

The background features a stylized globe with a network overlay. The globe is composed of a grid of dots connected by lines, creating a mesh-like structure. The dots are in various shades of blue and white, and the lines are thin and light blue. The globe is positioned on the left side of the image, with its right edge curving towards the center.

**TATA COMMUNICATIONS**



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# **TATA COMMUNICATIONS** **ANALYST DAY MEET**

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09/06/2021

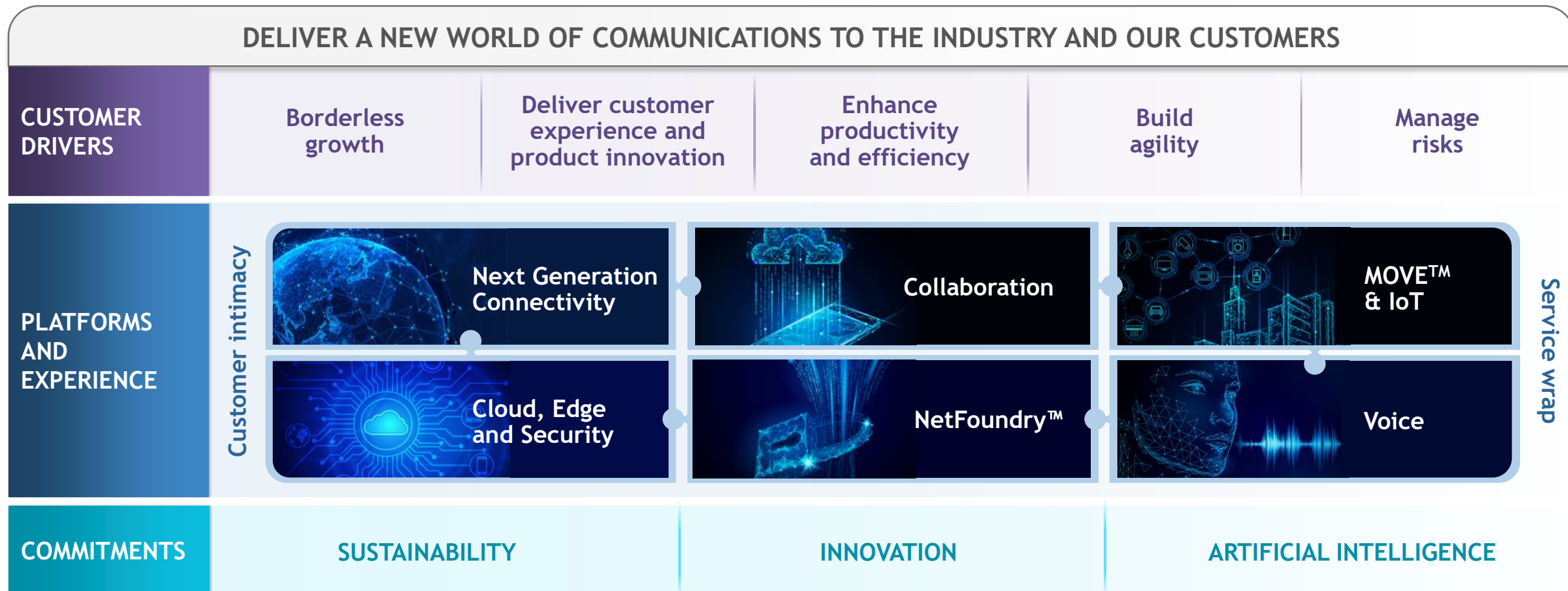
## SAFE HARBOUR

Some of the statements herein constitute “**forward-looking statements**” that do not directly or exclusively relate to historical facts. These forward-looking statements reflect our intentions, plans, expectations, assumptions and beliefs about future events and are subject to risks, uncertainties and other factors, many of which are outside our control. Important factors that could cause actual results to differ materially from the expectations expressed or implied in the forward-looking statements include known and unknown risks. Because actual results could differ materially from our intentions, plans, expectations, assumptions and beliefs about the future, you are urged to view all forward-looking statements contained herein with caution.

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# TATA COMMUNICATIONS AS A DIGITAL ECOSYSTEM ENABLER



## OUR STRATEGY : REVISITED



FINANCIAL  
FITNESS

HEALTHY BALANCE SHEET AND  
DOUBLE DIGIT PROFITABLE DATA GROWTH



GROWTH  
PLAN

POSITIONING AS A DIGITAL ECOSYSTEM ENABLER

WHO

WHAT

HOW



CULTURE

DRIVE LEADERSHIP BEHAVIOURS

# OUR GOALS IN REVIEW - GROWTH PLANS

## WHO

### IMPERATIVES



**Deeper with Fewer -**  
Top 1000 customer focus



**Customer Centricity**



**Competitive positioning** and  
value proposition articulation

### STEPS / SUCCESS MARKERS



**Focused Programmes** (Top 300  
and Next 700 Programme) for  
engagement and account planning



**Voice of Customer**  
- NPS improvement



**Marketing Initiatives** - Strengthening  
recognition, reputation and credibility  
**Alliances** - Go to Market agreements  
globally including SIs



# OUR GOALS IN REVIEW - GROWTH PLANS

## WHAT

### IMPERATIVES



**Product-to-Platforms** with right scaling and efficiency



Revamped **Operating Structure** for greater business focus



Pivoting the **Business Model** for greater value creation

### STEPS / SUCCESS MARKERS



**1-3-30 approach**  
**Agile New Product Innovation**



**3 Business Units**

- Network
- Collaboration and Connected Solutions
- Cloud, SDWAN and Security



Focus on **Fixed + Usage** model for digital platforms

## OUR GOALS IN REVIEW - GROWTH PLANS

## HOW

## IMPERATIVES



Right **Operating Model** with automation and agility



Value-added **Service Wrap**



Delivering superior **Customer Experience**

## STEPS / SUCCESS MARKERS



Analytics, AI and OPTIMUS



**Customer-focus:** Dedicated service desk, Multilingual Services, Advisory & Professional Services

**Solution-focus:** Service Design hub, Risk mitigation, Product Innovation



**TC<sup>x</sup>**

- Single portal for customers and partners to access and manage all our offerings
- Dedicated Customer Success Teams to ensure superior customer experience

# OUR GOALS IN REVIEW - FINANCIAL FITNESS

## HEALTHY BALANCE SHEET AND DOUBLE DIGIT PROFITABLE GROWTH

	ACTUAL STATUS	REVISED MEDIUM TERM TARGETS	OTHER ACHIEVEMENTS
ROCE Target - 20%	FY 21 ROCE 24.6% v/s 11.5% in FY 20	25-30%	Positive Net-Worth Trajectory
Reduction of Net Debt	Debt Reduction by INR 1,390 Cr; Net Debt to EBITDA at 1.8x	Maintain Optimal Net Debt	Highest PAT in 11 Years; INR 1,251 Cr
Double-Digit Profitable Data Growth	4.5% Data Revenue Growth in FY21	Double Digit Data Revenue Growth	Dividend at INR 14 per share; Increase of 3.5 times over last year
EBITDA Margins 22-25%, Focus on Optimal Cost Structure	FY 21 EBITDA Margin at 24.9%; With 29.5% Growth	23-25% EBITDA Margin	



**FINANCIAL  
FITNESS  
REDEFINED**



**FIT TO COMPETE**



**FIT TO GROW**

# FINANCE

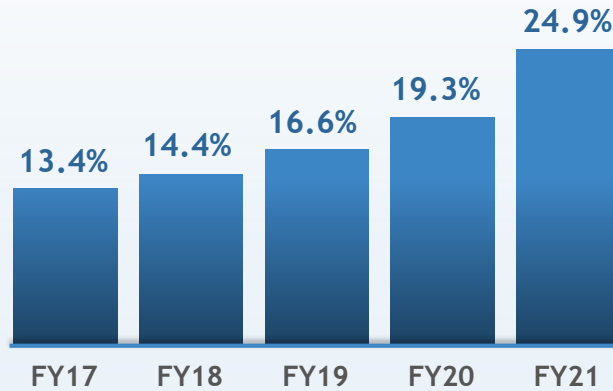
**KABIR AHMED SHAKIR**

- Chief Finance Officer

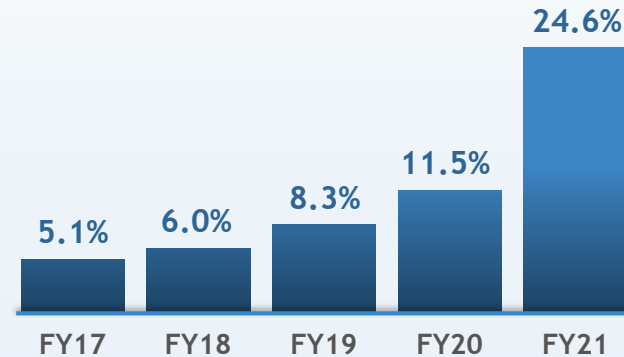


## FIT TO COMPETE

**EBITDA Margin**



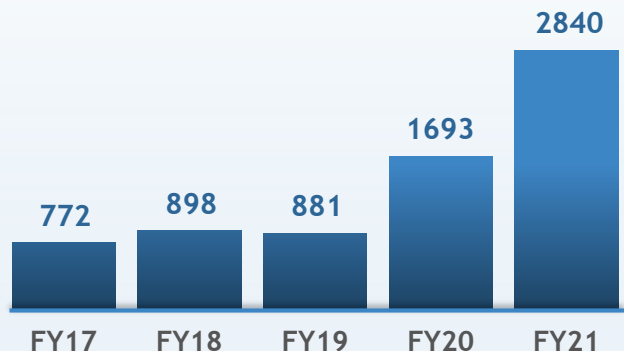
**RoCE**



**Net Debt to EBITDA**



**Free Cash Flow\***  
INR Crores



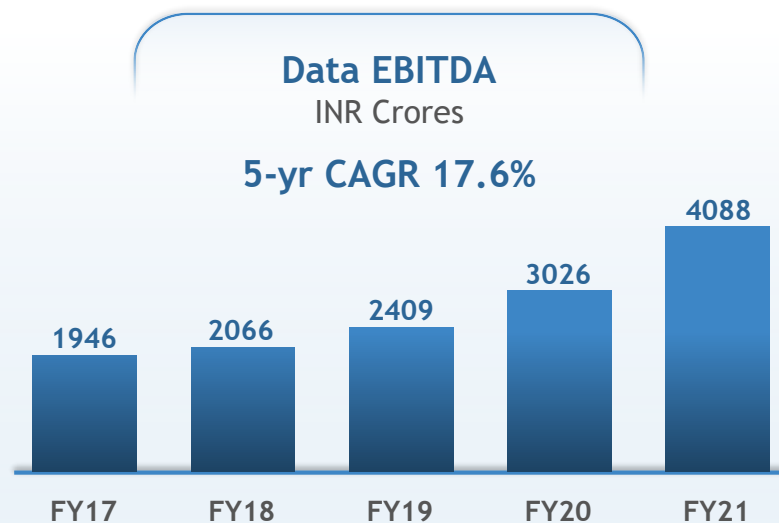
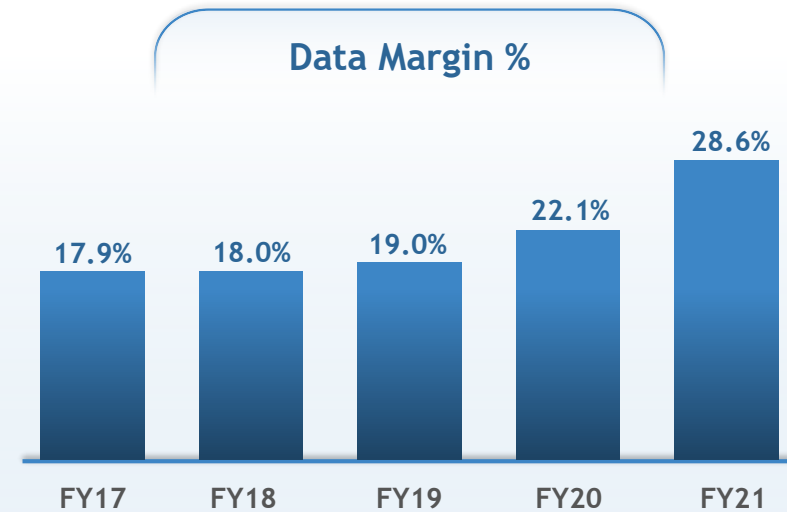
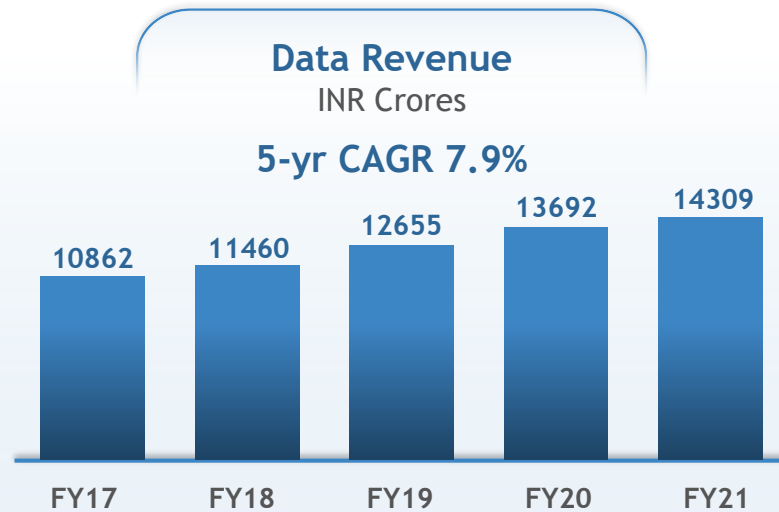
Medium term targets of a healthy balance sheet, growth in profitability and returns achieved



Improved cash flows and profits give us the confidence to invest in our customers, products and processes



## FIT TO COMPETE



Maximum management focus on acceleration of Data Revenue growth



Current profitability and Balance Sheet strength give us the flexibility to invest for future

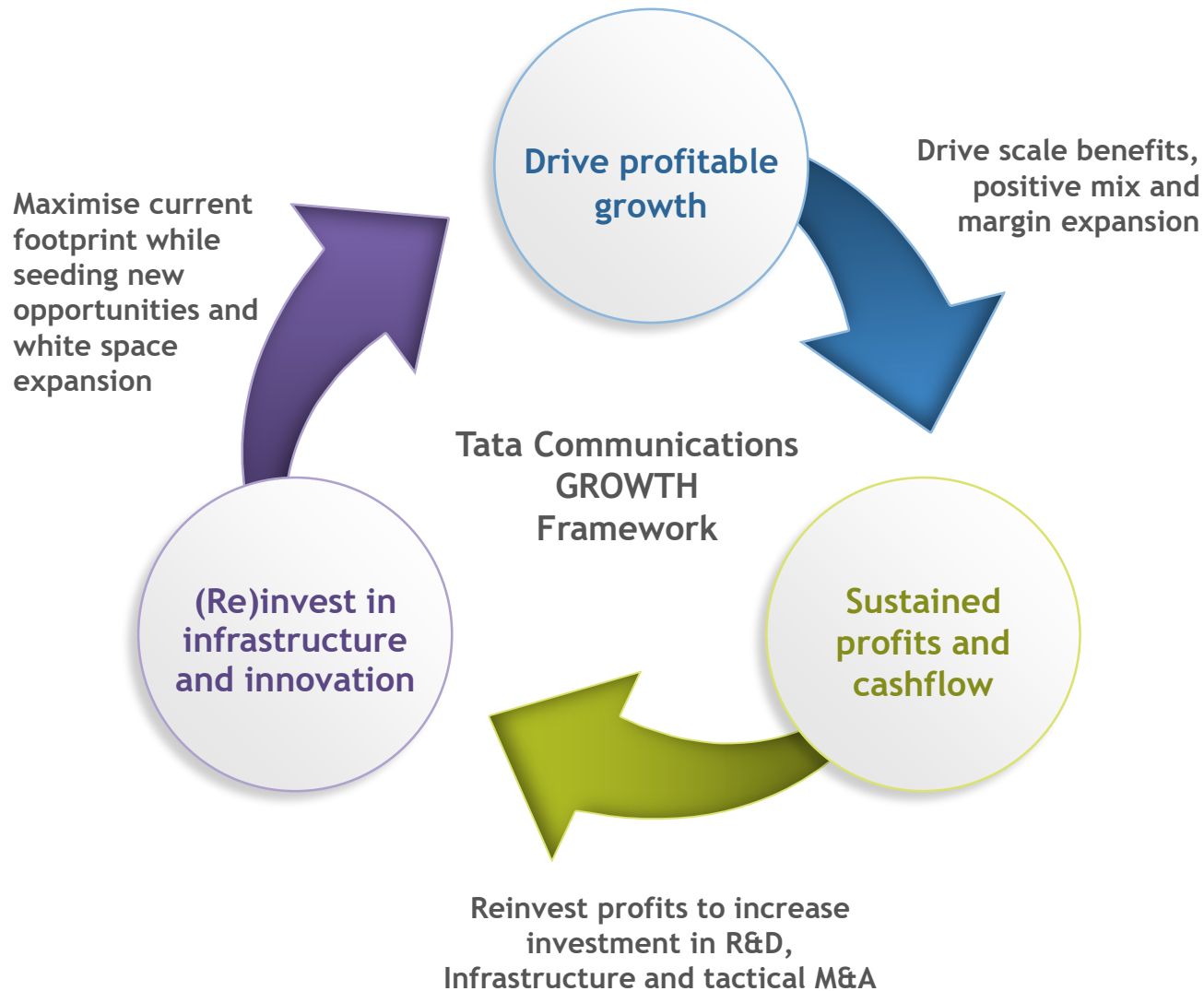


Growth Services portfolio had a CAGR growth of ~20% over last 5 years and became profitable in FY19



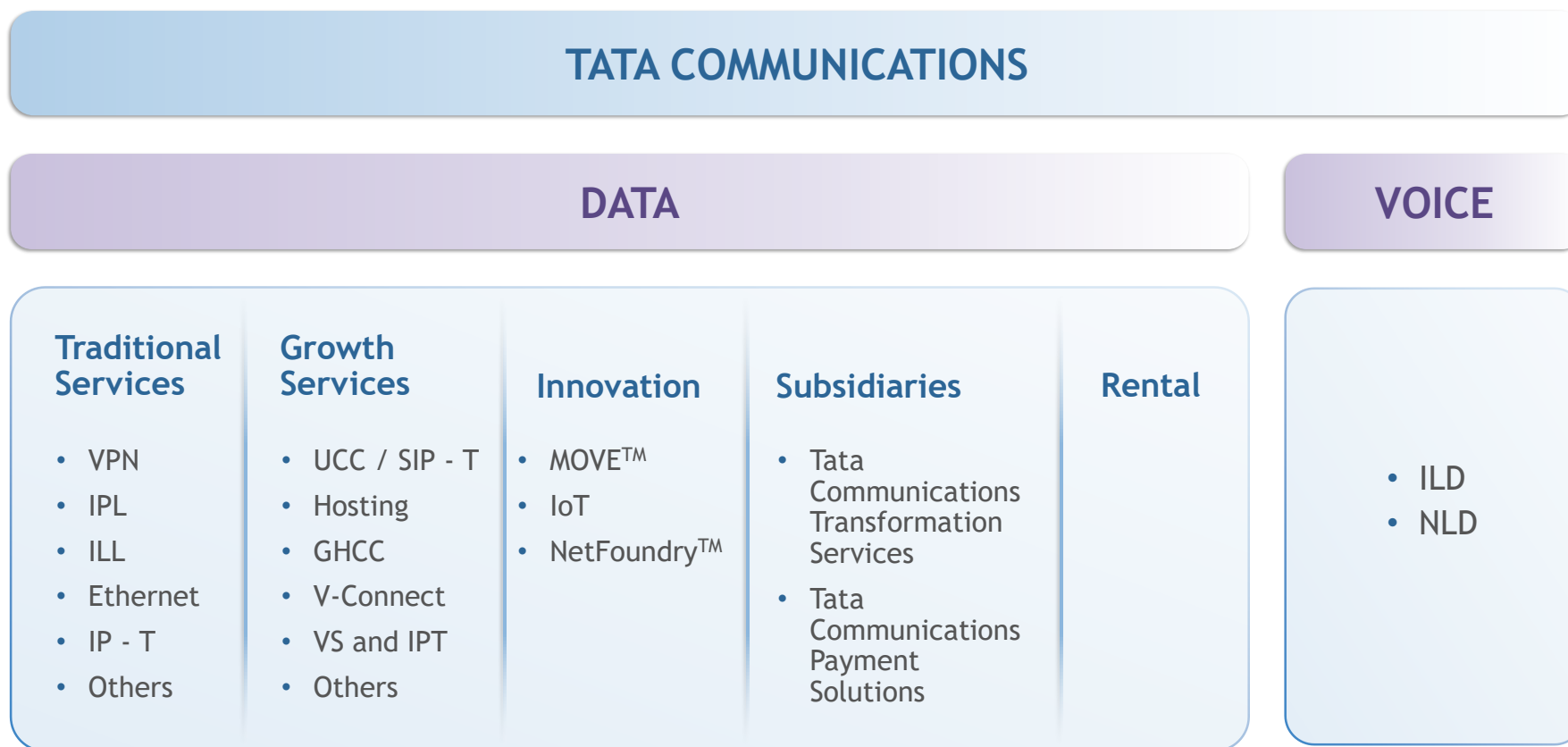
Our capex spends will be range bound, but invest with an eye on improved returns for each dollar spent coupled with a strategic view on such investments

## FIT FOR GROWTH - REVVING UP THE GROWTH ENGINE



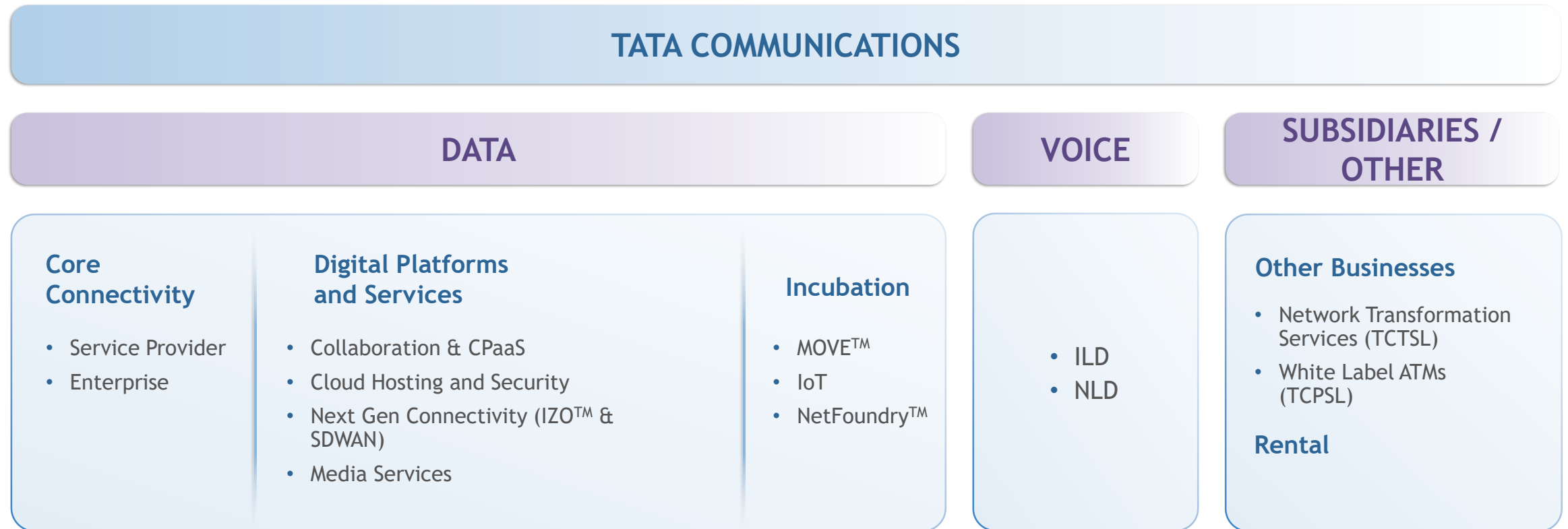
- Continued focus on margin improvement, with incremental efficiencies to be invested back in business
- Explore inorganic expansion as a growth driver
- Incremental cash position over the next few years supported by robust growth and profit margins will generate additional capacity to fund:
  - Tactical spends, Strategic capex and expansion requirements
  - Infrastructure investments to support new generation products portfolios
  - White space expansion to address market opportunity

## BEING FUTURE READY - CURRENT REPORTING STRUCTURE





# BEING FUTURE READY - NEW REPORTING STRUCTURE



- |  |  |
|--|--|
| <p>» 3 Business Segments now: Data, Voice and Others</p>   | <p>» Product grouping remains same except Content Delivery Network (CDN) which moves from Core Connectivity to Digital Platforms</p> |
| <p>» Traditional Services will be renamed as Core Connectivity and Growth Services will be renamed as Digital Platforms and Services</p> | <p>» Product level revenue segmentation discontinued; Segmentation is now basis customer proposition</p>                             |

## COMPARATIVE VIEW

### TRADITIONAL SERVICES

Amount in ₹, Cr; except ratios

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Gross Revenue	2,277	2,288	2,271	2,229	9,065
Net Revenue	1,882	1,871	1,853	1,802	7,407
EBITDA	970	981	1,016	941	3,908
EBITDA Margin	42.6%	42.9%	44.7%	42.2%	43.1%

### GROWTH SERVICES

Amount in ₹, Cr; except ratios

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Gross Revenue	774	806	903	923	3,406
Net Revenue	370	420	439	408	1,637
EBITDA	65	126	150	115	454
EBITDA Margin	8.4%	15.6%	16.6%	12.4%	13.3%

### CORE CONNECTIVITY

Amount in ₹, Cr; except ratios

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Gross Revenue	2,238	2,250	2,234	2,193	8,915
Net Revenue	1,858	1,845	1,829	1,779	7,311
EBITDA	976	984	1,017	946	3,923
EBITDA Margin	43.6%	43.7%	45.5%	43.1%	44.0%

### DIGITAL PLATFORMS AND SERVICES

Amount in ₹, Cr; except ratios

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Gross Revenue	813	844	940	959	3,556
Net Revenue	394	446	463	431	1,734
EBITDA	59	122	147	109	437
EBITDA Margin	7.3%	14.5%	15.6%	11.4%	12.3%

## SEGMENTAL BREAKUP

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Service Provider (Wholesale)	40%	40%	39%	41%	40%
Enterprise	60%	60%	61%	59%	60%

CORE CONNECTIVITY -  
REVENUE SEGMENTATION

Amount in ₹, Cr; except ratios

Particulars	Quarter Ended				Full Year Ended
	Mar 2021	Dec 2020	Sep 2020	June 2020	Mar 2021
Collaboration & CPaaS	44%	48%	53%	62%	52%
Cloud Hosting and Security	30%	26%	25%	20%	25%
Next Gen Connectivity (IZO™ & SDWAN)	16%	14%	13%	12%	13%
Media Services	11%	12%	9%	6%	9%

DIGITAL PLATFORMS AND SERVICES  
- REVENUE SEGMENTATION

Amount in ₹, Cr; except ratios



# GLOBAL CONNECTIVITY SERVICES

**GENIUS WONG**

- Chief Technology Officer and  
Head Network Connectivity Services



# REIMAGINING ENTERPRISE NETWORKS FOR THE NEW WORLD



## MARKET SHIFTS



Digital transformation



Hyper-scale connectivity



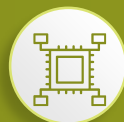
Digital-first business models



Faster Internet adoption



## ENTERPRISE CHALLENGES



Legacy WAN architecture



No SLAs on internet



WFH security



Network and IT cost optimisation



## NETWORK CONSIDERATIONS



MPLS for critical sites



Internet and broadband at other sites



Analytics and Automation



Single WAN and LAN provider



Scalable and diverse core network solutions



## CUSTOMER ASKS



Provider consolidation



100% digitised operations



Agile Networks



Service automation

# CONNECTIVITY SERVICES - ADDRESSING MARKET SHIFTS

## CORE CONNECTIVITY

Market size\* (USD bn)

CORE CONNECTIVITY	
CAGR	(1.9%)
2024	\$132Bn
2020	\$136Bn



## NEXT GEN CONNECTIVITY

Market size\* (USD bn)

NEXT GEN CONNECTIVITY	
CAGR	+14.5%
2024	\$18Bn
2020	\$11Bn

\* Source - Gartner, Cisco VNI, F&S, Internal Estimates



# CONNECTIVITY SERVICES - OVERVIEW

## ENTERPRISE

## SERVICE PROVIDER

### Competition

India - Telecom Service Providers and ISPs  
Global - Global Telecom Service Providers

India - Telecom Service Providers and ISPs  
Global - Regional Telecom Service Providers

### Right to Win

- Single Point of contact to manage and provision a variety of connectivity solutions across the globe
- Unified Service experience of SLA/ Assurance across regions
- On-demand connectivity solutions addressing dynamic requirements of customers
- Integrated WAN management with hybrid connectivity

- Presence across geographies with reach to key customer's location
- Consistent and market leading SLA coverage across regions
- Next generation, diverse and resilient service offering adapting to market demand
- Services scalability along with home market leadership

# INTERNATIONAL HYBRID WAN (5 YEAR JOURNEY) | CASE STUDY



## BACKGROUND

- APAC based customer with ~60 global sites, with major Data Centers in UK and HK
- Rolled out MS Office 365, Skype For Business and other SaaS services to 87,000 employees
- Customer need - Transformation of existing network, to a complete hybrid architecture and prepare for SD-WAN Transformation
- All other traffic to be routed over the Internet except latency sensitive traffic
- Need for end-to-end control, minimise latency, fast track resolution of any disruption



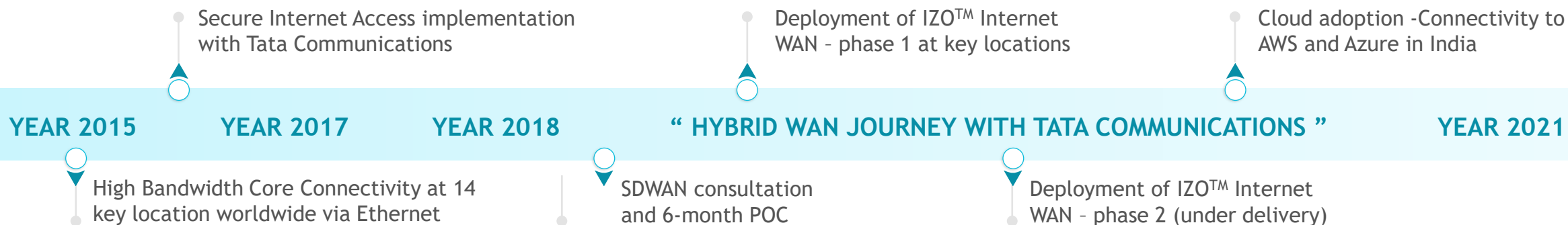
## CHALLENGE

- Bandwidth demand at all sites increased significantly due to SaaS adoption
- Upgrading MPLS circuits and backhauling Internet traffic to breakout at global DCs were not sustainable due to cost and performance reasons
- Multiple connectivity providers would create complexity in management



## SOLUTION

- Proposition combines IZO™ Internet WAN, IZO™ Private Cloud Connect and Zscaler ZIA solution
- Internet connectivity with assured performance SLAs and deterministic routing for superior site-to-site communication
- Faster troubleshooting and resolution due to strong partnership with local providers
- Solution helped consolidate vendors
- Flexibility to co-develop future solutions



# BANDWIDTH ON DEMAND | GLOBAL BFSI CUSTOMER | CASE STUDY



## BACKGROUND

- Leading global BFSI organisation with more than 2000 branches in 19 countries across globe
- Network Architecture based on regional branch connections on MPLS based network to hub Data Centers. DC-DC connectivity across regions on fixed bandwidth Ethernet private lines
- Floated RFP to transform global WAN architecture to be more agile, scalable and resilient



## CHALLENGE

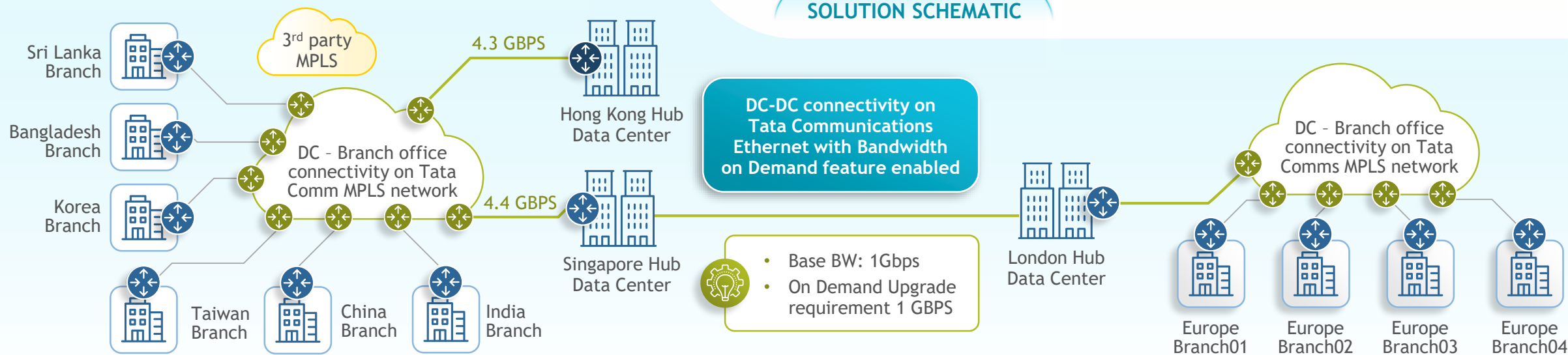
- Flexibility needed to support dynamic bandwidth consumption between global Data Centers due to surges in traffic arising from internal business requirements/ marketing promotional activities



## SOLUTION

- Offering: Mix of regional MPLS based connections and Ethernet services with Bandwidth on Demand to connect APAC DC to Europe DC
- Our USP - adding real time, self-managed dynamic bandwidth capability on the base Ethernet circuit between the two geographies with assured SLAs on base circuit
- Solution is expandable to other DC-DC connectivity links in the network

## SOLUTION SCHEMATIC



# DELIVERING GROWTH - MEETING DEMANDS OF CUSTOMERS



## OUR TARGET



## OUR WINNING FORMULA



## EXECUTION PLAN

### SERVICE PROVIDER

- Global top tier Telecom Service Providers, MNOs ISPs
- Cloud Native Companies

- Higher speeds and on demand solutions for Connectivity
- Better Network Coverage with diverse and internationally far-reaching routes and cable systems

- Service coverage expansion globally via partnerships/POPs
- On demand solutions across key hubs and Data Centers
- Multiple internet variants

- Leveraging our partner ecosystem to provide End-to-End services and global multi-provider delivery

- Self-service portal and API based Interaction supported by AI/ML based Service Assurance

### ENTERPRISES / OTT

- Distributed MNCs with diverse geographic footprint and multiple sites
- OTT with regional and global network requirements for their Cloud, backbone and end customers
- Organisations needing managed services and consolidation of footprint, along with network transformation

- Transformation to software defined, context aware networks for providing on demand solutions
- Offer integrated hybrid connectivity solutions integrating Ethernet, MPLS and internet-based connectivity to displace others' MPLS-heavy offerings

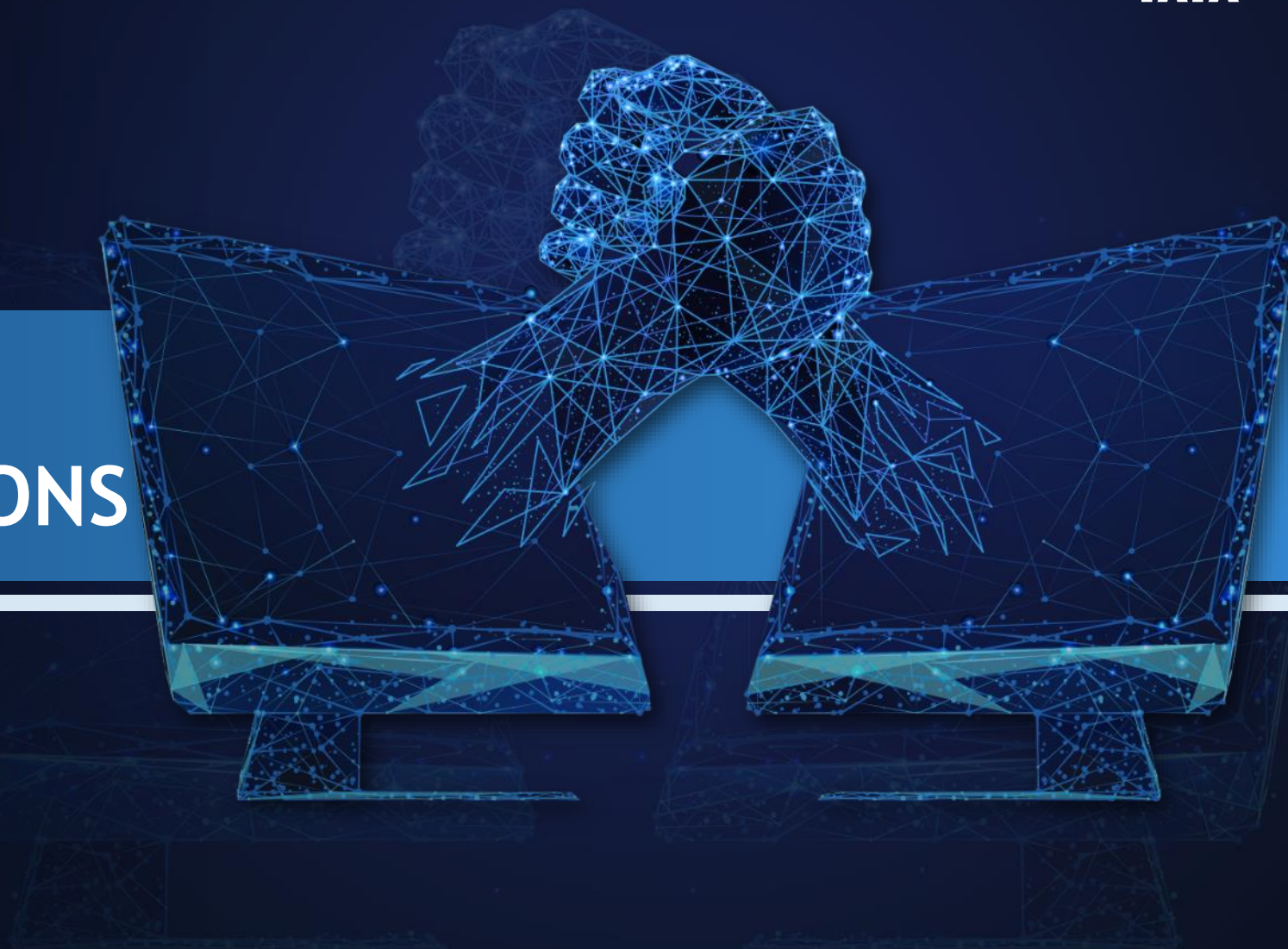
- Expanding IZO™ Internet WAN coverage globally, with broadband variants
- LAN/WAN management along with expanding IZO™ Internet in India
- Shift to bandwidth on-demand, dynamic service models



# COLLABORATION & CONNECTED SOLUTIONS

**MADHUSUDHAN MR**

- Head - Collaboration, CPaaS, MOVE™ and IoT



## MARKET SHIFTS



Managed collaboration platforms to reduce complexity



### Enterprise undergoing digital transformation

- Trends toward remote workforce
- Evolved needs and preferences beyond core connectivity
- Network functional virtualisation and software defined network to create self-service



IoT and Mobility connectivity platform to improve productivity through tracking and analytics



COVID-19 acting as catalyst for faster adoption



# COLLABORATION AND CONNECTED SOLUTIONS - OFFERING

## PLATFORM AND EXPERIENCE

### COLLABORATION & CPaaS

#### Unified Conferencing and Collaboration (UCaaS)

- Global SIP
- Microsoft Teams solution
- Cisco-powered solution
- Hosted Contact Centre (InstaCC™)

#### CPaaS

- Application-2-Person Messaging
- Cloud Communications (New)

UCaaS - cloud based enterprise communication platform supported by telephony, meetings, messages, mobility and communication enabled features

CPaaS - Cloud based platform for omni-channel communications on the software layer which can be accessed via APIs along with developer integration to build custom services as per the needs (configurable)

#### COLLABORATION

CAGR	+13.6%
2024	\$44 Bn
2020	\$26 Bn

#### CPaaS

CAGR	+16.5%
2024	\$24 Bn
2020	\$13 Bn

### CONNECTED SOLUTIONS

#### MOVE™

A “digital business platform” which offers connectivity management and uses the underlying data analytics and decisioning overlay to enable end-user connected applications

#### MOVE™

CAGR	+26.1%
2024	\$21 Bn
2020	\$8 Bn

#### India IoT Solutions

Application platform which allows creation of quick interactive visualisations of the data from multiple IoT devices into meaningful business insights

#### INDIA IoT

CAGR	+19.8%
2024	\$7 Bn
2020	\$3 Bn

## MARKET SIZE\*

# UNIFIED COLLABORATION AS A SERVICE | DIGITAL ENABLEMENT

## PROBLEMS

Enterprise Challenges: Multi-vendor management, multi-region, mobile-first, launch agility, interoperability, security, privacy, compatibility, etc.

We combine our core and platform service capabilities to drive business outcomes (not output) for our customers, with end-to-end technological upkeep and SLAs to address all challenges.

## SOLUTIONS

### InstaCC™

Digital ecosystem enabling enterprises to transform their customer engagements

#### Our solution

- On-demand contact center offerings
- Hybrid cloud strategy with global access
- Omni-channel & Cognitive experience
- Agent Productivity tools

#### Benefits to customers

- Improved NPS
- End to end ownership with integrated SLAs
- Lower cost of ownership

### Digital Customer Experience Platform (SCDx)

Digitised customer journey and brand engagement with Video commerce and in-store experiences to customers

#### Our solution

- Native APIs for One touch
- Video commerce
- Brand engagement with CDN and CPaaS
- Customer Onboarding (eKYC)

#### Benefits to customers

- Growth in Sales
- Improved customer acquisition and lower retention cost
- Better NPS

### CPaaS

Enables 360° human to machine conversations across all platforms. Outcome driven communications - customised, contextual, converged and clever

#### Our solution

- Omni Channel - Voice, SMS, Video, WhatsApp, Telegram, etc.
- Programmable Modules
- Intelligent Platform- Ready to launch Industry solutions

#### Benefits to customers

- Platform agnostic connectivity
- Bespoke workflow - Secure by design
- Regulatory compliance



## COLLABORATION AND CONNECTED SOLUTIONS - OVERVIEW

	COLLABORATION & CPaaS	MOVE™	INDIA IoT
CUSTOMER	Enterprises, Service Providers	Enterprise - Industry Vertical Solutions	Enterprise / Utility Companies / Government Agencies
COMPETITION	Telecom Service Providers, New Age Communication Service Providers	IoT Platform Players, Telecom Service Providers	Niche IoT players, Startups Telecom Service Providers
RIGHT TO WIN	<ul style="list-style-type: none"><li>• Global Network with understanding of local regulations, local billing and support</li><li>• Comprehensive solution design, transition, and managed service with significant cost and quality advantages</li><li>• Experience in the enterprise and wholesale segment</li><li>• One of the few providers who can offer both UCaaS and CPaaS services</li></ul>	<ul style="list-style-type: none"><li>• Access neutral connectivity</li><li>• Borderless and flexible coverage through global agreements</li><li>• Connectivity management platform backed by a secure global IP infrastructure</li></ul>	<ul style="list-style-type: none"><li>• End-to-End offerings consisting of devices, network, platform, application and business insights</li><li>• Managed services model</li><li>• Strong solutioning capabilities and dedicated network across India</li></ul>

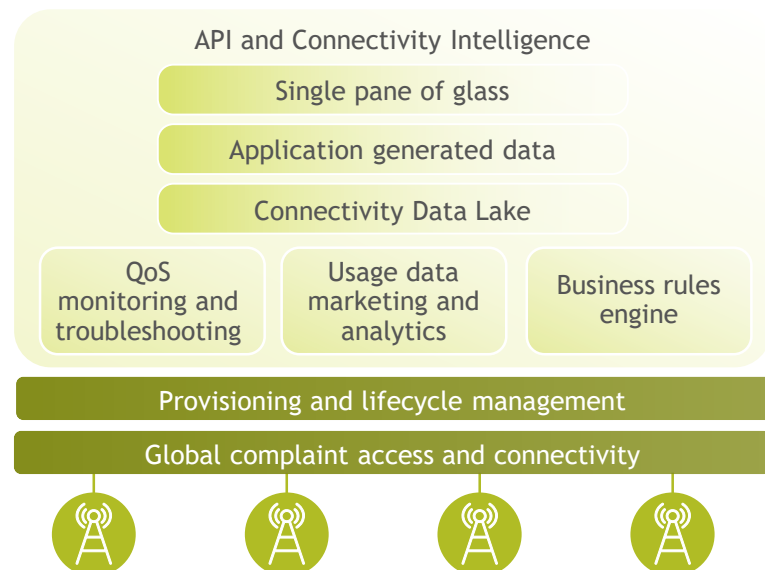
# LEADING CAR MANUFACTURER | CONNECTED CAR | CASE STUDY

World's leading manufacturer of premium all-wheel- drive vehicles; With manufacturing units in UK, China, Brazil and India and network of around 275,000 retailers and suppliers spread across 160 countries

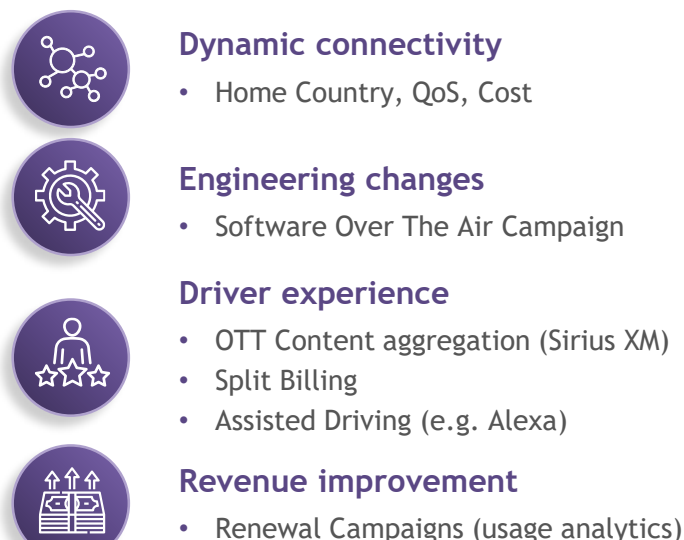
## CAR MANUFACTURER CHALLENGE



## OUR SOLUTION



## BENEFITS TO THE CUSTOMER



## QUICK FACTS

- Active Cars: 200,000+
- Total Data Usage: 37TB / month
- Average user data per month: 1.2GB
- Over 10% heavy data users
- Infotainment prime use case; rolling out Telematics

# END TO END IOT SOLUTION | LEADING STEEL MANUFACTURER | CASE STUDY

Fully managed solution bringing sensors, communications, data aggregation and applications together

## PROBLEMS



### EMPLOYEE MANAGEMENT

- Enhance employee productivity
- Ensure employee safety
- Adhere to social distancing



### MACHINE AND FACILITY MONITORING

- Digitise existing infrastructure
- Prevent incidents and accidents
- Reduce running expenses



### MATERIAL AND EQUIPMENT

- Reduce time to service
- Optimise equipment utilisation
- Track Man & Material movement

## SOLUTIONS

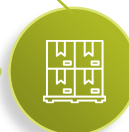
**Connected Workers**  
Optimise workforce safety and productivity



**Efficient Logistics**  
Track and enhance resource utilisation



**Inventory Management**  
Faster material search and automated processes



**Shop Floor Intelligence**  
Monitor machines to minimise downtime and increase productivity



**Smart Utilities**  
Monitor and optimise usage energy, water and gas consumption across facility



**Environment Monitoring**  
Monitor and optimise working and operating conditions



**Smart Facilities**  
Improve service levels and optimise running expertise



## EXPECTED IMPACT



**10% INCREASE**  
in worker productivity

**10% INCREASE**  
in equipment utilisation

**10% INCREASE**  
in utilities bill savings

**5% REDUCTION**  
in process cycle time

# DELIVERING GROWTH - CAPTURING THE OPPORTUNITY

	<b>CPaaS</b> Integrate Conversation to any Platforms	<b>SCDx</b> Digital Customer Experience Platform	<b>MOVE™</b> End User Connected App Platform	<b>India IoT</b> Digital Connect Platform
 <b>Go-to-market approach</b>	<ul style="list-style-type: none"> <li>• Cloud based platform   Software layer accessed via APIs   Robust developer community to build custom services</li> <li>• Live testing through Sandbox</li> <li>• Upsell to existing customers   Integrate in SCDx pitches</li> </ul>	<ul style="list-style-type: none"> <li>• Industry Vertical Solution offering to Enterprise Customers</li> <li>• Retail   BFSI   Travel, Transport and Hospitality   Automotive   IT/ITES and Outsourcing</li> </ul>	<ul style="list-style-type: none"> <li>• Industry Vertical Use Case based solution offering</li> <li>• Automotive   MVNO   Transportation/Aviation, Smart Cities   High Bandwidth Media</li> <li>• Dedicated sales and solutions specialists</li> </ul>	<ul style="list-style-type: none"> <li>• Use Case based offering</li> <li>• Smart Lights   Smart Utilities   Worker Safety and Productivity   Environment Monitoring</li> <li>• Dedicated sales and solutions specialists</li> </ul>
 <b>Our IP / Innovation</b>	<ul style="list-style-type: none"> <li>• Platform agnostic integration   Regulatory engine   Fraud prevention services</li> <li>• Omni-channel   Marketing Automation Tool   Anonymity and Multi-Factor Authentication   Number Masking Solution   Click-to-Call Solution   Instant Outbound Calling</li> </ul>	<ul style="list-style-type: none"> <li>• AI enabled outbound dialler and messaging</li> <li>• Omnichannel support service   Predictive Routing   Video service API   BOT Integration   CRM Integration</li> </ul>	<ul style="list-style-type: none"> <li>• Intelligent Data Analytics   Single Pane of Glass Monitoring, Control and Insights</li> <li>• Software Over The Air (SOTA) optimisation   Know your customer (KYC)   Connectivity management</li> </ul>	<ul style="list-style-type: none"> <li>• Hardware platform to convert any device to a smart product</li> <li>• Plug-n-Play enabler   Evolving to access neutral technology</li> </ul>



# CLOUD, HOSTING, SECURITY AND SD-WAN

**SRINIVASAN CR**

- Chief Digital Officer and Head -  
Cloud, Hosting, Security and SDWAN



## MARKET SHIFTS



Multi Cloud  
(Public and Private cloud)  
adoption is increasing



Application modernisation is being  
driven by the benefits of 'Portability,  
Modularity and High-Availability'



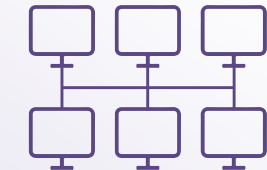
More CIOs looking for Cloud  
Infrastructure Professional and  
Managed Services



End point protection gaining  
importance with WFH Remote  
Access (Zero Trust Architecture)



Ransomware attacks and  
data breaches on the rise



SDWAN customers expect  
'WAN + Security'  
capabilities / services

# PLATFORM OVERVIEW

## PLATFORM AND EXPERIENCE

### Cloud and Managed Hosting

- Multi-Cloud platform (private and public) to enable cloud adoption. Infrastructure for application modernisation and Data Center migration bundled with network and security services

### Managed Security Services

- Functional Security platform - enables protection, detection and response capabilities and can protect the customer environment across various clouds Reporting and service orchestration functionality that incorporates an SLA driven managed service model

### SDWAN

- SDWAN platform transforms customer's network to provide Agility, Performance, Security and Visibility
- Integrate best-fit technologies, orchestration and analytics capabilities with 24x7 management services

## Competition

Telecom Service Providers, Data Centre Providers, Niche Cloud Providers, Software Integrators

Telecom Service Providers, Software Integrators, Consulting Firms and Niche players

Telecom Service Providers, System Integrators, OEMs

## Right to Win

- Managed Services provider for full suite of cloud migration services
- Industry-specific cloud offering- Government Community Cloud and IZO™ Financial Cloud
- Integrated offering for cloud + security + network

- Security offerings across Cloud to Edge, using our global network
- Comprehensive portfolio - Threat Management, Global Network Intelligence and Security with Integrated Service Platforms
- Digital Transformation by moving enterprise security to Cloud
- Managed Services model that takes care of integration challenges, skills challenges and operational challenges

- Global execution with expertise in SDWAN service design, transition, implementation, and lifecycle management of the customers' network
- Global network, offering a mix of Internet, private network and any third-party network (BYON), as a single provider

# CLOUD AND HOSTING | OFFERING

## MARKET SIZE\*

CLOUD AND HOSTING (INDIA)	
CAGR	+ 24%
2024	\$6.8 bn
2020	\$3 bn

## OUR FOCUS MARKETS

Focus market is India, goal is to become a leading IaaS / PaaS player in India

## THE OPPORTUNITY

- Space is driven by public and private cloud adoption
- Globally ~70% of enterprise customers choose multi-cloud journey
- With ~50% enterprises looking for a managed services provider

## CLOUD AND HOSTING SERVICES PORTFOLIO

IZO™ Private Cloud (Industry-specific and specialist workload)			
SAP HANA Grid	Govt. Comm. Cloud	BFSI Cloud	Edge Cloud

IZO™ Private Cloud (PaaS)
IZO™ Kubernetes DB-aaS / Cache-aaS / MQ-aaS, etc.

Managed Hosting Services	
17 DCs	Managed Services

Multi-Cloud (IZO™ Cloud Platform)			
IZO™ Private Cloud	AWS	Azure	GCP

## DRIVERS FOR CLOUD AND HOSTING

Transformation with investment protection

Migration to cloud for agility with flexibility and security

Application modernisation

Compliant / regulated workloads and data localisation / privacy

\* Market includes IaaS/PaaS/VDaaS/Cloud Management; Source - Gartner, Internal Estimates

\*\* GCC-Govt. Community Cloud | BFSI Cloud-Financial Services Cloud | IaaS-Infrastructure as a Service | PaaS-Platform as a Service | VDaaS-Virtual Desktop as a Service



# TRANSFORMATION FOR LARGEST MINING COMPANY | CASE STUDY

## BUSINESS NEEDS

### Business process efficiencies

- Improve e-auction process coordination and shorten order to bill cycle
- DMS system integration

### Supply chain efficiencies

- Optimised material management, and quality check processes and reduce waiting time for loaded wagons, trucks
- Application modernisation (SAP ECC to HANA) along ERP system consolidation

### Seamless employee health management

- Improved employee treatment cycle
- Unified HMS across network of clinics and hospitals

## SOLUTION



Single-pane-of-glass for integrated dashboard for cloud, network, and security services for unified monitoring and SLA management



Managed security from core to edge network, cloud, user and platforms



IZO™ Private Cloud for SAP HANA, application servers, disaster recovery



Network services for user access with private network aggregation across subsidiaries and internet

## BENEFITS



### AGILITY

- Largest SAP HANA deployed in <20 days



### PERFORMANCE

- Gain in performance with unified ERP systems
- Improved employee health management with centralised hospital management System



### RELIABILITY

- Integrated security for reliability and resilience
- Disaster recovery for business continuity planning

# MANAGED SECURITY SERVICES | OFFERING

## MARKET SIZE\*

MSS (Focus Markets)	
CAGR	8.1%
2024	\$ 15.5 bn
2020	\$11.4 bn

## OUR FOCUS MARKETS

India +  
Western EU and UK +  
APAC - ASEAN + MECAA +  
Service Providers and Media  
Companies

## THE OPPORTUNITY

- Driven by Enterprise risk - Solutions for ransomware attacks, data breaches, etc
- Security embedded in network transformation
- Increased adoption of analytics to handle advanced zero-day threats
  - Heightened cloud security
- Privacy and Regulatory compliance pressures

## MANAGED SECURITY SERVICES

### SECURE NETWORK TRANSFORMATION

Make internet safe for business | Secure access to corporate applications and enterprise workloads



### THREAT MANAGEMENT

Build AI and analytics-driven capability for threat detection, response, recovery | Solutions covering - Cloud SOC, Xtended Detection and Response (XDR) for improved time-to-detect/ respond

## SOLUTIONS AND OFFERINGS

### SECURITY FOR THE CLOUD

Security-as-a-service to protect cloud workloads, data, identity and infrastructure | Securing organisations adopting multi-cloud strategy



### RISK AND COMPLIANCE

Consulting and advisory approach for enterprise security posture evolution covering maturity assessment, red teaming simulation

# LEADING MANUFACTURER CUM RETAILER | CASE STUDY

Partnering over 5 years to create a robust security posture for the enterprise

## BUSINESS NEEDS

### Engagement with customer

- Milestone led security roadmap via Security Assessment for the as-is setup
- Adoption of security best practices inline with industry benchmarks

### Secured perimeter and business user access

- Fully managed network security solution (Firewalls and Proxy)
- Secured access for business users via Secure Web Gateway solution, with uniform security policies

### Protection for Inbound traffic and Web Applications

- Cloud DDOS solution for protecting internet links
- Web Application Firewall to guard business critical applications

## SOLUTION

### Integrated view on Security threats

- Solution with a Security Operation Control (SOC) setup for a consolidated view on the Security environment and better threat management

### Service enhancements

- Enhanced the SOC solution with user and event behavioural analysis, threat intelligence capabilities
- Upsell for Cloud based Secure Web gateway - across 6000 users for secure internet/outbound access

## BENEFITS

### Ongoing transformation - as per security roadmap and best practices

- Complete tech refresh - Enhanced the perimeter security with Next Gen Firewall across all sites
- Ongoing - SOC 2.0 transformation and move to fully Managed Detection and Response Services for
  - Improved threat detection
  - Faster response times
  - Remediation recommendations and actions



2015-16



2017-18



2019-20

# SDWAN | OFFERING

## MARKET SIZE\*

SD WAN	
CAGR	64%
2024	\$ 8 bn
2020	\$1 bn

## OUR FOCUS MARKETS

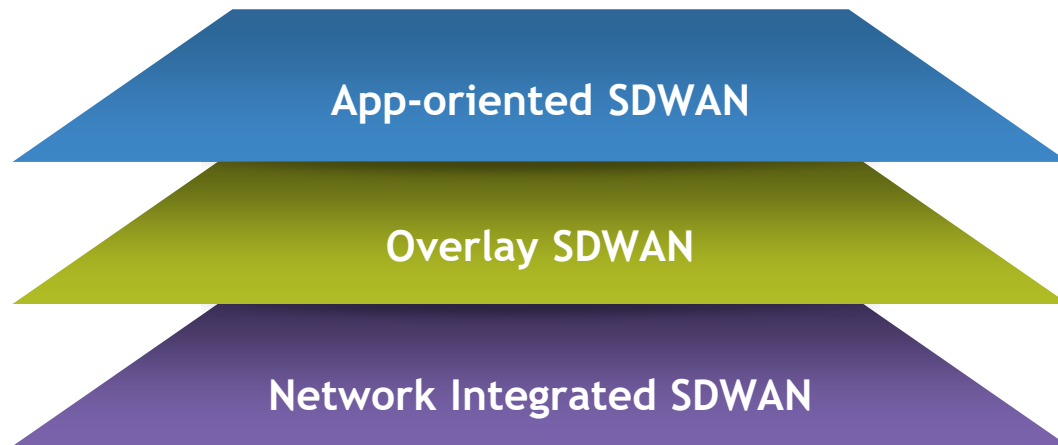
GLOBAL OFFERING

## THE OPPORTUNITY

Globally ~60% of customers choose a Managed Services Provider for their SDWAN requirements, where we have developed strong capabilities

Cloud-based deployment

Fully managed



Co-managed

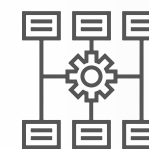
Dedicated On-premise deployment

## OFFERINGS



### DEPLOYMENT

- Cloud based
- Dedicated On-prem



### MANAGEMENT

- Fully managed
- Co-managed



## LEADING BAKING PRODUCTS COMPANY | CASE STUDY

Managed SDWAN provides a scalable network fabric that would enable seamless future growth and real agility

### CHALLENGE

- Rigid and complex network with multiple providers with bandwidth demands increasing at a rate of 25% or more annually
- CIO to support a growth plan that would double the size of the company
- Aim to build a network that would enable future growth, transform existing IT strategy, and accelerate cloud-first approach

### SOLUTION

- Our managed SDWAN has created an access-agnostic network, customised for each location, application and end-user need
- Bring Your own Network (BYON) functionality incorporated at few circuits
- Hybrid WAN has helped both MPLS and internet to coexist along with tight security controls with global policy orchestration

### RESULTS

- Increased cloud application performance across North America, Europe and APAC due to single service provider
- Fully managed solution ensures service even in the event of hardware failures
- With Bring Your Own Network (BYON), there is no need to replace all the existing circuits

### SERVICE AND SUPPORT

- Dedicated account management, customer success management, solution architect and project management team with quarterly and monthly business and service reviews
- Effective aid and support for all their lifecycle support requests in both presales and post-sales

### IMPACT



30% boost in bandwidth



40% capex saving



Network uptime of 99.999%



Up to 50% increase in service response time

## DELIVERING GROWTH - CAPTURING THE OPPORTUNITY

	Cloud and Managed Hosting	Managed Security	SDWAN
Go-to-market approach	<p>Integrated offerings (cloud + security + network)   multi-cloud migration and management including DevOps automation</p> <p>Deeper with fewer in enterprise market   Templatised solutions for mid-market</p>	<p>Partnering with enterprise for ‘secure by design’ solutions across network, cloud and collaboration services</p> <p>Dedicated sales and solutions specialists</p> <p>Deeper with fewer strategy- Focus on expansion of strategic accounts</p>	<p>Integrated offerings (SDWAN + security)   Support for multiple OEMs</p> <p>Upsell to existing network customers   Build and transfer opportunities   Templatised solutions for mid-market</p>
Our IP / Innovation	<p>TC<sup>x</sup> Platform - Customer journey automation   Multi-cloud self service portal with guardrails for security and compliance</p> <p>Platform-as-a-service for application modernisation requirements</p>	<p>TC<sup>x</sup>: Intuitive single-pane-of-glass   Anti-DDoS and network analytics platform   Threat intelligence platform</p>	<p>TC<sup>x</sup> Platform - Customer journey automation   Technology agnostic self service portal</p> <p>Pro-active monitoring (underlay and overlay correlation)</p>

# SALES AND MARKETING

**Sumeet Walia**

- Chief Sales and Marketing Officer



# BUYING BEHAVIOUR SHIFTS

## INDIA MARKETS



Shift towards **everything on the cloud**, multi cloud and hybrid cloud



Increased **spend** on overall **digital security infrastructure**



### Automotive

Opportunities driven by **AIS 140** for passenger safety, **EV push** and **shared mobility**



### Retail/Consumer

Remodelling the customer experience journey with a **omni channel** focus

## INTERNATIONAL MARKETS



**Vendor consolidation opportunities**



**Tailored professional services** with large enterprises



Increased consumption of **live 4K** sports events and a **remote production** delivery model



**Global Automotive OEMs** are looking for scale to expand connected services

# GLOBAL SALES ORGANISATION



ENTERPRISE SEGMENT



GLOBAL  
SEGMENTS

SELL TO

INDIA

ENTERPRISE  
DIRECT

INDIA PRIME (New)

INTERNATIONAL

AMERICAS | MECAA | UK and IRELAND  
| CONTINENTAL EUROPE | APAC

INDUSTRY / TECH VERTICALS

Media &  
Entertainment

MOVE™ - AUTO

MOVE™ - GLOBAL  
CONNECT

CLOUD  
COMMUNICATION

SERVICE  
PROVIDERS

OTTs

GLOBAL ALLIANCES - SELL WITH



# ACCELERATING GROWTH AT TATA COMMUNICATIONS

Mastering 'Deeper with Fewer', Scale, Customers' acquisition, Sales execution

## DEEPLY SEGMENTED HORIZONTAL MARKET APPROACH

Top 300 program, Next 700  
program



## EARLY STAGE EXECUTION RIGOUR

Large deals war room, executive  
sponsorship, proactive proposals  
based on customers' digital roadmap



## TRANSFORMED SALES ENGINE ENABLED BY TOP CLASS ANALYTICS

To drive cross sell / up sell, self-  
service (portal-enabled) connectivity



## DRIVING OUTCOMES

Funnel Addition,  
Improvement in win rate,  
New customer acquisition



## CUSTOMER SUCCESS OUTCOME - NPS®



### TRACKING VOICE OF CUSTOMER:

Voice of Customer dashboard, structured and unstructured input



### CUSTOMER FOCUSED CULTURE:

New engagement model with CST and CSM



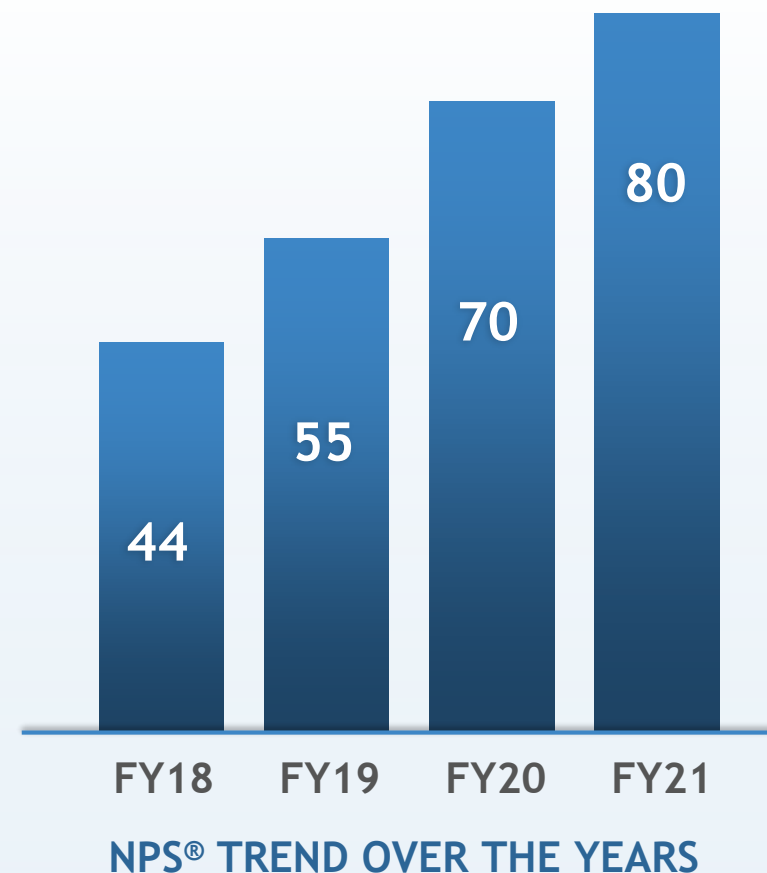
### CUSTOMER EXPERIENCE INITIATIVES:

Filling product gaps, network roll-out, automation / digitisation

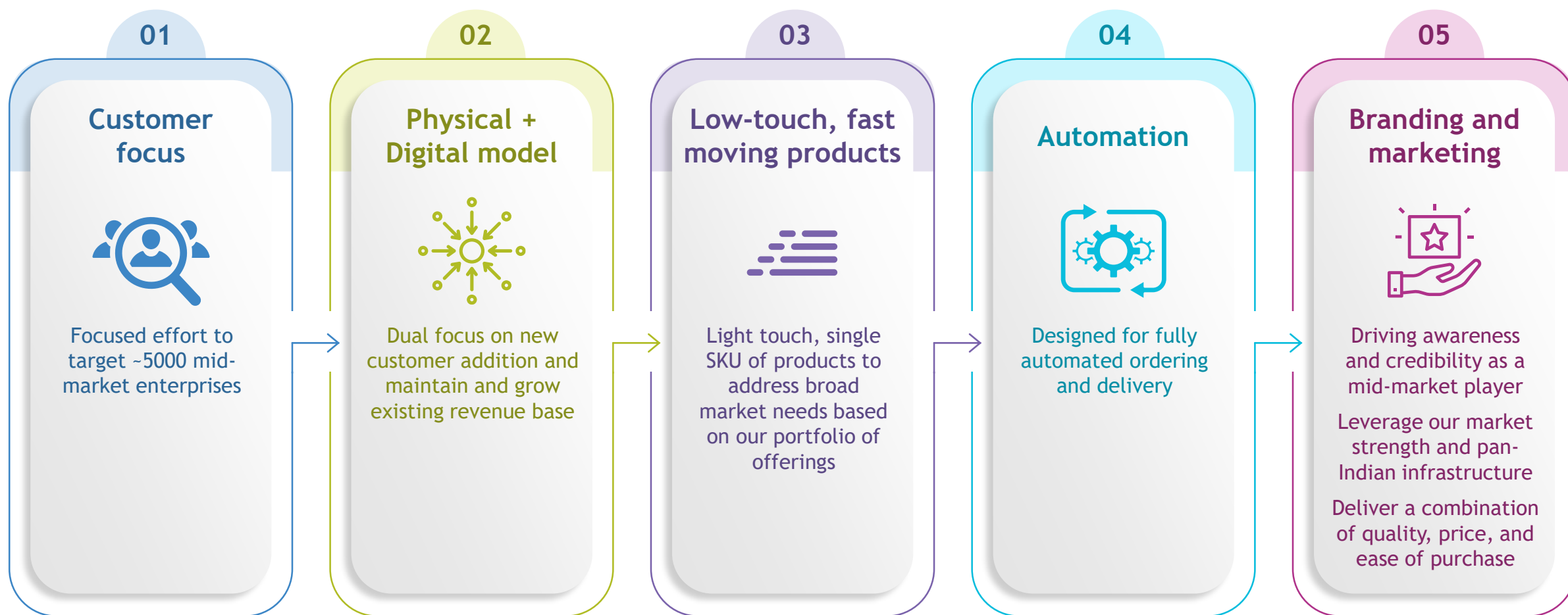


### QUICK IMPACT PROGRAMS:

Detractor management, advocacy programs, account improvement plans



## BROADENING OUR INDIA MARKET REACH



This segment of enterprises contribute to ~20% of enterprise telecom services market

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# LEADERSHIP WITH TRUST

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