



**NTT Ltd.**  
**Growth Strategy**

Jason Goodall, CEO, NTT Ltd.



**Jason  
Goodall**

*Chief Executive Officer*  
**NTT Ltd**

# Self introduction

- 2016** ○ Group Chief Executive Officer, Dimension Data
- 2010** ○ Group Chief Operating Officer, Dimension Data
- 2003** ○ Managing Director of Middle East & Africa, Dimension Data
- 2001** ○ Chief Operating Officer at Internet Solutions
- 1998** ○ Chief Financial Officer of OmniLink

# Company Overview

The non-Japan businesses of NTT Communications, Dimension Data and NTT Security have been integrated to create a new NTT-branded global operating company (NTT Ltd.) in July 2019.

The new operating company will deliver Global Managed IT Services to clients around the world.

**Legal Name:** NTT Ltd.  
**Head Office:** London, UK  
**Brand Name:**  **NTT**  
**CEO:** Jason Goodall  
**Revenue:** US \$11 Billion  
**Employees:** 40,000+  
**Location:** 70+ countries and regions

## Board Members

### Tsunehisa Okuno

Executive Vice President,  
*NTT Corporation*

### Jason Goodall

Chief Executive Officer,  
*NTT Ltd.*

### Masaaki Moribayashi

Senior Executive Vice President,  
*NTT Ltd.*

### David Sherriffs

Chief Financial Officer,  
*NTT Ltd.*

### Rory Scott

Independent Non-executive Director

### Vab Goel

General Partner,  
*NTT Venture Capital*

# Our industry is the most dynamic and evolving in the world

---



## IT budget increases

In 2019, CIOs expect the IT budgets (2.9% in 2019)<sup>1</sup> globally to grow at almost the same rate as the previous year (3.0% in 2018)<sup>2</sup>, whilst witnessing regional changes in the growth rate



## Priority – digitization

In 2019 – digital initiatives is becoming mainstream objective for organisations – CEOs plan to look at new structural growth paths using digital



## Game changing technologies

Within digital technologies, artificial intelligence is emerging as a game-changer and moving beyond the hype phase, with both CEOs and CIOs being highly enthusiastic about the technology



## Impacting business models

Business model change remains a key priority for both CEOs and CIOs

- Nearly two-thirds of CEOs expect to change some aspect of their business model over the next two years

<sup>1</sup> Source: Gartner The 2019 CIO Agenda: Securing a New Foundation for Digital Business, Figure 10, October 2018

<sup>2</sup> Source: Gartner The 2019 CIO Agenda: Securing a New Foundation for Digital Business, Figure 10, October 2018

# Our industry is the most dynamic and evolving in the world

---



## Focus on product-methodologies

Organizations are looking at product-centric approach to drive better outcomes

- By 2023, approximately 40% of large enterprises will manage internal business capabilities as products to drive continuous innovation and competitive advantage<sup>3</sup>



## Tech talent a prerequisite

As digitalization takes hold, there is a growing challenge of talent

CEOs recognize the need to develop the digital talent base, with 52% of CEOs mentioning tech skills.<sup>4</sup>



## Shift in culture is pertinent

Significant culture change is common – especially in companies with a digital business initiative

- 37% of CEOs need significant or deep culture change by 2020<sup>5</sup>

<sup>3</sup>Source: Gartner Predicts 2019: Product Centricity Helps Close the Strategy Execution Gap, Dec 2018

<sup>4</sup>Source: Gartner Event Presentation, Symposium India Closing Keynote: The CEO Perspective 2018: How CIOs Should Respond, Symposium ITXPO, November 2018, Goa, India

<sup>5</sup>Source: Gartner Event Presentation, Symposium India Closing Keynote: The CEO Perspective 2018: How CIOs Should Respond, Symposium ITXPO, November 2018, Goa, India

# NTT Ltd is a market leader with capabilities across full services stack and lifecycle

Smart  
Mobility



Smart  
Sports



Smart  
Resources



Smart  
Agriculture



Smart  
Cities



Smart Factory /  
Industry 4.0



Smart  
Healthcare



Enabling a smarter world with disruptive innovation

## Our combined capability is market recognized

### Leading SI

Global Systems Integrator and Elite 150  
Managed Service Provider (CRN 2018)

### Leading MSP

Secure 24 –Top 3  
“Pace-setter” MSP (TSIA)

### #3 in the World’s Top 200 MSSPs<sup>6</sup>

In the MSSP Alert list for 2019

### Network

Coverage in 190+  
countries and regions

### #4

IP Backbone  
(Dyn Research)

### #3

Data Center  
(Telegeography)

# NTT Ltd. Operating Model

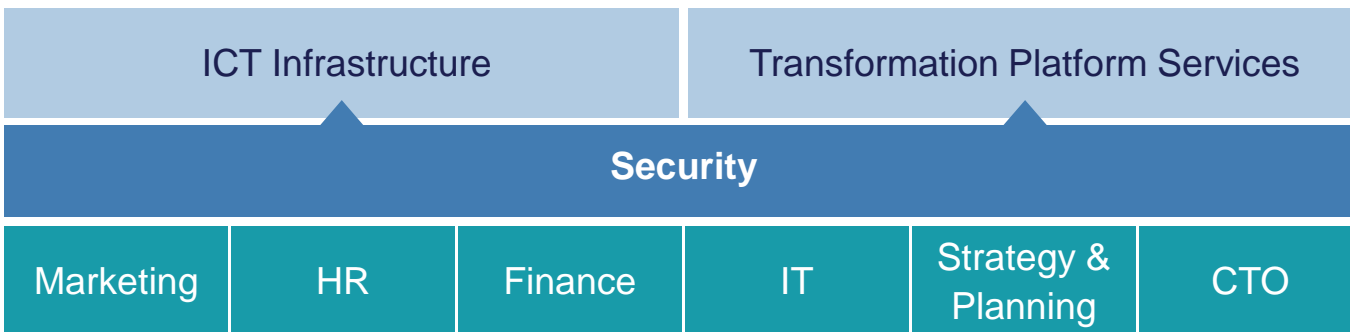


<b>Our clients</b>		
15,000 clients	\$11bn revenue	85% Fortune 500

Our clients are **at the centre** of our operating model



**Our 5 regions lead how we engage with our clients.** Supported by our global account and strategic solutions team. Taking our core go-to-market practices to market



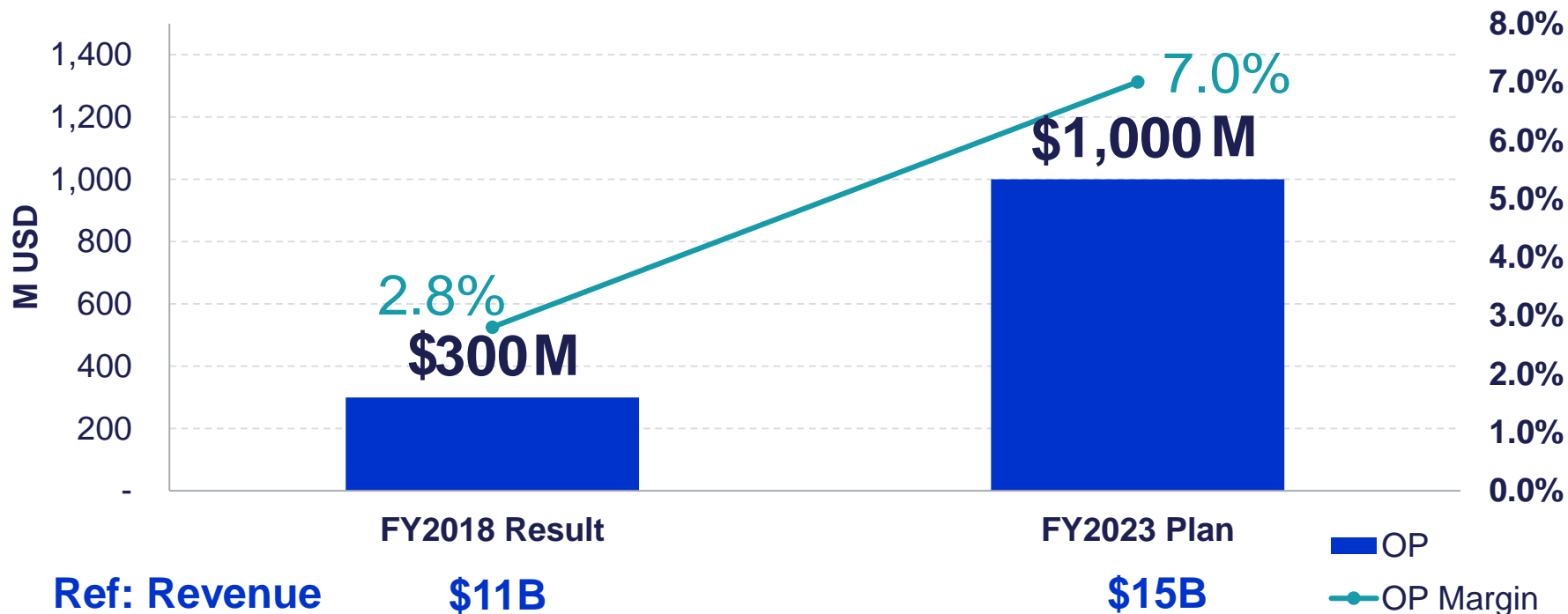
Our capability centres of excellence **deliver world class products and services** that are bundled together to meet our clients' needs

Our support functions ensure **we operate with the maximum impact**

# Our Financial Aspiration



Aim to achieve \$1,000M profit, 7% profit margin, and \$15B revenue by FY2023 ...



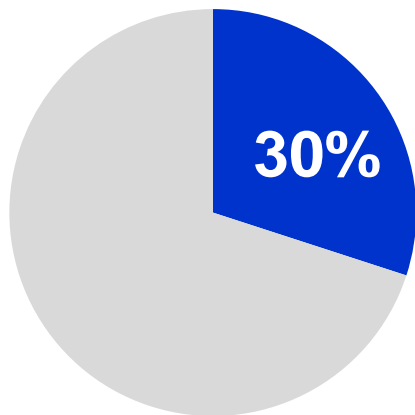


# Our Financial Aspiration

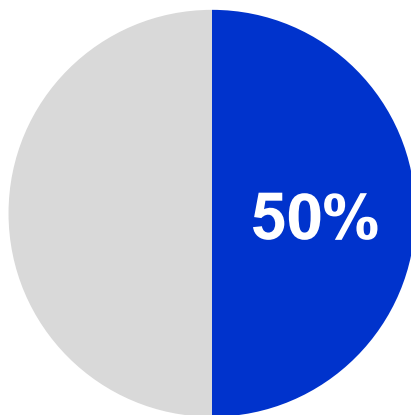
... by transforming our services portfolio to fastest growing parts of our market

**Shift portfolio** to attractive markets (market size, growth, and profitability) such as Data Center, Managed, Network and Security and increase **revenue share** from these markets from 30% to 50%

**FY2018**



**FY2023**



## Attractive Markets

- Data Center
- Managed
- Network
- Security etc.

=> Keep 10%+ OP Margin

# Our Financial Aspiration



How we plan to achieve this.



**Capitalize on the faster growth in these markets**

Overall IT Market  
growth: 3%

Managed Services 7%

Data Center 9%<sup>10</sup>



**Achieve higher profit margin with portfolio shift to higher margin markets**

Industry average OP

Managed Services 12%

Security 10%



**Efficiency improvement in excess of \$200M OP**

(Internal Digitalization, Spans & Layers, Delivery, Procurement, Office etc.)



**Thank you**