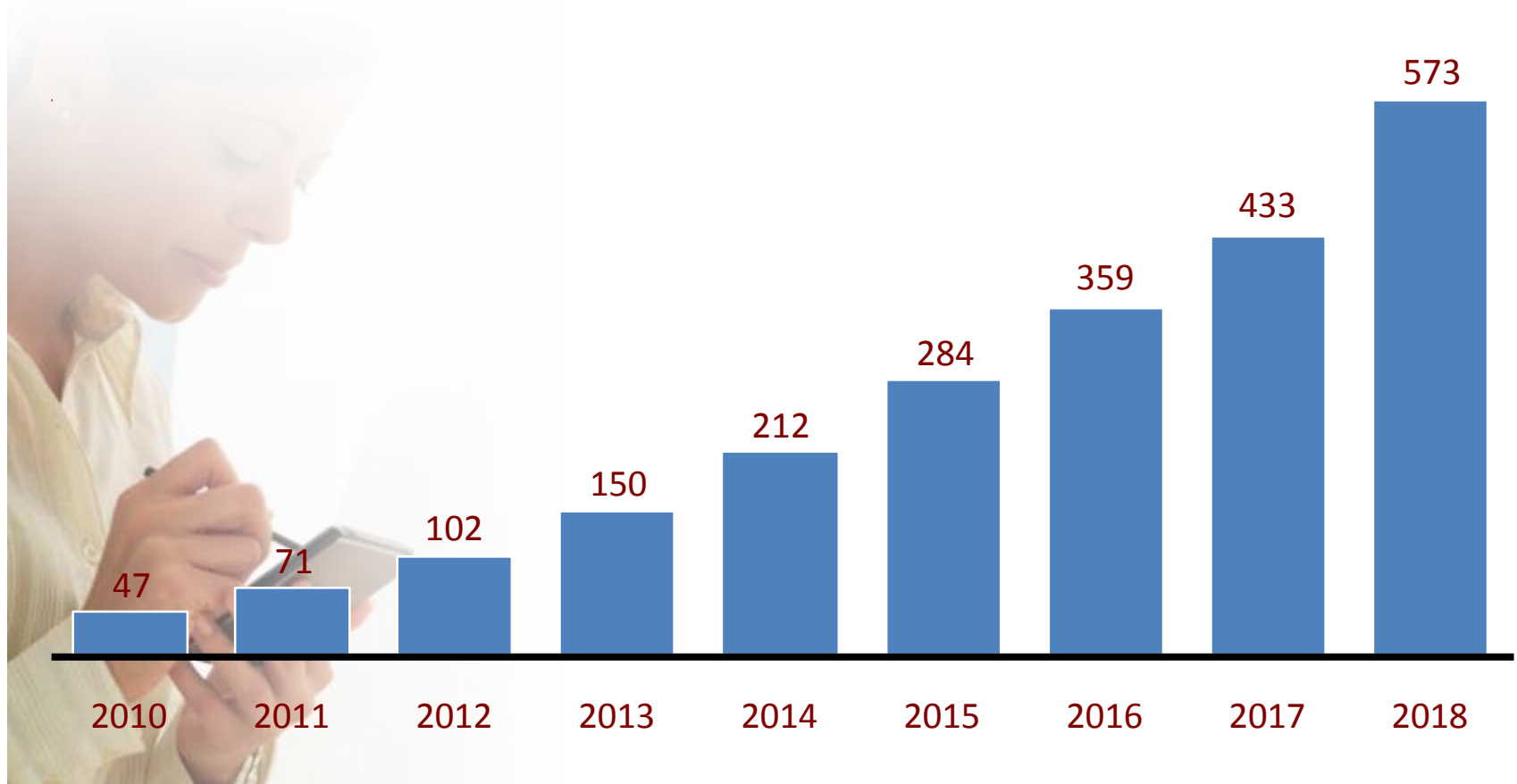


1 Access to mobile continues to advance at a rapid pace

Smartphones in SingTel footprint¹

Mn phones

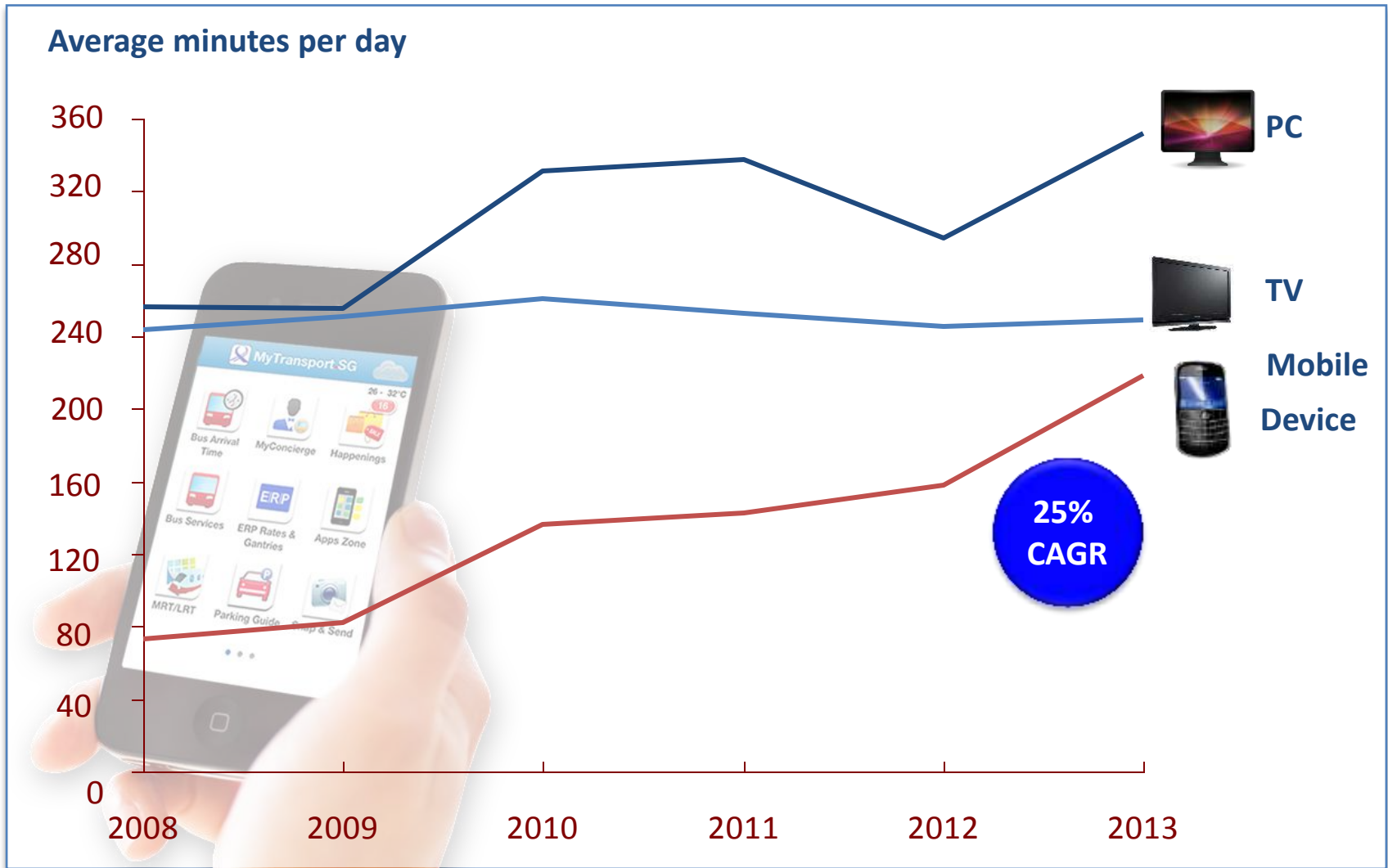
Overall SingTel



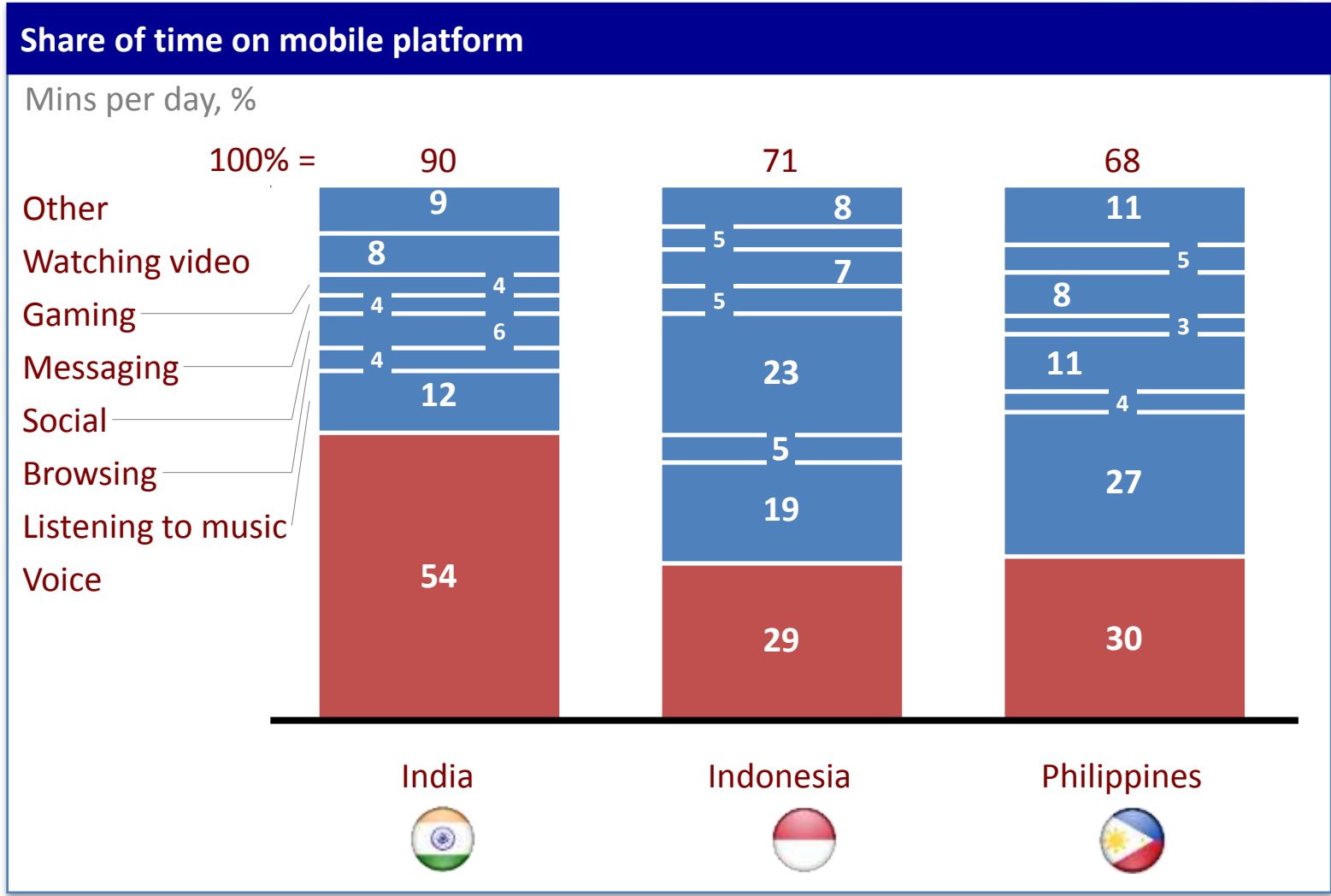
¹ Includes Indonesia, India, Philippines, Singapore, Australia and Thailand

SOURCE: Strategy Analytics, SingTel

1 Mobile usage is the fastest growing usage type

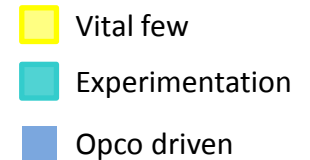


1 Consumers are spending a significant portion of their time on mobile, particularly on non-voice activities

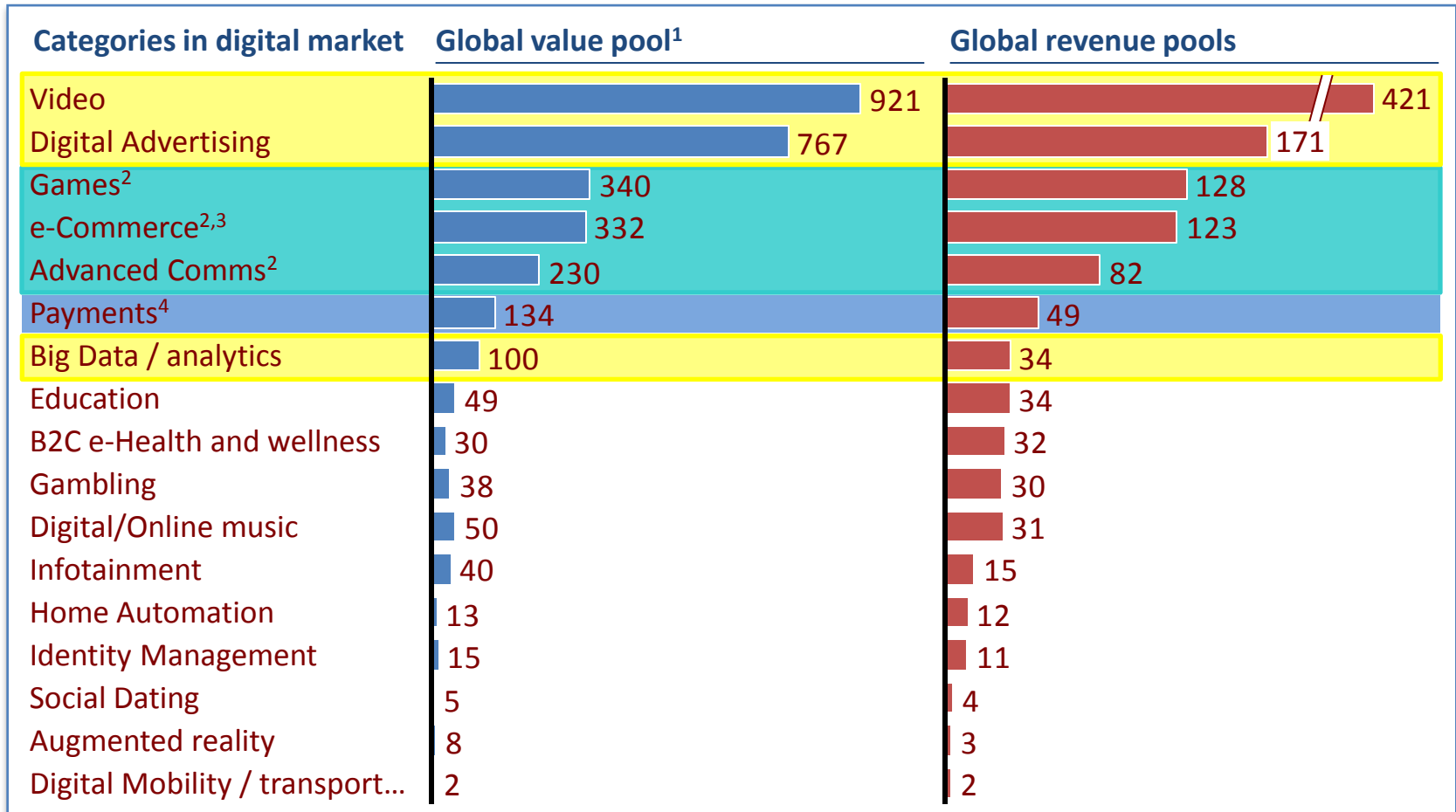


SOURCE: McKinsey iConsumer

2 We want to target the most relevant value & revenue pools



USD billions, 2017



1 Value pool is calculated via EV/Rev multiples benchmarked using companies that operate primarily in that segment

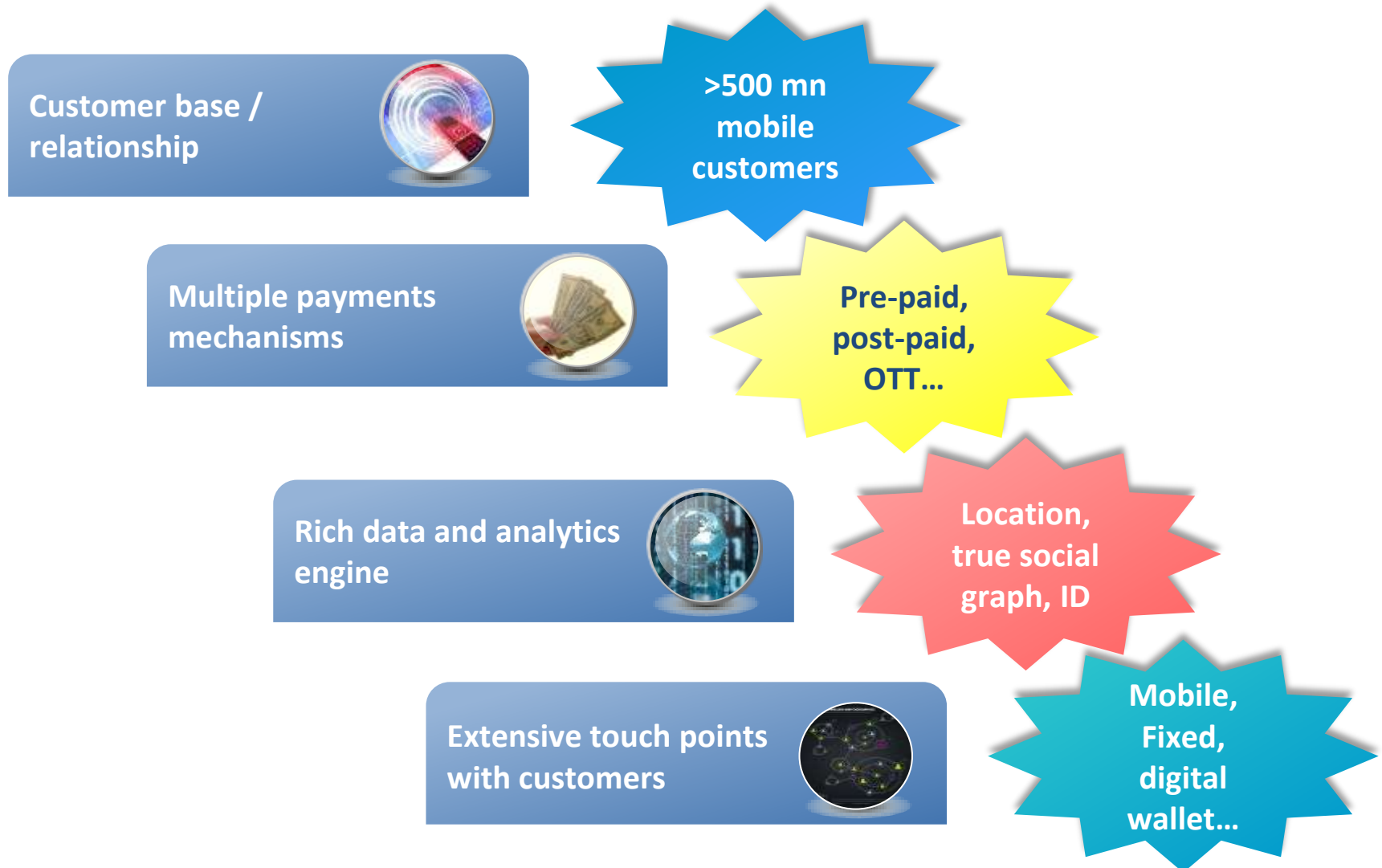
2 Insufficient insights / unproven business models

3 Not included 1.5 trillion of additional ecommerce of physical goods

4 Opcos already in this space

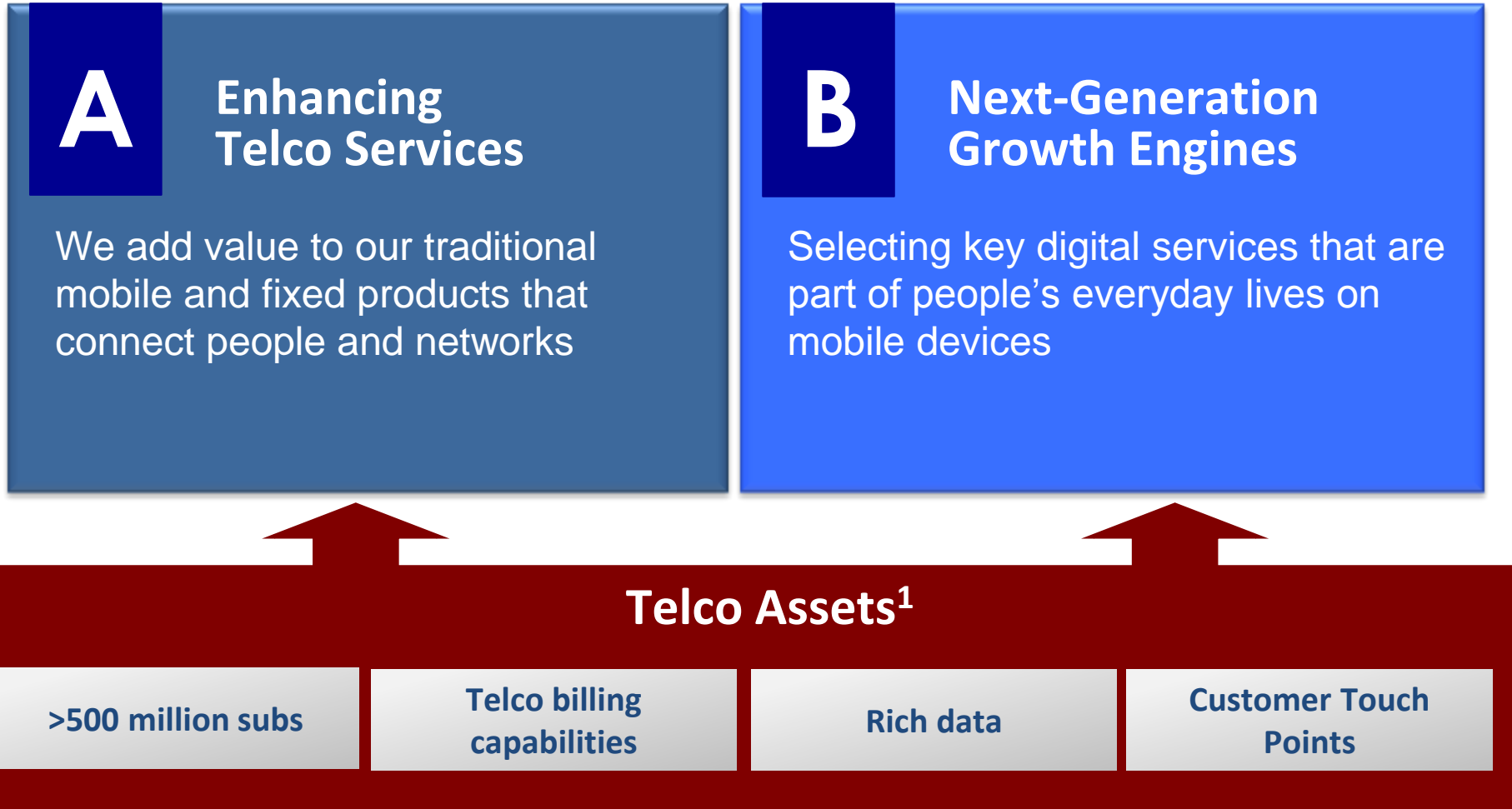
SOURCE: PWC, Goldman Sachs, Pyramid, Gartner, IDC, McKinsey Global Banking pools database, Capital IQ, Press search

2 We are playing in the digital ecosystems that can best benefit from our assets



Note: Other relevant assets such as our network or our reach with our point of sales can also help us win

2 GDL can create value for SingTel in two different ways:



¹ Other assets such as our distribution capabilities or customer care can also be leveraged

2 Innovation is a critical element of our business which we are driving through two initiatives

SingTel
innov8

External equity linked partnerships



42 investments in
8 countries

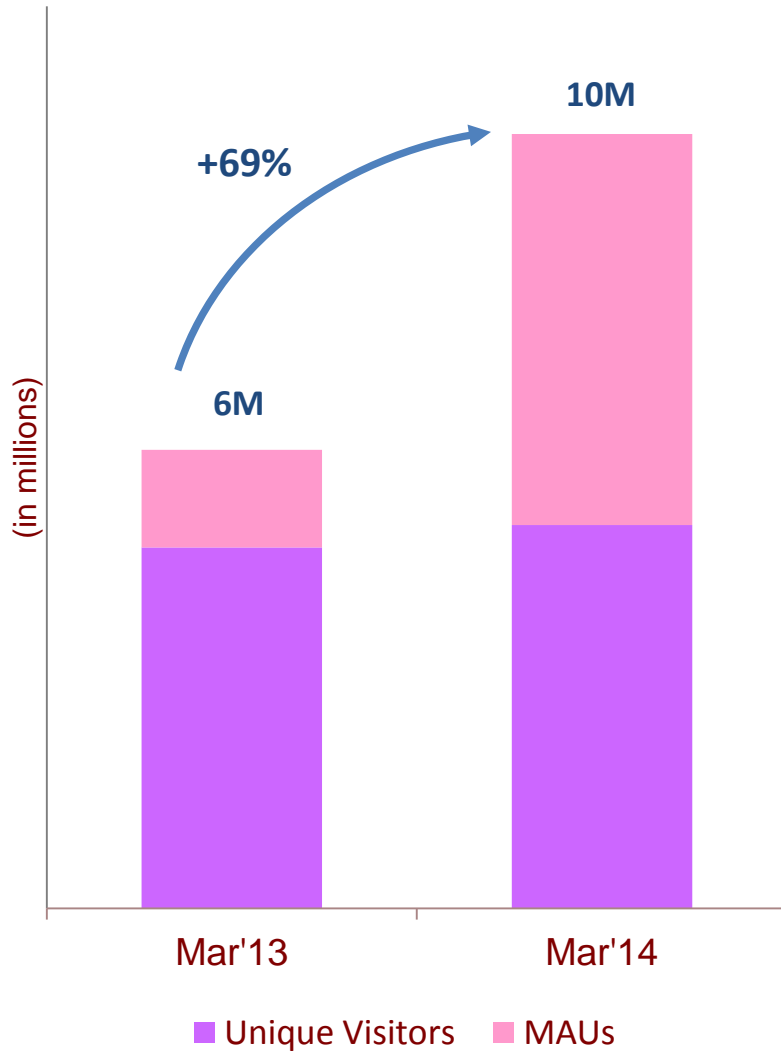
LifeLabs

Sourcing disruptive technologies & experimenting



4 innovation centers

3 Engaging customers in our footprint and worldwide



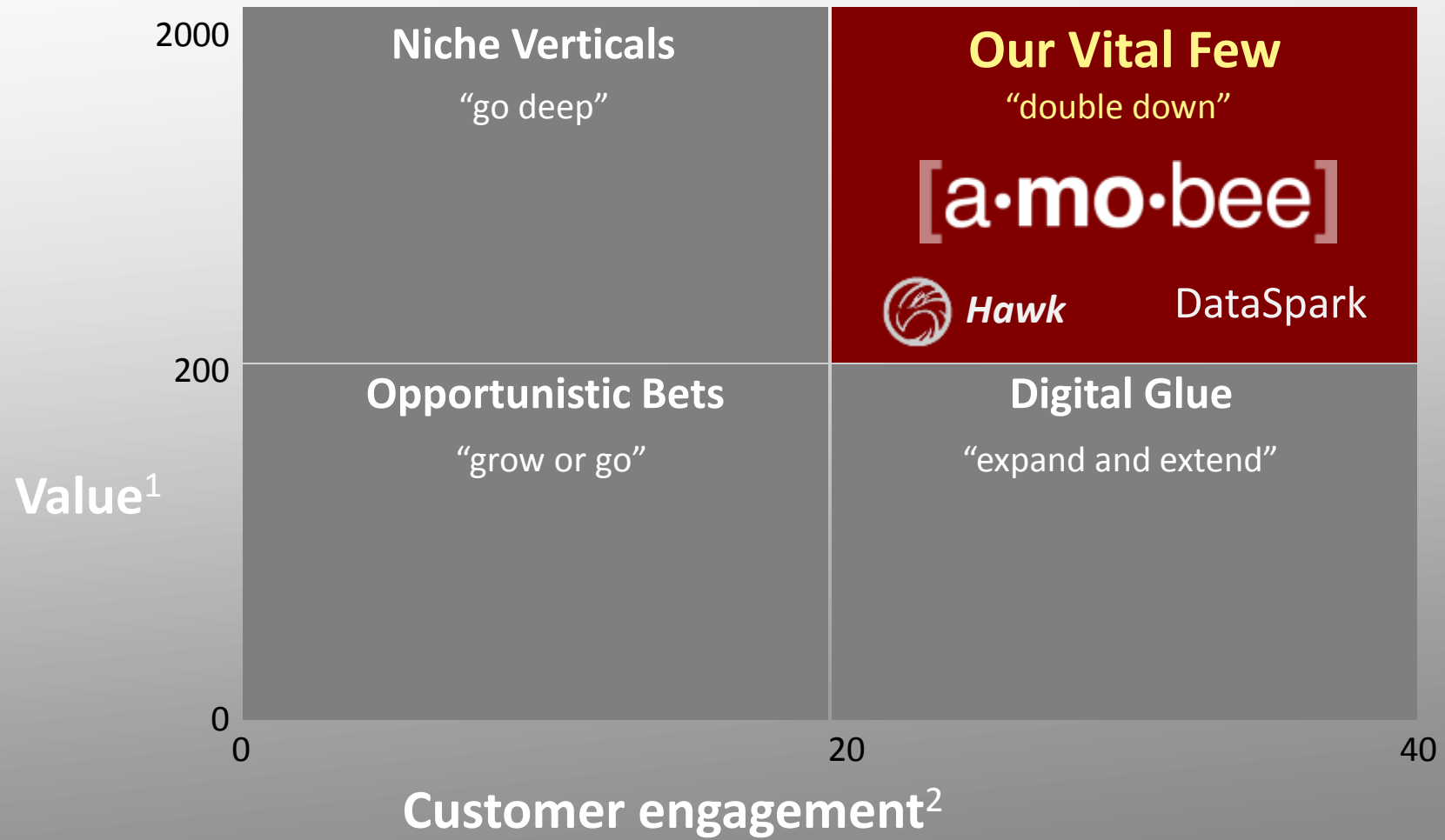
MAU – Monthly Active Users

SOURCE: SingTel

Key strategic digital services (Owned)

Key strategic investments (Investment)

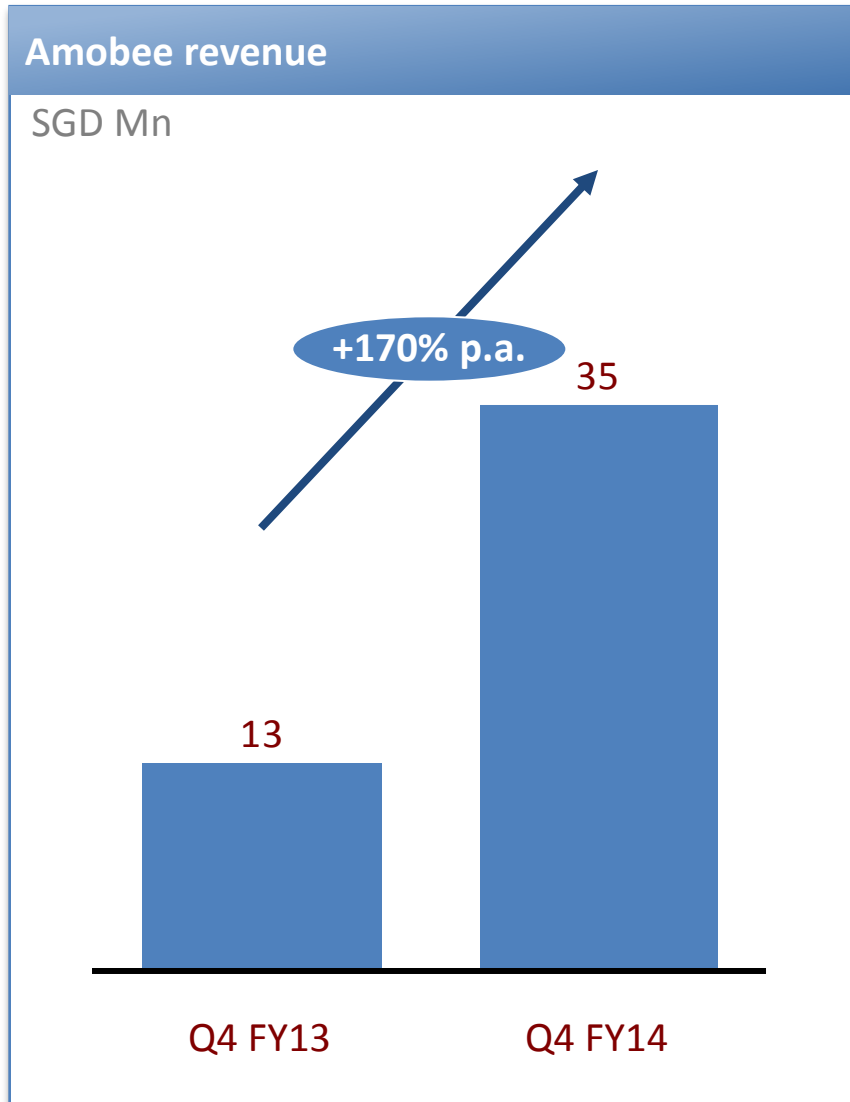
We are addressing the opportunities with a portfolio approach



1 Million SGD by 2017

2 Average time spent per sub per day (indirect effect equivalencies for B2B2C)

3 Amobee has been outgrowing the mobile advertising market



[a·mo·bee]

- Q4 FY14: strong revenue growth +170%

- Outperformed global mobile advertising growth of 65 to 85% in FY2014
- Strong growth in Asia Pacific
 - Contributes more than 40% of FY2014 revenue (FY2013: ~7%)
 - Key markets : Australia, Singapore, China
- Key customers



3 Amobee continues to differentiate itself through new capabilities

Pulse 3D

- Cutting edge technology
- Successful campaigns in automobile, consumer electronics and travel industry



Advanced analytics and real time bidding (RTB)

- Margin expansion through increased spend on programmatic ad placements
- Allows multi-tier contextual & behavioral targeting
 - 580m mobile users profiles
 - Increasing at 2-3m / day
- Expand from US to EMEA and APAC



3 DIGITAL ADVERTISING: SingTel's aspiration is to be a global digital advertising managed services player

Digital advertising



Outlook

SGD30bn global market opportunity in FY2018



Managed services platform serving **multiple ad units**



Integrated solution with a strong data and technology back end



One global sales force

3 Our investment in Vuclip has helped us achieve positive results with several of our associate telcos

Airtel



Telkomsel



Service

Rs 1 video store
Launched April 2013

Rp. 500 video store
Launched December 2013

Paying subs

~800K

~100K

**Value to Telco
through driving
data usage**

50% of all new data users since launch attributable to video service

25% of video store users are first time data users

Overall mobile customer **ARPU** boost of **INR15**

Video user **ARPU** boost of **Rp 10,000**

3 Premium mobile-led video service: SingTel's aspiration is to be the leading mobile video service in the SingTel footprint

Premium mobile-led video



Outlook

>SGD1.2bn market opportunity in our footprint¹ in FY2018



Offer **local and international** content



Win first in mobile, then provide ubiquitous delivery



Seamless **integration with SingTel associates** using their billing systems and bundling with 3G data services



Disrupt market through **low service pricing (<US\$3)**

¹ SingTel footprint includes India, Indonesia, Thailand and Philippines

SOURCE: Team analysis

3 We have extensive experience in analytics from our internal use cases

Customer Acquisition & Retention

Broadband Sign-ups

Better bundle discounts/promos

20%

Slow internet/downloading speed

19%

Have existing services with SingTel

15%

Want to subscribe to mio TV

14%

Recommended by SingTel/D2D promo

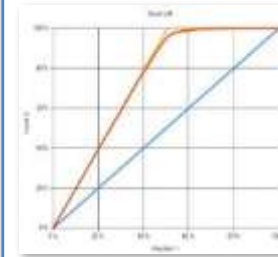
13%

To enjoy multi-line discount

12%

Keep close to the **pulse of the consumer** every week

SingTel Churn Prediction Model



Analyzes **behavioral attributes** to discover churn predictors

Network improvement



Optimize **network configuration** and operational cost through traffic analytics

Monetising Roaming Opportunities

14 Mn

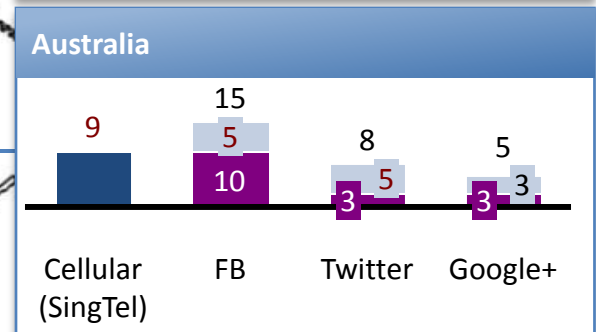
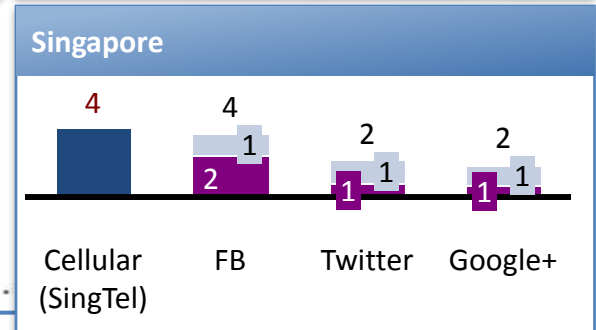
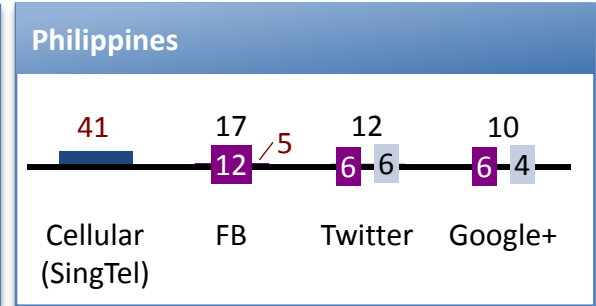
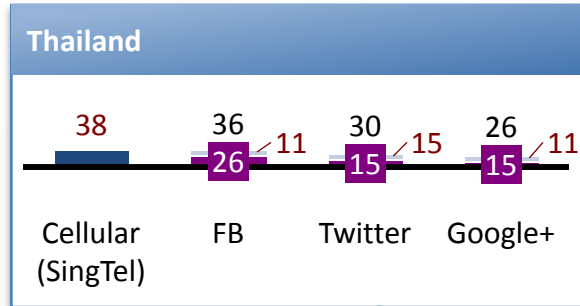
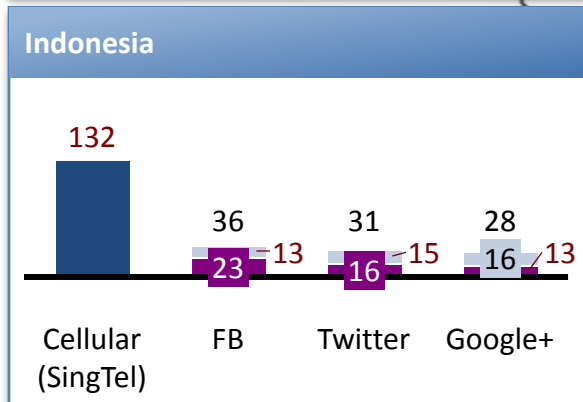
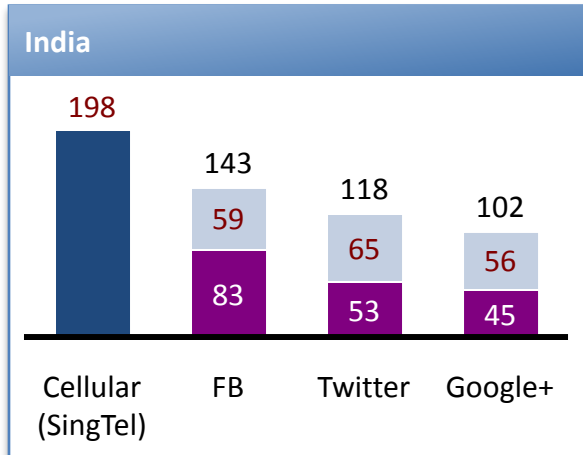
Outbound Travels Per Year

“We can predict customers who are going to travel **even before they tell us**”

3 Although digital usage is becoming prevalent, cellular location data still dominates in coverage and continuity

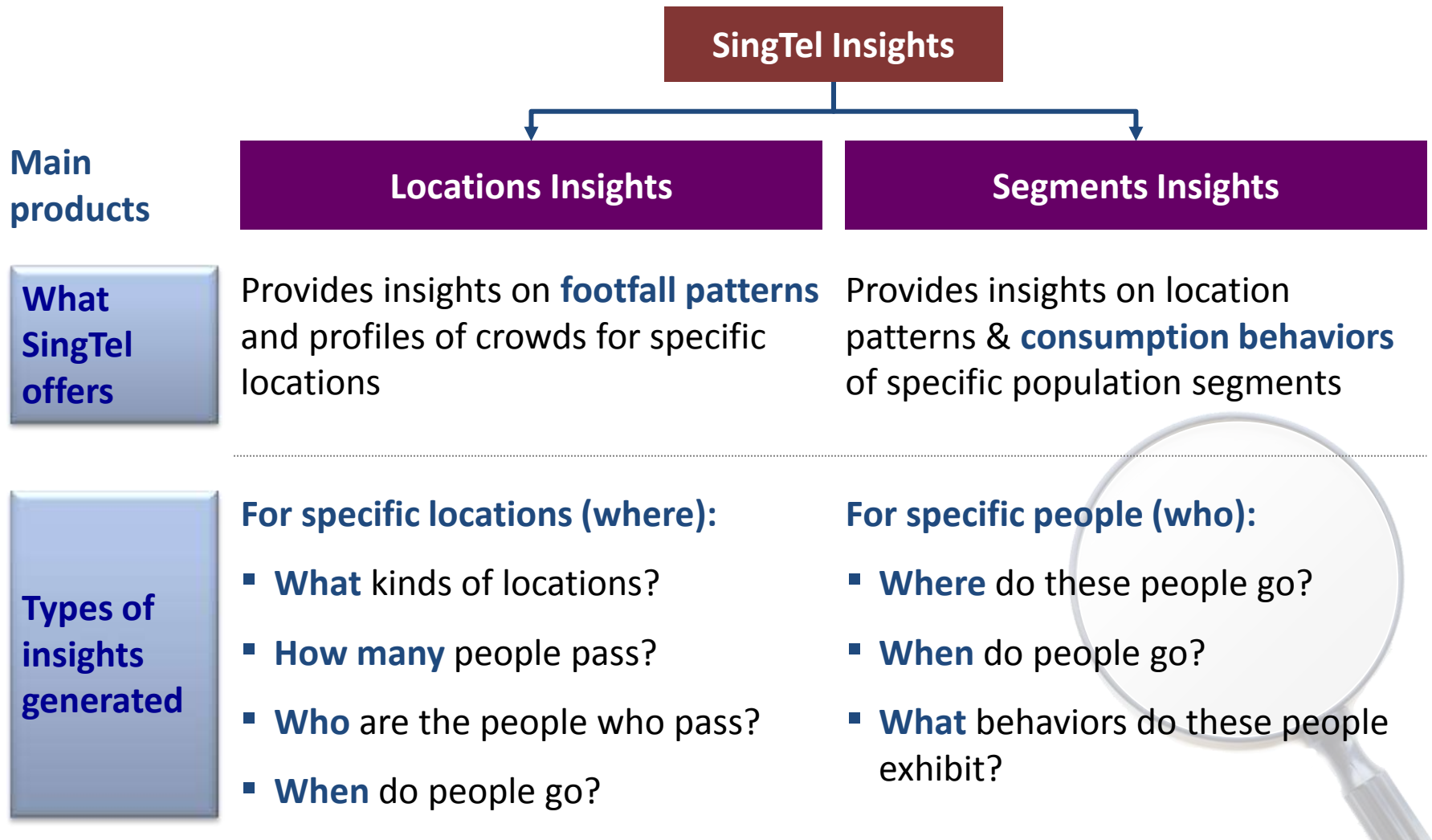
Million subs

■ Non-active account owners
■ MAU



Telcos are still in strongest position to conduct precise identification of subscriber location at scale

3 We are launching 2 main Geo-analytics products



3 DataSpark: SingTel's aspiration is to become the regional leader in innovative use of Big Data for marketing applications

DataSpark



Outlook

SGD1.2bn market opportunity in FY2018



Use telco **"always on"** data to track consumer behavior over time



Build on position with consumer as **trusted custodian** of data



Work with carriers to launch in-country businesses

4 Our Execution Model – balancing risks and rewards

Financial discipline

- Track record of strong financially disciplined approach to acquisitions
- Focus on monetization, financial margins, ability to scale, competitive advantage through telco assets
 - Amobee – faster growth than market. Guiding for lower losses in this FY
 - Innov8 – very strong portfolio with some early successful exits (e.g., Viki, Maker, Ruckus Wireless)

Aligned with industry practices

- SingTel allocated up to SGD 2bn for investment by FY2016; in line with similar moves from other leading telcos
- Some of them are making major moves in adjacent markets (e.g., AT&T recent offer to acquire Direct TV, Verizon recent acquisitions of Uplynk and Edgecast)



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Group Consumer

SingTel Investor Day

3 June 2014

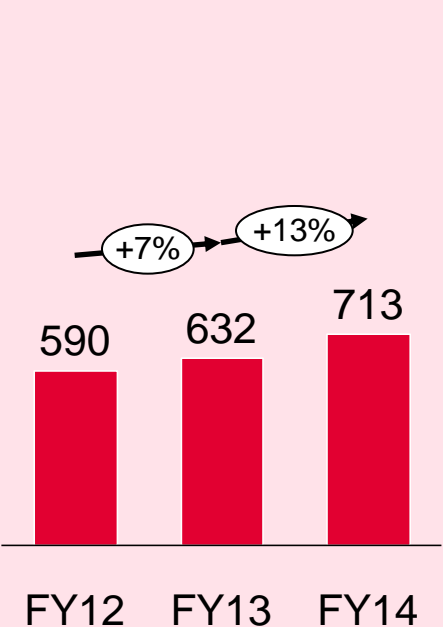
Paul O'Sullivan

CEO, Group Consumer

Our core businesses have generated strong profitability over the last 3 years

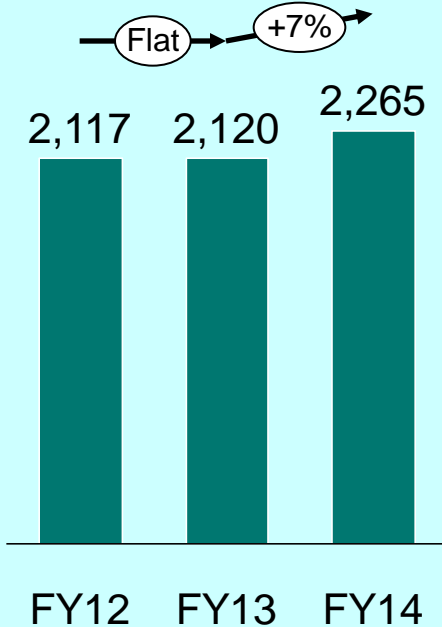
Singapore Consumer

EBITDA
S\$ M



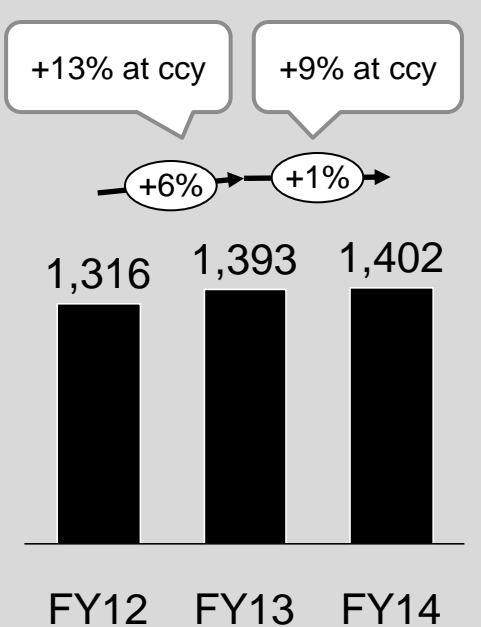
Australia Consumer

EBITDA
A\$ M



Regional Mobile Associates

Share of Assoc. NPAT
S\$ M



However, changes in our external environment demand we urgently transform to future-proof our business – OTTs are redefining and improving traditional telco tasks

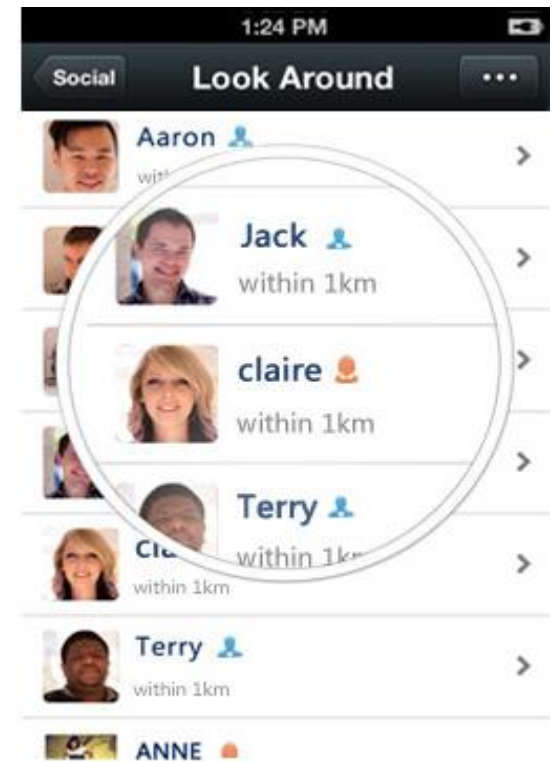
Messaging



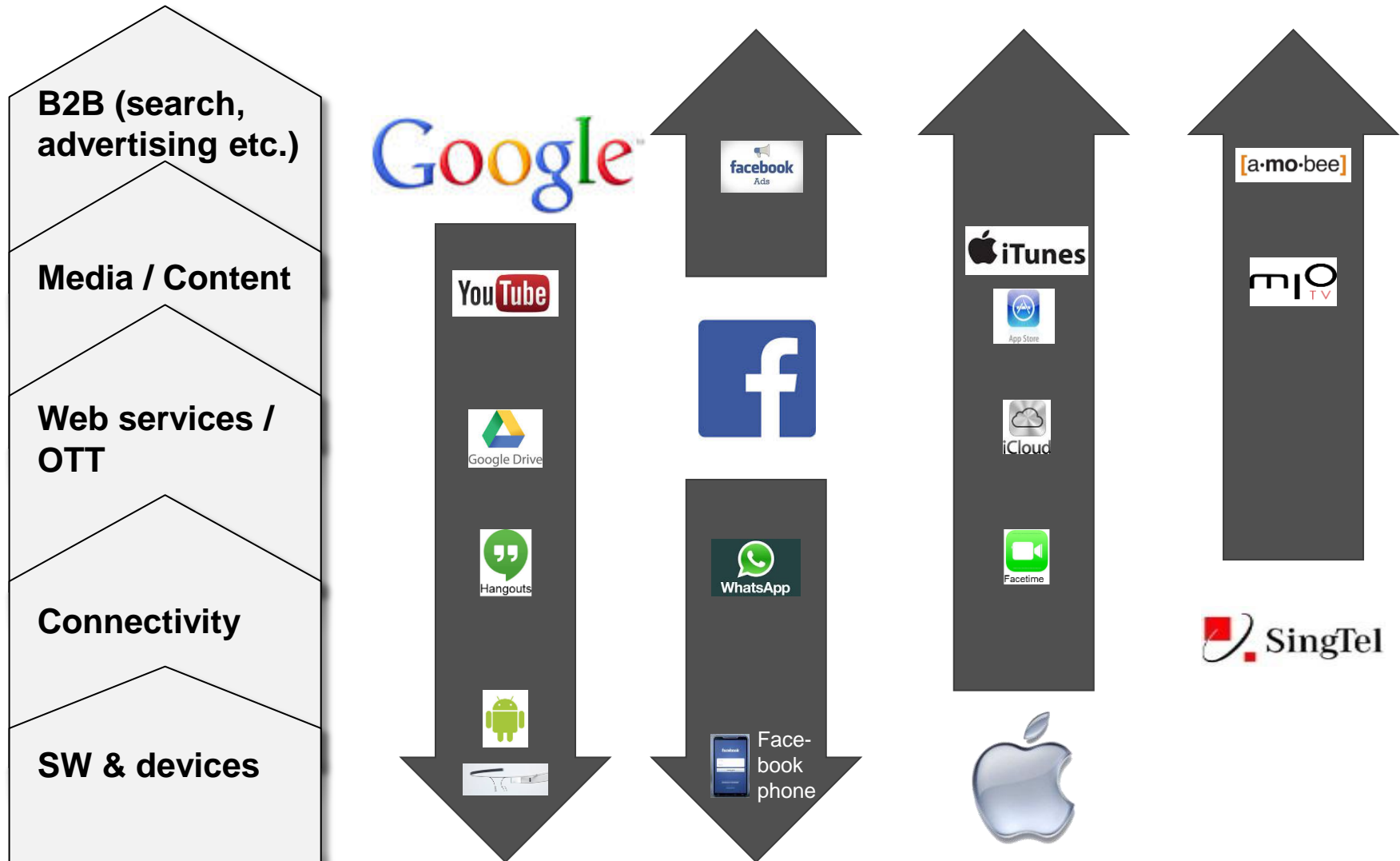
Collaboration



Social Networking

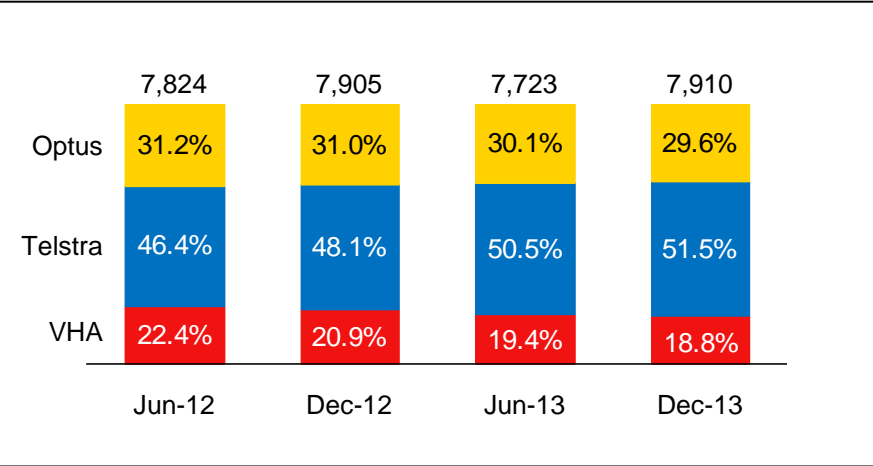


A handful of tech giants are emerging, each expanding their reach across the value chain and building up their respective ecosystems

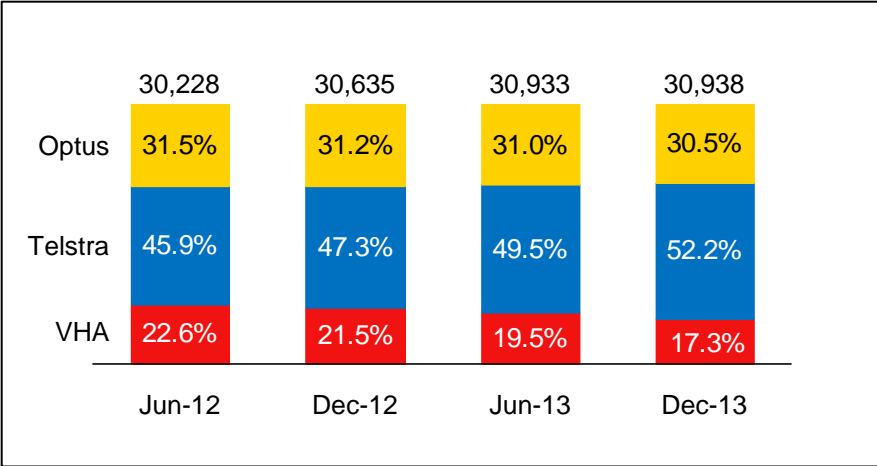


In Australia, we have the added challenge of needing to regain trading momentum and market share in mobile and fixed

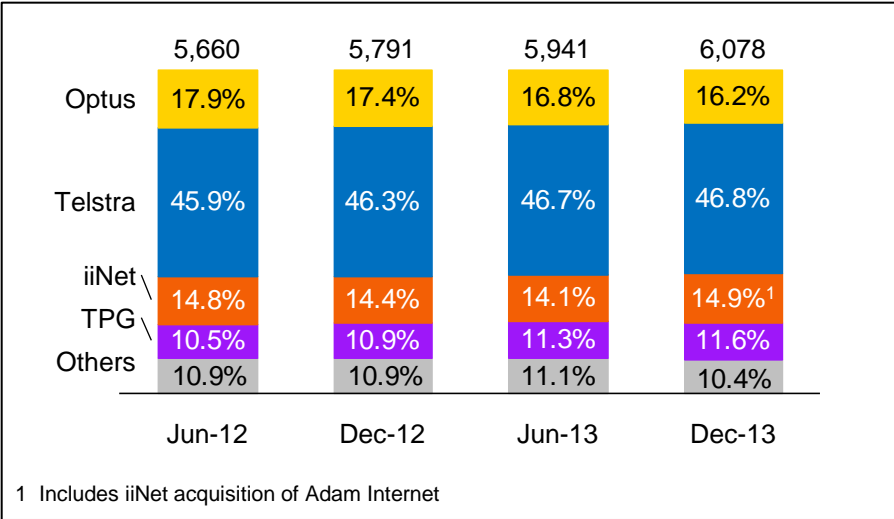
Mobile market service revenue
A\$ M, %



Mobile subscribers
'000



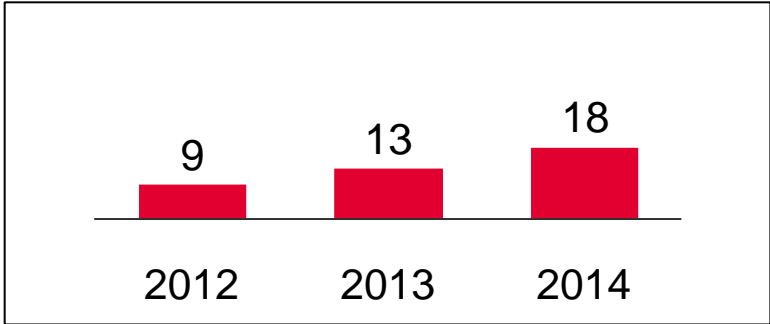
Fixed BB subscribers excluding WBB
'000



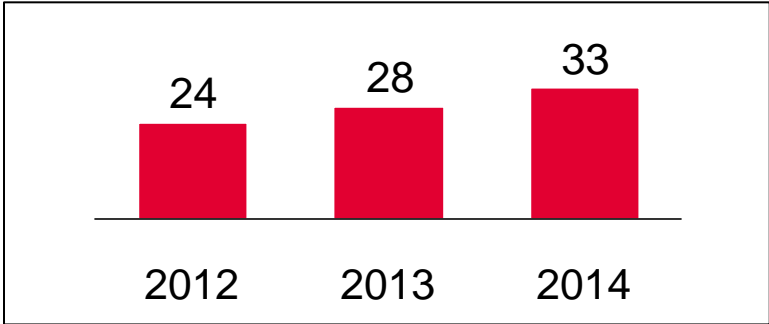
The same shifts affecting our SG & AU markets are similarly hitting our Associate markets

Aggregated across Associate markets

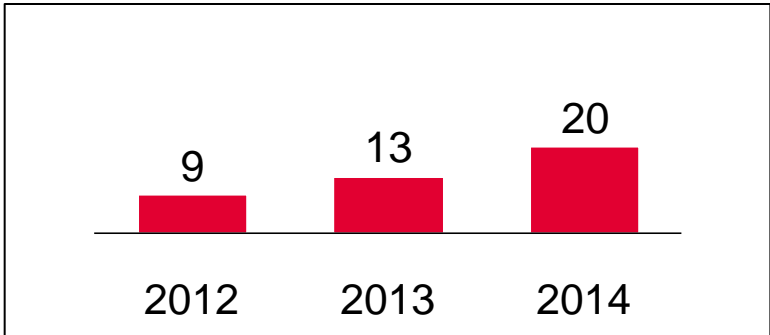
Data as % of revenue



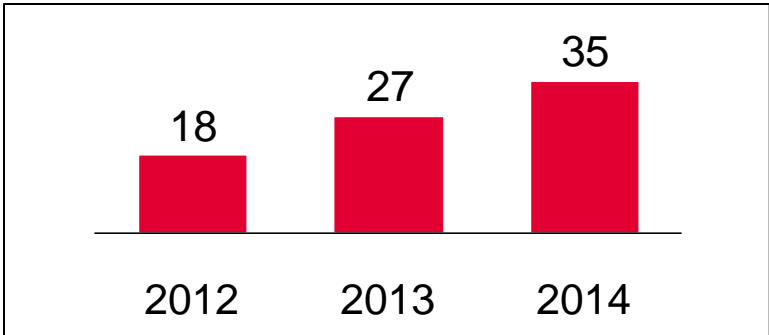
% data users



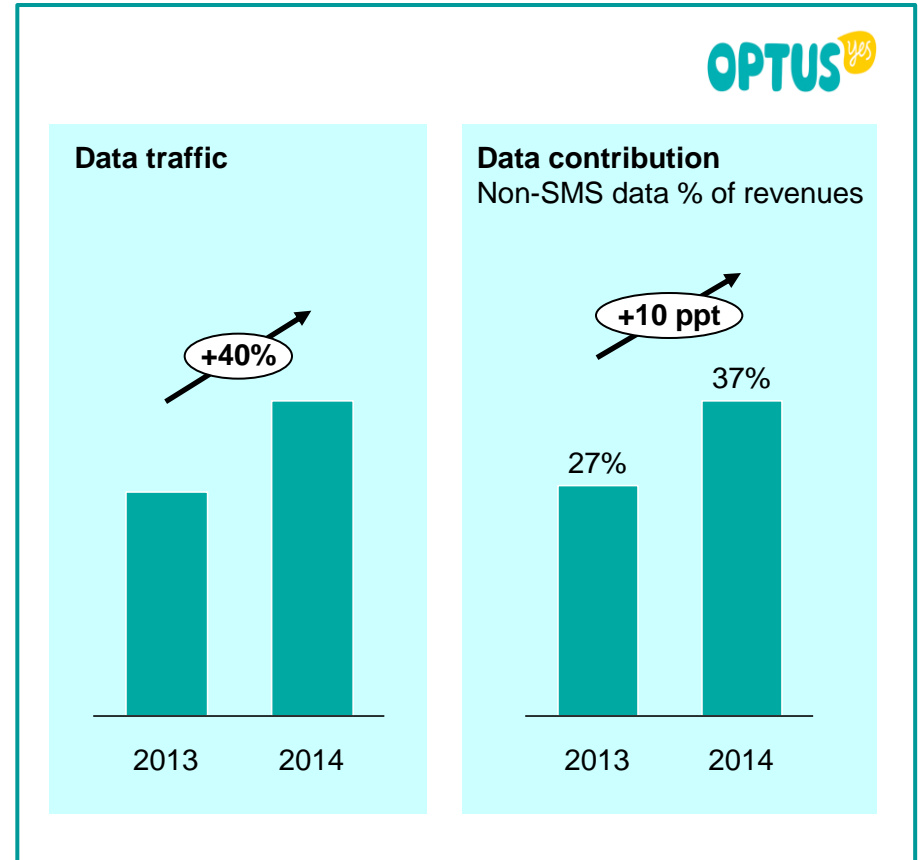
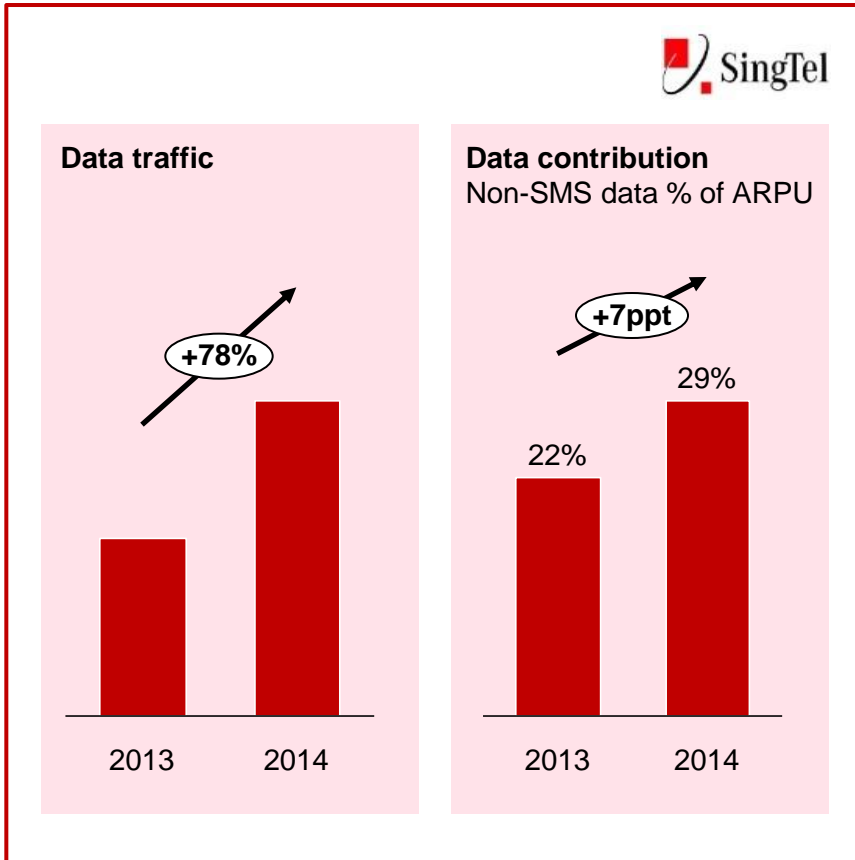
% smartphone uptake



**3G NW roll-out
(3G BTS as % of 2G + 3G BTS)**



We are retooling our business to capitalise on one thing that is certain: Data growth



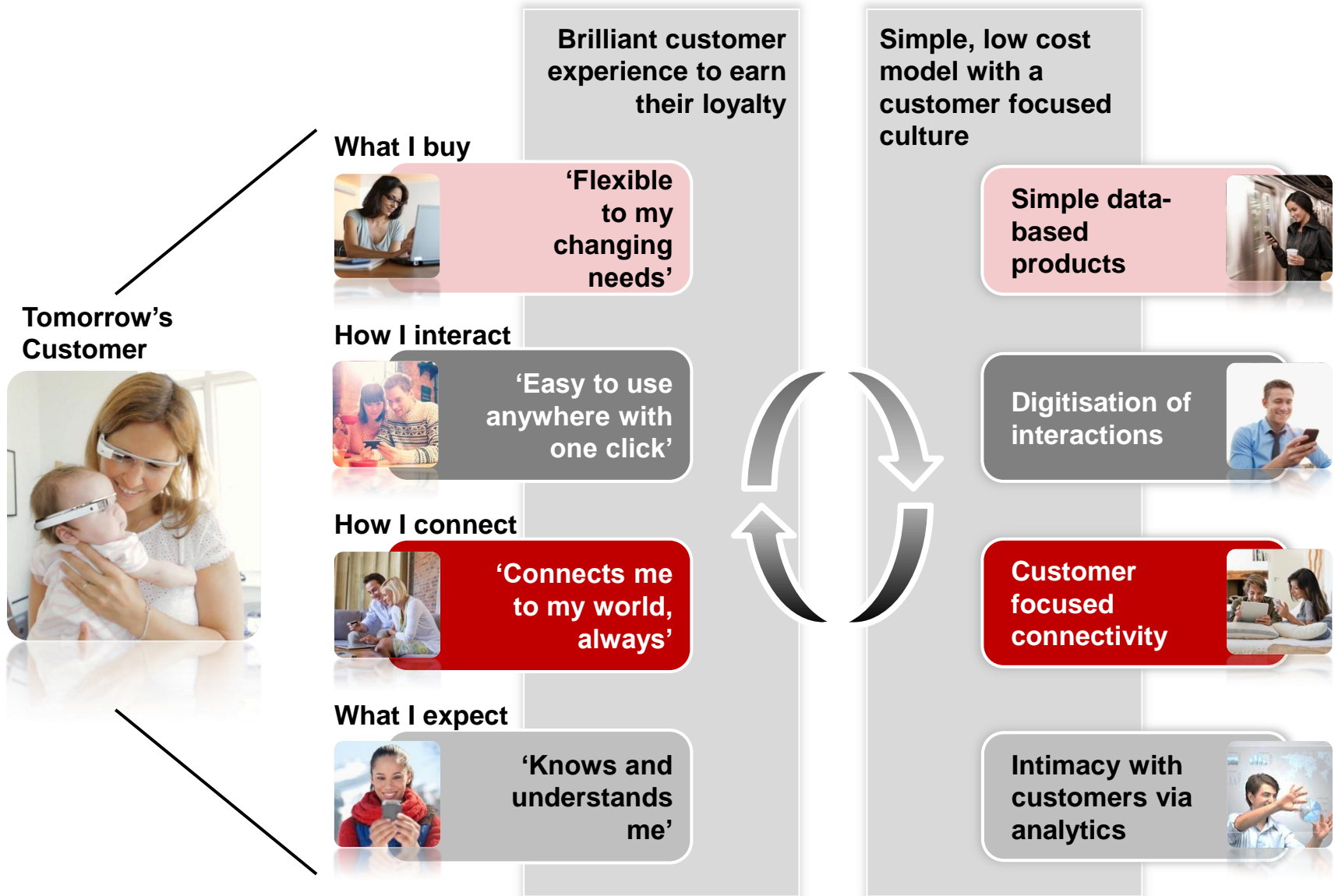
Data Monetisation initiatives

- Shift to tiered data plans
- Re-pricing data
- Data sharing
- Pre-paid 4G
- Co-bundling with OTT
- Wi-Fi as new mode of access



**Our vision :
Data Leader**

We have a 3-year plan to change the business



We are making major shifts in our operating model to cater to the customer of the future : 4-S strategy

Examples

Product



- Deliver highly simplified modular products with a focus on data
 - “Mix-and-match” constructs that provides flexibility to increase data allowance vis-à-vis traditional Voice / SMS
 - Data Sharing
 - BYO plans

“Simplify”

Service & Sales



- Digitise interactions
- Drive self-service through easy “one-click” access

“Self-serve”

Network



- Build and design to anticipate data growth
- Consolidate and virtualise our core
- Develop self-healing / self-optimising network
- Leverage advanced analytics tools to enhance NW management

“Self-optimising”

Analytics



- Use Big Data analytics to better target micro-segments
- Care for customers intelligently, anticipating issues and proactively triggering resolutions

“Smart”

Key transformation metrics we will be tracking

Product



- Data % of ARPU
- ARPU

Service & Sales



- NPS
- Online % of sales / care transactions
- Call-center volume reduction

Network



- Network NPS
- Mobile Data Capacity Headroom

Analytics



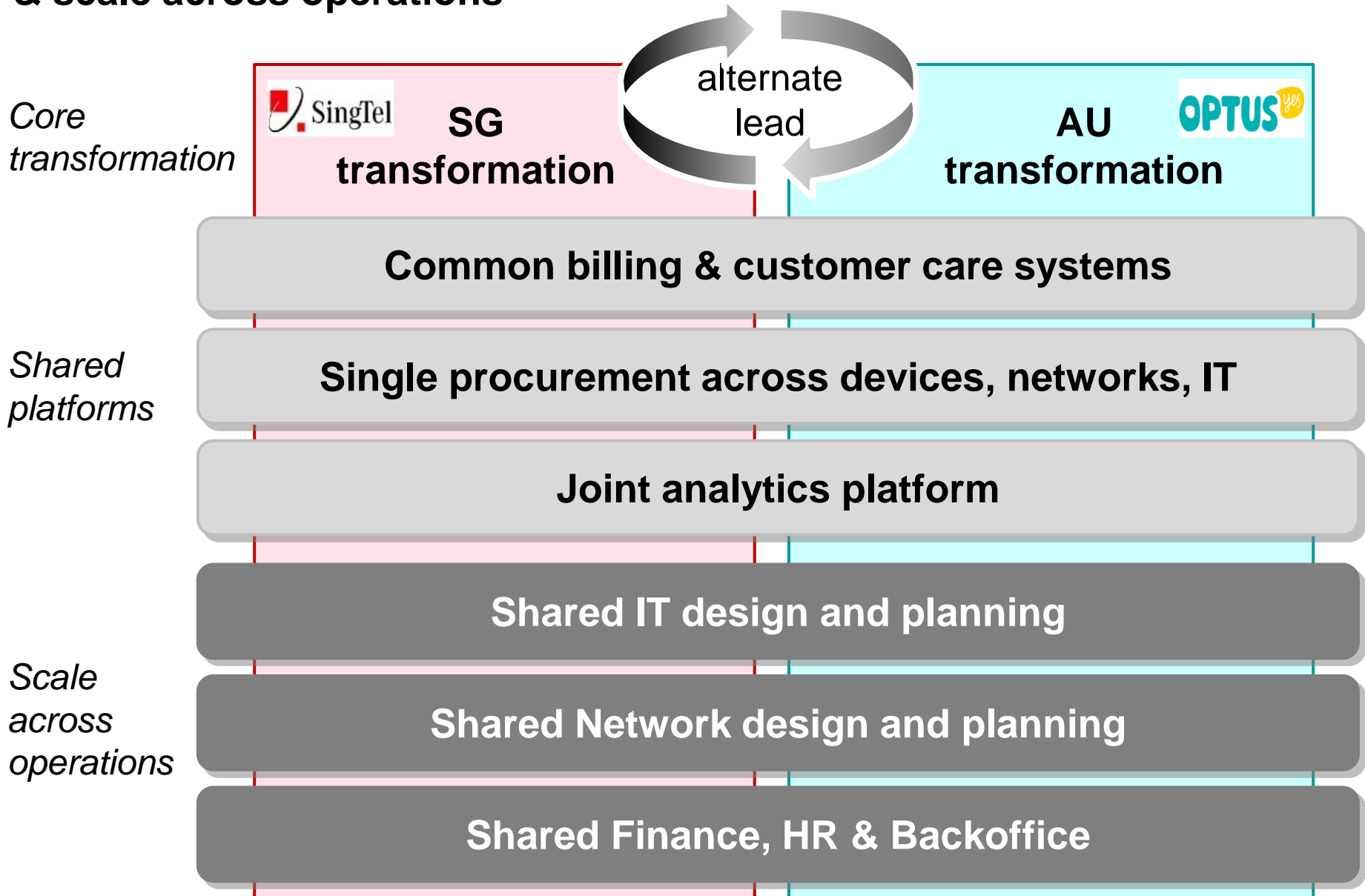
- Churn reduction
- Upsell / cross-sell improvements

Costs



- Opex savings
- Capital efficiency

We are underpinning our SG & AU transformation with shared platforms & scale across operations



In parallel, we are implementing a strong turnaround initiative focused on rebuilding AU market

In FY15, this includes :

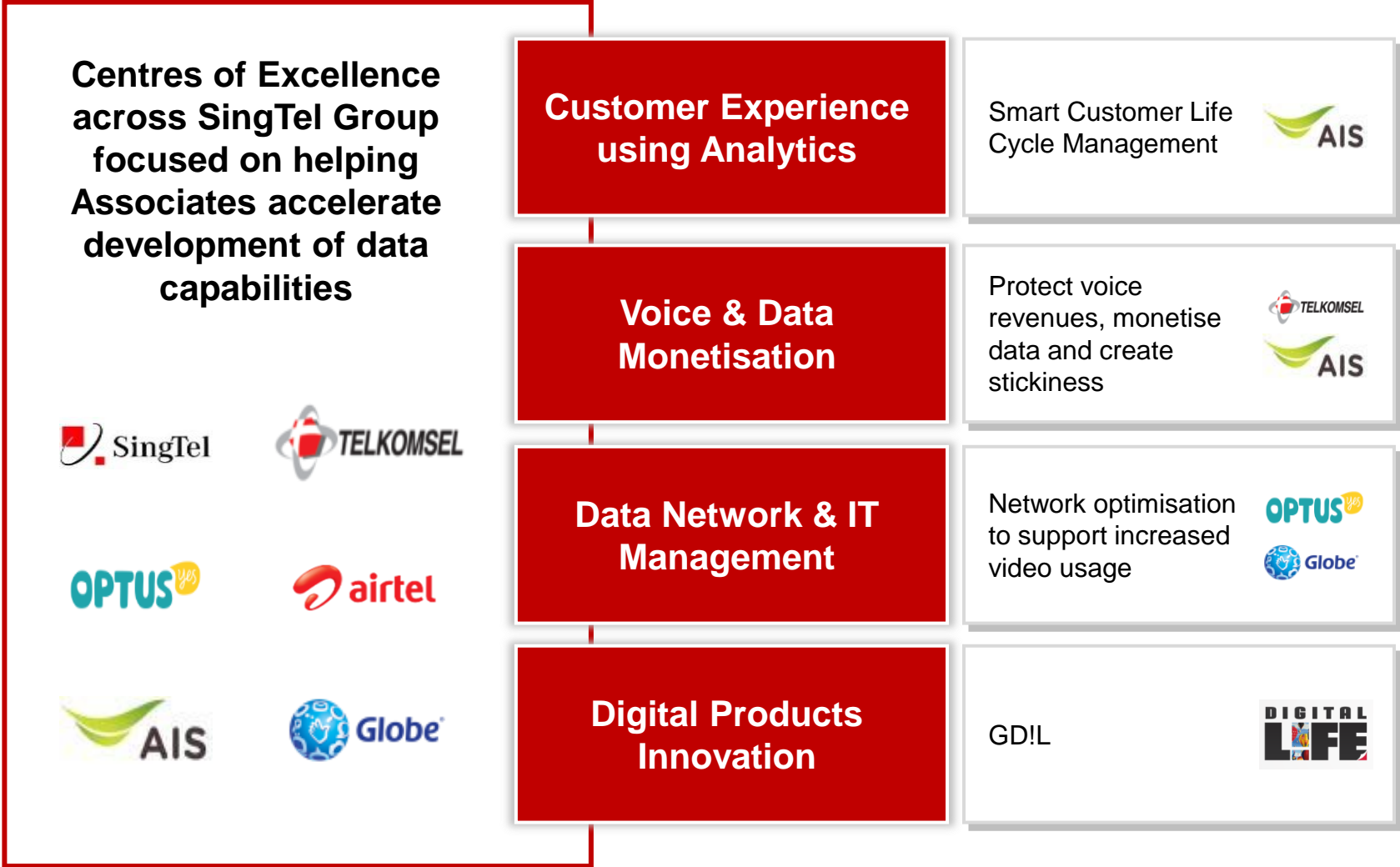
Reinforcing our brand positioning

Launching breakthrough products to attack Data Sharing & BYO

Doubling our Share-of-Voice in the market

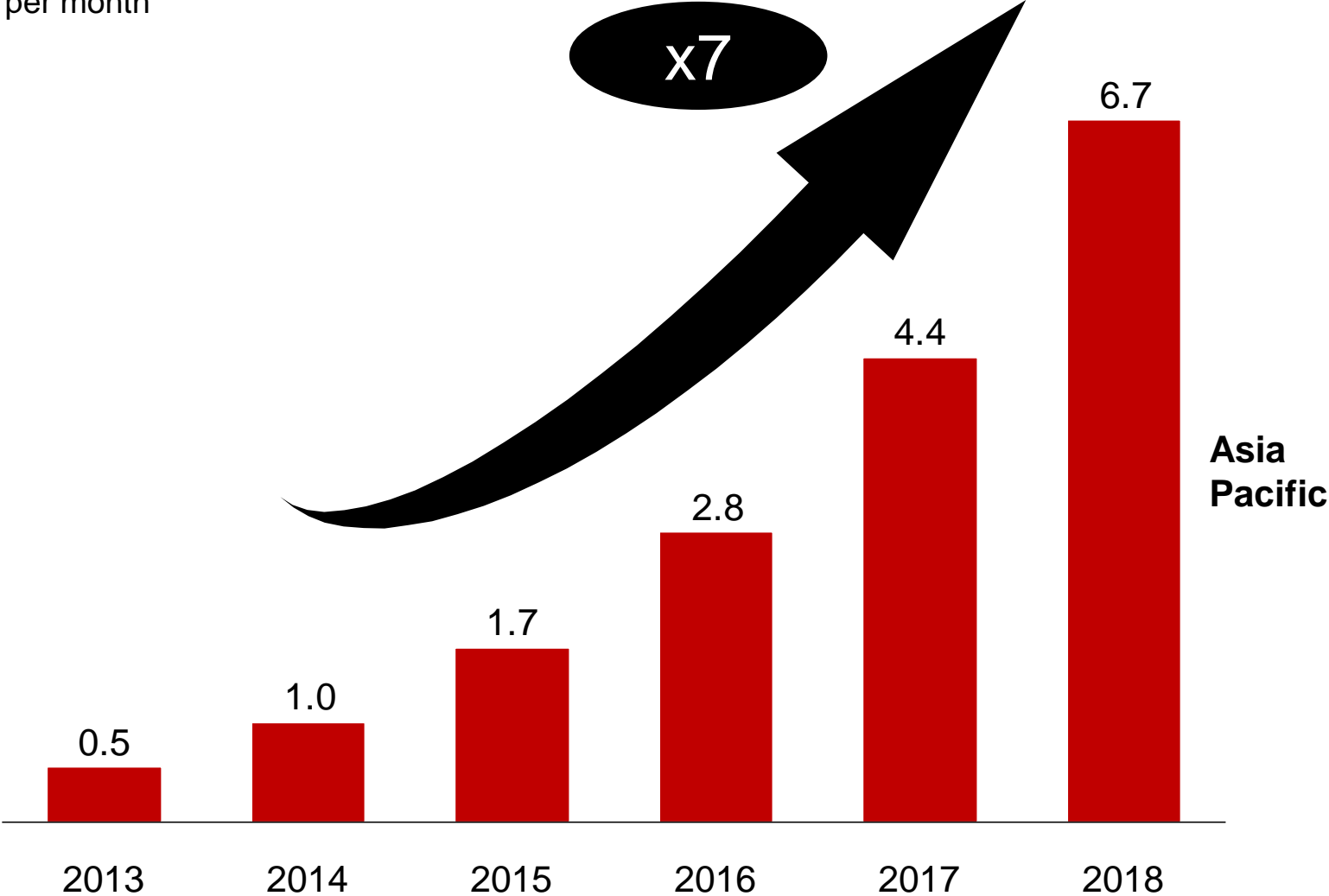
Aggressively addressing customer growth in Mobile & Fixed

To unlock further value at our Associates, we will be increasingly leveraging Group synergies and scale



With data growth set to explode, our 4-S strategy will serve us well for the future

Mobile Data Traffic
Exabytes per month



Source : CISCO VNI Jan 2014 (ITU)



Disclaimer: This material that follows is a presentation of general background information about SingTel's activities current at the date of the presentation. The information contained in this document is intended only for use during the presentation and should not be disseminated or distributed to parties outside the presentation. It is information given in summary form and does not purport to be complete. It is not to be relied upon as advice to investors or potential investors and does not take into account the investment objectives, financial situation or needs of any particular investor. This material should be considered with professional advice when deciding if an investment is appropriate.

GROUP CONSUMER

Singapore Consumer

SingTel Investor Day

3 June 2014

Yuen Kuan Moon

CEO, Singapore Consumer

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Strategic Focus Areas

Accelerating Data Monetisation

- › Address data needs of different customer segments
- › Drive customers to use more data locally
- › Ensure 'no bill shock' and increase number of countries for unlimited data roaming packages to increase data roamers

Winning In The Home

- › Strengthen bundles and drive fibre adoption
- › Promote ARPU growth for current customer base
- › Leverage on mioTV and other innovative services as important differentiators

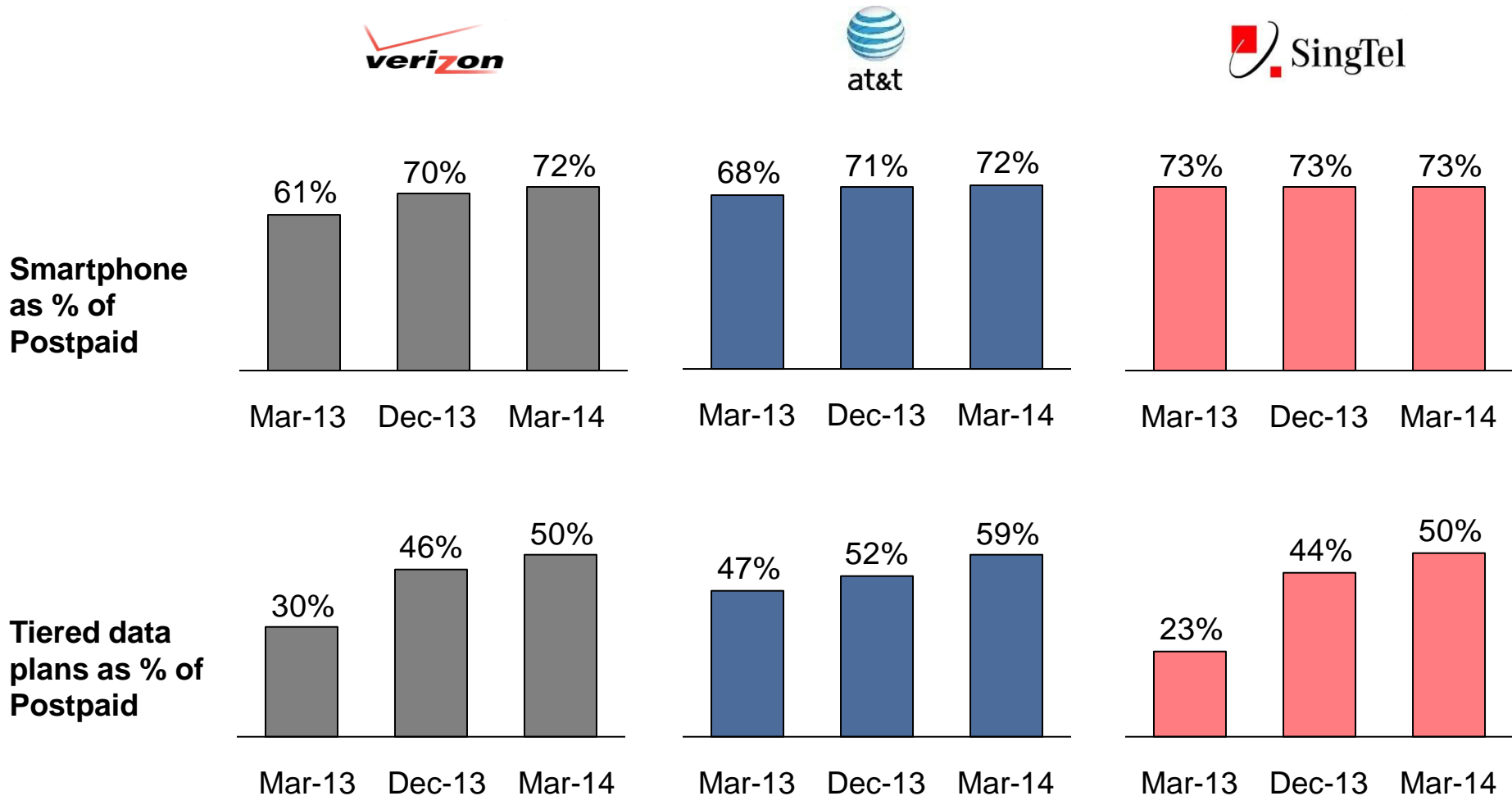
Transforming Cost Base

- › Drive towards self-help to improve customer experience while revamping existing cost structure
- › Push sales transactions online
- › Increase efficiency of network design and spend

Maintaining Network Lead

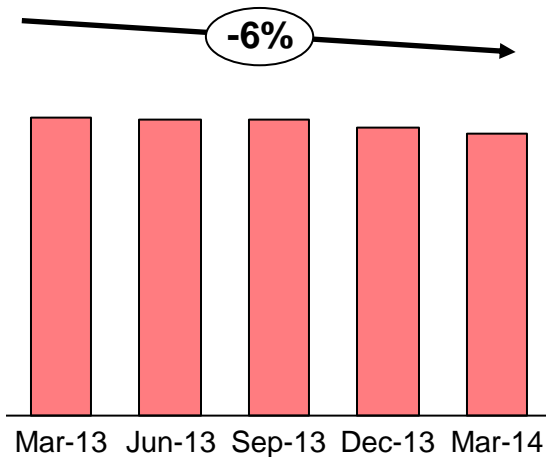
- › Invest in market-leading speed technologies
- › Develop an intelligent network

Good progress in driving smartphone penetration and tiered data plans

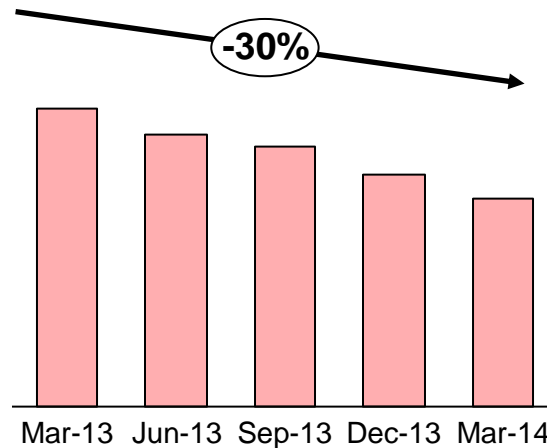


Data usage growing steadily to mitigate decline in voice and SMS

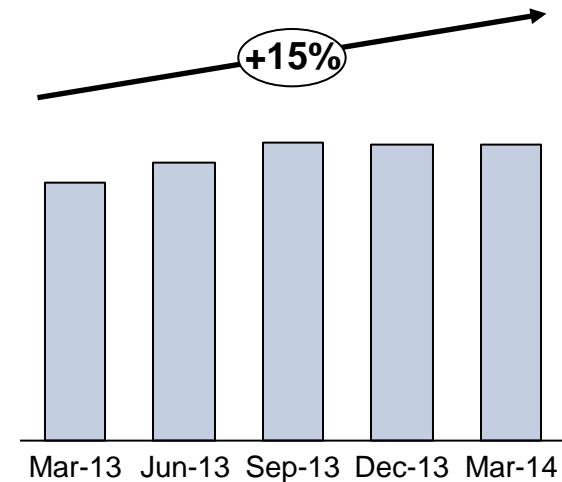
Minutes of use
per subscriber per month



SMS volume
per subscriber per month

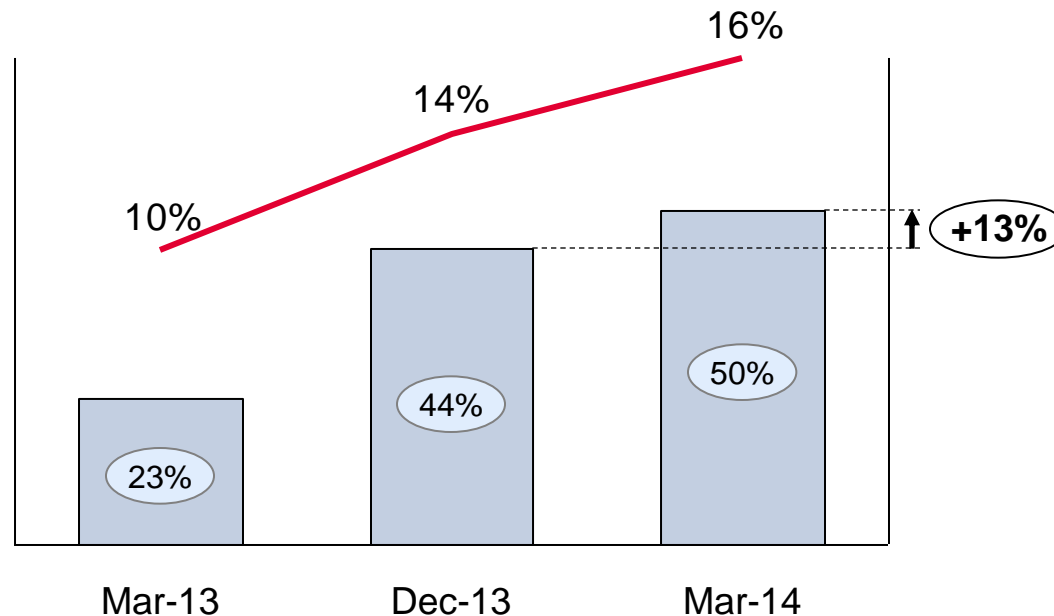


Data usage (GB)
per subscriber per month



Data monetisation efforts gaining traction since introduction of tiered data plans in Jul-12

Postpaid customers on plans with tiered data bundles



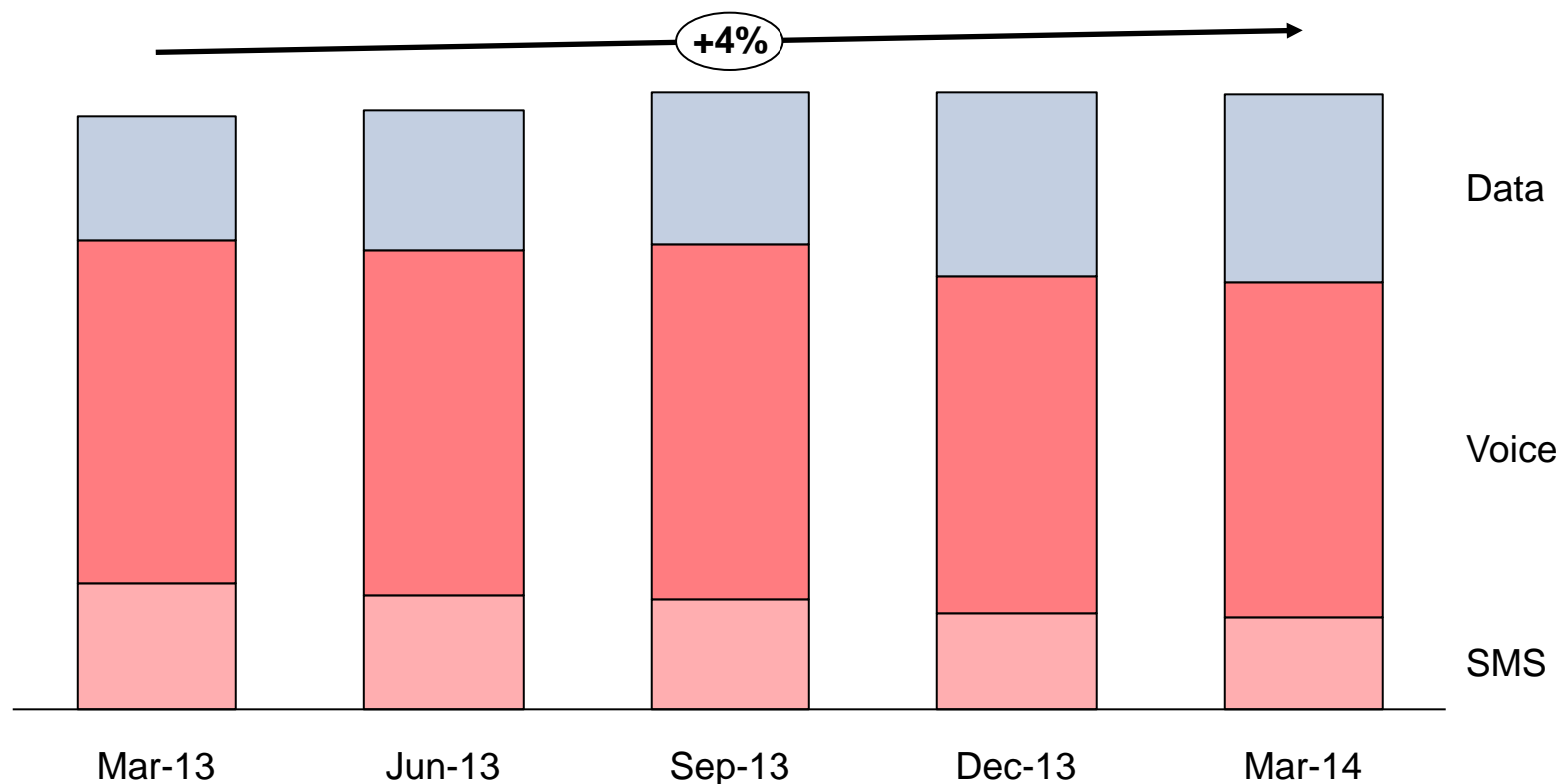
— % of lines exceeding data bundle

■ % subscribers on plans with tiered data bundles

○ X % of Postpaid base

Data revenue is now the main contributor towards overall mobile growth

Mobile Revenue (ex Roaming)
S\$b



More initiatives are being implemented to help accelerate growth in data revenue

Partnerships with OTT players



- › Prepaid plans for access to popular Social Networking Apps

Optimising data pricing

- › Increased data rate from \$5.35/GB to \$10.70/GB for excess usage



- › DataMore VAS to supplement data bundle

Worry-free roaming



- › Network lock to protect data roamers from unintended charges on non-partner network

Reaching out to Silver segment



- › First discounted mobile data plans for seniors

Winning in Consumer Homes

Executing a Differentiation strategy

Consumer home revenue S\$127m, up 6%

Strengthening the bundle

Households on bundles

> Up 6%

368,000

Driving fibre adoption

Fibre Customers

> approx. >50% market share

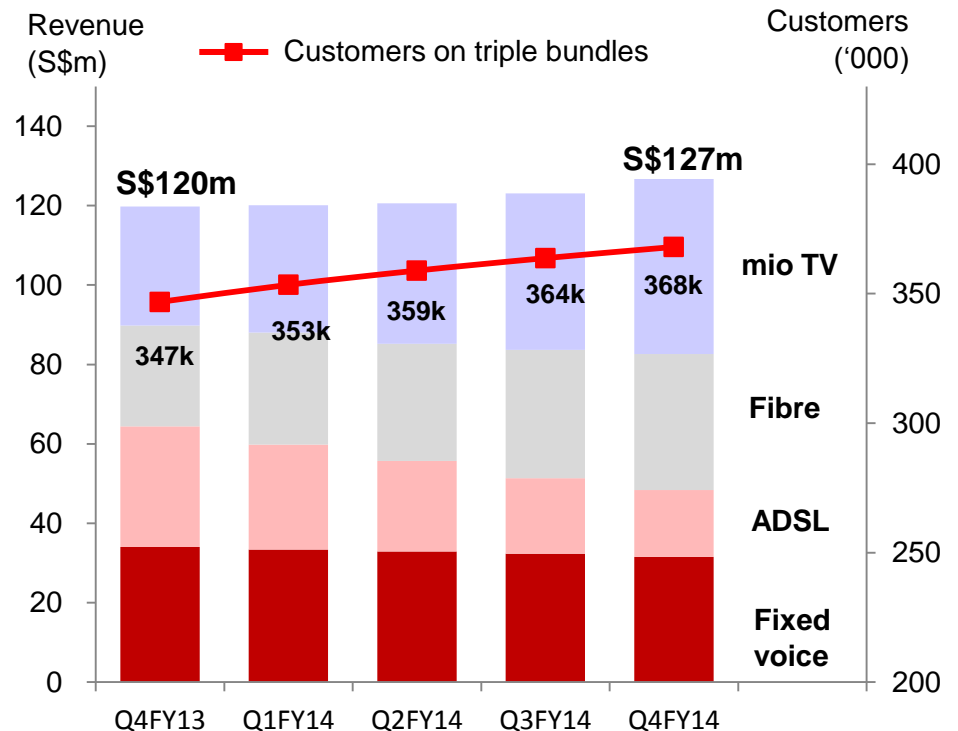
289,000

Growing household spend

Household ARPU

S\$58

> Up 9%



mioTV – A Key Differentiator To Home Strategy

mioTV is now serving more than 418,000 customers



We will continue to...

Strengthen our content suite

New channels added:



Differentiate through the experience

- › Fully harness synergies with Internet and Voice services to drive home leadership
- › Provide On-the-Go functionality & convenience through companion app, mioTV GO, topping it off with new, exciting features for World Cup
- › Invest in original production that resonates with the customers and their everyday life

Enhancing customer experience while transforming cost structure

Solution: Encourage Self-Service

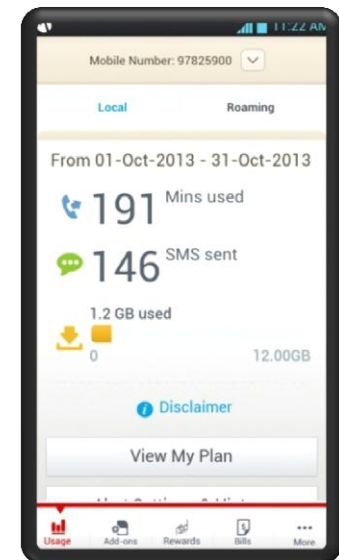
- › Simplified Self-Help Kiosk – customers can obtain a queue ticket at SingTel Shop in 3 quick steps
- › Enhanced MySingTel app capabilities and user-friendliness
e.g. Purchase of daily unlimited data roaming plans
- › Self-help videos launched on Youtube to address common issues
e.g. How to Check Android Connectivity Settings

Solution: Push Sales Transactions Online

- › Enhance our eShop experience and provide more services options online

Outcome

- › Revamp of existing cost structure
- › Customers are able to solve their problems faster and easier, thus improving their experience with us

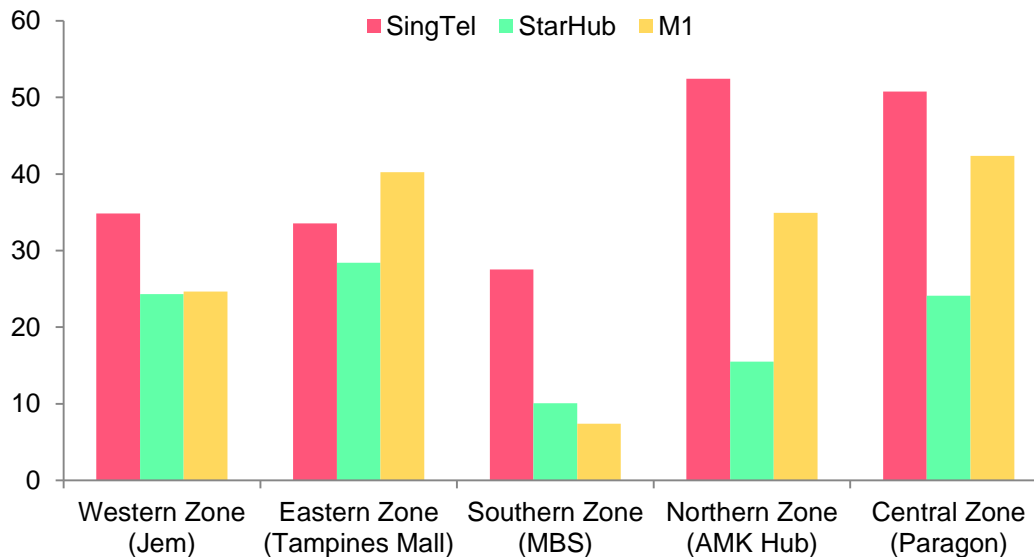


Investing in market-leading speed technologies to maintain network leadership

Mobile

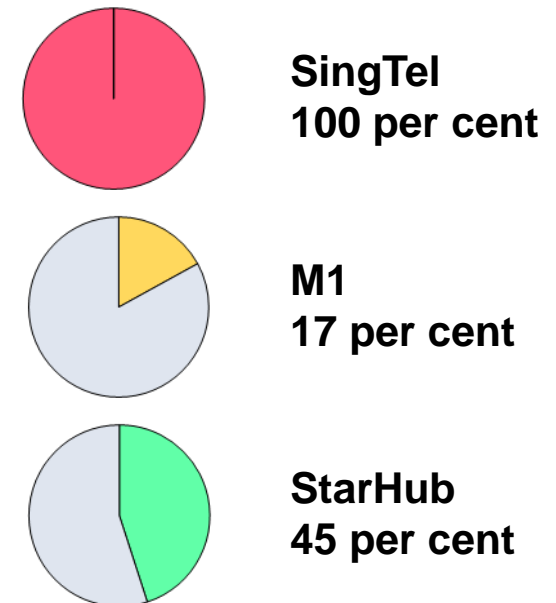
Download speed test of Singapore telcos

Download Speed (Mbps)
Indoor test unless otherwise stated



Google Play Download speed on 4G @ Circle Line MRT

Progress of Plants vs. Zombies 2:
Downloaded within 2 mins (File size: 214MB)

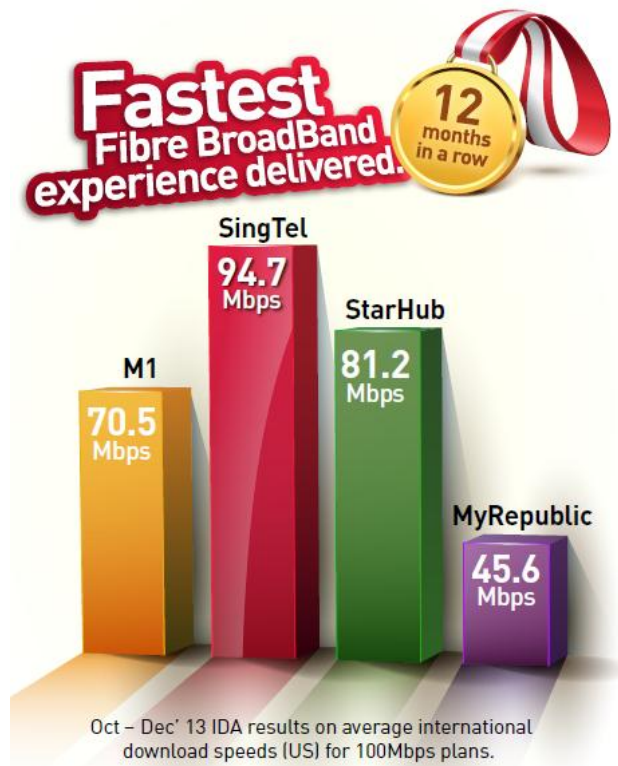


Source: [ST Digital Life on 22 Jan 2014](#)

Source: [HardwareZone.com.sg](#)
2013 Year-End (Dec) Review of 4G LTE Networks in Singapore

Investing in market-leading speed technologies to maintain network leadership

Fibre Broadband



READERS' CHOICE

The Readers' Choice Awards are given to products and services with the highest number of votes cast by our readers of HWM and HardwareZone.com.

| CATEGORY | WINNER |
|--|---------|
| Best 4G Network (Singapore) | SingTel |
| Best Telco (Singapore) | SingTel |
| Best Fibre Broadband Service (Singapore) | SingNet |



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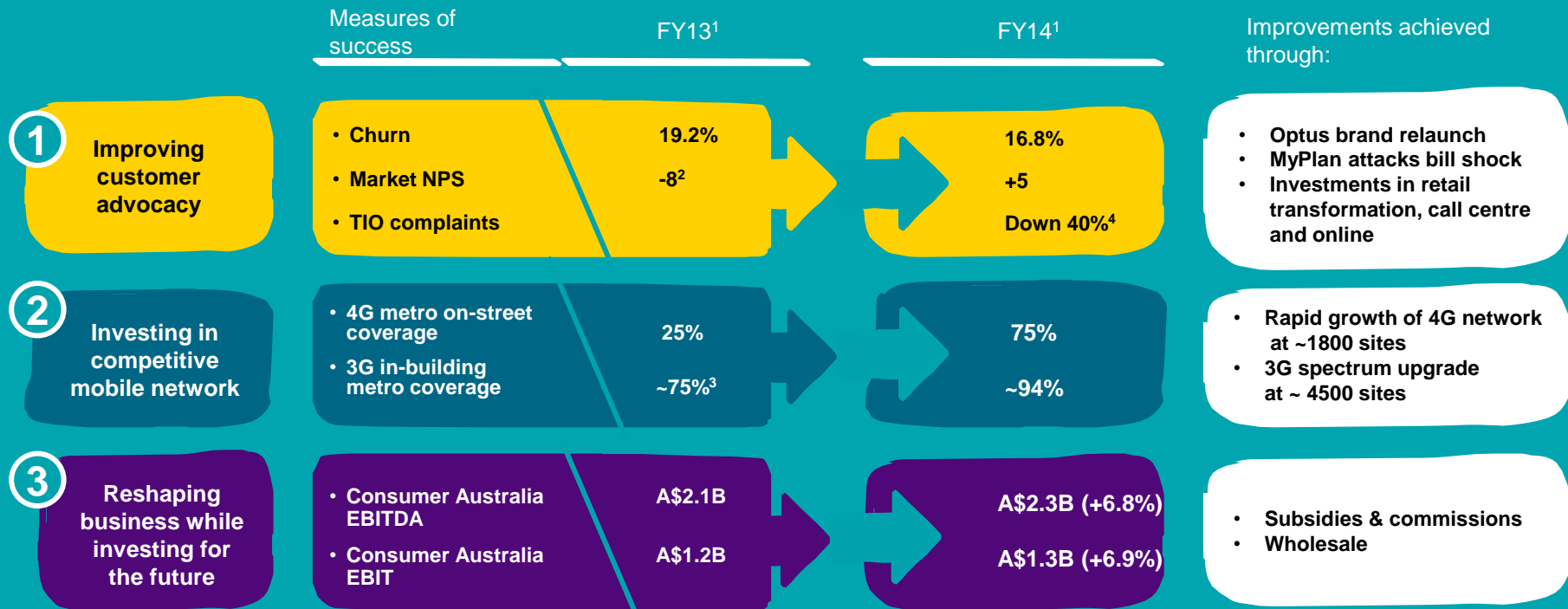
AUSTRALIA CONSUMER

SingTel Investor Day
3 June 2014

Paul O'Sullivan
CEO, Group Consumer

Vicki Brady
Managing Director, Customer, Australia Consumer

IN FY14, AUSTRALIA CONSUMER BUILT A FOUNDATION FROM WHICH TO GROW REVENUES



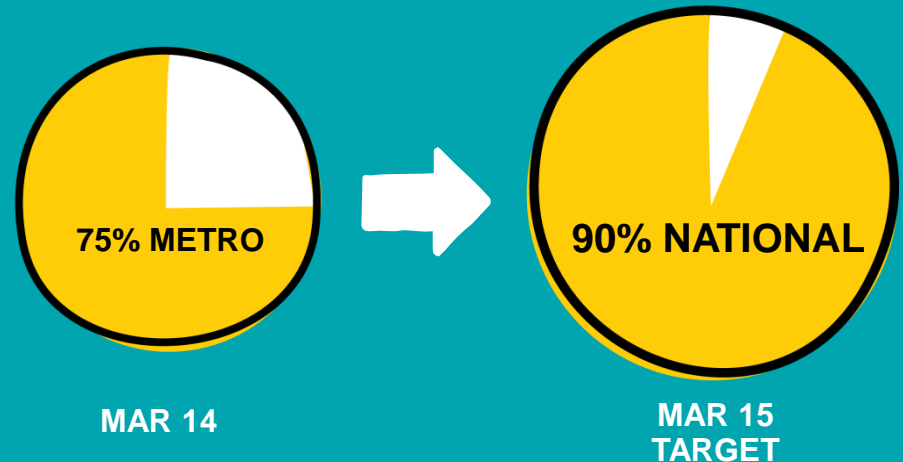
1. Year ended 31 March unless otherwise stated
 2. As at June 2013, when methodology first adopted
 3. As at April 2012 when U900 spectrum migration program commenced
 4. For the quarter ended 31 December 2013; YoY comparison

BUILDING A STRONG 4G NATIONAL NETWORK WITH AGGRESSIVE ROLLOUT

Optus 4G Network % Population Coverage (on-street)

Leverage access to ~1,000 metro sites through VHA JV

+2500 site builds and upgrades in FY15

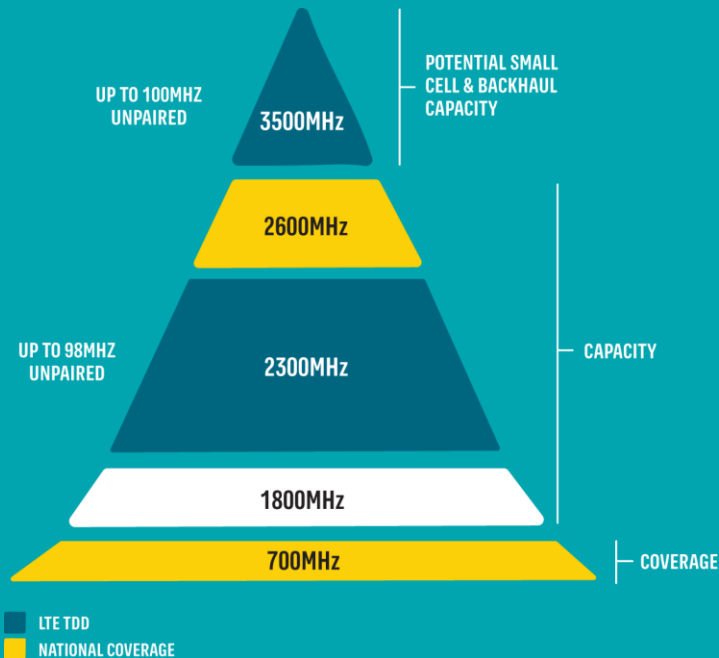


LEVERAGING ADDITIONAL SPECTRUM TO DELIVER GREATER COVERAGE AND CAPACITY

Optus' 4G spectrum holdings¹

Accelerated national 700MHz & 2600MHz pre-build; ready for switch-on in early 2015

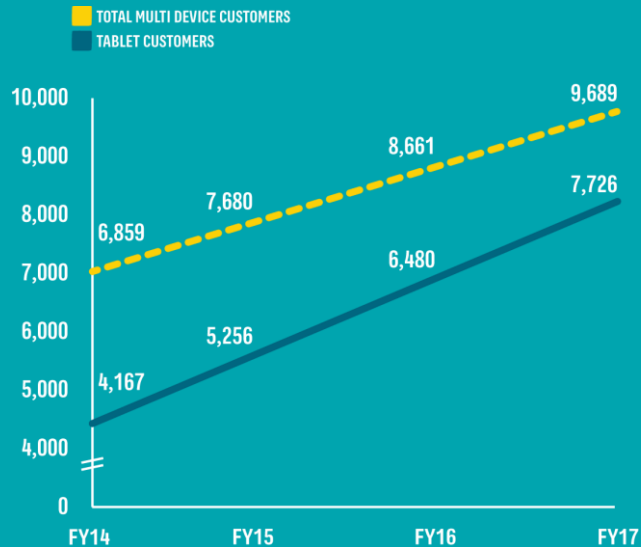
Differentiated technology and capacity with 2300 MHz (TD-LTE)



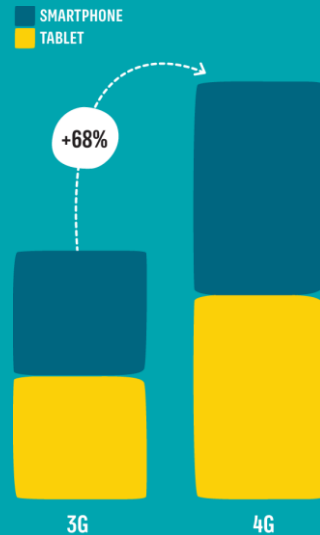
1. 3500MHz not currently deployed for 4G; its 4G potential is being considered.

MULTI-DEVICE CUSTOMERS ARE A GROWING COHORT; THEY ARE HUNGRY FOR DATA AND GREATER NETWORK SPEEDS

Total Australian Market¹ (000)



Average monthly data usage²
Multi device customer (GB)



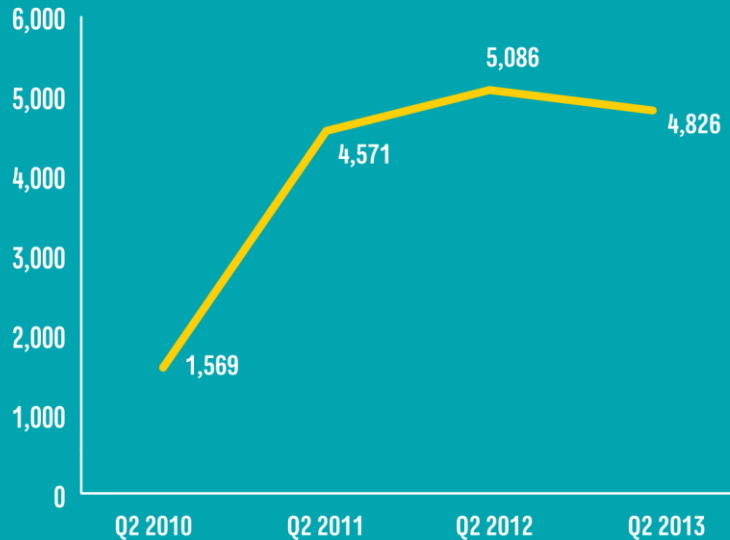
“49% of smartphone owners also own at least one other mobile internet device”³

I use my mobile for everything and generally want to have the latest technology. I can't imagine life without my mobile!

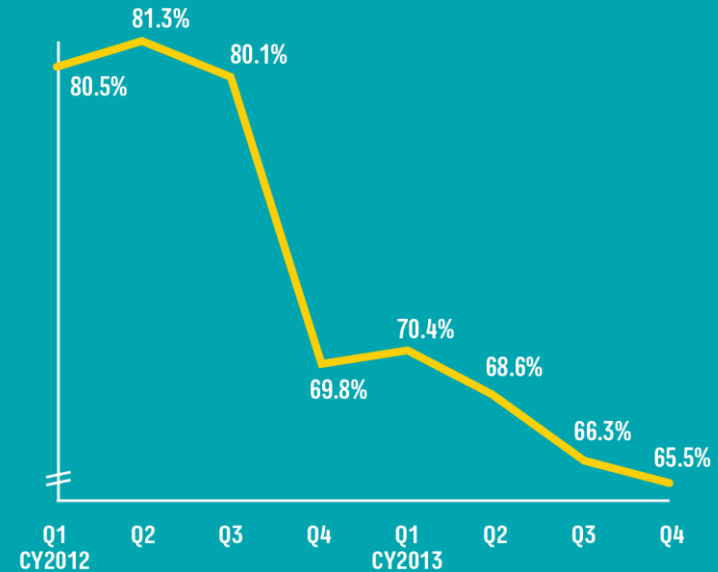
1. IDC Hardware Tablet tracker, GfK multi device market sizing Nov 2013
 2. Blended usage of most popular devices on Optus' network
 3. Research conducted on behalf of Optus by GfK research, June 2013

MORE CUSTOMERS ARE PREFERRING UNCONTRACTED PROPOSITIONS (BYO)

Australian market smartphone shipments¹ (000's)



Telco Share of Australian Market Smartphone Sales²



1. IDC AU smartphone tracker (Q2 2013)
2. IDC Mobile Phone Tracker

TWO NEW COMPELLING CUSTOMER PROPOSITIONS: DATA SHARING AND BYO

YES!
TO SHARING
DATA
ACROSS YOUR
MOBILE
DEVICES

There's no ongoing cost, just a one-off
\$5 set-up fee per device.

OPTUS yes

The advertisement features a teal background with several mobile devices (a smartphone, a tablet, and a laptop) connected by dotted lines to a central text block. At the top, there is a Wi-Fi symbol with an arrow pointing down towards the text.

**YES! TO
AN EPIC
SIM PLAN
WHEN
YOU BYO
PHONE**

Bring your own phone, or buy one outright for our best
value deal on a no lock-in contract SIM plan.

**UNLIMITED
STANDARD
CALLS & TEXT &
2GB
OF DATA
FOR \$45
A MONTH**

Cost of 1MB Data is \$0.0036.
All for use within Australia.

OPTUS yes

The advertisement has a bright yellow background. The main headline is in large, bold, white letters. Below it, there is a smaller line of text. In the center, there is a graphic of a white document with a yellow character holding it. The document contains text about an unlimited standard calls and text plan with 2GB of data for \$45 a month. At the bottom right, there is the Optus logo.

BRINGING DATA SHARING TO LIFE

NEW BEGINS 10 JUNE

MOBILE PHONE
2GB



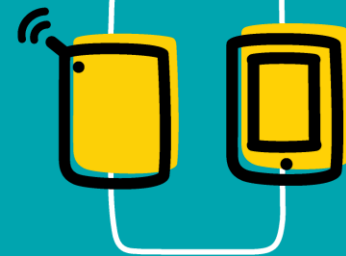
MOBILE BROADBAND
DEVICE 1
1.5GB



MOBILE BROADBAND
DEVICE 2
1.5GB



MOBILE PHONE



MOBILE BROADBAND
DEVICES

| | OPTUS \$65 MY PLAN SIM ONLY | OPTUS \$60 MY PLAN PLUS SIM ONLY |
|---|--|---|
| ADDITIONAL DEVICES | 2 x standalone \$20 MBB plans | 2 data sharing SIMs |
| INCLUDED STANDARD NATIONAL CALLS, SMS AND MMS | Unlimited | Unlimited |
| INCLUDED DATA PER MONTH | 2GB mobile phone 1.5GB mobile broadband device 1 1.5GB mobile broadband device 2 | 5GB |
| DATA SHARING | No | Yes One-off \$5 set-up fee per device and no ongoing costs |
| MONTHLY COST | \$105 | \$60 (first month is \$70) |
| MINIMUM TOTAL COST FOR 12 MONTHS | \$1,260 | \$730 |

Based on data sharing with two mobile broadband devices
All for use within Australia

THE NITTY GRITTY: Important information: information correct as of 30 May 2014. Comparison based on Optus \$65 My Plan SIM only and 2 x \$20 My Mobile Broadband plans. Excess data on both plans charged at \$10 per GB.

SIM ONLY (BYO) PLANS WHICH DELIVER OUTSTANDING VALUE AND RESPOND TO CUSTOMER NEEDS

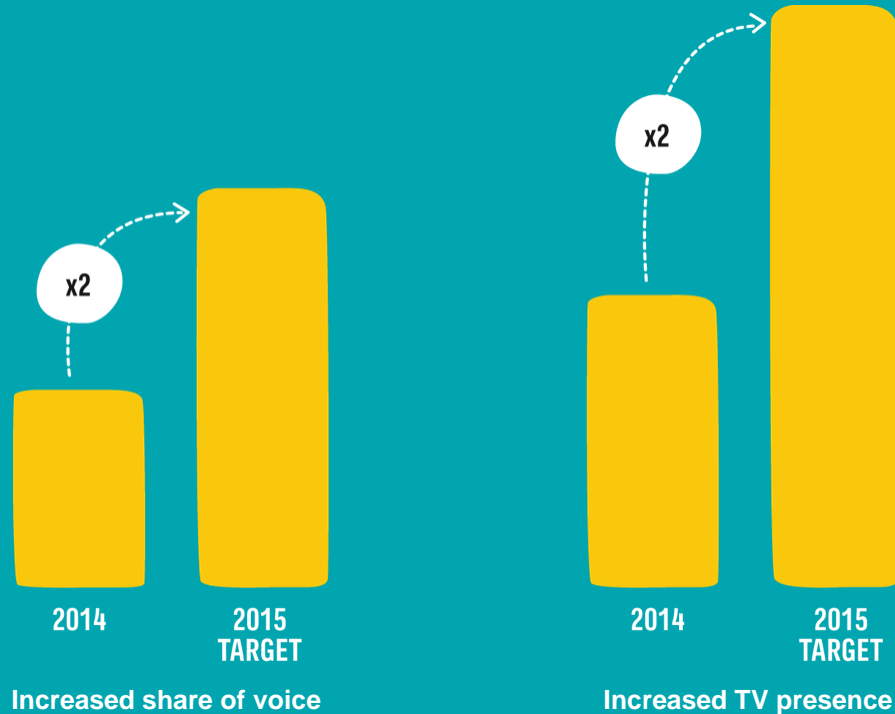
SIM ONLY PLANS WITH DATA SHARING AND UNLIMITED VOICE



| | OPTUS \$60 MY PLAN PLUS SIM ONLY | TELSTRA \$105 MOBILE ACCELERATE BYO DATA SHARE PACKAGE <small>\$105 package = \$95/month BYO phone plan + \$10/month SIM plan</small> |
|---|--|--|
| CONTRACT LENGTH | Month to month | 12 or 24 months |
| INCLUDED STANDARD NATIONAL CALLS, SMS AND MMS | Unlimited | Unlimited |
| INCLUDED DATA PER MONTH | 5GB | 3GB + 100MB = 3.1 GB 100MB for each additional device |
| NATIONAL VIDEO CALLS | Additional cost 40c flagfall + \$1 per minute | Unlimited |
| EXCESS DATA CHARGES | \$10 per extra 1GB (\$0.01 per MB) Charged per 1GB | \$30.72 per extra 1GB (\$0.03 per MB) Charged per 1MB |
| DATA SHARING COSTS | One-off \$5 set-up fee per device with no ongoing costs Up to five additional devices | Includes data sharing with one mobile broadband device Up to four additional devices for \$10 per month per device |
| MINIMUM TOTAL COST FOR 12 MONTHS | \$725 | \$1260 |
| | Based on data sharing with one mobile broadband device All for use within Australia | |

THE NITTY GRITTY: Important information: Information correct as of May 30 2014. Comparison based on a customer who shares data between one mobile phone and one additional SIM-enabled device. Comparison with Telstra's cheapest SIM only data sharing unlimited voice plan.

IN FY15 WE WILL DRAMATICALLY RAISE OUR VISIBILITY IN THE MARKET



IN FIXED WE WILL LIFT OUR VISIBILITY THROUGH LOCAL AREA MARKETING

- Double A&P spend in FY15
- Enabling NBN customer growth

**SOUTH MORANG
UNLIMITED
NBN
BUNDLES
ARE HERE**

Choose an Optus Unlimited NBN bundle backed by our NBN experts, and you'll enjoy next generation internet with NO LIMITS and NO CATCHES.

NO DATA LIMITS **NO CONNECTION FEES**
NO COMPULSORY CONTRACTS **NO SNEAKY CHARGES**



FOR MORE ON THE BEN OF HELP SWITCHING, CHAT TO US TODAY
OPTUS.COM.AU/NBN OPTUS 'YES' STORE 1300 074 600

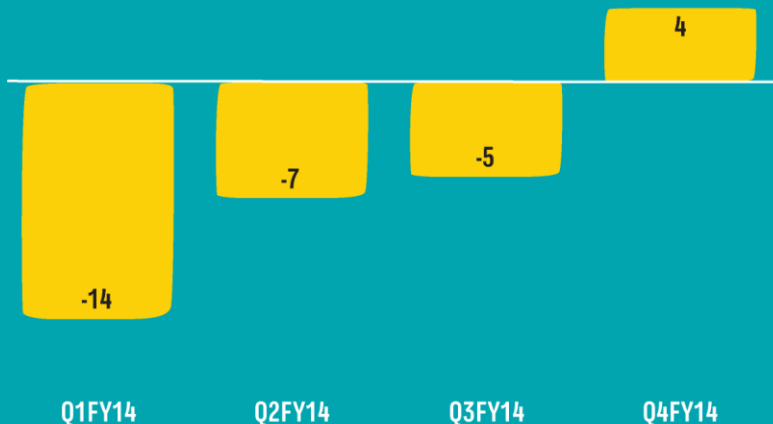
OPTUS yes



OPTUS yes

WE ARE BUILDING MOMENTUM IN FIXED WITH CUSTOMER-CENTRED PROPOSITIONS, IMPROVED EXPERIENCE AND BY LEVERAGING THE NBN

FY14 On-net Mass Market Fixed Broadband Net Adds ('000's)



FY14

Customer-focused My Home plans deliver improved trading performance

**NO DATA LIMITS
NO GOTCHAS**



FY15

- Drive **higher broadband access ARPUs** from increased penetration of triple-play bundles
- Fixed **network investment** to improve experience and service availability
- Improved **ordering, activation and installation** process
- NBN
 - maintain advocacy for level playing field
 - leverage footprint expansion
 - focus on Local Area Marketing

APPENDIX

OPTUS PLANS




| MY PLAN PLUS | \$35 | \$50 | \$60 | \$80 | \$100 |
|---|--|---|----------------------------------|----------------------------------|----------------------------------|
| Included Minutes Standard Australian mobiles and landlines, 13/1300 numbers and voicemail | 300 mins Use more and get 200 mins for \$10 or UNLIMITED mins for \$20 | 600 mins Use more and get UNLIMITED mins for \$10 | UNLIMITED | UNLIMITED | UNLIMITED |
| Included SMS/MMS Standard national SMS and MMS | UNLIMITED | UNLIMITED | UNLIMITED | UNLIMITED | UNLIMITED |
| Included Data You can share this data with up to 5 mobile devices, like your tablet | 500MB \$10 per extra 1GB | 1GB \$10 per extra 1GB | 2GB \$10 per extra 1GB | 3GB \$10 per extra 1GB | 5GB \$10 per extra 1GB |
| Cost of 1MB inc. Data | \$0.0293 | \$0.0195 | \$0.0122 | \$0.0114 | \$0.0098 |
| Contract Min total cost over 24 months | 24 months \$840 | 24 months \$1,200 | 24 months \$1,440 | 24 months \$1,920 | 24 months \$2,440 |

All for use within Australia

| ADDED OPTUS BENEFITS | | | | | |
|--|---|---|---|---|---|
|  Extra Data Automatically get extra data for just \$10 per 1GB, if you need more | ✓ | ✓ | ✓ | ✓ | ✓ |
|  Data Sharing Share your plan's data with up to 5 mobile devices like your tablet, for a one-off \$5 fee per device | ✓ | ✓ | ✓ | ✓ | ✓ |
|  Usage Alerts Stay in control of your spend and avoid hefty excess fees | ✓ | ✓ | ✓ | ✓ | ✓ |

| MY PLAN PLUS SIM ONLY | \$30 | \$45 | \$60 |
|---|--|----------------------------------|----------------------------------|
| Included Minutes Standard Australian mobiles and landlines, 13/1300 numbers and voicemail | 300 mins Use more and get 200 mins for \$10 or UNLIMITED mins for \$20 | UNLIMITED | UNLIMITED |
| Included SMS/MMS Standard national SMS and MMS | UNLIMITED | UNLIMITED | UNLIMITED |
| Included Data You can share this data with up to 5 mobile devices, like your tablet | 500MB \$10 per extra 1GB | 2GB \$10 per extra 1GB | 5GB \$10 per extra 1GB |
| Cost of 1MB inc. Data | \$0.0293 | \$0.0098 | \$0.0068 |
| Contract Flexibility to move up and down plans as you like | Month-to-month | Month-to-month | Month-to-month |

All for use within Australia

| ADDED OPTUS BENEFITS | | | |
|--|---|---|---|
|  Extra Data Automatically get extra data for just \$10 per 1GB, if you need more | ✓ | ✓ | ✓ |
|  Data Sharing Share your plan's data with up to 5 mobile devices like your tablet, for a one-off \$5 fee per device | ✓ | ✓ | ✓ |
|  Usage Alerts Stay in control of your spend and avoid hefty excess fees | ✓ | ✓ | ✓ |