NCS Overview

ncs//

Make extraordinary happen

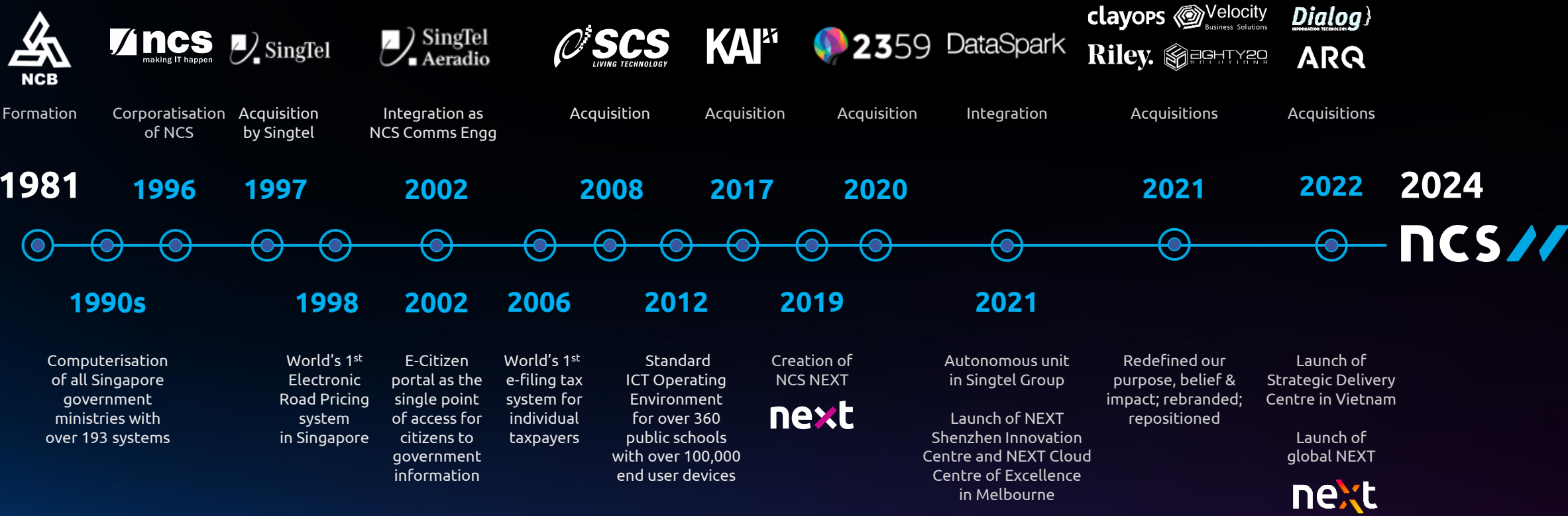Since 1981, we have been part of Singapore's remarkable technological transformation.

With 40 years of experience in digitalising public services and enterprises, we are now #1 in technology services in South East Asia.

Together, we make extraordinary happen.

Our Heritage

For more than 40 years, we have played a key role in advancing a smart nation

NCB	ncs making IT happen	SingTel	SingTel Aeradio	SCS LIVING TECHNOLOGY	KAI	2359	DataSpark	clayops / Velocity Business Solutions / Riley. / EIGHTY20 SOLUTIONS	Dialog INFORMATION TECHNOLOGY / ARQ
Formation	Corporatisation of NCS	Acquisition by Singtel	Integration as NCS Comms Engg	Acquisition	Acquisition	Acquisition	Integration	Acquisitions	Acquisitions

1981   **1996**   **1997**   **2002**   **2008**   **2017**   **2020**   **2021**   **2022**   **2024**

NCS⫽

1990s   **1998**   **2002**   **2006**   **2012**   **2019**   **2021**

1990s
Computerisation of all Singapore government ministries with over 193 systems

1998
World's 1st Electronic Road Pricing system in Singapore

2002
E-Citizen portal as the single point of access for citizens to government information

2006
World's 1st e-filing tax system for individual taxpayers

2012
Standard ICT Operating Environment for over 360 public schools with over 100,000 end user devices

2019
Creation of NCS NEXT

neXt

2021
Autonomous unit in Singtel Group

Launch of NEXT Shenzhen Innovation Centre and NEXT Cloud Centre of Excellence in Melbourne

2021 (Acquisitions)
Redefined our purpose, belief & impact; rebranded; repositioned

2022 (Acquisitions)
Launch of Strategic Delivery Centre in Vietnam

Launch of global NEXT

neXt

NCS Overview

#1

Market leadership in IT services in SG and SEA[1]

S$2.8B

FY24 Group Revenue[2]

51%

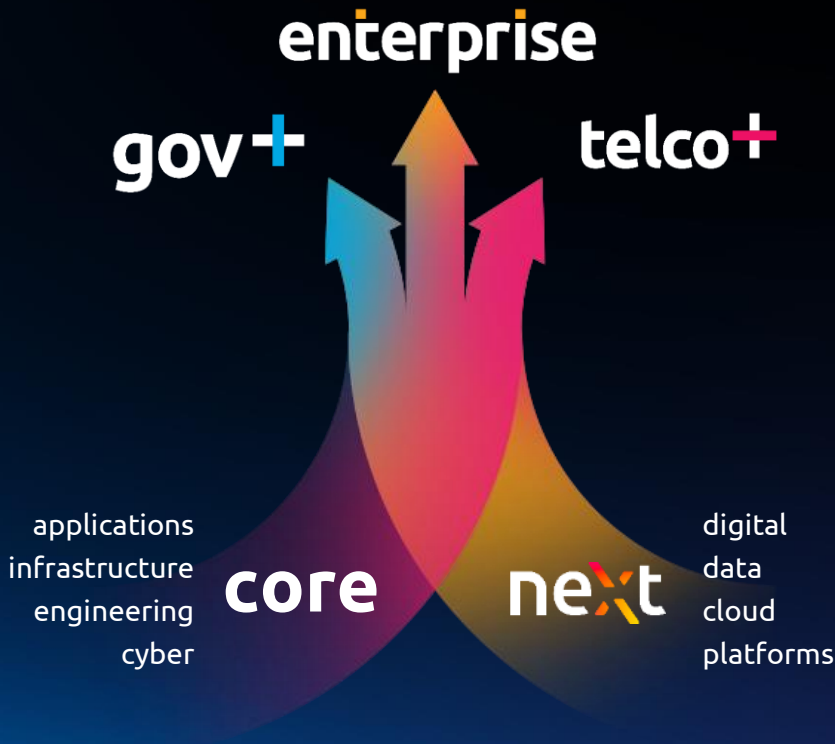Rev in digital, data, cloud, platforms and cyber services[2]

>13,000

Headcount

>4,000

Active projects

>20

Cities in APAC

enterprise

gov+   telco+

applications
infrastructure
engineering
cyber

core   **neXt**

digital
data
cloud
platforms

Greater China
~1,500

Chengdu

Guangzhou

Pune

Hanoi   Manila

IT "Talent Arc"
(Global Delivery Network)

Singapore & Southeast Asia
~10,000

Innovation Centres

Singapore | Melbourne | Shenzhen

Australia
~1,500

Our Growth Strategy: 3 axes of growth for a regionalising NCS

Riding the wave of digitalisation across APAC

Client Industries

Reinvent public sector business & expedite enterprise business

- Comms, Media & Technology
- Financial, Industrial & Commercial
- Healthcare & Transport
- Defence & Homeland Security
- Public Service

Services

Offer end-to-end capabilities with Core & NEXT

- Platforms
- Cloud
- Digital
- Cyber
- Engineering
- Infrastructure
- Applications

Geographies

Double down on SG business & expand beyond SG

- Singapore
- Greater China
- Australia
- APAC

#1
Market leadership in IT services in SG and SEA[2]

>13,000
Talent across APAC

S$2.8B
FY24 Group Revenue[1]

>4,000
Active projects

51%
Rev in digital, data, cloud, platforms & cyber services[1]

>20
Cities in APAC

1. Financial Year Ended 31 Mar 2024
2. Source: IDC Worldwide Semiannual Services Tracker 2H 2023

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Our Market Leadership

We are a market leader in IT services in Singapore and Southeast Asia

Southeast Asia[1] Ranking in 2023 (by market share %)		
1	**NCS**	**6.4%**
2	Accenture	5.5%
3	Deloitte	3.5%
4	IBM	3.4%
5	Tata Consultancy Services	1.5%
6	DXC	1.5%
7	HCL Technologies	1.5%
8	Oracle	1.4%
9	ST Engineering Electronics	1.3%
10	PwC	1.3%

Singapore Ranking in 2023 (by market share %)		
1	**NCS**	**16.0%**
2	Accenture	8.5%
3	Deloitte	4.9%
4	IBM	3.9%
5	ST Engineering Electronics	3.1%
6	Tata Consultancy Services	2.8%
7	HCL Technologies	2.7%
8	Equinix	2.5%
9	DXC	1.7%
10	Oracle	1.6%

NCS Singapore Ranking in 2023 (by market share %)		
#1	**Education**	**37.0%**
#1	**Government**	**32.3%**
#1	**Transportation**	**21.0%**
#1	**Telecommunications**	**8.2%**

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We hold the #1 market share in Singapore and Southeast Asia for IT Services

[1] Includes Singapore, Malaysia, Thailand, Indonesia, Philippines and Vietnam.
Source: IDC, 'IDC Semiannual Services Tracker', 23 Apr 2024

Our Regional Footprint

With a strong regional presence in >20 cities

Singapore	**Beijing**	**Adelaide**
Bangkok	**Chengdu**	**Brisbane**
Brunei	**Guangzhou**	**Canberra**
Colombo	**Hangzhou**	**Melbourne**
Hanoi	**Hong Kong**	**Darwin**
Kuala Lumpur	**Shanghai**	**Perth**
Manila	**Shenzhen**	**Sydney**
Pune	**Suzhou**	