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Welcome to SBF Global's

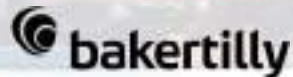
Developing the Technology Nexus Between Singapore & South Africa, Gauteng

21 September 2021, Tuesday

3.00 - 4.30pm (SG-time)

9.00 - 10.30am (SA Time)

EVENT PARTNER



SGTECH

sistema
AsiaCapital



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COURTESY POINTS



**By default, you would be muted when you joined the webinar .
Otherwise, please mute your microphone throughout the session.**



**Have a question? Type your questions into the Question & Answer
Panel and we will read it out later or contact you after the webinar**

PROGRAMME LINE UP

SG Time

SA Time

3.00 pm

9.00 am

Introduction of GlobalConnect@SBF

3.05 pm

9.05 am

Introduction of Gauteng Growth & Development Agency (GGDA) and Opening Address

Ms Mosa Tshabalala, Group CEO, GGDA

3.10 pm

9.10 am

Overview of Information technology Sector and Growth Trends in South Africa

Ms Busi Mathe, CEO, RRS Innovation

3.20 pm

9.20 am

Overview of Information technology Sector and Growth Trends in Singapore

Mr Lim Hui Jie, Partner, Baker Tilly Vision

3.30 pm

9.30 am

The Innovation Hub's Smart Industries Incubation Programme

Mr Pieter Holl, CEO, The Innovation Hub

Ms Wandisiwe Marhaya, Acting Senior Manager, The Innovation Hub

3.40 pm

9.40 am

Singapore's Digital Landscape and a Hub for the Region

Mr Edward Tay, CEO, Sistema Asia Capital, Council Member for SG Tech

3.50 pm

9.50 am

Business Roundtable Networking Session

Learn with us

- About markets
- About new customers
- About Free Trade Agreements

Because knowledge is power.

Land with us

- Dedicated digital spaces
- Established networks
- Hands-on advice and facilitation

Scale and grow *smartly*.

Localise with us

- Trusted relationships abroad
- Deepen market presence
- Secure long-term sustainability

Because network is net worth.

GLOBALCONNECT@SBF

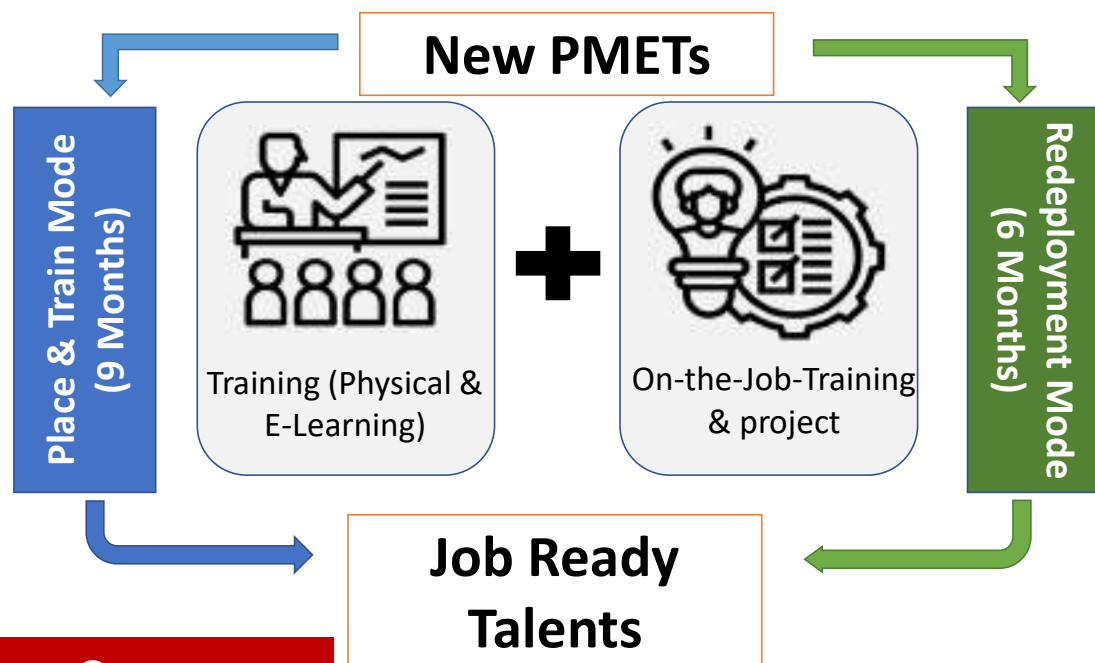
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<https://globalconnect.sbf.org.sg/>

Helping Companies Build Internationalisation Capabilities

Professional Conversion Programme: Internationalisation Professionals (PCP-I)



Scan / Email us for more information



Mr Eady Ng

Email: eady.ng@sbfb.org.sg

Ms Elizabeth Wee

Email: elizabeth.wee@sbfb.org.sg

Grant Support



6 Months / 9 Months
Up to 90% Salary Support



70% of \$13,000 training
course subsidy



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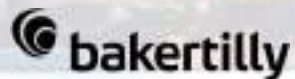
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Opening Address
Ms Mosa Tshabalala
Group CEO
GGDA

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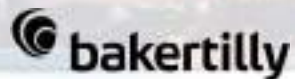
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Overview of Information Technology Sector
and Growth Trends in South Africa

Mrs Busi Mathe
CEO
RRS Innovation

EVENT PARTNER



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DEPT. OF TRADE & INDUSTRY
Advancing Industry Growth Opportunities

Overview of Information Technology Sector & Growth Trends in South Africa

Overview of the IT Sector



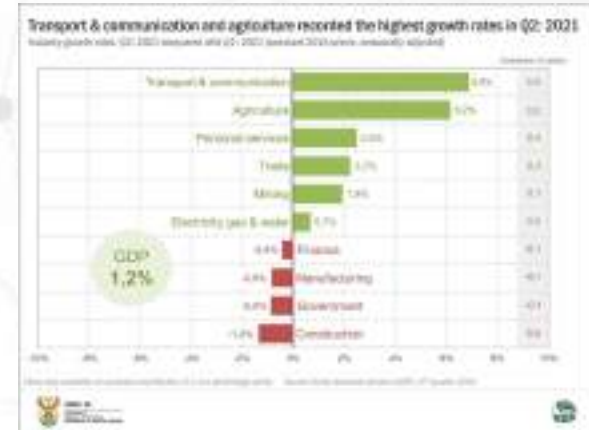
Largest ICT market in Africa in:

- mobile software
- security software, as well as
- electronic banking services.

Regional hub and a supply base for neighbouring countries & RoA.

In 2020 SA's IT **spending declined by 10.2%.**

In 2021, IT spending is anticipated to **be up by 5.2%**, with value spend projected to be **\$12.78 billion** during this period.



Overview of the IT Sector

Public Sector:

- Largest spender
- Focus on key interventions to:
 - >increase the usage of ICT to facilitate socio-economic justice & inclusion
 - >improve competitiveness and prepare for the 4th / Digital Industrial Revolution
- Skills Development Program aimed at training 1 million young people by 2030 in Robotics, Artificial Intelligence, Coding, Cloud computing and Networking
- (SMME) Development Strategy seeks to accelerate the growth and development in the SMME sector (incubation, networking, and capacity building)



Private Sector:

- Largest spender – Banking & Financial Institutions
- Grow their digital platforms & increasing their online security measures - drive innovation in internet banking and mobile access and mobile money solutions.

Growth trends & opportunities

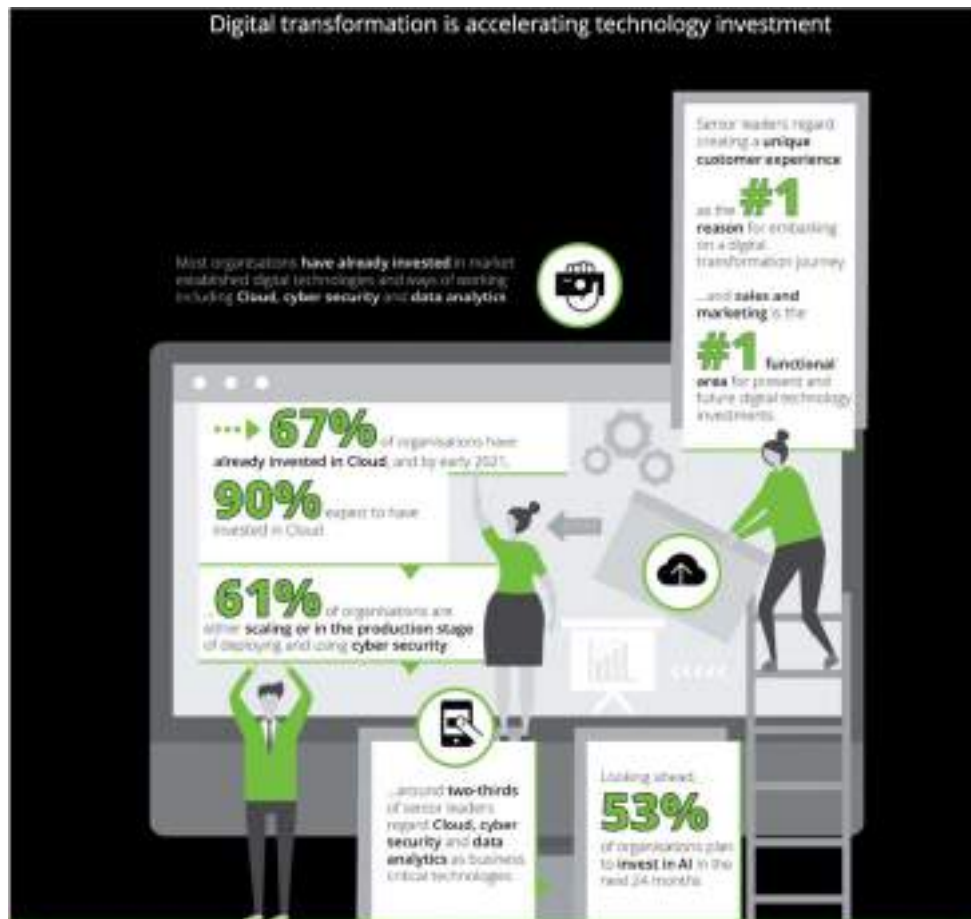
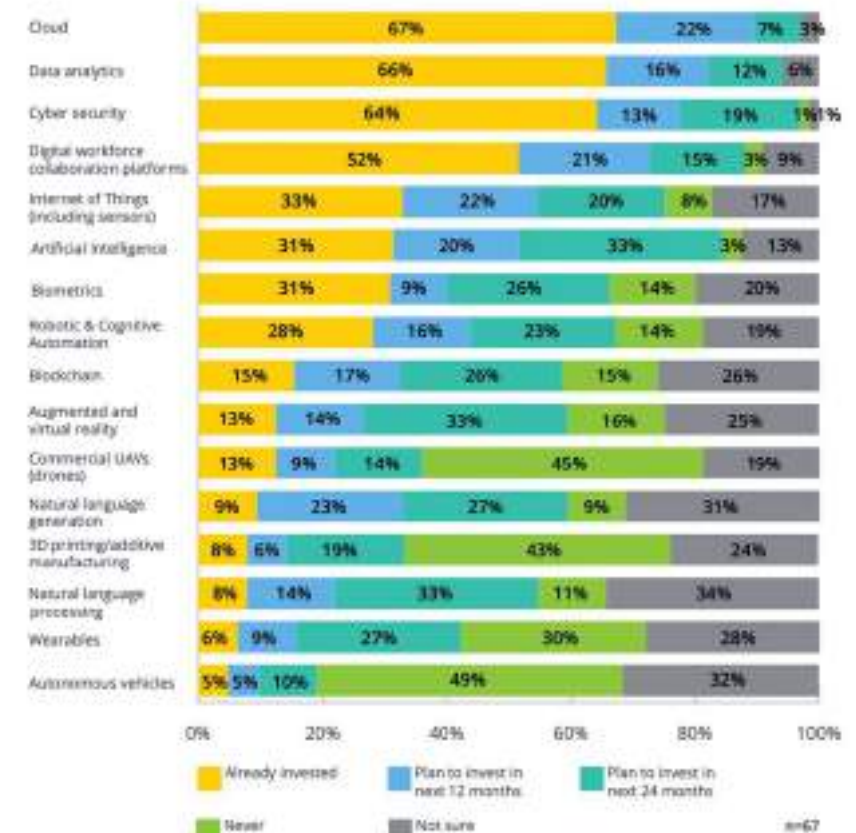


Figure 22. When do you expect your organisation to invest in the following technologies?



Source: Deloitte Africa analysis

Regulations



Datafication and
data collection

Increasing the pool
of collectable data

- Open data
- Data portability



data analytics

Enhancing data
analytic capacities

- Cloud infrastructure
- Data scientists



data-driven
decision

Promoting responsible decision-
making for growth and well being

- Domain-specific competencies
- Entrepreneurship



Thank you

Busi Mathe

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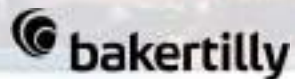
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Overview of Information Technology Sector
and Growth Trends in Singapore

Mr Lim Hui Jie
Partner
Baker Tilly Vision

EVENT PARTNER



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**"Developing the Technology
Nexus Between Singapore &
South Africa, Gauteng"**

Table of Contents

1. Introduction of Baker Tilly & Baker Tilly Vision
2. Overview of Singapore & South Africa
3. Digital Ecosystem
4. Growth Trends & Case Studies
5. Opportunities
6. Expanding into Singapore





Baker Tilly Vision

A joint venture between Baker Tilly Singapore & VisionGroup.

Baker Tilly Vision is technology group that focuses on the **Future of Technology** & how Technology will assist companies to **Future Proof** and be **Future Ready**.

www.bakertillyvision.co

1. Digital Ecosystem

Digital Ecosystem

Overview of Singapore & South Africa

Comparison of internet & mobile penetration (Jan 2021)

Singapore		South Africa	
Population	5.87 Million	Population	59.67 Million
Lives in Urban Centers	100%	Lives in Urban Centers	67.6%
Lives in Rural Areas	0%	Lives in Rural Areas	32.4%
Internet Users	5.29 Million	Internet Users	38.19 Million
Internet Penetration	90%	Internet Penetration	64%
Increase of 146,000 internet users from 2020 to 2021		Increase of 1.7 Million internet users from 2020 to 2021	
Social Media Users	4.96 Million (84.4%)	Social Media Users	25 Million (41.9%)
Mobile Connections	8.54 Million (145.5%)	Mobile Connections	100.6 Million (168.5%)
Increase of 210,000 social media users from 2020 to 2021		Increase of 3 Million social media users from 2020 to 2021	
Decrease of 21,000 mobile connections from 2020 to 2021		Increase of 817,000 mobile connections from 2020 to 2021	

Source: datareportal.com

Digital Ecosystem

Overview of Singapore & South Africa

Singapore

Updated: As of 12 September 2021, Trending in the last 28 days

App	Publisher	App	Publisher
1. Temu - Mass Video Maker	Temu (Pty) Ltd	1. NewsTogether	Government Technology Agency
2. L.L.B. Online & Store	Lawson, J.	2. Shopee SG - 4 Shopping Day	SHOPEE SINGAPORE PRIVATE LIMITED
3. Decoy Run	WOTWOT	3. WhatsApp Messenger	WhatsApp Inc.
4. Shopee SG 11.11 Shopping Day	Shopee	4. TikTok - Global Tasty Community	TikTok Pte. Ltd.
5. People's Choice Fresh: Clean produce online, local	People's Choice	5. YouTube Watch, Listen, Stream	Google LLC
6. Telegram	Telegram FZ LLC	6. Singpass	Government Technology Agency
7. TikTok	TikTok Pte. Ltd.	7. Facebook: Fast, Reliable	NTUC FairPrice Cooperative Limited
8. FoodPicking	FoodPicking	8. Telegram Messenger	Telegram FZ LLC
9. Singpass	Government Technology Agency	9. FoodPicking - Shopping Online	United Parcel
10. Get Lucky	ARABIA SUMMIT	10. Instagram	Instagram, Inc.

Google Store

Apple Store

1. Ecommerce
2. Government App
3. Social Media

South Africa

App	Publisher	App	Publisher
1. WhatsApp Messenger	WhatsApp LLC	1. B2B Index	B2B
2. Google	Google LLC	2. G2G - Global Gateway	G2G Group Ltd
3. Facebook	Facebook	3. WhatsApp Messenger	WhatsApp Inc.
4. Google Chrome: Fast & Secure	Google LLC	4. TikTok	TikTok Pte. Ltd.
5. YouTube	Google LLC	5. Instagram	Instagram, Inc.
6. Gmail	Google LLC	6. Facebook	Facebook, Inc.
7. Instagram	Instagram	7. Shopee	SHOPEE INC.
8. Messenger - Text and Video Chat for Free	Facebook	8. YouTube Watch, Listen, Stream	Google LLC
9. Google Drive	Google LLC	9. B2B - Fast, Affordable Rates	B2B TECHNOLOGY INC.
10. Samsung Internet Browser	Samsung Electronics Co., Ltd.	10. Messenger	Facebook, Inc.

Google Store

Apple Store

1. Social Media
2. Communication Tool
3. Transport

Digital Ecosystem Overview of Singapore

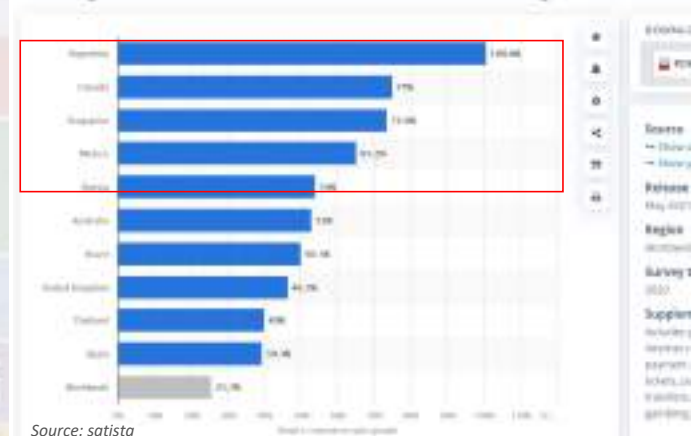


Government initiatives to become a Smart Nation

The three key pillar:

- Digital economy
- Digital government
- Digital society

Leading countries based on retail e-commerce sales growth in 2020



Most Popular Online Platforms in Singapore

Here are the most popular online platforms in Singapore:

Source: heysara.sg

Rank	E-commerce Platform	Monthly web visits		Percentage Increase
		Q1 2021	Q2 2021	
1	Shopee	5,963,300	10,079,900	67%
2	Lazada	7,786,700	8,570,000	10%
3	Qoo10	5,646,700	7,647,600	12%
4	Amazon.sg	2,833,300	3,653,333	29%
5	EBay	1,031,900	1,681,800	62%

Digital Ecosystem

Overview of South Africa

South Africa has growth of opportunities in these areas:

- Digital Payment within and across the world
- Digitalization & Finance
- eCommerce
- Logistics & Manufacturing
- Agriculture & more

A competitive and fragmented platform ecosystem



eCommerce is booming however was ranked #38 as a no.1 store in South Africa

Figure 4: Mobile cellular subscriptions, African countries, 2019 and CAGR (%), 2015-2019

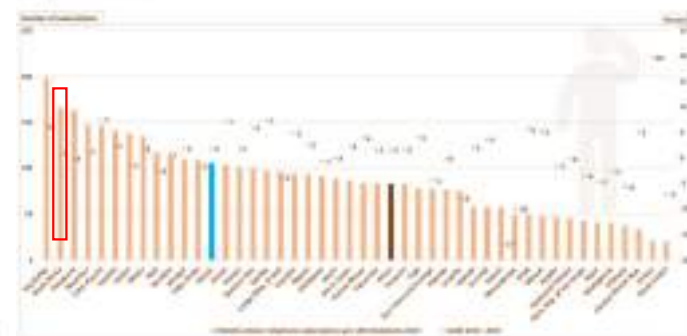
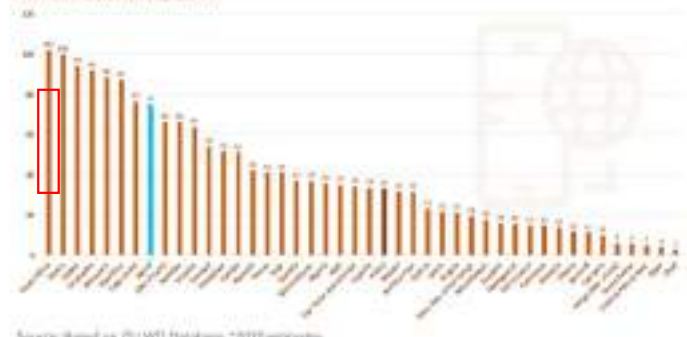


Figure 5: Active mobile broadband subscriptions per 100 inhabitants, 42 African countries, 2019



South Africa is doing better, benchmarked against the world average



2. Growth Trends

Growth Trends

Trends in Singapore

Ready Digital Infrastructure and Digital Ecosystem to tap into.

Singapore has seen Major companies moving into Singapore in the last few years:

- Tencent
- TikTok / ByteDance
- Bigo Live
- Zoom
- Twitter
- Rakuten

Digital Infrastructure such as

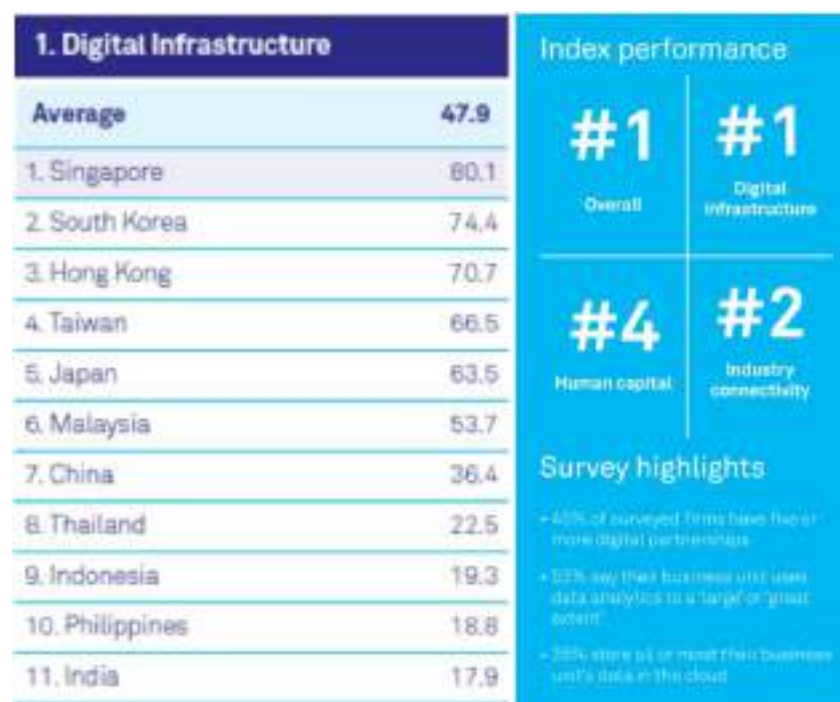
- 4G mobile network coverage
- ICT investment
- ICT laws.

Digital Connectivity such as

- Developing top-notch IT engineers and developers

Industry Connectivity such as

- Firms' innovation interaction with digital partners, networks and communities
- Nation payment network
- Common data infrastructure (CDI)



Source: The Economist Intelligence Unit

Growth Trends

E-Commerce case studies

- In July 2017, Amazon Prime launched 100,000 square feet facility.
- Prime Now in Singapore is Amazon's first foray in Southeast Asia based on new operating model leveraging on technology.
- Now, it gives shoppers in Singapore access to tens of thousands of products.
- Lazada is a privately owned e-commerce in 2011.
- In 2014, operate within Southeast Asia and raised approximately US\$647 million huge investors.
- In 2016, Alibaba Group announced to acquire up to \$1 billion for controlling stake.
- In 2017, increased investment in Lazada by another \$1 billion.
- Later in 2018, invested another \$2 billion.
- In Philippines, Lazada was ranked top e-commerce player.
- Shopee started in Feb 2015, has expanded to 15 countries, mostly covering Asia.
- Within 4 years, established as the second largest e-Commerce marketplace in the region, with 147.6 million monthly visits record in June 2018.
- On 3 September 2019, Shopee officially opened its new six-storey regional headquarters, with 244,000 square feet.
- In Aug 2021, took just 2 years to become Brazil's most downloaded app.
- Now Shopee is the top eCommerce in Southeast Asia.

Growth Trends

Initiatives in Singapore

Singapore government recognises the value of lowering barriers to trade and actively pursues an agenda of open trade borders.

- > 20 Free Trade Agreement around the world
- The Africa Continental Free Trade Area (AfCFTA)

Key initiatives that helps:

- Providing support in automation technology, including AI & robotics process automation
- Pool of Talent for hire; there are many programs for talent development in the space of technology
- Increased spending to accelerate and continue develop future-ready infrastructure to deliver outstanding digital connectivity.

According to a report by Deloitte, commissioned by Autodesk Foundation

- Singapore is the country least at risk from automation
- Ranking second for preparedness, behind Australia, and ahead of Japan.

Source: techwireasia.com



Growth Trends

Trends in South Africa

South Africa as a Hub of Africa

- Durban harbor, which handles 69% of South Africa's maritime imports, has struggled to meet demand and cut transit times
- In South Africa is the 37th largest market for eCommerce with a revenue of US\$4 billion in 2020
- The biggest player in the South African eCommerce Market had a revenue of US\$451 million in 2020.
- Manufacturing output rose 87.9% year-on-year in April 2021 but has it many challenges
- 3 out of 5 as top financial hubs in Africa – Johannesburg (\$226 Billion), Cape Town (\$123 Billion), Durban (55 Billion) (in estimated private wealth – pulse.ng)



Opportunities

Collaboration / Partnerships

Singapore is the gateway to the world especially ASEAN & China; strategic location with superb connectivity

Singapore can provide:

- Infrastructure providing necessary capabilities to drive business and digital transformation
- Launchpad for expansion in the Region, Good base for Regional HQ
- Technology driven and equipped with core methodology, especially in automation

Bonus Section:
Favorable Tax Policies

South Africa is the gateway to emerging and marketing booming Africa

South Africa can provide Regional outreach to Africa and has massive growth opportunities, along with

- Connectivity; South Africa as a bridge to Africa
- Resources, Commodities, Supplies
- Investment and opportunities in a growing market



Expanding into Singapore

Interested party looking for partners, please reach out to us.

- Setup companies for you or your clients
- Digitize Business & Market Entry

The Baker Tilly Funds Practice Team offers a comprehensive suite of services, from funds audit, tax planning to specialist advisory solutions:

Assurance

- Statutory Audit of fund management companies, funds, private equities and financial advisers
- Monetary Authority of Singapore Compliance Reporting
- Cayman Islands Monetary Authority Compliance Reporting
- Financial Due Diligence

Tax

- Annual Tax Compliance and Tax Filings
- Tax Due Diligence
- Tax Planning and Advisory
- GST Advisory
- GST Compliance
- GST Reviews

Governance and Risk

- Enterprise Risk Management (ERM) Services
- Internal Audit and Regulatory Compliance
- Operations and Sustainability Advisory

Advisory

- Corporate Finance
- Forensic Services
- Strategy Consulting
- Transaction Advisory Services
- Valuation

Business Solutions

- Accounting Services
- Corporate Secretarial Services
- Payroll Services

Expanding in Singapore

Baker Tilly Vision

Baker Tilly Vision is technology group that offers industry specialised services in digital transformation and in digital assets and digital asset audit support. With a focus on serving companies that wishes to digitally transform themselves and companies that handles digital assets, we help our clients plan for the future.



>100 years of combined experience in audit and technology, consultancy and implementation



Supported by a top 10 largest accounting and business advisory firm locally and a blockchain technology solution provider



Experience in servicing both that wishing to digitally transform and to be future ready as well as upcoming digital asset focused companies

Together, we embrace the opportunities tomorrow presents through....



Digital Transformation Consultancy



Enterprise Grade Blockchain Solutions



Digital Asset Audit Support Solutions



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The Innovation Hub's Smart Industries Incubation Programme

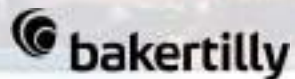


Mr Pieter Holl
CEO
The Innovation Hub



Ms Wandisiwe Marhaya
Acting Senior Manager
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Developing the Technology Nexus between Singapore and South Africa Gauteng Webinar 21 September 2021



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Vision and Strategic Objectives

VISION

To be a model science park and the innovation agency of choice for fostering economic development and competitiveness in Gauteng City Region.

PRIORITY SECTORS



Bio-economy



Green Economy



Smart Industries



OUTCOMES

Knowledge-Based Enterprises

Skilled Workforce

Decent Jobs

Socio-Economic Development

Organizational Sustainability

STRATEGIC OBJECTIVES

- Foster business growth
- Develop and strengthen strategic partnerships
- Accelerate the full development of Science Park
- Develop and Nurture Human Capital



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Smart Industries

INNOVATION

BUSINESS INCUBATORS



About Smart Industries



The Smart Industries unit is set out to support start-ups in the sector. The aim is to be the preferred partner for championing smart innovative solutions in the ICT (IoT, big data & analytics, devices/sensors, cyber security, artificial intelligence, virtual and augmented reality) and Advanced Manufacturing (foundry 4.0, additive manufacturing and Industrial IoT) sub-sectors.

Our key objectives are to:

- Strengthen multi-helix collaboration to foster innovation;
- Promote skills development in Industry 4.0;
- Establish and manage innovation collaboration platforms in both private and public sector; and
- Recruitment and support of high-growth and high-impact technologies.

The programmes within the Smart Industries unit are Maxum Business Incubator (Smart and Digital), Open Innovation Exchange (OpenIX) and Gauteng Accelerator Programme (GAP-ICT).



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MAXUM

Business Incubators



Maxum Programmes

Maxum Business Incubator Programme is one of the programmes within the Smart Industries unit at The Innovation Hub Management Company. Maxum provides an enabling environment for start-ups from the knowledge intensive (Smart Industries) sectors, which are fast-tracked to compete in the global village. The start-ups are offered support through the twelve-month pre-incubation (Factory) and the main three year incubation (Maxum Core) Programmes.

FOCUS AREAS

Maxum Smart

- ICT
- Advanced Manufacturing

Maxum Digital

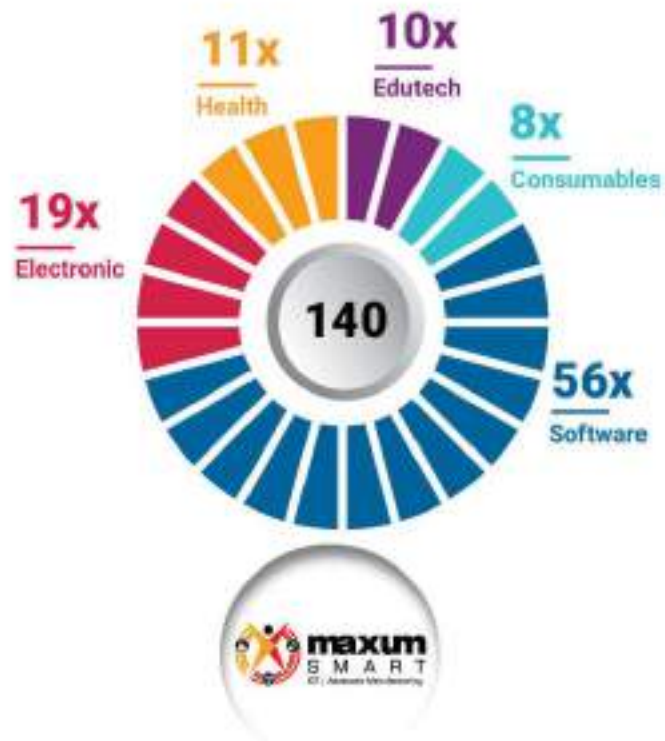
- Gaming
- Animation
- Virtual Reality
- Augmented Reality



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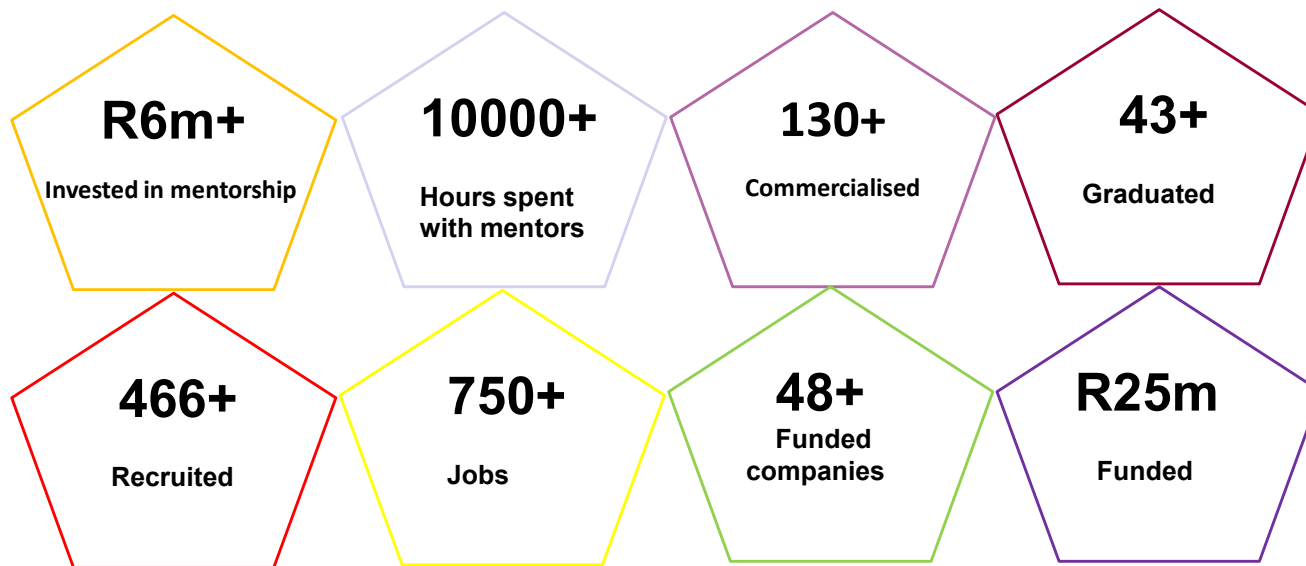
Maxum Business Incubator Clusters



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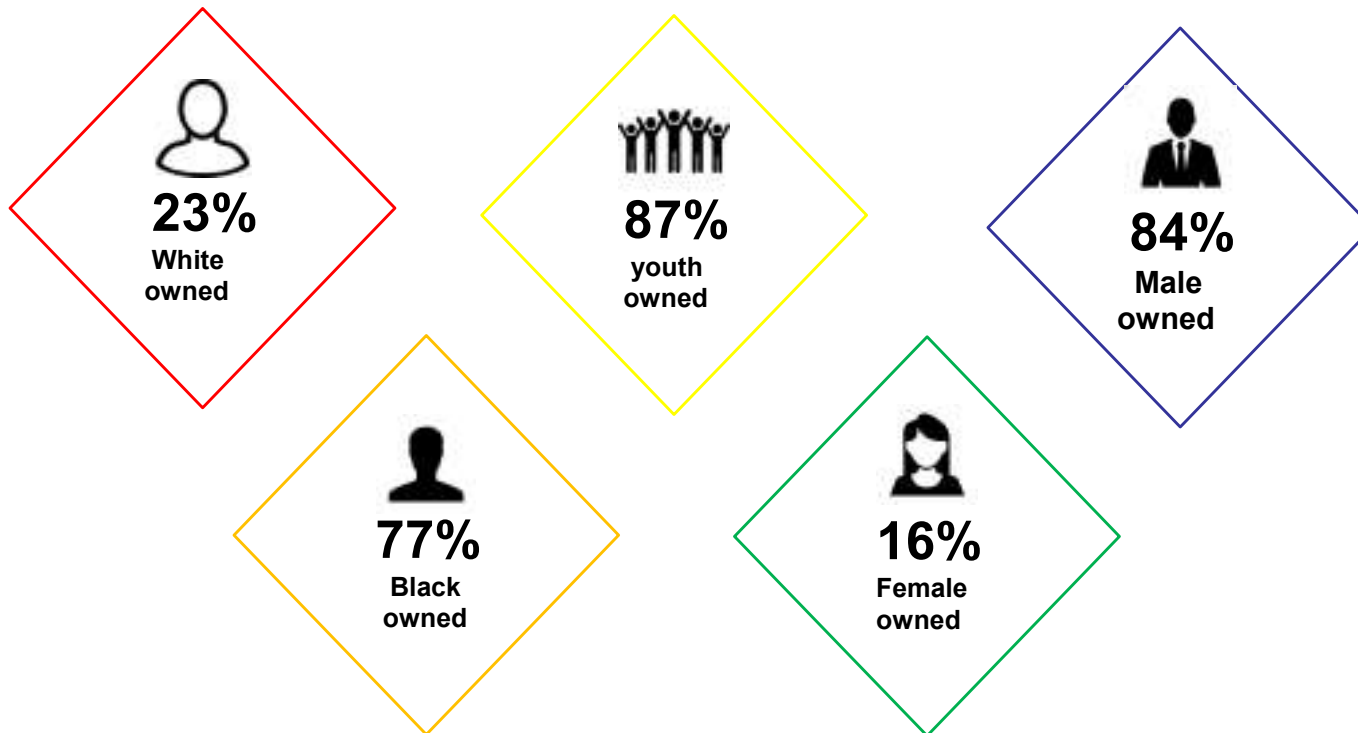
Maxum Business Incubator Impact



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Maxum Business Incubator Demographics



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Our Start-up Highlights



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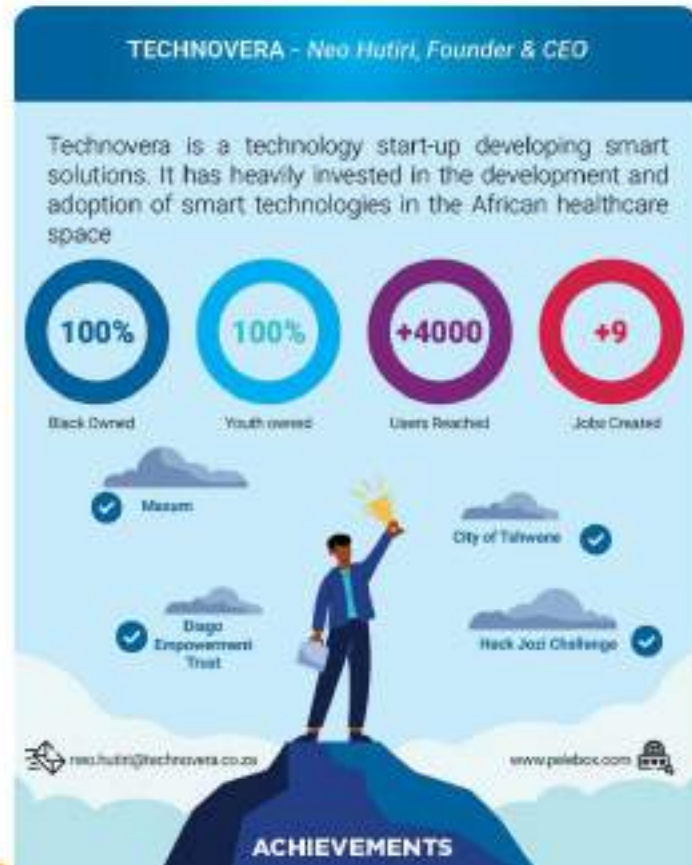
Our Start-up Highlights



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Our Start-up Highlights



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Together. Moving Gauteng City Region Forward

Thank You



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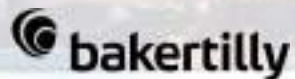
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Singapore's Digital Landscape and a Hub for
the Region

Mr Edward Tay
CEO
Sistema Asia Capital

EVENT PARTNER



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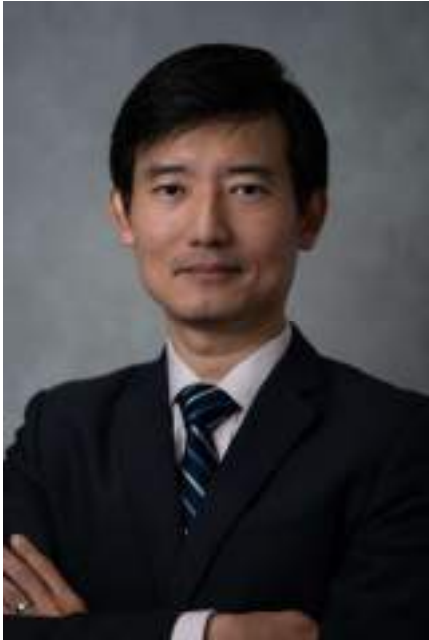
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Singapore's Digital Landscape and a Hub for the Region

EDWARD TAY | CEO Sistema Asia Capital, EXCO SG TECH

ABOUT EDWARD TAY



Edward Tay is the Chief Executive Officer for Sistema Asia Capital, a registered fund management company with Monetary Authority of Singapore.

Prior to his current role, he has served senior appointments in technology giants such as IBM, British Telecom, Keppel T&T. Avid angel investor since 2000 and presently served as an Adjunct Professor at the School of Economics, Beijing University and is also a project mentor at the SMU, SEAS, NTU and ACE.

He is also the co-founder of Asia Sustainability Forum, that aims to create awareness and supports initiatives towards shared vision of sustainability. Edward is also an Exco in SG Tech Singapore Enterprise Chapter 2021/22. He has also been appointed as the Co-Chairman for Huawei Sparks Advisory Council Asia Pacific.



ABOUT SISTEMA

Russia's Largest Private
Investment Corporation

Sistema Group is amongst the top 20 largest Russian listed companies in the Forbes Global 2000.

Established in 1993, Sistema is now one of the main contributors to Russia's GDP, representing multiple high-potential sectors through its portfolio of companies that serve more than 150 million consumers.



Sistema's shares are listed on Moscow Stock Exchange (MCX: AFKS) and the London Stock Exchange in the form of global depositary receipts (LSE: SSA).

Sistema Asia Capital (SA Cap) is a Registered Fund Management Company (RFMC) regulated by the Monetary Authority of Singapore and is wholly owned by Sistema PJSFC.

INVESTMENT ACHIEVEMENTS

Assets : \$21.1B+

Revenue : \$11.2B+

OIBDA : \$3.8B+

- ▶ **Sistema is an investment company**
- ▶ **Successful 25-year investment record**
- ▶ **Strong history of portfolio value-creation**
- ▶ **Largest private equity player in Russia**
- ▶ **Consistent profitable private equity exits**
- ▶ **Operates 5 Funds Across 10 Countries**
- ▶ **Most active venture investor in Russia**

INVESTMENT SECTOR COVERAGE

- | | | | |
|-------------|-----------------|------------------|--------------------|
| ▶ Telecoms | ▶ Commodities | ▶ Healthcare | ▶ Power Grids |
| ▶ Retail | ▶ Agriculture | ▶ Pharmaceutical | ▶ Microelectronics |
| ▶ Fashion | ▶ Manufacturing | ▶ Real Estate | ▶ Deep-technology |
| ▶ Ecommerce | ▶ Banking | ▶ Hospitality | ▶ ... |

NOTABLE PORTFOLIO COMPANIES (IPO & Pre-IPO)



Telecoms
NYSE: MBT | \$10B
Effective Stake: 50%



Ecommerce
NASDAQ: OZON | \$14B
Effective Stake: 33%



Vertical Retail
MCX: DSKY | \$1B+
Fully Exited in 2020



Real Estate / Construction
LSE: ETLN | \$500M+
Effective Stake: 25%

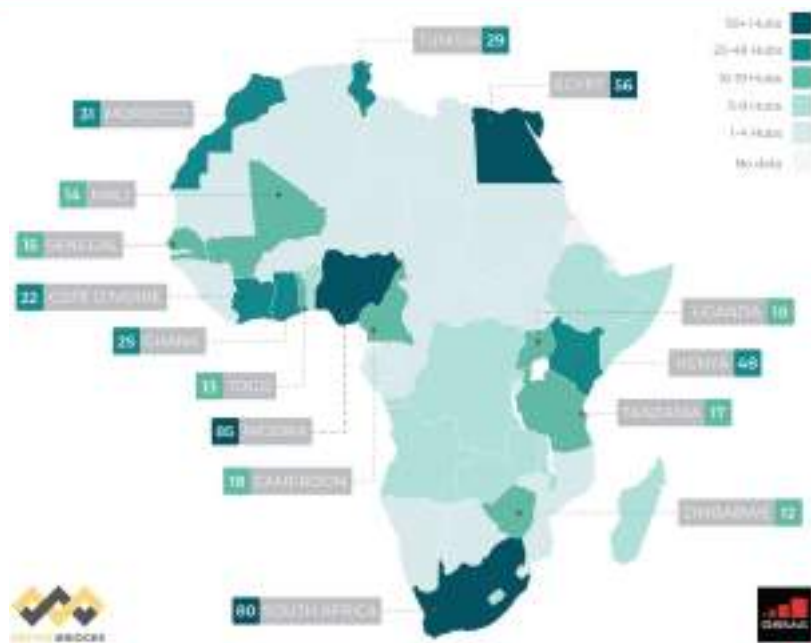


Real wood, pulp and paper, packaging
MCX: SGZH | \$2B
Effective Stake: 73.7%



Agriculture
One of Russia's Largest
Effective Stake: 85%

AFRICA'S TECH LANDSCAPE



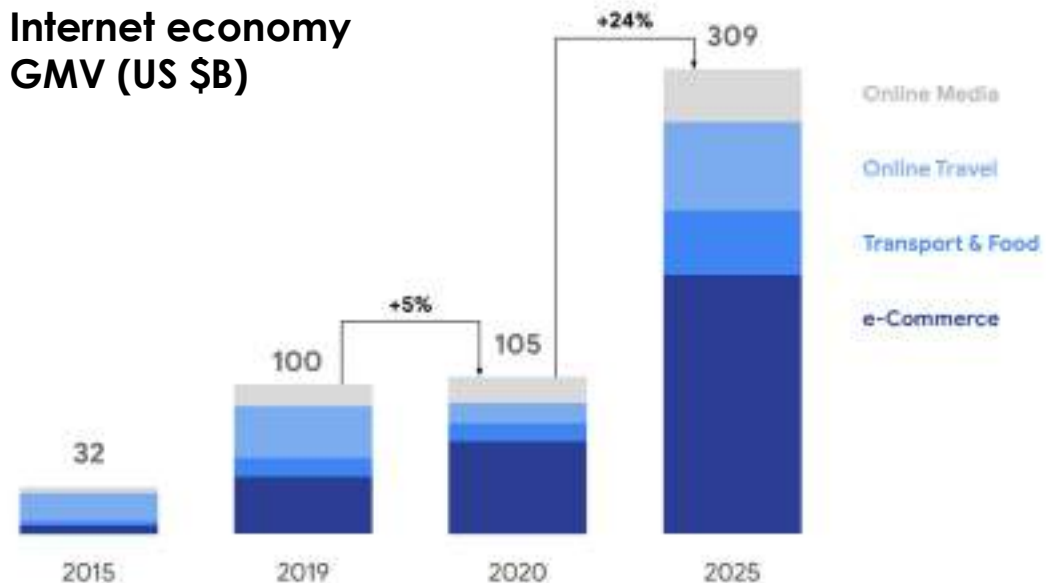
SEA'S DIGITAL ECONOMY

Google TEMASEK BAIN & COMPANY

Amongst the fastest growing markets in the world:

- 10 Countries
- > 600M People
- ~500 M Internet Users

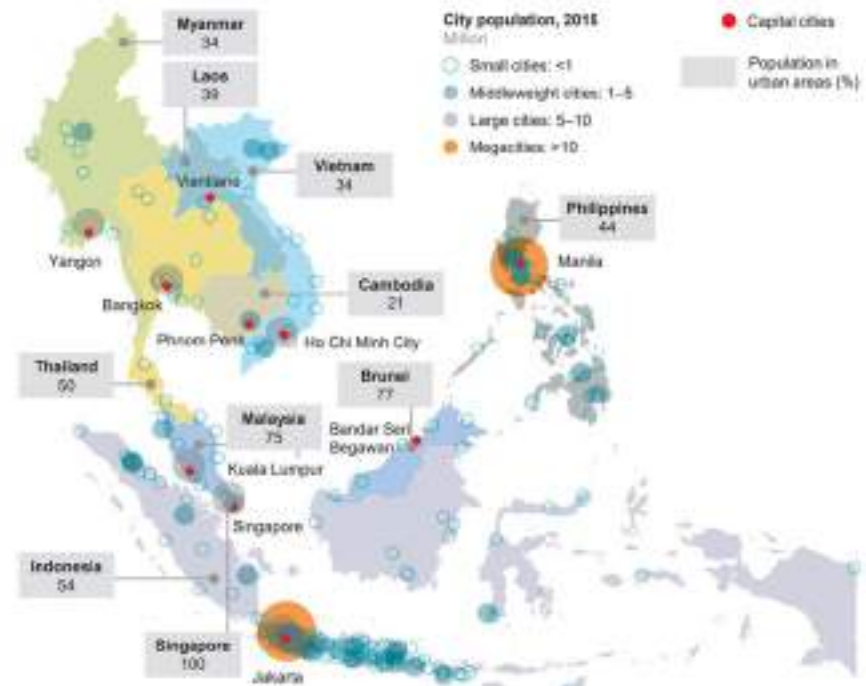
**Internet economy
GMV (US \$B)**



1) THINKING REGIONAL

ASEAN is not a Monolith, tech companies need:

- Large enough addressable market
- High growth trajectory / scalability

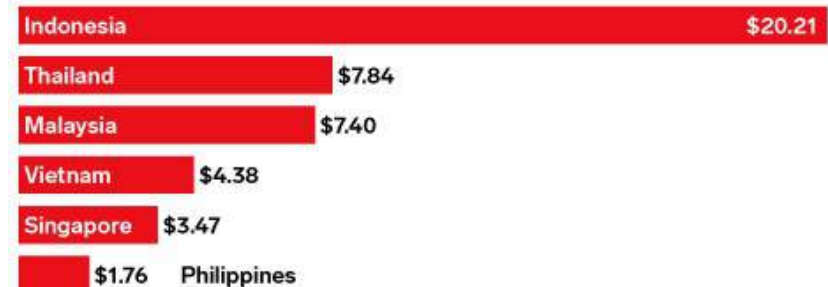


2) DIGITAL ECONOMY

- Digital retail in South East Asia grew 85% year-on-year and the region is on track to see almost 80% of consumers go digital by the end of 2021. The growth in SEA outpaces the likes of China (5%), Brazil (14%) and India (10%)
- Digital spending per person is up 60% compared to last year, with overall e-commerce sales set to double by 2026 as SEA consumers are not just spending more online as forecasted in 2020, more of them (45%) are using online as a primary purchase channel
- They are also buying an even wider range of categories online - survey respondents said they now buy online for an average of 8.1 categories – 60% higher than the 5.1 average seen in 2020

Retail Ecommerce Sales in Select Countries in Southeast Asia, 2021

billions



Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes, or money transfers, food services and drinking place sales, gambling, and other vice goods sales; total retail ecommerce sales in the 6 countries listed=\$45.07 billion in 2021
Source: eMarketer, May 2021

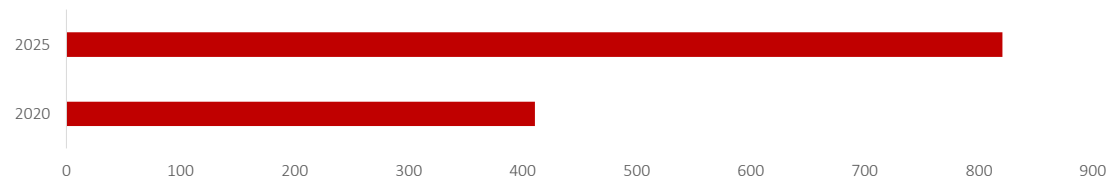
266710

eMarketer | InsiderIntelligence.com

3) SMART CITIES

Emerging economies across APAC are expected to offer new market opportunities to vendors in the smart city market

Forecasted Global Smart City Market in USD Billions



- Factors such as the need for public safety and communication infrastructure and increased adoption rates of advanced technologies are driving the smart city market
- Increased environmental concerns, growing demand for advanced technologies such as IoT and 5G, and developing economies are generating a number of opportunities
- Acquisitions and product launches are expected to offer lucrative opportunities for market players in the next 5 years
- The market growth in APAC can be attributed to increasing technology investments and ongoing smart city projects in the region

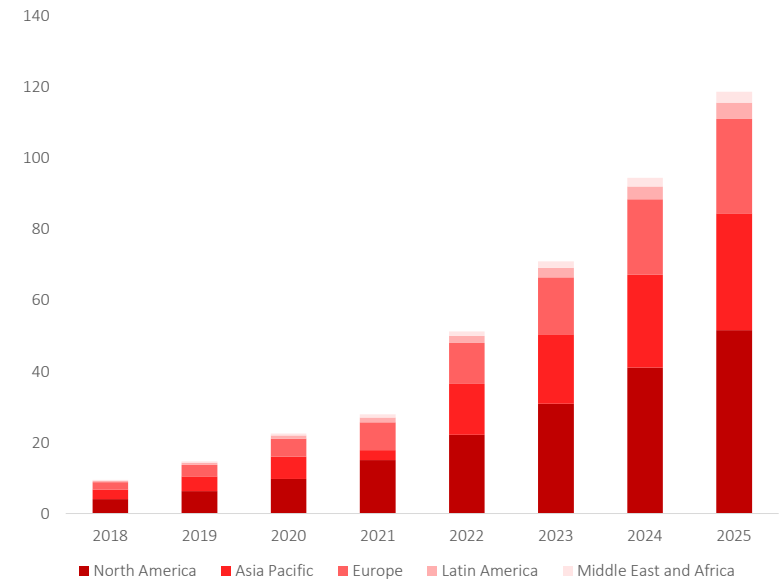
4) ARTIFICIAL INTELLIGENCE

CREATING IMPACT THROUGH NATIONAL AI PROJECTS

The 5 National AI Projects address key national challenges for Singapore in transport and logistics, smart cities and estates, healthcare, education, and safety and security. Implementing them will require our research institutes, industry, and Government to work collectively to develop and deploy AI solutions.



Revenues from AI software market worldwide from 2018 to 2025 (in USD billions)



ASEAN UNICORNS (2021)

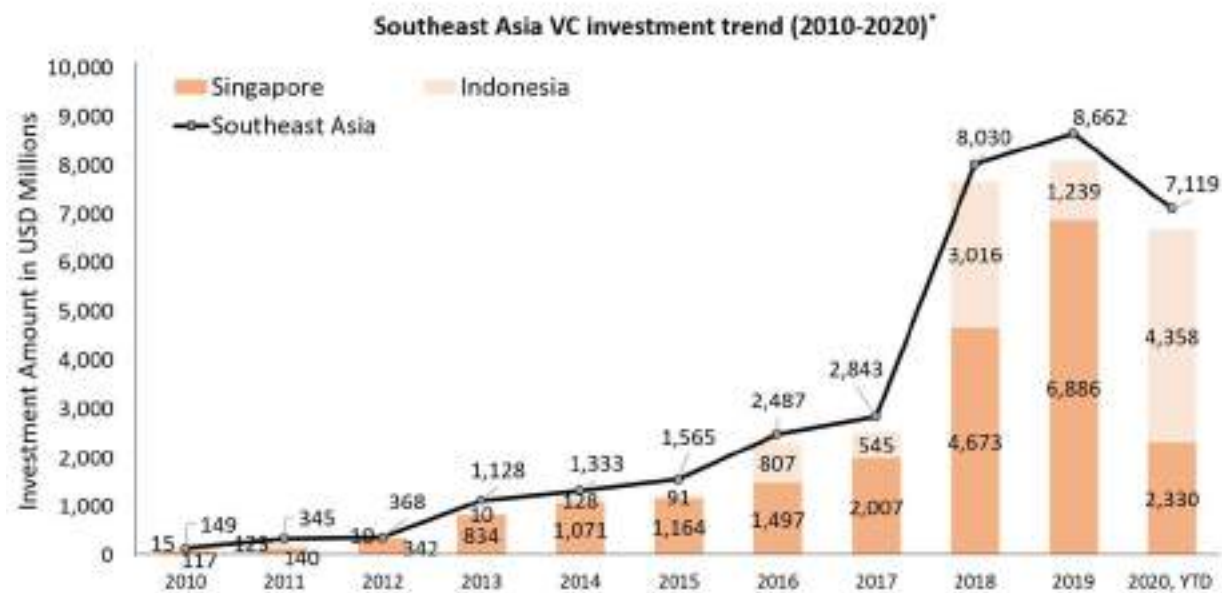


+ MORE...

ACTIVE VCs (2021)



INVESTMENT TREND



AN ECOSYSTEM EFFORT

**Research
Institutions**

Government

**Large
Corporates**

Universities

**Accelerators/
Incubators**

Investors

- 
- Cutting edge R&D
 - Strong IP regime
 - Robust talent pool
 - Access to markets
 - Conducive business environment
 - Investment funding at all stages

CONTACT



SGTECH



LinkedIn

EDWARD TAY

Chief Executive Officer
Sistema Asia Capital

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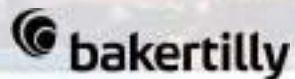
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Poll Question on Financing Assistance

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Join us now for our virtual business roundtable session to
connect and chat with our esteemed speakers.



<https://us02web.zoom.us/j/86993335134>

Thank you!

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