

# **SingTel: Asia's leading communications group**



SingTel Regional Mobile Investor Day  
2 December 2011  
Group CEO, Chua Sock Koong

# Forward looking statement – important note

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The following presentation contains forward looking statements by the management of Singapore Telecommunications Limited ("SingTel"), relating to financial trends for future periods, compared to the results for previous periods.

Some of the statements contained in this presentation that are not historical facts are statements of future expectations with respect to the financial conditions, results of operations and businesses, and related plans and objectives. Forward looking information is based on management's current views and assumptions including, but not limited to, prevailing economic and market conditions. These statements involve known and unknown risks and uncertainties that could cause actual results, performance or events to differ materially from those in the statements as originally made. Such statements are not, and should not be construed as a representation as to future performance of SingTel. In particular, such targets should not be regarded as a forecast or projection of future performance of SingTel. It should be noted that the actual performance of SingTel may vary significantly from such targets.

"S\$" means Singapore dollars and "A\$" means Australian dollars unless otherwise indicated. Any discrepancies between individual amounts and totals are due to rounding.

# Changes in customer behavior, technology and the wider industry present challenges and opportunities

## Social networking



More than 800 million Facebook active users - 3<sup>rd</sup> "largest country" in the world

## Competition from non-traditional players

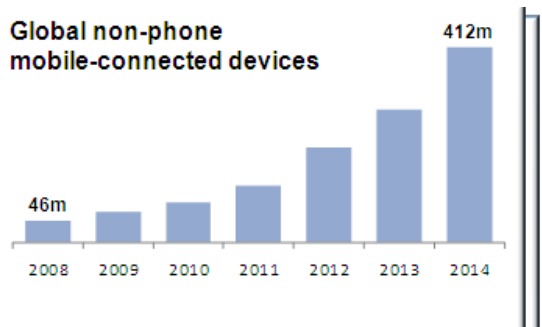


## National Broadband Networks

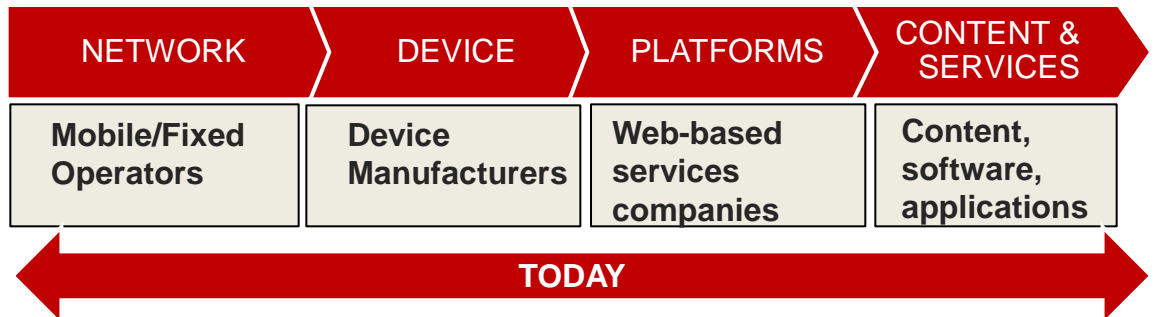


## Connected devices

Global non-phone mobile-connected devices



## Ecosystems colliding



# Growing the core business and grow new businesses

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## **Growing the Core**

- › Customer leadership
- › New business models to monetize data
- › Leading in an NBN world
- › Cost transformation to maintain competitiveness

## **Growing new businesses**

- › Consumer digital life initiatives
- › Enterprise ICT initiatives
- › Review investment opportunities in communications and adjacent businesses

## **Growing our Associates**

- › Strategic value add through regional business transformation
- › Explore investment opportunities and up-stakes in existing associates

# Growing the core: driving operational excellence

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**Customer  
Leadership**

- › LEAN Six Sigma implementation
- › Strong Customer Experience KPIs and strong rewards programs
- › Enhancement of customer analytics capabilities

**Cost & Business  
Transformation**

- › Reducing cost through automation and improving processes
- › Take advantage of newer and more cost efficient technologies such as LTE

**NBN  
Readiness**

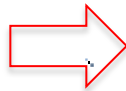
- › Delivering high fibre speeds, bundled with strong services portfolio for consumers to enjoy the true benefits of fibre

# Growing new business: grow our share of customers' wallet through relevant & personalised services

## Our strengths

- › Many touch points with customers
- › Trusted local operator
- › Understanding of customers' needs
- › Local knowledge and partnership with local vendors

## Content distribution



## Content aggregation & creation



Jia Le



Optus Go Places

## Different business models for applications

### • Free apps

- › generates ad revenue



### • Exclusive apps

- › creates differentiation



### • Chargeable apps

- › chargeable content and revenue share



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# Growing new business: multi-pronged drive to innovation

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**Innov8 is providing intelligence from, and building our reputation in the hotbeds of innovation**



**Idea Factory brings in quick-win innovations**



**SiX allows developers to bring their products to market with us**





# Growing our associates: collaboration across the region



- › Support associates in strategy and market operations through the power of our regional scale
- › Share best practices and experiences to shorten individual learning curve
- › Build associates' capabilities to capture mobile broadband growth in emerging markets
- › Harness ideas from Group innovation efforts on Digital Lifestyle products and services
- › Build regional platforms to drive data adoption



## In summary

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**Growing the  
Core**

**Growing new  
businesses**

**Growing our  
Associates**

### **Investments**

- › Strategic investments to help Group gain scale and fast-track service rollout

### **Innovation**

- › Leverages core assets and proprietary insights to create differentiation against competitors and capture growth opportunities

