



TATA COMMUNICATIONS

EMPOWERING
TOMORROW

INVESTOR MEET 2022

14th June 2022

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 beyond 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.

Tata communications does not undertake any obligation to update or revise forward looking statements, whether as a result of new information, future events or otherwise.



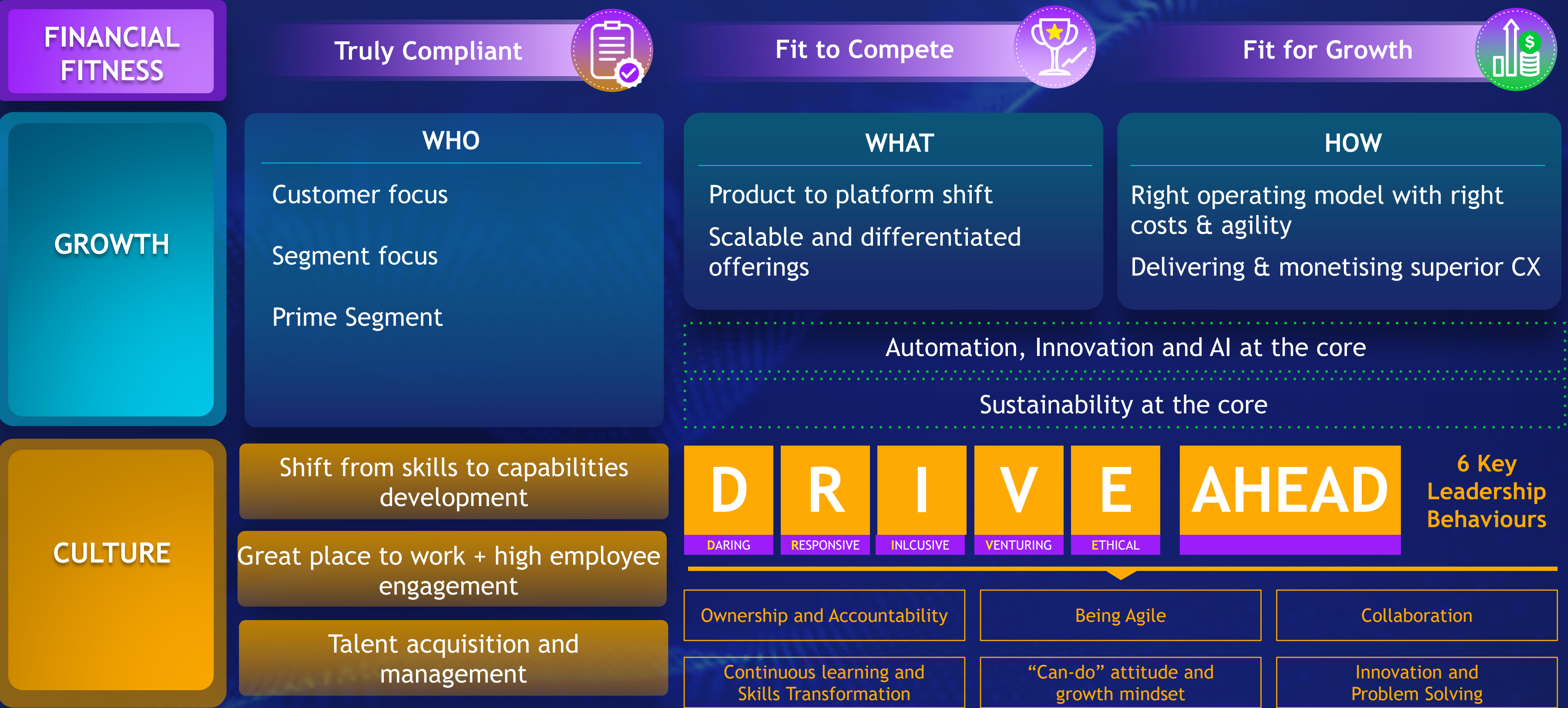
TATA COMMUNICATIONS

EMPOWERING
TOMORROW

KEYNOTE ADDRESS

Presented by A.S. Lakshmi
Managing Director & Chief Executive Officer

OUR STRATEGY




PERFORMANCE HIGHLIGHTS

FINANCIAL FITNESS

ALL KPI
IMPROVEMENTS
DELIVERED **AHEAD**
OF SCHEDULE

P&L AND BALANCE
SHEET **FUTURE**
READY TO SUPPORT
OUR GROWTH
AMBITIONS

EBITDA
Margin  **25.3%** FY22
16.6% FY19

ROCE %  **26%** FY22
8.3% FY19

Net Debt
/ EBITDA  **1.6x** FY22
3.1x FY19

CUSTOMER SHIFTS

WE CONTINUE TO BE RELEVANT ACROSS KEY CUSTOMER THEMES



ENABLING BORDERLESS GROWTH





ENHANCING PRODUCTIVITY AND EFFICIENCY





BUILDING AGILITY





BOOSTING PRODUCT INNOVATION AND CUSTOMER EXPERIENCE





MANAGING RISK



Customer case studies



Large multi-national medical equipment manufacturer based in UK



Large Airline based in the Middle East

- Integrated suite of bundled offerings
- Delivered through service wrap

DEEPER
WITH
FEWER

Million Dollar Club

of
Accounts

+33

Enterprise Revenue
contribution

+8%

Digital Platform and Services
Fixed Revenue CAGR

28%

CUSTOMER SHIFTS

**NPS®
IMPROVEMENT**

**DELIVERING
SUPERIOR
CUSTOMER
EXPERIENCE
IS OUR TOP
PRIORITY**

84

FY22

PRODUCT SHIFTS

PRODUCT TO PLATFORM SHIFTS STRENGTHENING OUR PORTFOLIO



Next Gen Connectivity Services

- IZO™ Internet WAN
- ‘Bandwidth-on-Demand’ services
- IZO™ Network Edge
- IZO™ SDWAN



Collaboration and Connected Solutions

- 
Powered by Tata Communications
- Tata Communications GlobalRapid
- InstaCC
- MOVE™



Cloud and Cybersecurity

- IZO™ Cloud - Financial Cloud, IZO™ Kubernetes
- Cloud SOC



Media

- Video Connect
- Media Ecosystem
- Media Edge and Cloud

PRODUCT SHIFTS

FOCUS ON
PRODUCT
DIFFERENTIATION

BROADENED ANALYST COVERAGE

FY22: **18** Analyst Houses

FY20: **2** Analyst Houses

Gartner®

FROST & SULLIVAN

AVASANT

***ISG**

 **IDC**

 GlobalData.

 Everest Group®

OUR COMMITMENTS

INNOVATION, AUTOMATION AND AI



OPTIMUS



CO-CREATION WITH
CUSTOMERS



ACTIVE ENGAGEMENT WITH
UNIVERSITIES AND START-UP
ECOSYSTEM

OUR COMMITMENTS

SUSTAINABILITY



PEOPLE

INCREASING **EMPLOYEE ENGAGEMENT** SCORE:

FY20		FY22
80%	▶	86%

MULTIPLE **BEST EMPLOYER** RECOGNITION



PLANET

INCREASE IN **RENEWABLE ENERGY** FOOTPRINT, IMPROVING **ENERGY EFFICIENCY** OF OUR DATA CENTERS, **REDUCING WATER CONSUMPTION**

- **GOLDEN PEACOCK GLOBAL AWARDS - WINNER SUSTAINABILITY 2021**
- **BUSINESS WORLD SUSTAINABILITY AWARDS**



COMMUNITY

TATA COMMUNICATIONS

MPowered



TATA COMMUNICATIONS

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REVISITING OUR FINANCE STRATEGY

Presented by Kabir Ahmed Shakir
Chief Financial Officer

KEY PILLARS



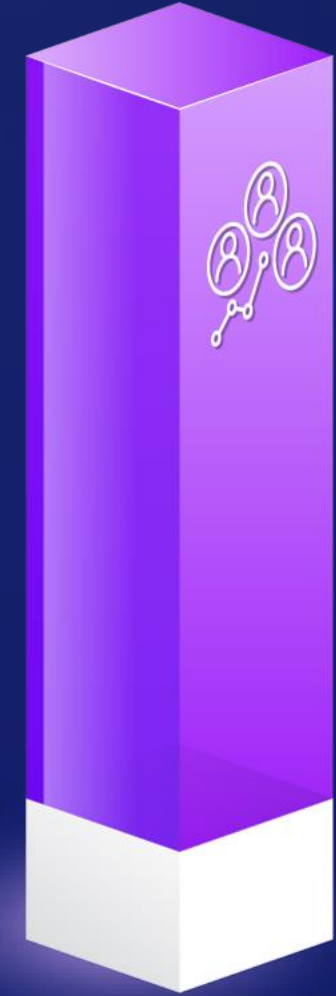
Truly
Compliant



Fit to
Compete



Fit to
Grow



Winning
Mix

FIT TO COMPETE



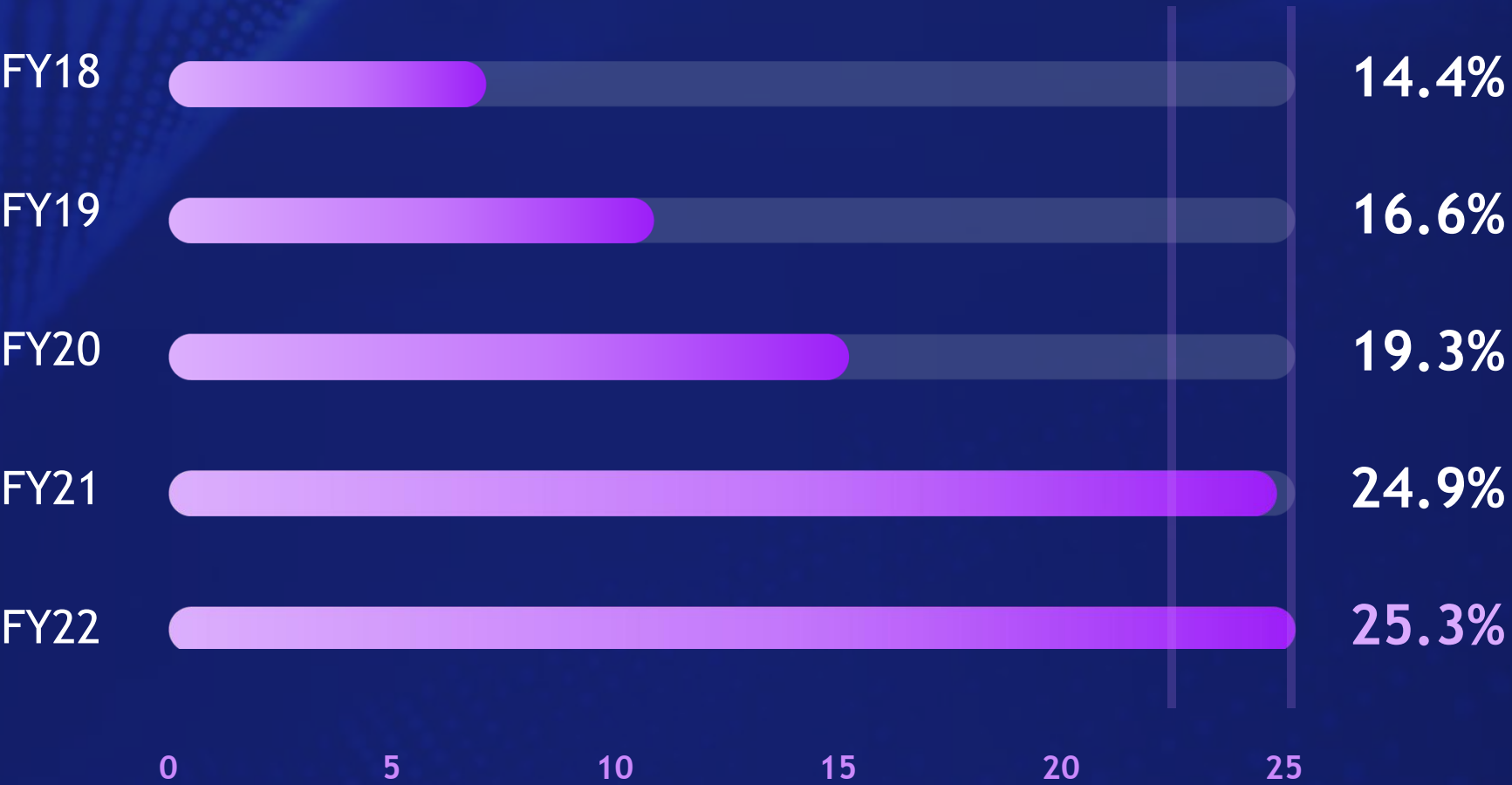
Medium term targets of a healthy balance sheet, growth in profitability and returns achieved ahead of time

A strong and robust balance sheet gives us the confidence to fund our growth ambitions

Strong cash flows and profits have helped us to improve shareholder returns through a significant improvement in our EPS

Dividend Distribution Policy with a pay-out of 30-50% of our consolidated profits; dividend of 40% of our consolidated profits for FY22

EBITDA Margin (%)



FIT TO COMPETE



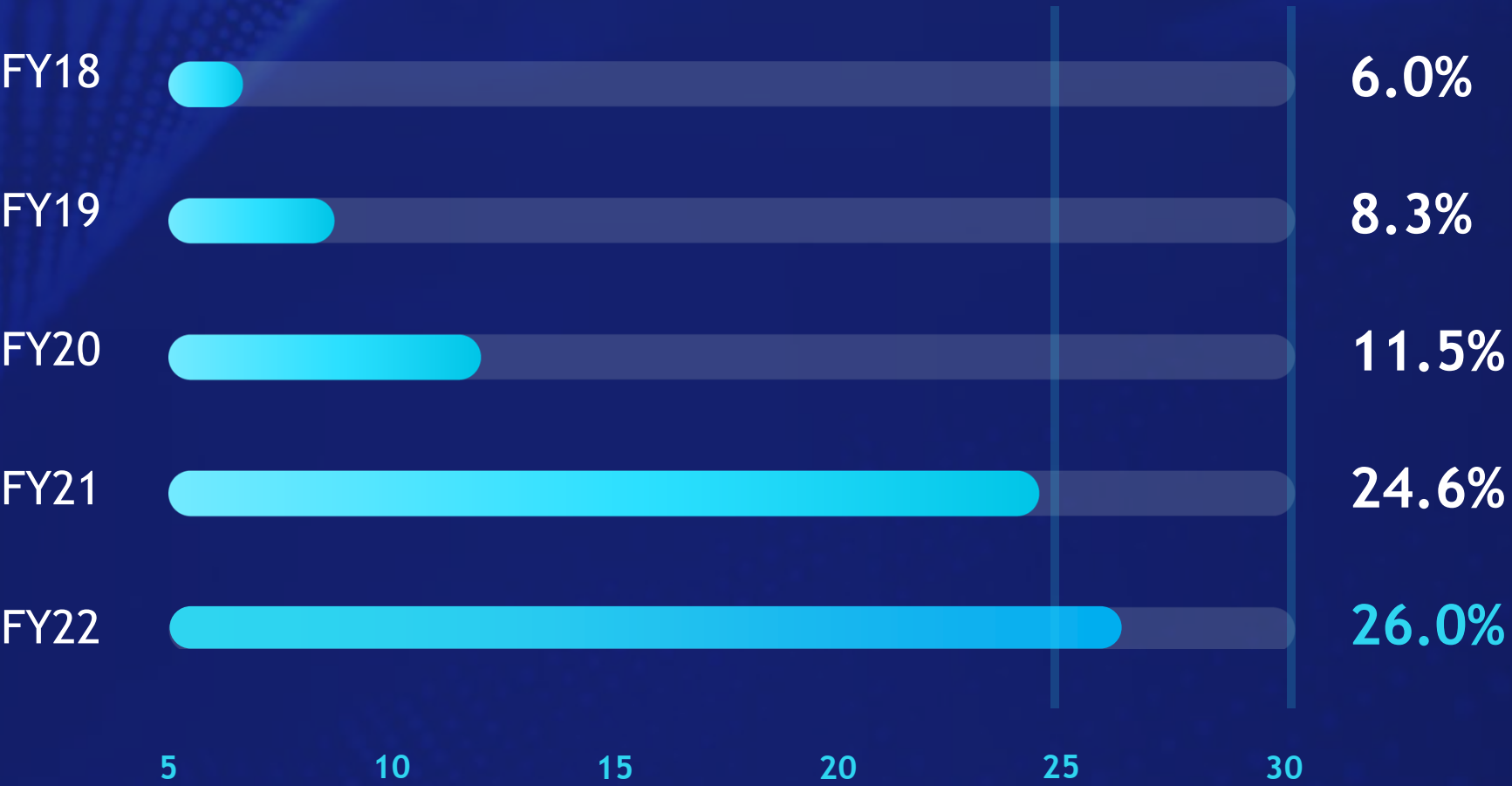
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Return on Capital Employed (%)



FIT TO COMPETE



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Net Debt/EBITDA



FIT TO COMPETE



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Earnings Per Share (INR)



FIT TO COMPETE



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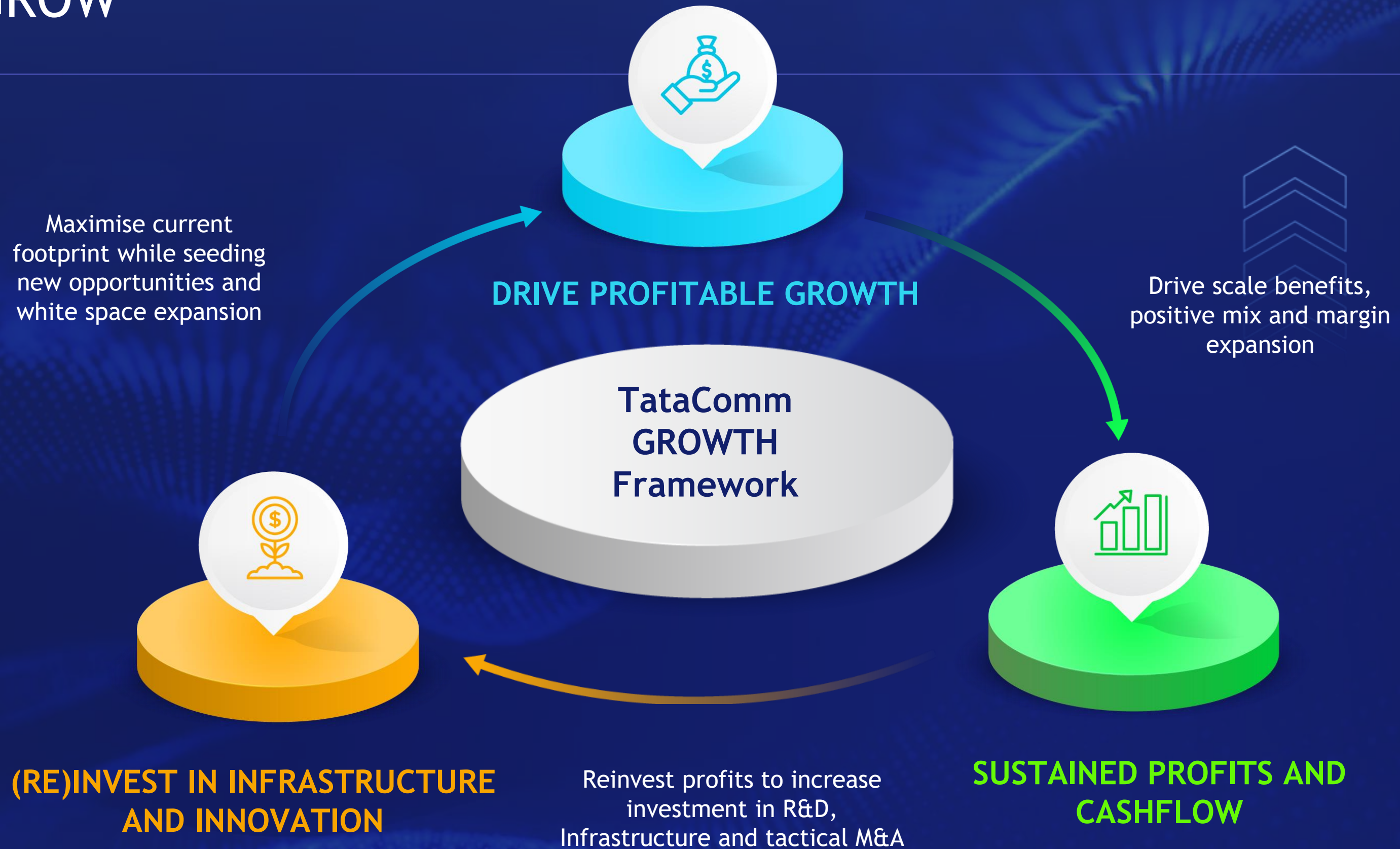
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Dividend Per Share (INR)



* Includes a special dividend payout of INR 1.5 per share

FIT TO GROW



FIT TO GROW

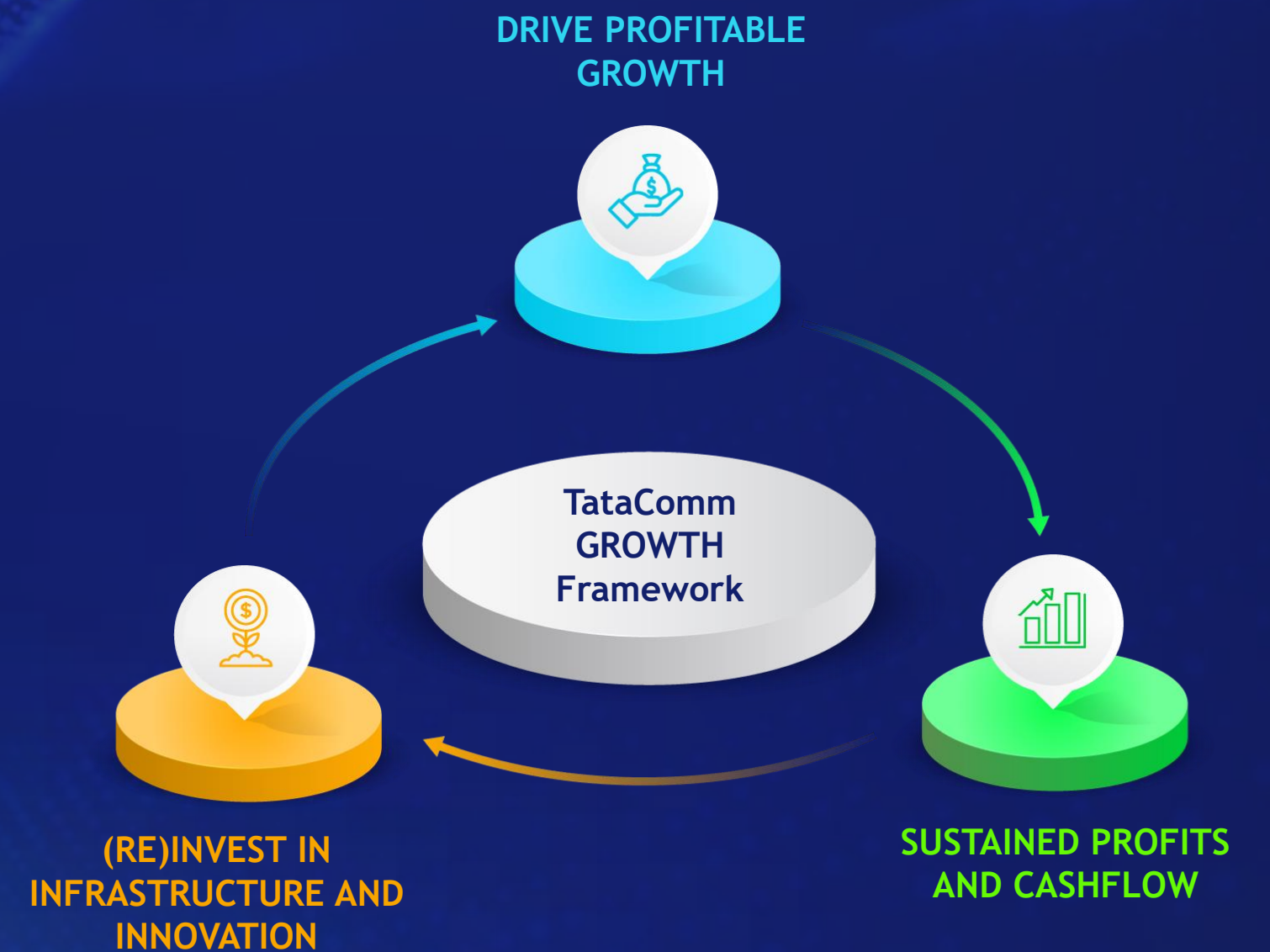
TataComm GROWTH Framework



Financial Fitness is an integral part of our reimagined strategy and our ambition of consistent double-digit growth

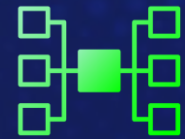


Expanding margins through driving profitable growth and reinvesting towards building capabilities that support and drive future growth



FIT TO GROW

Successful execution of this model will allow us to:



Continue investing in our infrastructure and platforms, including expanding our investment capacity



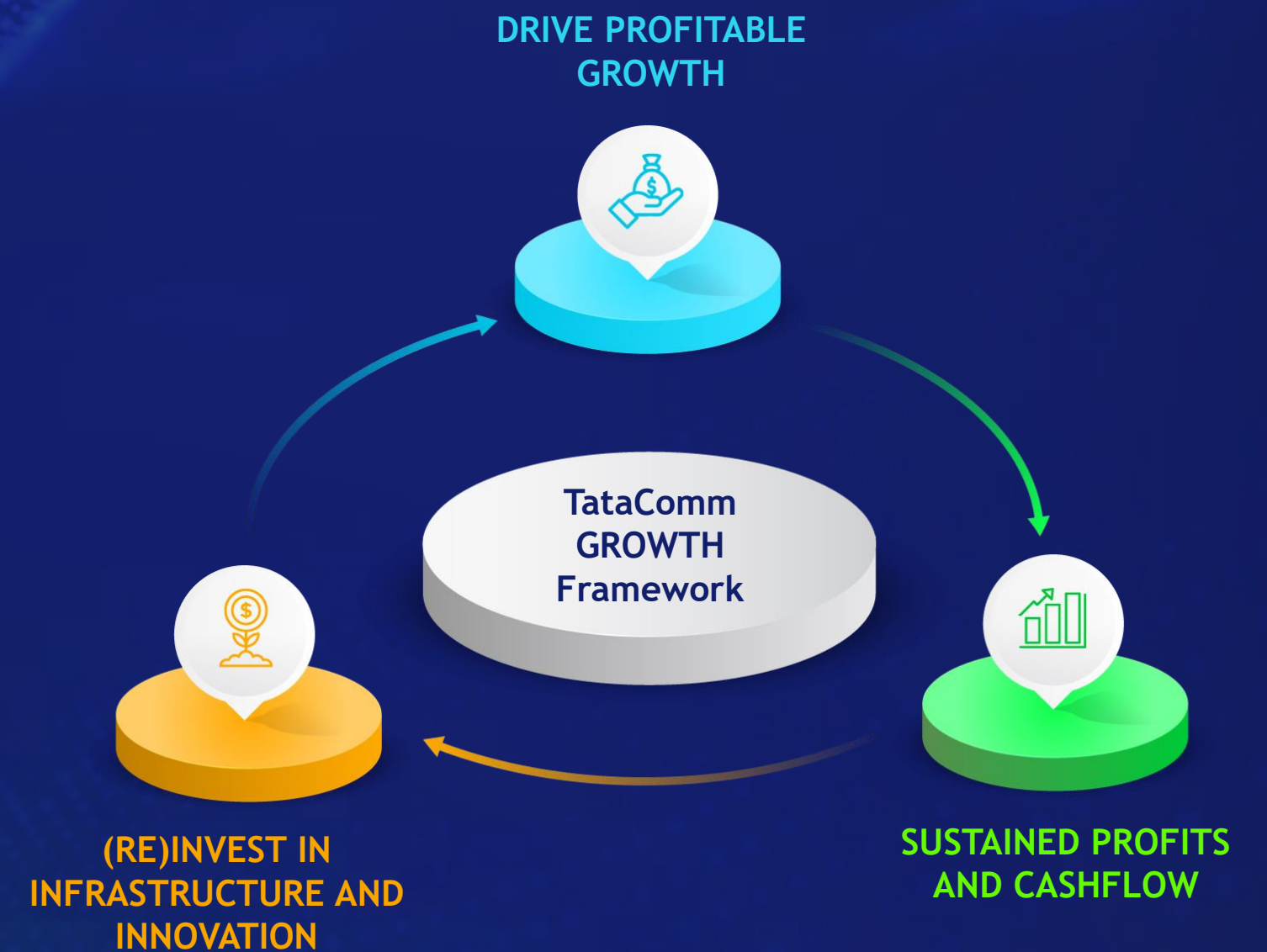
Drive Innovation in our product portfolio to meet the future needs of our customers



Invest in skills and capabilities of our people



Strengthen our business through external (M&A) opportunities





TATA COMMUNICATIONS

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STRENGTHENING OUR NETWORK SERVICES

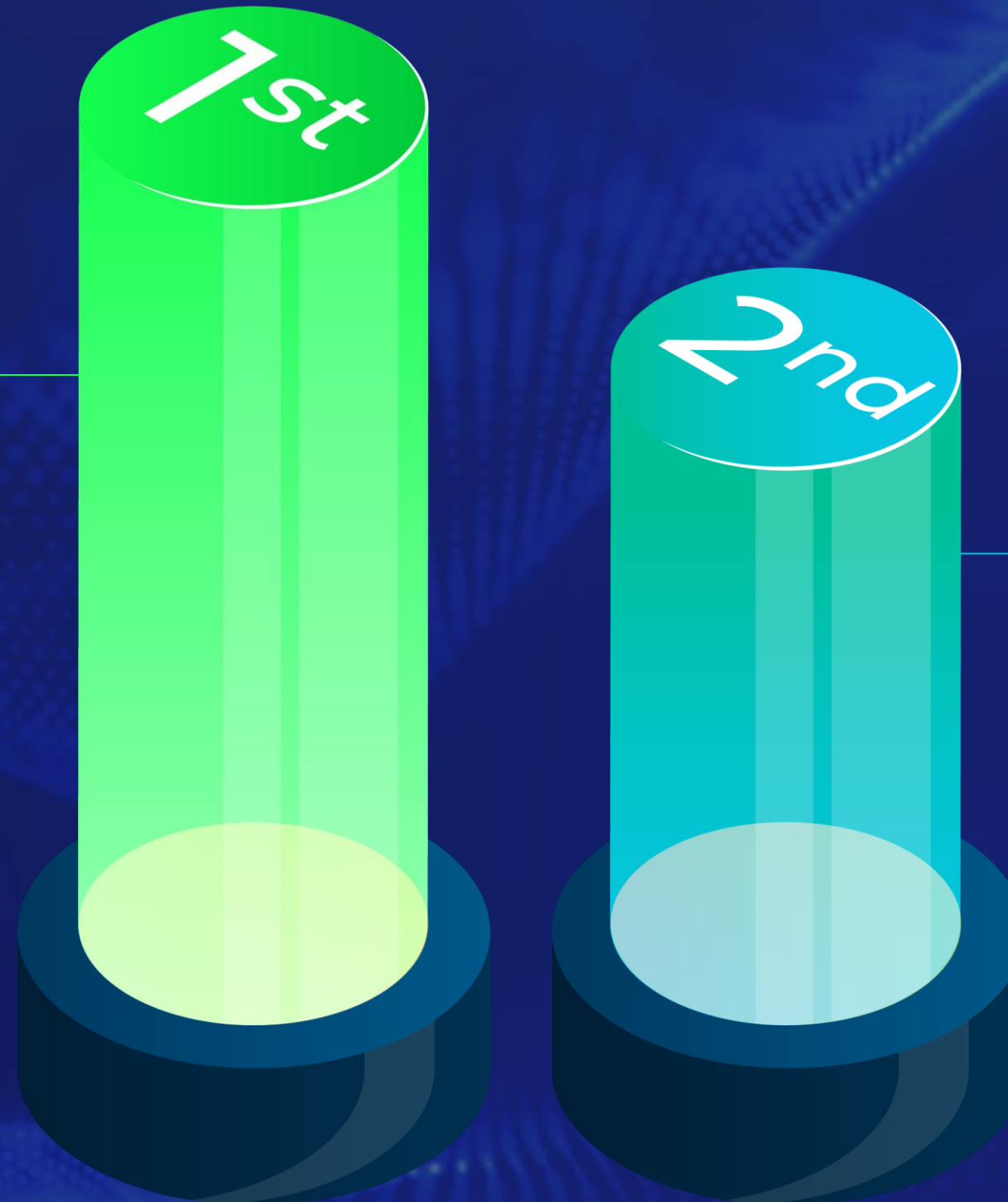
Presented by Genius Wong

*Executive Vice President - Core & Next Gen Connectivity Services, Global Network
Services and Chief Technology Officer*

OUR STRONG INDIA MARKET LEADERSHIP

India Market Position*

- VPN
- Internet
- IPL
- India DC-DC dedicated build



➤ NPL + Ethernet

GROWTH OPPRTUNITY AHEAD OF US



WE CONTINUE TO STRENGTHEN OURSELVES

Increase Network Reach and Capillarity

Introduced New and Enhanced Services & Features

Continuous Transformation & Automation of our underlay network

FOCUS ON CONTINUOUS EXPANSION

1

Strong network coverage in DC-DC, Tier 1 and Tier 2 markets in India

2

Continue to increase network coverage in T3/T4 markets by building and partnering for more on-net fibre & wireless access

3

In FY22*, our India Large Enterprise market share improved by 2%, increasing to 32.3%

* F&S report is based on FY22 Q1-Q3 actual, Q4 outlook

In 2 years, we doubled India Enterprise WAN coverage



ON-DEMAND INDUSTRY USE CASES

Enabling customers to align their network with cloud consumption model by meeting dynamic bandwidth needs efficiently, in real-time, providing greater operational efficiency and expense management capability



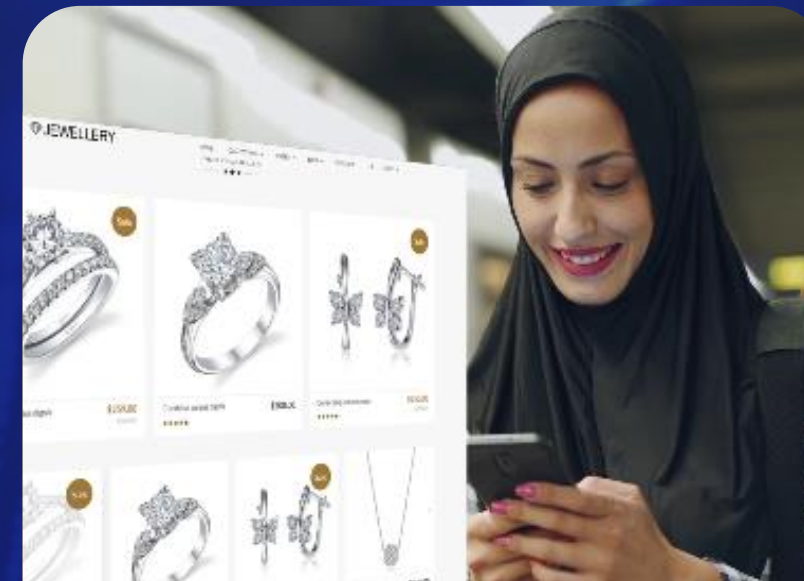
BFSI

Boosting productivity and application performance during festival seasons and corporate events



MEDIA

Enhancing media workflows for efficient remote production of HD content



ECOMMERCE / RETAIL

With exceptional performance, focus on rolling out dynamic sales campaign on the fly



IT / ITES / SERVICES

Supporting innovation with enhanced flexibility, scale and agility

Leading the enablement of On-Demand connectivity for our customers from India Market across the Globe

NETWORK TRANSFORMATION - ADDRESSING THE SHIFT TO CLOUD AND INTERNET

SHIFT TO A CLOUD-FIRST, INTERNET FIRST SOFTWARE-DEFINED NETWORK



INCREASED ADOPTION OF INTERNET

Helps organisations improve performance and cost efficiencies



HYBRID NETWORKS MOVING TO SDWAN AUTOMATION

Helps simplify and standardise provisioning, management and providing visibility



WAN EDGE PICKING PACE

Helps Multi-Cloud (and Hybrid Cloud) adoption with more robust cloud connectivity

SHIFT TO A CLOUD-FIRST, INTERNET FIRST SOFTWARE-DEFINED NETWORK

	IZO™ Hybrid WAN	IZO™ SDWAN
Addressable Market CAGR*	2.6%	35%
2021	\$63.9 bn	\$3 bn
2024	\$69 bn	\$7 bn

* Based on Gartner's Comms Services Forecast, Q1 2022. IZO Hybrid WAN addressable market is defined as 20% of total MPLS market and all of Internet market.

ALL INTERNET SERVICES ARE NOT EQUAL

How these services impact your business silently



DEDICATED INTERNET

- Packet might not take the shorter path
- Traffic goes through many hops to the destinations
- No performance guarantee on end-to-end latency and packet delivery



BROADBAND INTERNET

- Same issues as the dedicated internet
- Contention ratio applies
- Best effort in both availability and service restoration time

IZO™ INTERNET WAN

IZO™ INTERNET WAN - INTERNET YOU CAN DEPEND ON



**Multiple
New Variants
including
Dependable
local broadband**



**High Availability
and Fast
Restoration**



**Deterministic
Routing
extending
to Applications
in cloud**



**Available in over
150 countries
with deep
capillarity**



**Simple & Agile
Management
with Regional
Control &
Visibility**

**IZO™ Internet WAN, the world first end-to-end predictable internet for business,
is ready to replace your current network with a best-fit solution for your business**

AWARDS & RECOGNITION



IZO™ Hybrid WAN

Gartner

Leader in Gartner
Magic Quadrant, Network
Services Global 2022

9TH
YEAR IN
A ROW

F R O S T & S U L L I V A N

Indian Cloud
Interconnect Services
Company of the
Year Award



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TOWARDS A CLOUD FIRST, SECURE FIRST WORLD

Presented by Srinivasan CR
Executive Vice President - Cloud & Cybersecurity Services
Chief Digital Officer

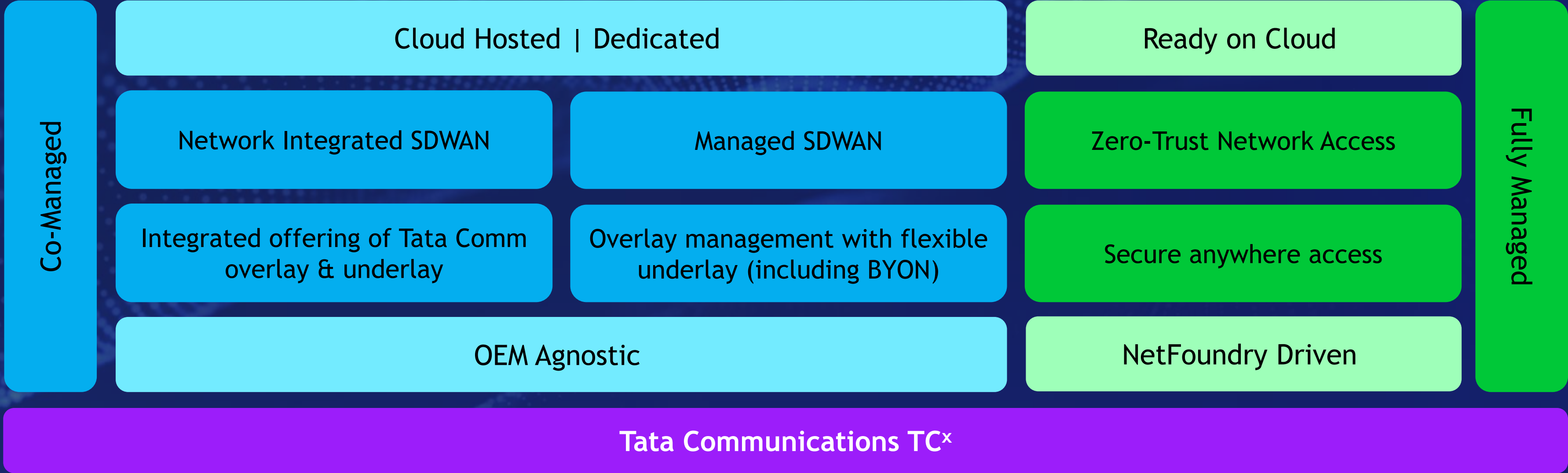
OUR SD-WAN OFFERING



Internet underlay and multi-cloud connectivity poses higher complexity and security risks



Globally ~60% of customers¹ prefer a Managed Services Provider for their SDWAN requirements



¹ Quadrant

THE SDWAN COMPETITIVE LANDSCAPE

COMMUNICATION PROVIDERS

NTT
Orange Business Services
Verizon
Sify
Airtel

GLOBAL SYSTEM INTEGRATORS

Wipro
Tech Mahindra
Cognizant
HCL

CONVERGED SOLUTIONS PROVIDER

CATO Networks
Aryaka

WHY WE ARE WINNING

We enable our customers through

Our Global Network transformation expertise across Define, Deliver, Operate & Optimize



Unified Solutions Provider offering Integrated managed services with E2E coverage



Enhanced ROI reducing network costs by 25%+



Flexibility across deployment models with OEM agnostic technology coupled with Third Party Management Capabilities



Unified management using Tata Communications TC^x



ANYWHERE ACCESS (CODE NAMED SPAED)

Plug-and-play solution that enables Secure application access using available connectivity

60%

Of enterprises want to swap out VPN for ZTNA²

¹

70-76%

Of SMEs driven by network cost savings and faster WAN deployment

³

WHAT MAKES US THE RIGHT CHOICE



Performance Reliability



Agility



Enhanced Security



Lower OPEX

USE CASES



Small Retail Formats



Pop-up retail stores



NBFC Branches



Remote Workspace

¹ Gartner; ² Zero-Trust Network Access; ³ Frost & Sullivan

DIGITAL TRANSFORMATION LEADING TO

Acceleration in Adoption across Multi-Cloud

- High Availability
- Better Ecosystem & Economics
- Improved Analytics and Insights

Increased complexity driving the need for automation

Leading to increased Network Decentralisation

Network Performance and economics managed better by Network + SDWAN

Anywhere access leading to frameworks like Zero Trust

With increased Cyber Security Risks

Increased cyber threats driving the need for proactive and advanced Cyber Security tools

Global and In-country cyber security compliance

CLOUD & CYBER SECURITY SERVICES OVERVIEW

CLOUD AND MANAGED HOSTING

MANAGED SECURITY SERVICES



OPPORTUNITY

- Driven by Multi-cloud adoption
- CSPs expected to manage multi-cloud complexity

- Customers opting for Cloud-based security
- Network Transformation integrates Network & Security
- Increasing Cyber threats
- Need to protect 'Data + User + App' anywhere



OUR FOCUS MARKETS

- **India** - to be the first-choice multi-cloud platform

- **India** - Offer comprehensive Managed Security Services and lead globally with advanced Network Security Services



MARKET SIZE¹

¹ Gartner

	India
CAGR	24%
2021	\$4 bn
2025	\$8.4 bn

	India	International
CAGR	22%	9%
2021	\$2.1 bn	\$145 bn
2025	\$4.7 bn	\$218 bn

CLOUD & HOSTING | OVERVIEW

	WORKLOADS		
WORKLOAD TYPE	Highly Regulated	Predictable	High Variance
SERVICE TYPE	Managed Hosting Services	Private Cloud (IPC)	Public Cloud
FEATURES	<ul style="list-style-type: none">• Dedicated• Add on managed Services	<ul style="list-style-type: none">• Pay as per use• Platform Services (Kubernetes, DBaaS, Cache-aaS)	<ul style="list-style-type: none">• Multi-cloud management• Manage costs + workloads
PLATFORM TYPE	Hosted across 17 DCs	<ul style="list-style-type: none">• HANA Grid• GCC¹• Fin. Cloud¹• Dev Cloud²• Analytics Cloud²	Tata Communications TC ^x for visibility provisioning and management
Tata Communications TC ^x			

¹ Regulatory requirements fulfilled in Cloud; ² In Progress

COMPETITIVE LANDSCAPE

HOSTING PROVIDERS

NTT Global Data
Centres (Netmagic)

CtrlS

Sify

Nxtra Data (Airtel)

ESDS

CLOUD RESELLERS

Progressive

Orient Technologies

Embee

Minfy

Bluepi

SYSTEM INTEGRATORS

Wipro

Tech Mahindra

DXC Technology

Hitachi MicroClinic

InspiriSys

COMPETITIVE LANDSCAPE

WHY WE ARE WINNING

We bring to our customers:

Flexibility - Integrated Services across Cloud, Security, Network & Collaboration

Remain Compliant as per global/localised data privacy requirements

Help reduce TCO by up to 30% and Bill Shocks

Unified Management using Tata Communications TC^x

MANAGED SECURITY SERVICES | OVERVIEW



COMPETITIVE LANDSCAPE

COMPETITION IN INDIA

NTT Global Data Centres (Netmagic)

Airtel

IBM

Deloitte

Inspira

COMPETITION IN INTERNATIONAL MARKETS

AT&T

BT

Orange Business Services

Verizon

Telefonica Tech

COMPETITIVE LANDSCAPE

WHY WE ARE WINNING

Integrated Offerings for Network and Security Services

Trusted Security Player - Proven methodology of Design-Deploy-Manage & remote Shared SoC Services Model; Enhanced speed of Deployment of Solution leading to faster GTM for customer services

Enhanced Portfolio of Products
- E2E Threat Detection and Mitigation Platform coupled with right Cloud SOC capabilities

Differentiated Operational and Commercial models - Provide flexibility to scale up and down

OUR ROADMAP TO ENHANCE CUSTOMER EXPERIENCE (CX)

BUYING JOURNEY

- Simplified buying process
- Self-provisioning
- End to End Visibility
- CX Feedback oriented continuous journey improvement



PORTFOLIO ADDITIONS

- Increased focus on Threat hunting on SOC's (AI/ML tools being deployed)
- DevOps/DevSecOps management focus on industry-specific clouds



NEWER SERVICES

- Expanding functional/industrial cloud
- Zero Trust evangelisation and portfolio adoption
- Analytics across all services



SECURE CLOUD TRANSFORMATION FOR FINANCIAL SERVICES COMPANY

BUSINESS NEEDS

BUSINESS EFFICIENCIES

Agility on technology support to enhance market responsiveness competitiveness

SCALABILITY

- Scalable platform/infrastructure meeting regulatory/compliance requirements
- Infra readiness aligning with their business strategy

CUSTOMER EXPERIENCE

Provide a unified and a seamless digital customer experience through a dependable CSP

SOLUTION



IZO™ Financial Cloud



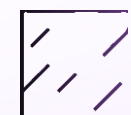
Managed Security Services



Network services through IZO™ SDWAN and Internet

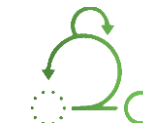


Unified Communication and Collaboration Platform



Tata Communications TC^x

BENEFITS



AGILITY

- Complete deployment & migrations in <30 days



PERFORMANCE

- Gain in performance with unified systems
- Platform to support cloud-native applications
- Enterprise database



RELIABILITY

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

AWARDS & RECOGNITION



CLOUD & HOSTING



IDC MarketScape APAC
(Excluding Japan) Managed
Cloud Services 2021

Recognized as
Major Player

FROST & SULLIVAN

Indian Managed Multi-
Cloud Service Provider
of the Year
(4th Year in a row)



Winner in Technoviti 2022

Award by Banking
Frontier for IZO™
Financial Cloud



Best Cloud Service
Provider and Cloud
Technology
2022



MANAGED SECURITY SERVICES



NASSCOMM DSCI
EXCELLENCE AWARDS 2021

Cyber security services
(3rd Year in a row)

FROST & SULLIVAN

India Managed Security
Services Industry -
Company of the year
2022

FROST & SULLIVAN

Leader in Frost & Sullivan
Indian Managed Security
Services Market Study



Best Enterprise Managed
Security Service Provider
2022



TATA COMMUNICATIONS

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TRANSFORMING THE MEDIA SERVICES ECOSYSTEM

Presented by Dhaval Ponda
Vice President and Global Head, Media & Entertainment Services

THE MARKET OPPORTUNITY

Unprecedented growth and opportunities

GROWING CONTENT FOOTPRINT

Global sports media rights: \$70 Bn

DIRECT TO CONSUMER

Average content consumption
> 50 hrs per week

GROWTH IN GAMING & ESPORTS

\$545 Bn market by 2028
with a CAGR of 13.2%

LIVE PRODUCTION GOES REMOTE

\$4.7 Bn by 2028,
CAGR of 16.7%



CONVERGED AND IMMERSIVE CONTENT EXPERIENCES

MASS MIGRATION TO CLOUD

Global cloud gaming market is expected to reach \$14 Bn by 2027, CAGR of 64.1%

INTERACTIVITY & GAMIFICATION

Global Sports media rights-<https://www.sportbusiness.com/global-media-report-2021/>
D2C market -<https://www.broadcastandcablesat.co.in/ott-market-to-garner-1039-03-billion-by-2027/>
Gaming & esports -<https://www.globenewswire.com/news-release/2021/08/24/2285514/0/en/Gaming-Market-to-Hit-USD-545-98-Billion-by-2028-Rising-Investments-in-Online-Games-Worldwide-to-Augment-Growth-Says-Fortune-Business-Insights.html>
Virtual Production Market- <https://www.broadcastprome.com/news/global-virtual-production-market-size-to-hit-4-71bn-by-2028-research-and-markets/>
Migration to cloud - <https://www.globenewswire.com/news-release/2022/02/10/2382631/28124/en/The-Worldwide-Cloud-Gaming-Industry-is-Expected-to-Reach-14-Billion-by-2027.html>

TRANSFORMING THE MEDIA, SPORTS & LIVE EVENTS INDUSTRY

Our infrastructure spans the world to allow **end-to-end programme delivery at any scale, enabling consistency, reliability and speed of content** dispersal through our core products.

Manage distribution for
3000+ TV
Channels globally



400+ media hotspots in
125 cities globally



24x7
Dedicated global media
services operations



13,000+

live events delivered

750+ remotely produced

10,000+ hours supported / month

Media Native cloud with
26 edge location and
7 regional locations

100GB

Uncompressed media backbone,
3700+TB of content
transferred

OPPORTUNITY & COMPETITIVE LANDSCAPE

MEDIA PRODUCT HAS GROWN AT 40% YoY FY 22

\$ 4Bn GLOBAL MARKET FOR
VIDEO TRANSPORT

\$ 8Bn GLOBAL MARKET FOR
VIDEO PRODUCTION

MEDIA NATIVE SERVICE PROVIDERS

STRENGTHS:

- Broadcast pedigree
- Operational experience

WEAKNESS:

- Legacy infrastructure
- Lack digital roadmap

PUBLIC HYPERSCALERS

STRENGTHS:

- Cloud services at scale
- Marketplace & partnerships

WEAKNESS:

- Cloud infra not media optimised
- Managing live video at scale still an issue

TELECOM PROVIDERS

STRENGTHS:

- Global network presence
- Existing relationships

WEAKNESS:

- Not agile enough for live video
- Bundling for digital services an issue

#BUILTFORMEDIA PLATFORM

Agile & Seamless workflows across the media value-chain

MANAGE VIDEO AT SCALE



Video Connect



Video Connect
Plus



VDN: Ultra Live
& Low Latency

MEDIA ECOSYSTEM



Media Workflow
Engine



Media-native
Edge



Media-native
Cloud

As a managed, scalable, networked service

Media-Native Cloud & Edge solutions

#BUILTFORMEDIA PLATFORM

Business Poised for Growth

LEVERAGE GROWTH OF VIDEO CONSUMPTION



Enable live video distribution to ALL screens globally



Bundle multiple video and data related services

STRATEGIC INITIATIVES



Cloud & Edge:
Early mover for video optimised Edge



E-sports & Gaming:
Greenfield opportunity in a growing market

Empowering Tomorrow for Digital First business globally

REMOTE PRODUCTION - ENABLING AGILITY & SUSTAINABILITY



Managing over 27,000 hours of broadcast to 433 Million households in over 100 countries

- Enabling Dorna a centralized remote production facility at their Barcelona HQ through Custom-built Tata Communications pods
- Enable video and data feed transfer in real-time
- Reduced carbon footprint and better resource allocation through remote production



LEADING CRICKET LEAGUE

Enabling Remote Production for the most popular Cricket league with 55+ matches across 10 cities

- In a first-of-its-kind remote production initiative in India
- **Extremely high level of reliability** to the ultra-low latency inputs received thousands of miles away
- Massive **savings on personnel and equipment travel**
- **Unprecedented flexibility**

HYBRID DISTRIBUTION: ENABLING SCALE & SUSTAINABILITY



Empowering tomorrow
for the **World's Greatest
Racing Spectacle**

- Empowering Formula 1 with global end-to-end managed network services thereby transforming the motorsports experience
- Facilitating the transfer of more than 100 video feeds and over 250 audio channels in under 200 milliseconds
- Delivering Speed, Scale, Performance and Sustainability for F1!

➤ Reducing F1's
travelling freight by

34% 

➤ Connecting a broadcast
audience of

1.55bn 

➤ Average time to
transmit data

200ms 

➤ Enabling F1 to broadcast to

180+
Territories globally 

➤ **500TB** 

Transferred every race weekend

DRIVING INNOVATION WITH MEDIA NATIVE CLOUD & EDGE



Eclat
MEDIAGROUP

Delivering an engaging viewer experience for South Korea's largest sports broadcaster

- Remotely producing and distributing language customised commentary
- Expanding reach to 14 countries in South East Asia
- Broadcast **4000+ hours** of content annually



SAIL GPTM

One of the most premium water sport races spanning across Europe and Americas

- First sports organisation to deploy remote monitoring through Tata Communications' (Virtual Video Assisted Referee) V-VAR for its nine-event season
- Tata Communications' Media Native Cloud enables incredible processing power taking the concept of V-VAR to the next level
- Provides a unique experience to viewers by Leveraging Tata Communications' Video Delivery Network (VDN)



TATA COMMUNICATIONS

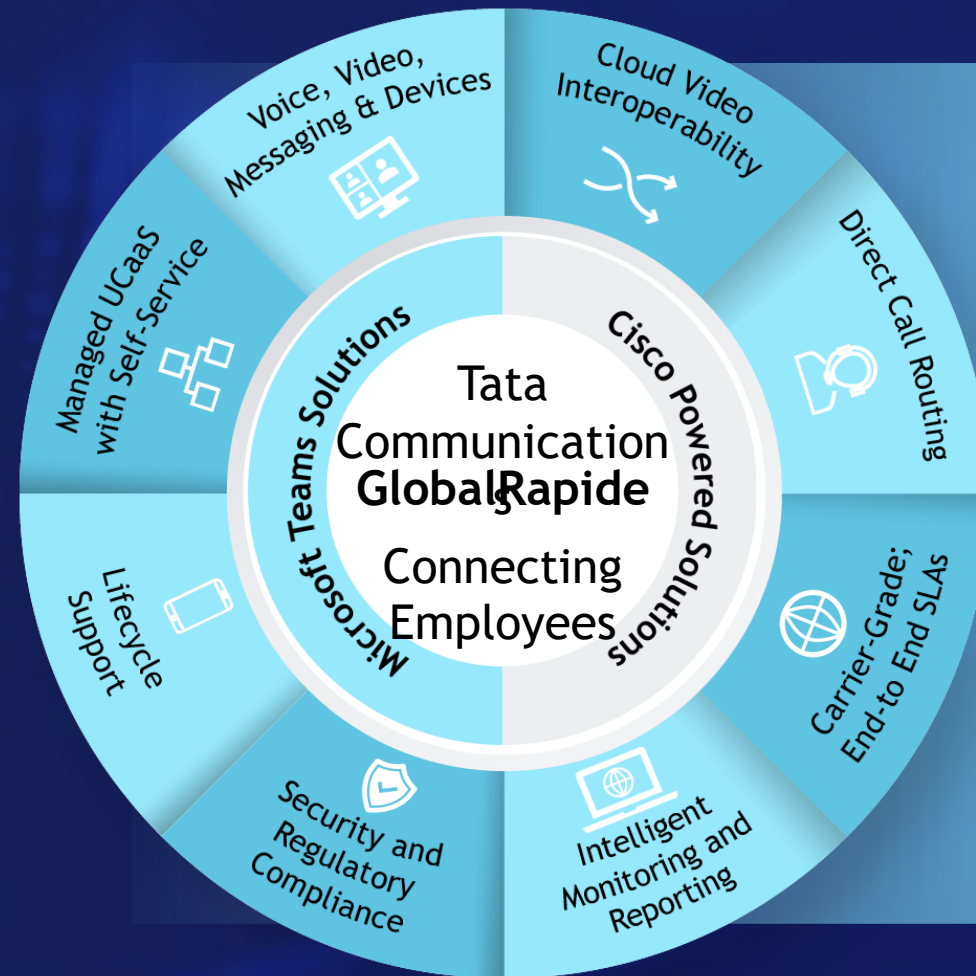
EMPOWERING
TOMORROW

COLLABORATION AND CONNECTED SOLUTIONS

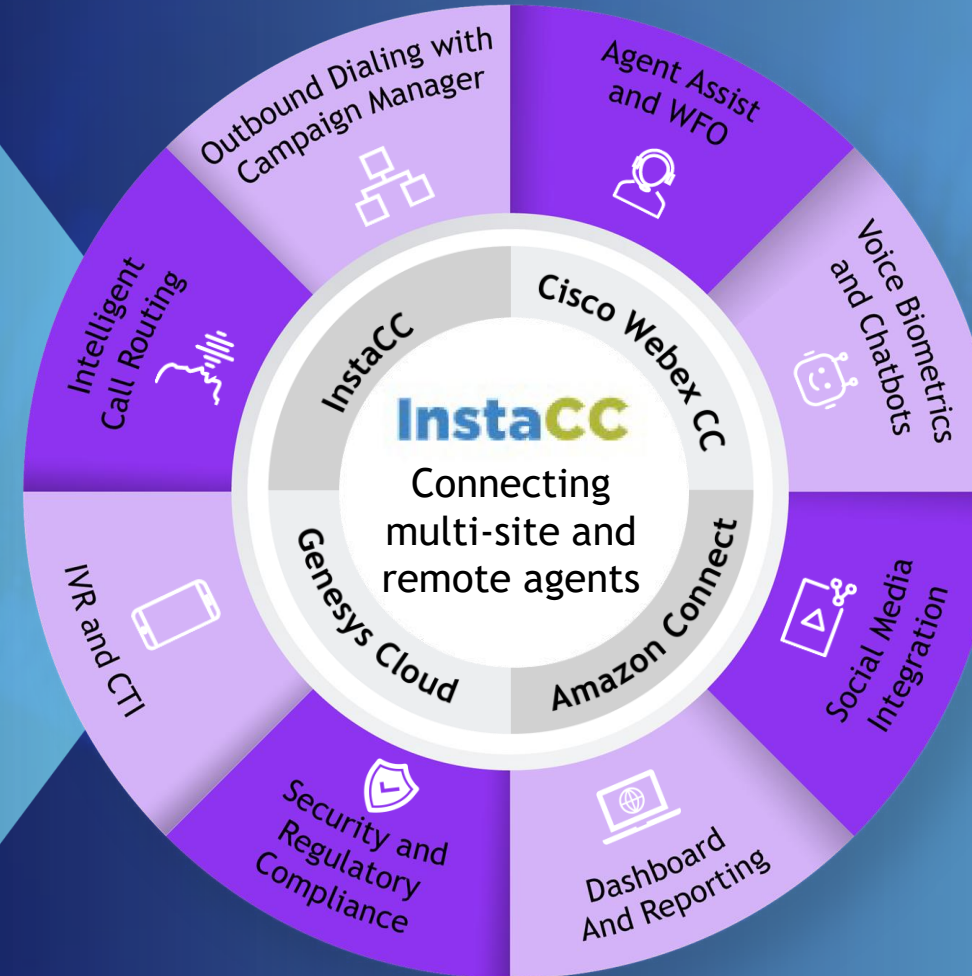
Presented by Mysore Madhusudhan
Executive Vice President - Collaboration & Connected Solutions

COLLABORATION SOLUTIONS OVERVIEW

ENABLING CLOUD APPLICATIONS



DIGITAL EXPERIENCE ECOSYSTEM



ENHANCED CUSTOMER AND EMPLOYEE EXPERIENCE



- Enabling:
- Employee Engagement
 - Customer Experience
 - Digital Transformation

Global Voice Cloud with SIP Connect
Best-in-class applications deployed as global cloud services

Tata Communications GlobalRapide (UCaaS)

KEY HIGHLIGHTS



Tata Communications
GlobalRapide launched



Significant increase
in monthly leads



~2X increase
in MCS seats YoY

GROWTH STRATEGY



Focus on **large MNCs**
Joint GTM with TCS and Microsoft
Leverage **partner ecosystem**

KEY DIFFERENTIATORS



Simplified User
Experience

Intelligent
Monitoring



Global Microsoft
Gold Partner

One of five Cisco
partners globally

InstaCC (CCaaS)

KEY HIGHLIGHTS



InstaCC Connect
launched



Partnership with
Genesys Cloud



Improved customer
acquisition

GROWTH STRATEGY



Platform modernization

KEY DIFFERENTIATORS



End-to-end
ownership and
integrated SLAs



Global presence
and availability

The future of customer engagement is



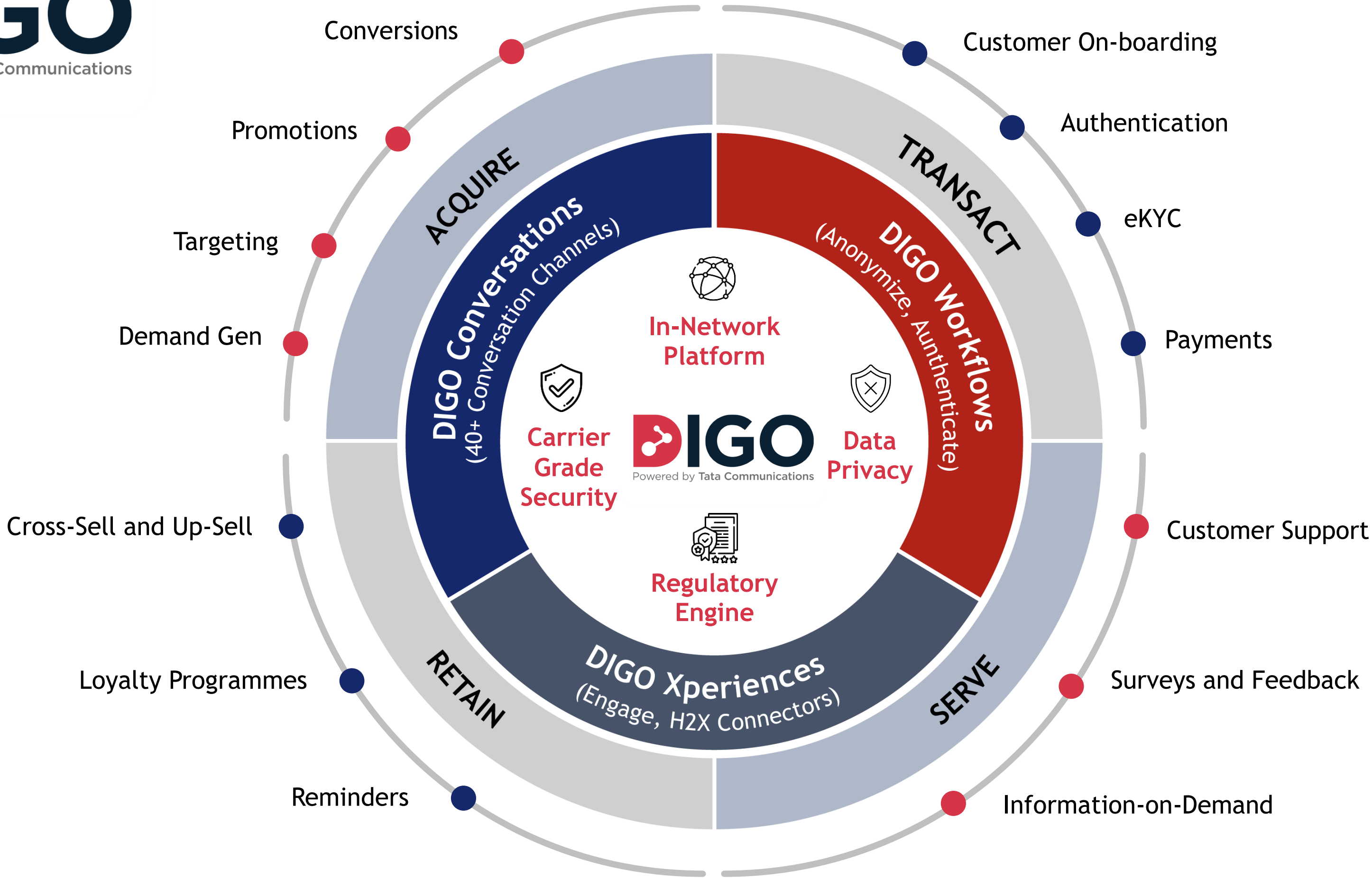
Let's  **DIGO**
Powered by Tata Communications

 **DIGO**

Powered by Tata Communications

is helping enterprises deliver
Customized, Converged & Contextual Conversations, not just more of them.

While doing so, it optimizes costs, increase agent productivity and enhance customer experience and brand perception

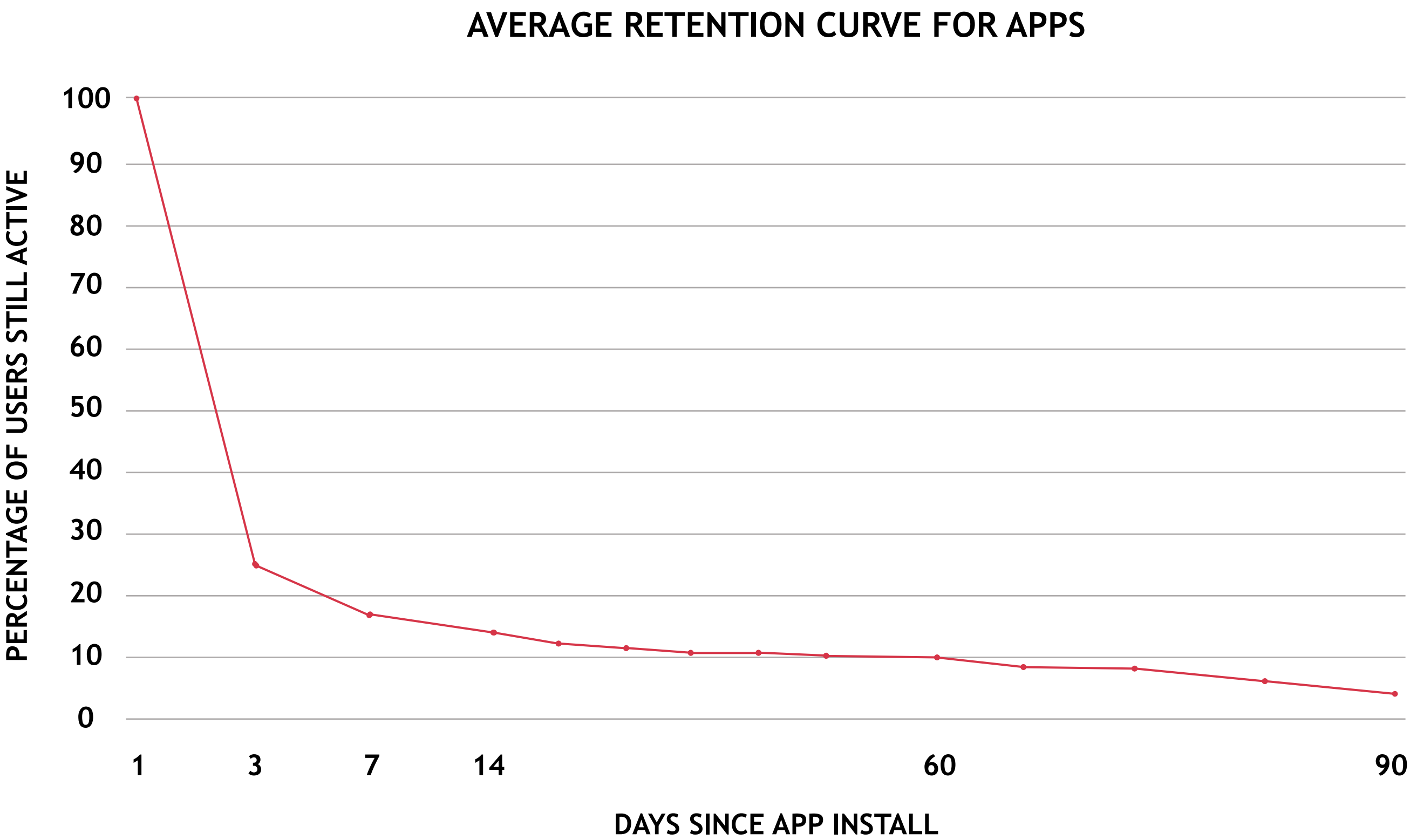


APP MORTALITY

NON-MESSAGING APPS ARE ON THE DECLINE

The average app loses **77%** of its DAUS within the **first 3 days**, and **95% within 90 days**.

Apps are expensive to build and even more so to maintain.



PREFERRED CONTACT CHANNELS

**Popularity of Business
Contact Channels, by Age**
*Which channels are most popular
with your age-profiled customers?
(% of contact centers)*

% of Centers Reporting Most Popular Contact Channels by Generation

**Internet /
Web Chat**

Social Media

**Electronic
Messaging
(e.g. email, SMS)**

**Smartphone
Application**

Telephone

Generation Y
(born 1981 - 1999)

24%
(1st choice)

24%
(1st choice)

21%
(3rd choice)

19%
(4th choice)

12%
(5th choice)

Generation X
(born 1961 - 1980)

21%
(3rd choice)

12%
(4th choice)

28%
(2nd choice)

11%
(5th choice)

29%
(1st choice)

Baby Boomers
(born 1945 - 1960)

7%
(3rd choice)

2%
(5th choice)

24%
(2nd choice)

3%
(4th choice)

64%
(1st choice)

Silent Generation
(born before 1944)

2%
(3rd choice)

1%
(4th choice)

6%
(2nd choice)

1%
(5th choice)

90%
(1st choice)

Let's

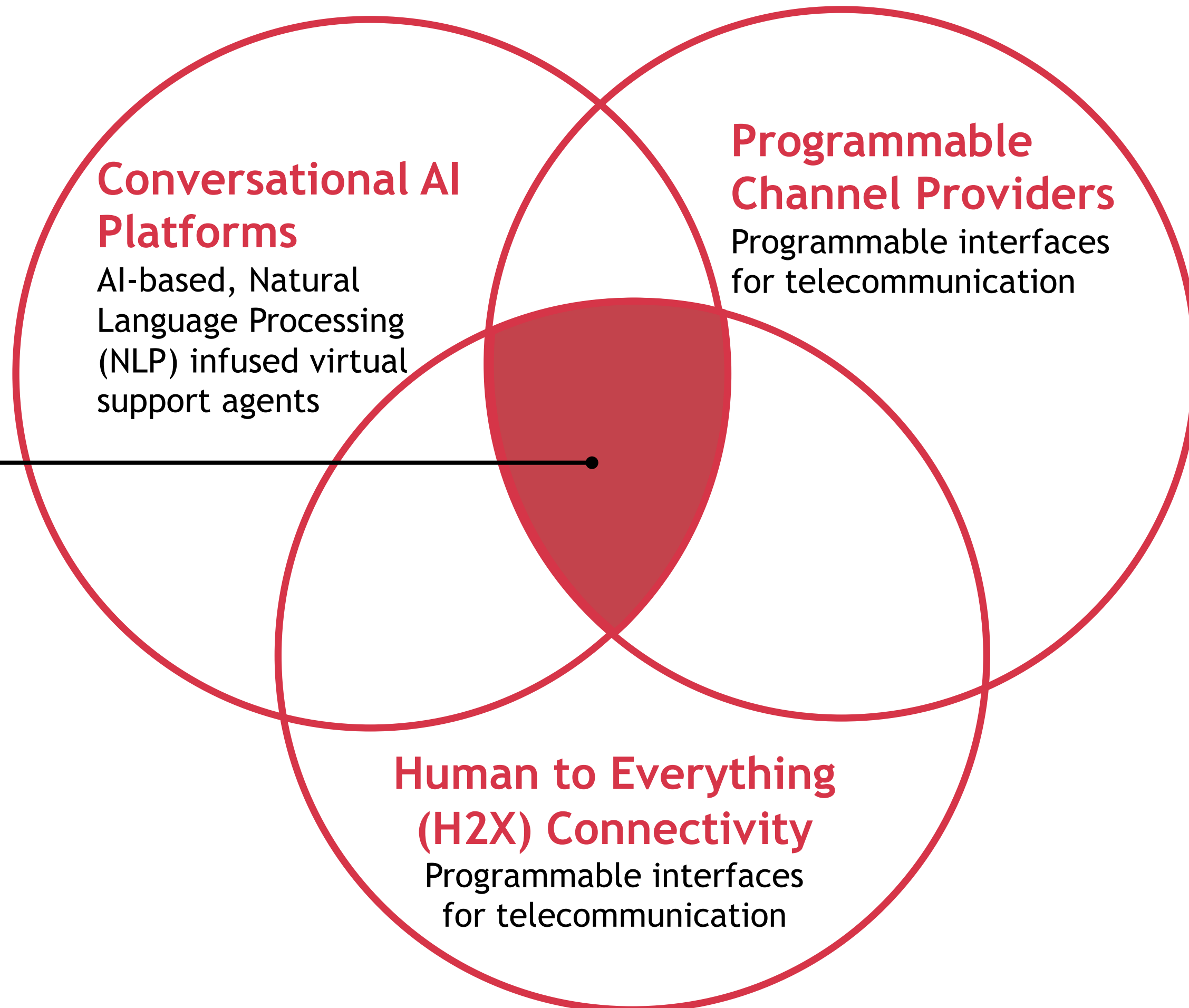
DIGO

Powered by **Tata Communications**



Powered by Tata Communications

Powering Customized,
Converged & Contextual
Conversations across
Customer Journeys



MARKET TRENDS

KEY TRENDS

IoT adoption to be led by **Asia-Pacific, Western Europe and North America**

5G Connected Cars to be a differentiator

Hyperscalers expand into connectivity i.e. **LoRAWAN**, Private 5G and satellite IoT

Adoption of **AI/ML** at the **edge cloud**

TOP 4 SECTORS IN 2028



Smart Buildings & Smart Cities



Automotive

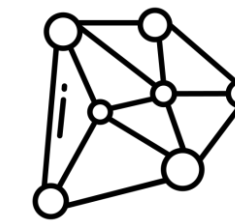


Tracking



Utilities

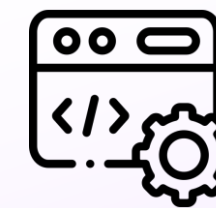
SHARE OF REVENUE IN 2028



Connectivity: 9%

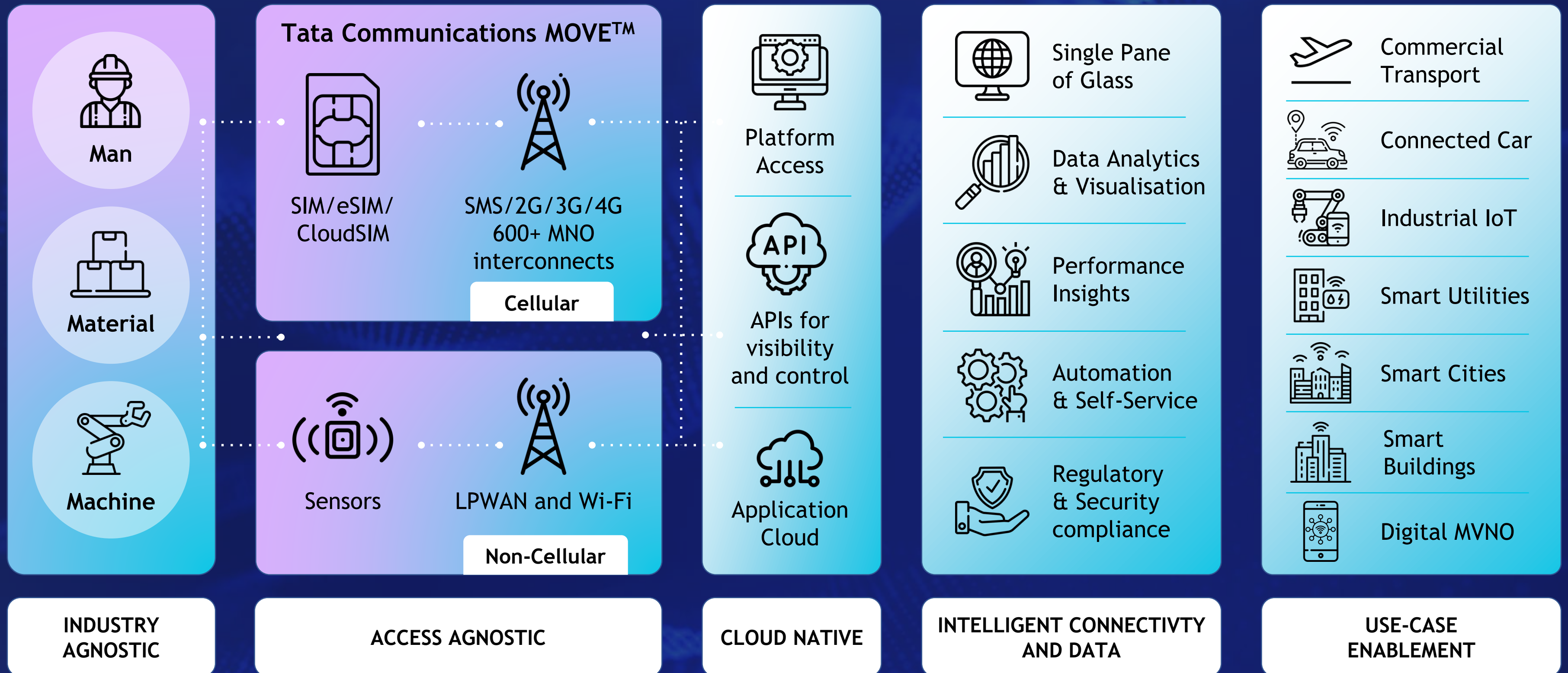


Hardware: 32%



Application: 60%

TATA COMMUNICATIONS IN IOT



END TO END NON-CELLULAR IOT SOLUTIONS

ALL KEY COMPONENTS OF IIOT SOLUTION



SMART SENSORS



THE NETWORK



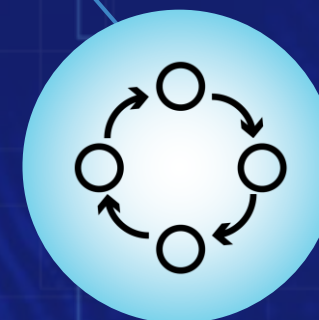
THE PLATFORM



THE APPLICATION



ANALYTICS



MANAGED SERVICES

IOT SOLUTIONS ENABLING USE-CASES

CONNECTED OPERATIONS: MAN-MATERIAL-MACHINE

Enabling enhanced safety and productivity of 150K+ employees across 40+ locations



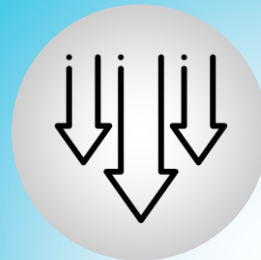
Productivity improvement
~15%



Prevented 40+ safety incidents (including potentially fatal ones)



~100% reliability in locating workforce in emergency scenarios



~20% reduction in un-authorized entries

SMART UTILITIES: CREATING SUSTAINABLE AND SAFER CITIES

Powering 6 smart cities managing 200K+ Streetlights



Additional energy savings
~20%



Manual fault detection cost reduction by
~80%



Reduced Green House Gas (GHS) emission by
~23000 MTCO₂e

THE EVOLVING MOVE™ STACK

Digital Business Platform

End User Applications
Application Enablement Platform

SIM / eSIM / CloudSIM
Application Enablement Platform

SPOG | APIs | Portal
Data Exchange Platform

Airtime
Connectivity Management Platform

THE EVOLVING MOVE™ STACK

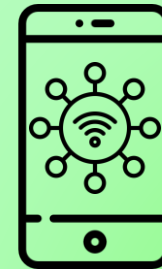
Digital Business Platform



SOTA Assure



Embedded
Connectivity



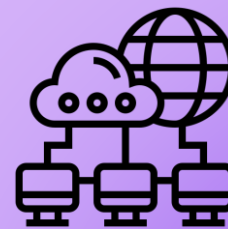
Digital MVNO



Fleet Assure /
AIS-140



Renewal Assure



Device to Cloud



A DAY WITH MOVE™



TATA COMMUNICATIONS MOVE™
BORN TO CONNECT



TATA COMMUNICATIONS

EMPOWERING
TOMORROW

SALES & MARKETING

Presented by Sumeet Walia
Executive Vice President - Chief Sales & Marketing Officer

CUSTOMER IMPERATIVES IN THE DIGITAL WORLD



ENABLING BORDERLESS GROWTH

End to end Digitization at the core of business operations



ENHANCING PRODUCTIVITY AND EFFICIENCY

Seamless experiences for all stakeholders - customers, partners and employees



BUILDING AGILITY

Digital self-service model



BOOSTING PRODUCT INNOVATION AND CUSTOMER EXPERIENCE

Adoption of industry specific solutions



MANAGING RISK

Enabling business resilience

STRATEGY IN MOTION

DRIVING CUSTOMER OUTCOMES(FY19-FY22)

- Deeper with Fewer
- Investing in our Customer Success Teams
- MIX of Fortune 2000 and ET 500

Our MILLION-DOLLAR CLUB

Growth



33 accounts added in Million dollar club



CAGR of 10% vs Enterprise CAGR of 6%



75% of Overall Enterprise (share ↑ 8%)

Increasing share of wallet



Avg. Rev per customer up 33%



PPR up 12%



Churn down 20%

Deepening Relevance



Fixed Digital platforms and services Revenue up 28%

DEEPENING CUSTOMER INTIMACY

WIN RATE

- Win rate in top customers is 36%, about 10% higher than enterprise win rate

FUNNEL ADD

- Digital platforms and services funnel add contributing to 60% of the funnel add in Enterprise segment

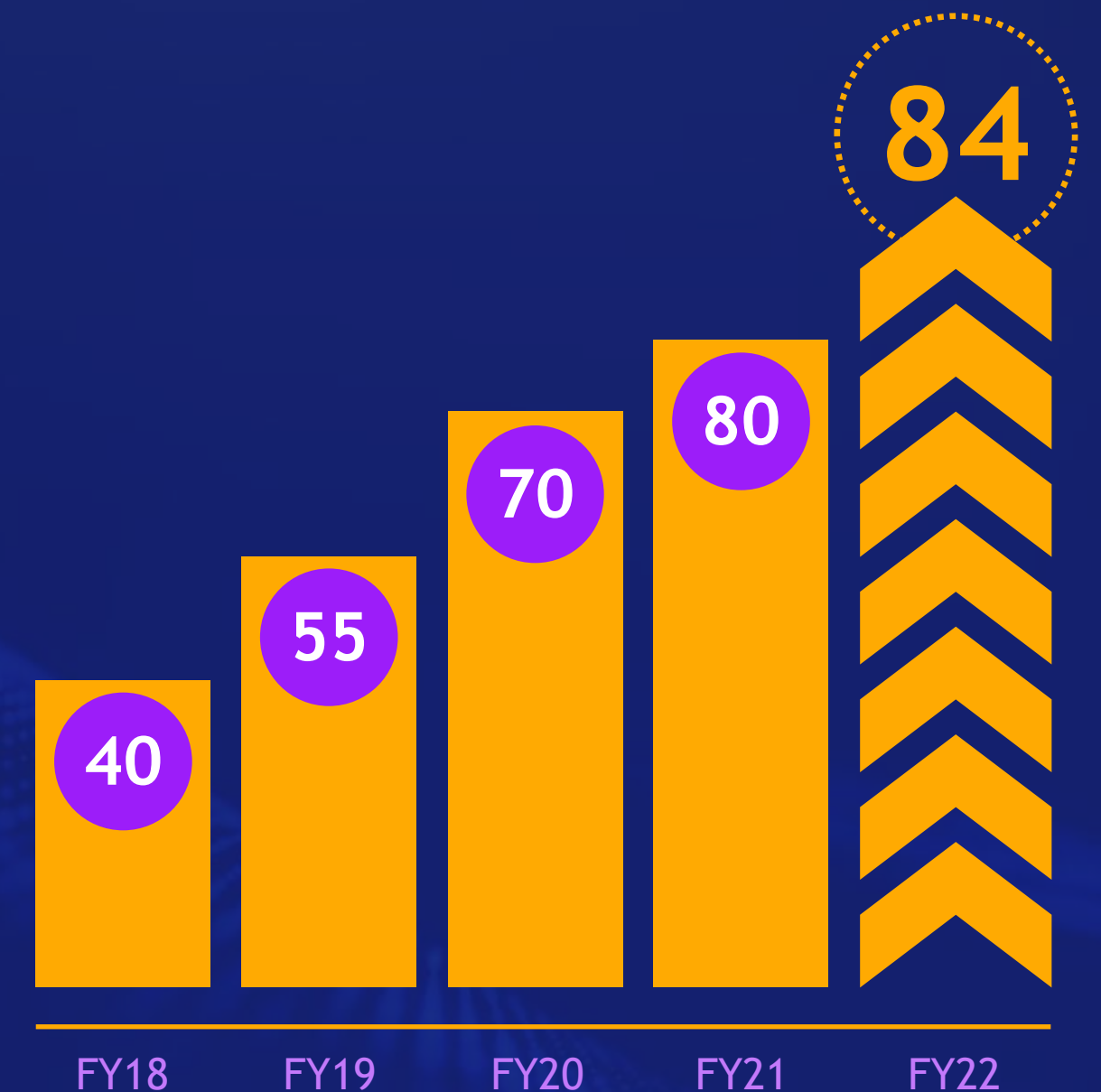


DIGITAL CONNECT

- Launch of self service portal TC^x for agility and ease of doing business and faster turn around of revenue

CUSTOMER EXPERIENCE

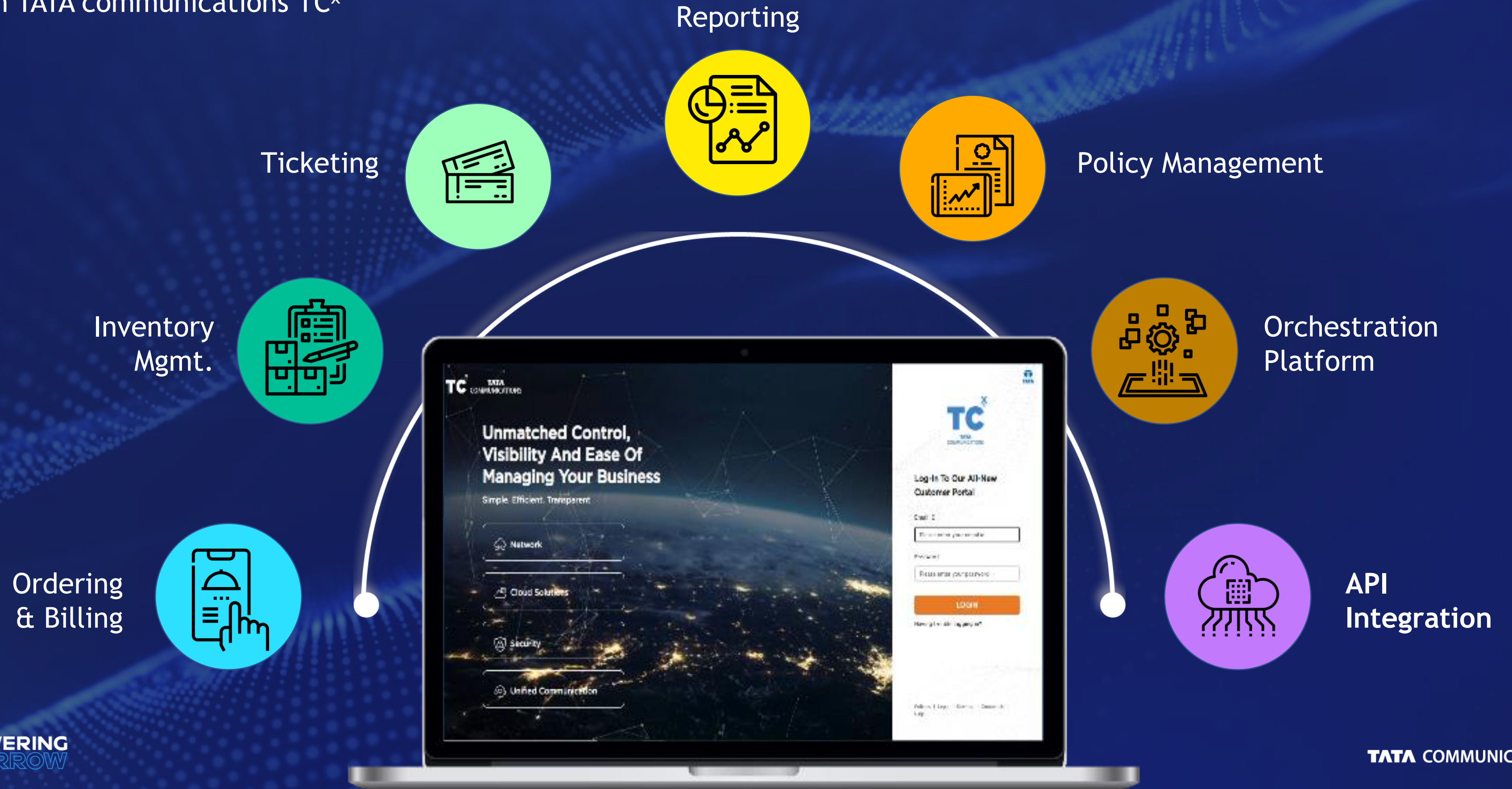
- Churn in enterprise segment down YoY by 12%
- Executive Engagement, Systemic Fixes across Quote to Cash cycle



SIGNIFICANT GROWTH IN NPS YOY

TATA COMMUNICATIONS TC^x -CUSTOMER EXPERIENCE PORTAL

Digitising our customer touchpoints
with TATA communications TC^x



EFFECTIVE EXECUTION – WINNING BIG WINNING STRONG

Hager group avails enhanced network stability and user experience from Managed SDWAN

CUSTOMER OVERVIEW

Founded in 1955, Hager Group is a French-German origin manufacturer of electrical installations in residential, commercial, hotel and industrial buildings.

DEAL DETAILS

Deployment Region: Global

SOLUTION

- Tata Communications IZO™ SDWAN
- Managed Services,
- IZO™ Hybrid WAN Services



BUSINESS CHALLENGE

- As a trusted manufacturer of electrical distribution systems, Hager Group was dissatisfied with the MPLS links from their existing service provider
- They were looking for a strategic partner to help them transform their global connectivity with a cloud-ready network



Stable Level
of Cost



No
Latency



Increased
Productivity



Stable Uninterrupted
Network

“Tata Communications has assisted in our company’s IT Transformation journey and Tata Communications Managed SDWAN Select along with IZO™ WAN provides a stable network to support our business operations. There has been significant improvement in productivity and user experience.”

Antonio Gelardi , IT Manager Infrastructure, Digital & Information, Hager Group



OUR USP

- A comprehensive solution and global connectivity to Hager Group’s locations
- Predictable performance in major locations and with MPLS circuits in China.
- Together with our BYON functionality incorporated at few of Hager Group’s in-contract circuits were part of the solution



BUSINESS IMPACT

- A One-stop-shop for global connectivity for Hager Group
- Increased performance in cloud applications
- Stable uninterrupted network which results in a greater end-user experience
- A stable level of costs and an increase in productivity
- Seamless connectivity for Hager Group’s internal customers and is flexible to meet any future needs

CONTINUING ON OUR CUSTOMER SUCCESSES

STRATEGIC NEW WINS

Multiple wins with Digital Native Unicorns

- Secure Network, CPaaS Platform and Contact Centre

Global Swedish Engineering MNC based in Europe

- Colocation & connectivity to host SDWAN hubs; Internet connectivity to Cloud Providers

Leading Financial Services Company in India

- Cloud based 24*7 security operations center that is based on Nextgen SIEM as a service

Global Transport and Logistics Company based in Europe

- Managing Global Distributed Contact Centre across Europe, APAC on a Cloud based platform

Global Analytics and Digital Solutions Co based in India

- Cloud and DC migration with more than 1500 VMs across 12 DC consolidated into 5 HyperScaler Regions

Green field Mutual Fund JV between Indian PSU and French financial services co in India

- Multi tower solution with end to end Digital IT infrastructure across Cloud, Collaboration,
- Security, SDWAN and End user Device management. IZOTM Financial Cloud implemented

FOUNDATION OF STRONG EXISTING RELATIONSHIPS ...



STRENGTHENING INDIA LEADERSHIP

RECOGNITION



Managed **Multi Cloud Company** of the Year
SD-WAN Company of the Year



Enterprise **Network Transformation Provider** Award
Best Enterprise Managed Security Services Provider



Data Security Council of India - Excellence Awards 2021

SUCCESS MARKERS



Double digit CAGR(FY 19-22) in India Enterprise revenue



Network Transformation

- Market leader in DC to DC connectivity
- Expanding reach with **new IZO variants**
- **Funnel for Network Services and SDWAN** showing **strong uptick**



Cloud & Cybersecurity Revenue CAGR(FY 19-22) in India at **33%**



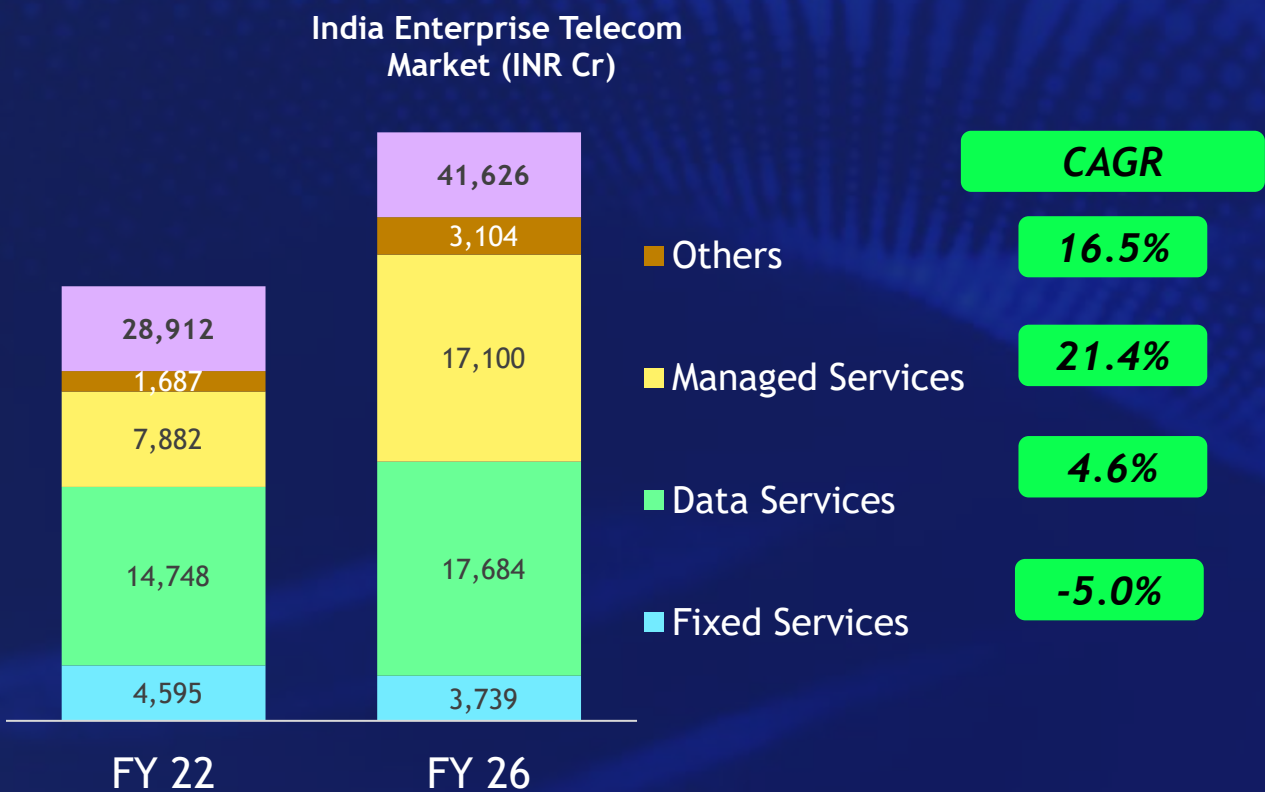
50% of Million dollar club customers are in India

ADDRESSING THE EMERGING INDIA OPPORTUNITY(PRIME)

Volume led growth to address a wider customer base with standard products and bundles in fast-growing market segments. Automated tools for account engagement, order management and delivery



India Prime - Segmentation



- India Prime setup to build on our home market strength and help Tata Comm cater to ~2/3rd of the overall India enterprise telecom market covering over 3000 accounts



FY '22 Highlights

- Coming from a small base strong YoY growth seen in order book
- Funnel add is showing high double digit growth with major contribution coming from Digital Platforms & Services
- First of its kind in India(for network services) - TC^x self-serve, in the initial months of launch adopted by over 100 customers

DRIVING INTERNATIONAL GROWTH

RECOGNITION

Gartner

A ‘**Leader**’ in **Gartner Magic Quadrant**, for 9th consecutive year

AVASANT

Moved from **Innovators** to **Leaders** in Avasant SD WAN Managed Services report.

IDC
Analyze the Future

IDC MarketScape: Cloud Security Services 2021 - **Major player**

SUCCESS MARKERS

APAC

Strong growth seen in Network Transformation(26%) and UCAAS (62%)

AMERICAS

Growth drivers in Americas are Network Transformation(18%) and CPAAS(200%)

UK & CE

Growth pivoted on Network Transformation(35%) and MOVE(200%)

BRAND ASSOCIATION



Official Broadcast Connectivity Provider, once again

* All the % increase numbers above are 3Y Revenue CAGR

GROWTH DRIVERS



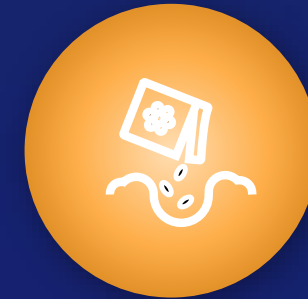
DIGITAL TRANSFORMATION

- Momentum in Fixed Digital Platforms & Services business, growing at a 3 year CAGR of 20%
- This momentum is seen across all regions and all portfolios
- Current funnel contribution is 55% of overall pipeline



LARGE DEALS FOCUS

- Large Deals order book up 13% YoY
- Large deals open funnel contributing to 46% of total funnel
- Focus on multi-tower deals



NEW LOGO ACQUISITION

- Augmenting Headcount for new customer acquisition in international regions
- Targeting specific industry verticals
- Leveraging partners like TCS for joint GTM



TATA COMMUNICATIONS

EMPOWERING
TOMORROW

THANK YOU

tatacommunications.com

www.tatacommunications.com  @tata_comm

<http://tatacommunications-newworld.com> www.youtube.com/tatacomms

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