

WELCOME TO TATA COMMUNICATIONS ANALYST DAY

26TH JUNE 2020

TATA COMMUNICATIONS

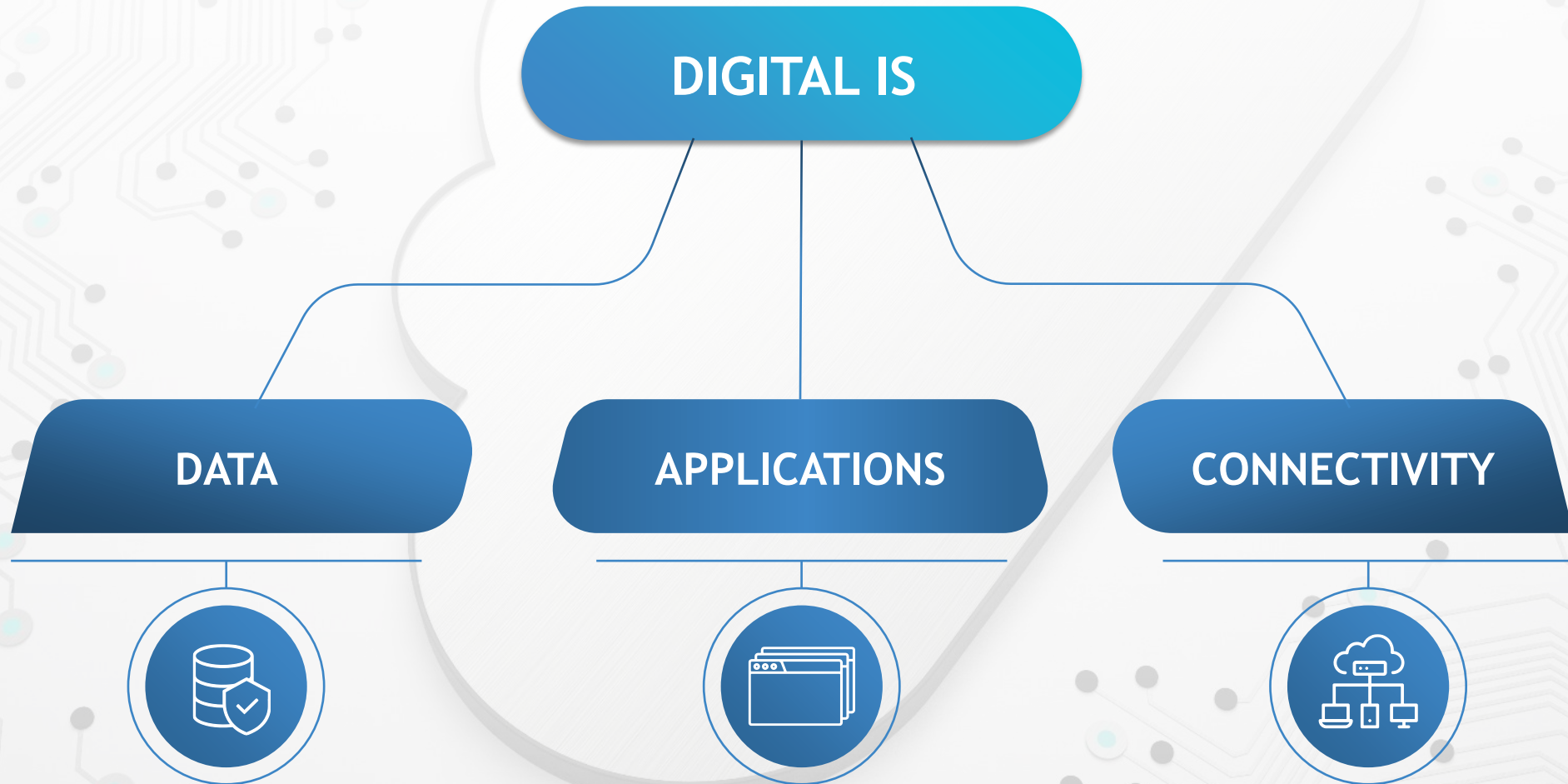


Tata Communications, **Reimagined**

WHAT ARE THE CUSTOMER DRIVERS?



WHAT IS DIGITAL?



OUR OPPORTUNITY LANDSCAPE



AVAILABLE MARKET

6 key platforms have been identified to significantly contribute to our growth in revenue.



MOBILITY & IoT



COLLABORATION



NEXT GENERATION CONNECTIVITY



CLOUD, EDGE & SECURITY



VOICE



NETFOUNDRY

Available Market 2023

Mobility & IoT	
CAGR	+3.9%
2022	\$243 Bn
2019	\$217 Bn

NetFoundry	
CAGR	+25.5%
2022	\$109 Bn
2019	\$55 Bn

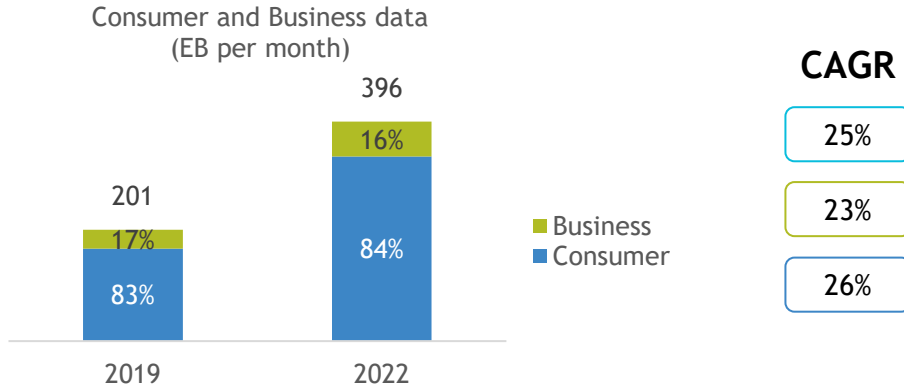
Collaboration	
CAGR	+12.2%
2022	\$35 Bn
2019	\$25 Bn

Cloud, Edge & Security	
CAGR	+12.0%
2022	\$224 Bn
2019	\$159 Bn

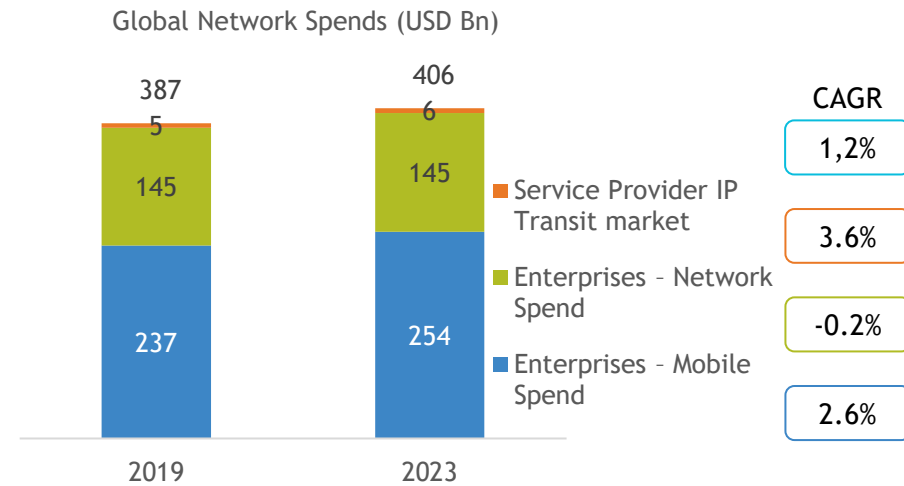
Next Generation Connectivity	
CAGR	0.2%
2022	\$145 Bn
2019	\$145 Bn

Voice	
CAGR	(6.6)%
2022	\$8 Bn
2019	\$7 Bn

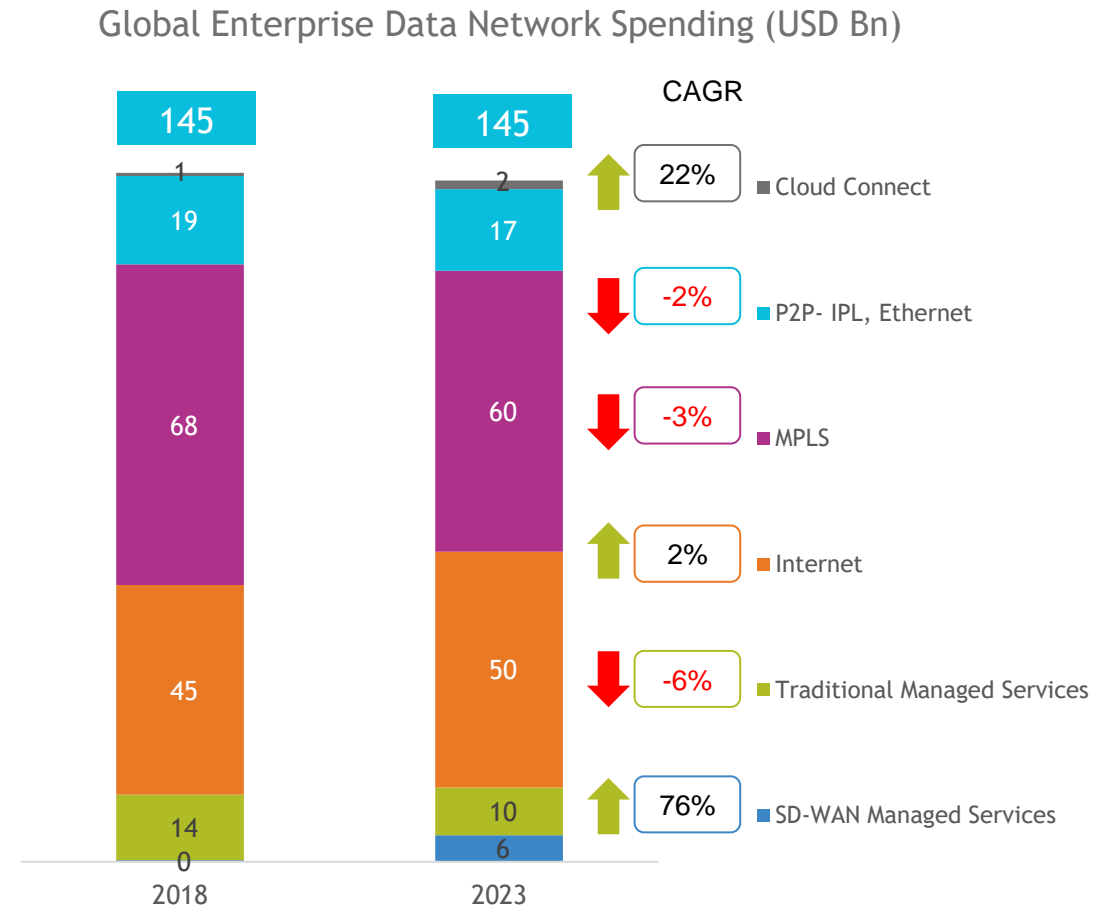
SHIFT HAPPENING IN GLOBAL ENTERPRISE NETWORK SPEND



Source: Cisco VNI: Forecast and trends 2017-2022

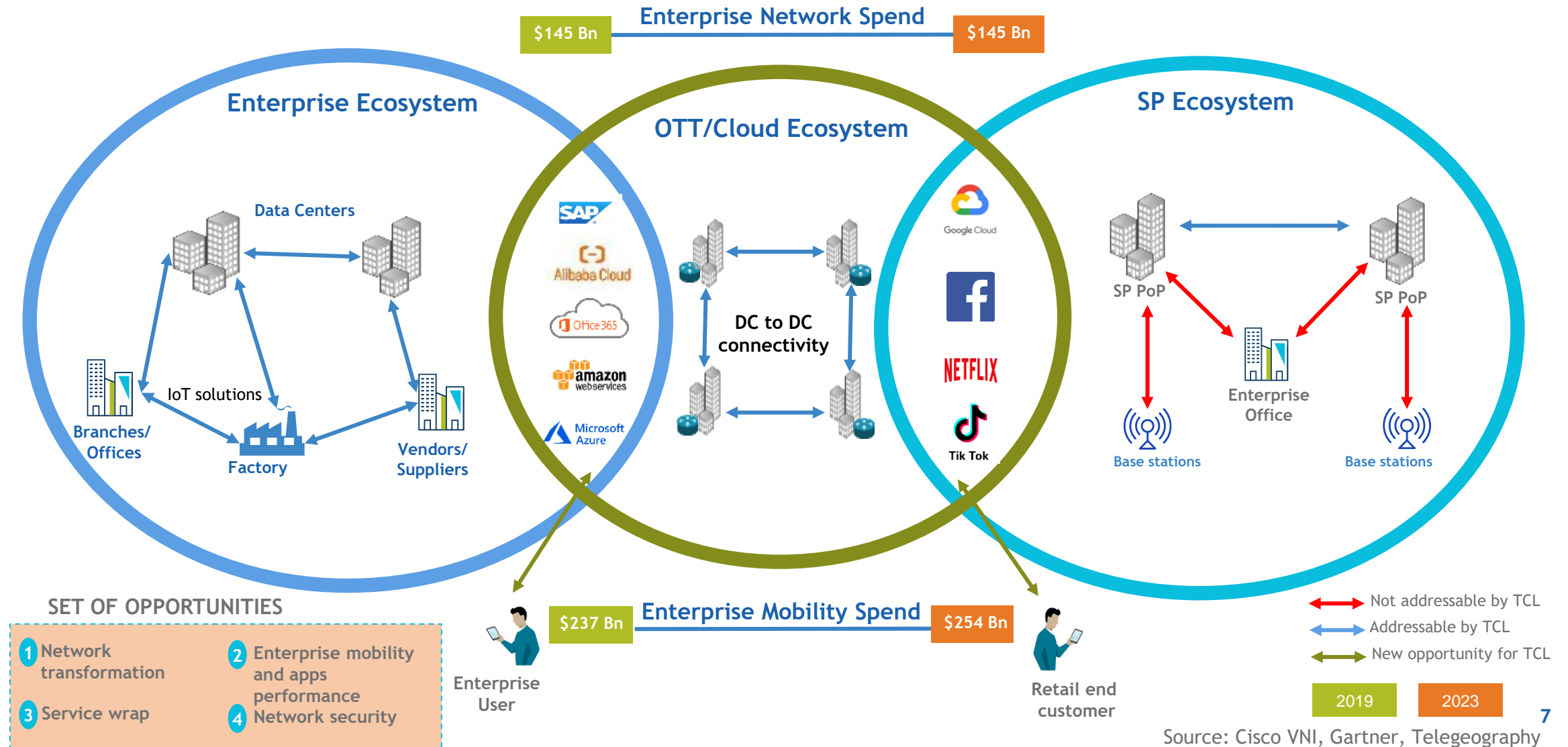


Source: Enterprise network and mobile spend from Gartner; SP IP spend based on internal estimates



Source: Gartner

WELL POSITIONED TO BE PREFERRED DIGITAL PARTNER



IDENTIFYING KEY PILLARS

MOVE™ IoT - Platform enabling intelligent, agnostic and network independent global cellular connectivity



Network++¹ - Enabling enterprise network transformation to adopt cloud, internet and software-defined services (including SD-WAN)



InstaCC - Cloud based digital Customer and employee experience portfolio for enterprises across multiple channels



Collaboration - Fully managed collaboration services for enterprises



Media (Video Connect) - Seamless and dedicated video content delivery network



MMX - Omnichannel Mobile messaging service enabling digital customer experience for enterprises



¹ Includes Integrated WiFi and VNF and integrated network security

SECURE CONNECTED DIGITAL EXPERIENCE (SCDX)

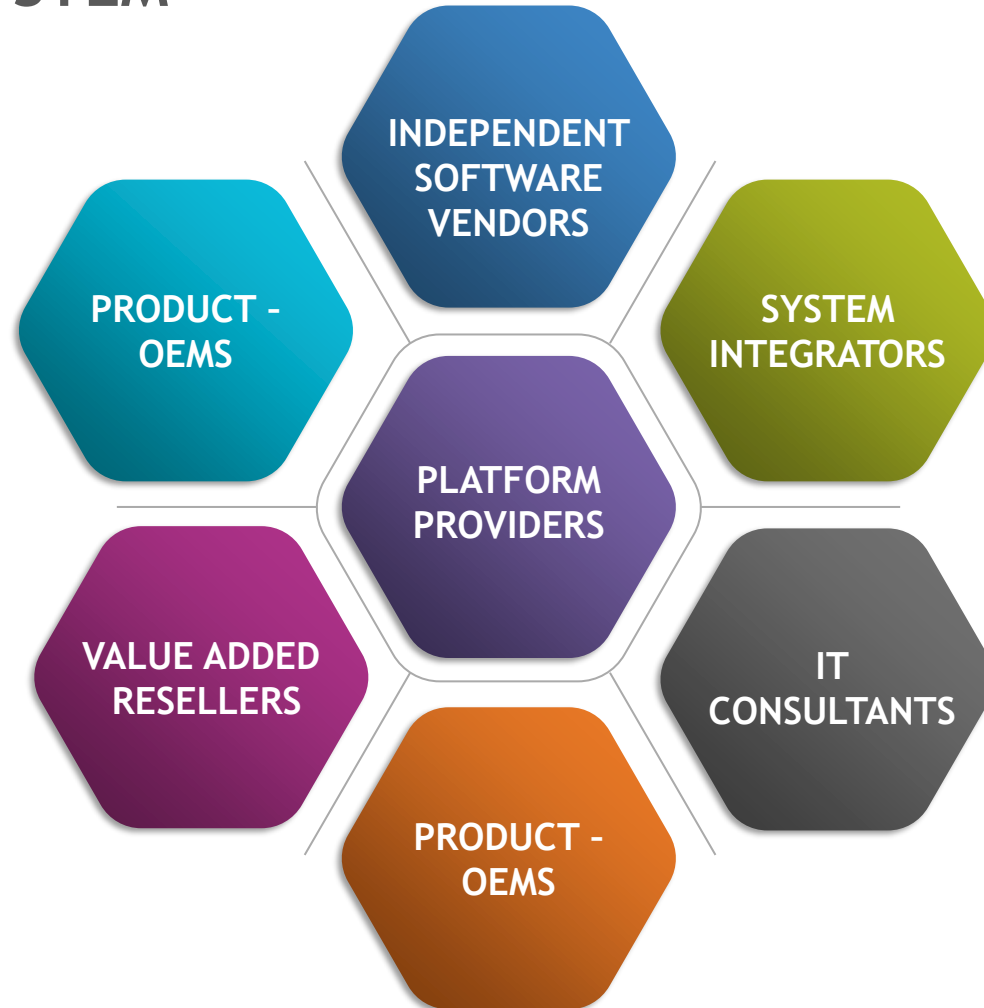
DIGITAL ECOSYSTEM ENABLER: INTRODUCING SCDX



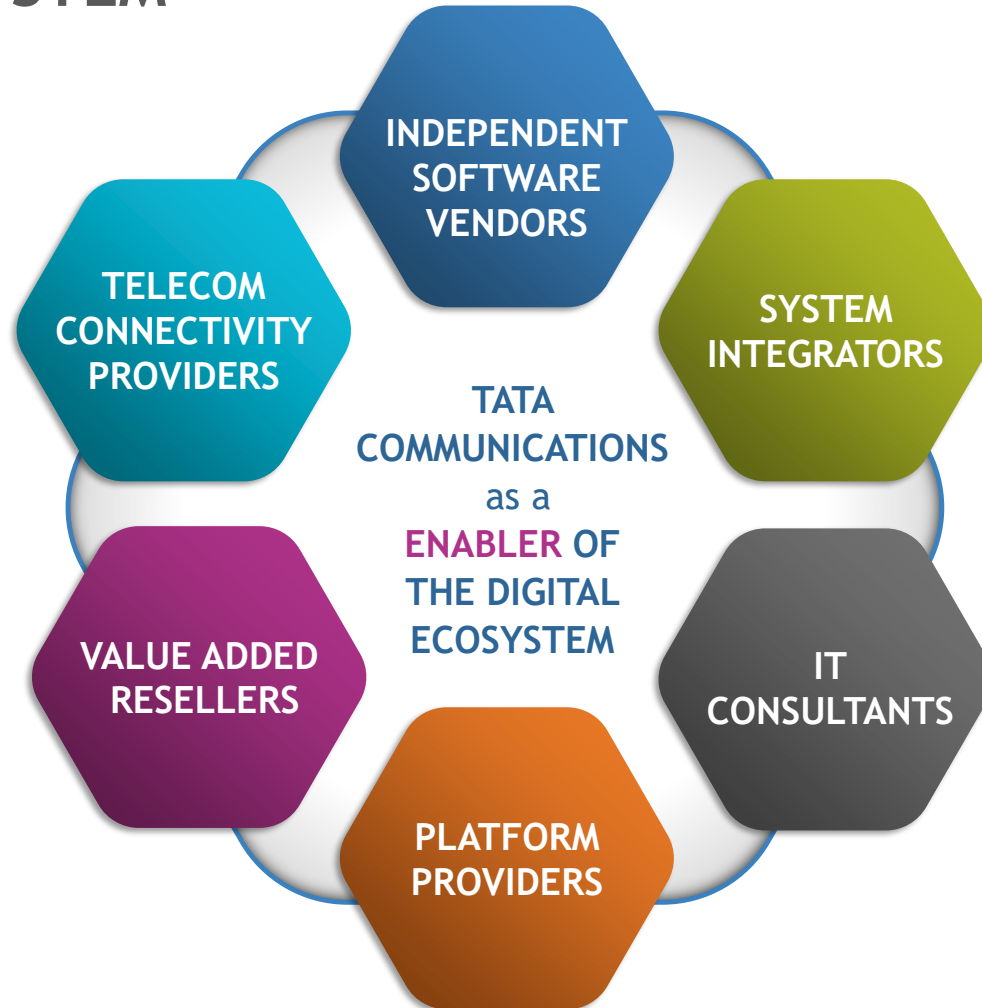
Driving Principles

- **Build to suit the new ways of working**
- **Create technology solutions to solve operational hurdles**
- **Understand the IT priorities that surround their offerings**
- **Show Flexibility**

WHO OWNS THE CUSTOMER IN THE DIGITAL ECOSYSTEM



WHO 'CAN' OWN THE CUSTOMER? IN THE DIGITAL ECOSYSTEM



OUR AMBITION

TO ACHIEVE ***PROFITABLE GROWTH***

AND BECOME

A LEADING DIGITAL ECOSYSTEM ENABLER

IN THE EYES OF OUR CUSTOMERS

AND THE INDUSTRY

OUR STRATEGY

**FINANCIAL
FITNESS**

HEALTHY BALANCE SHEET AND DOUBLE DIGIT PROFITABLE GROWTH

**GROWTH
PLAN**

POSITIONING AS A DIGITAL ECOSYSTEM ENABLER

WHO

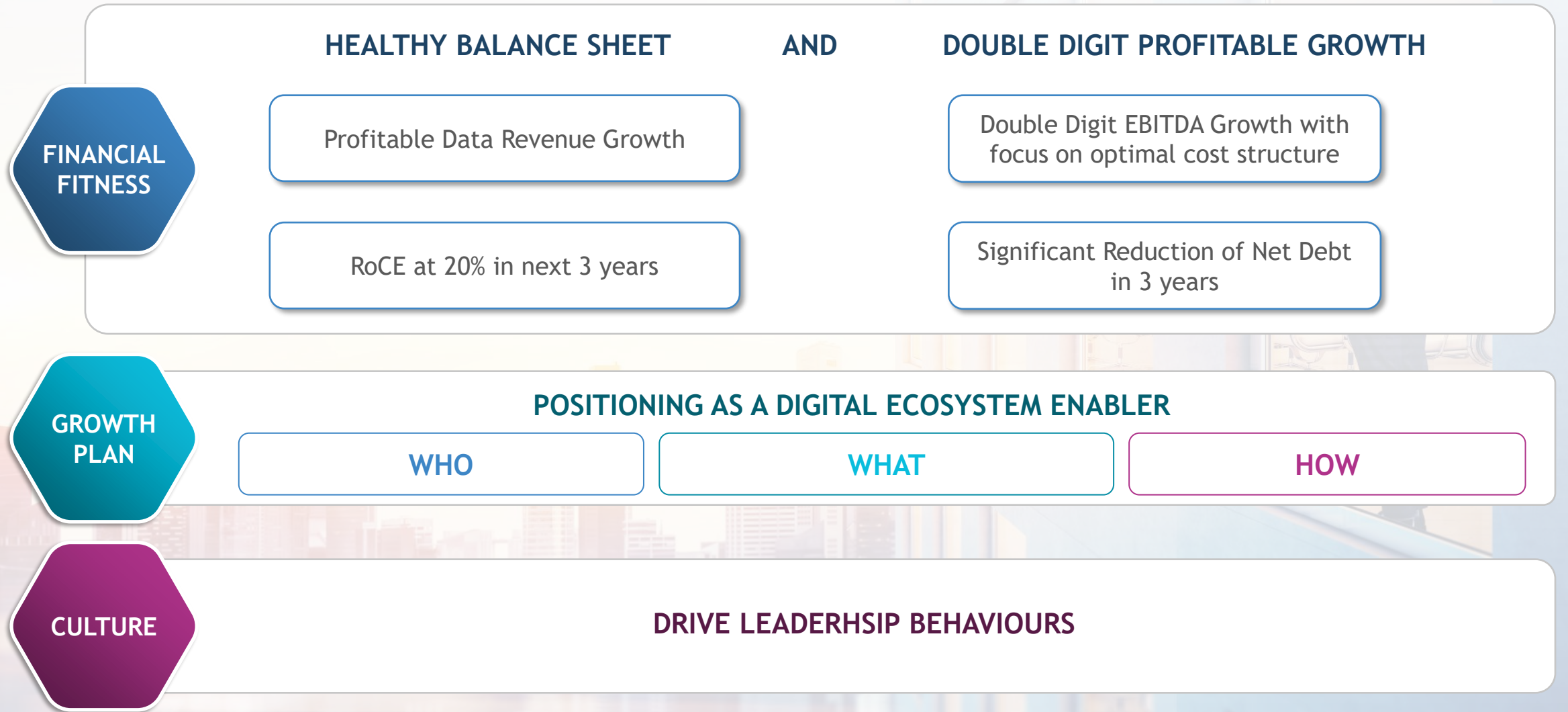
WHAT

HOW

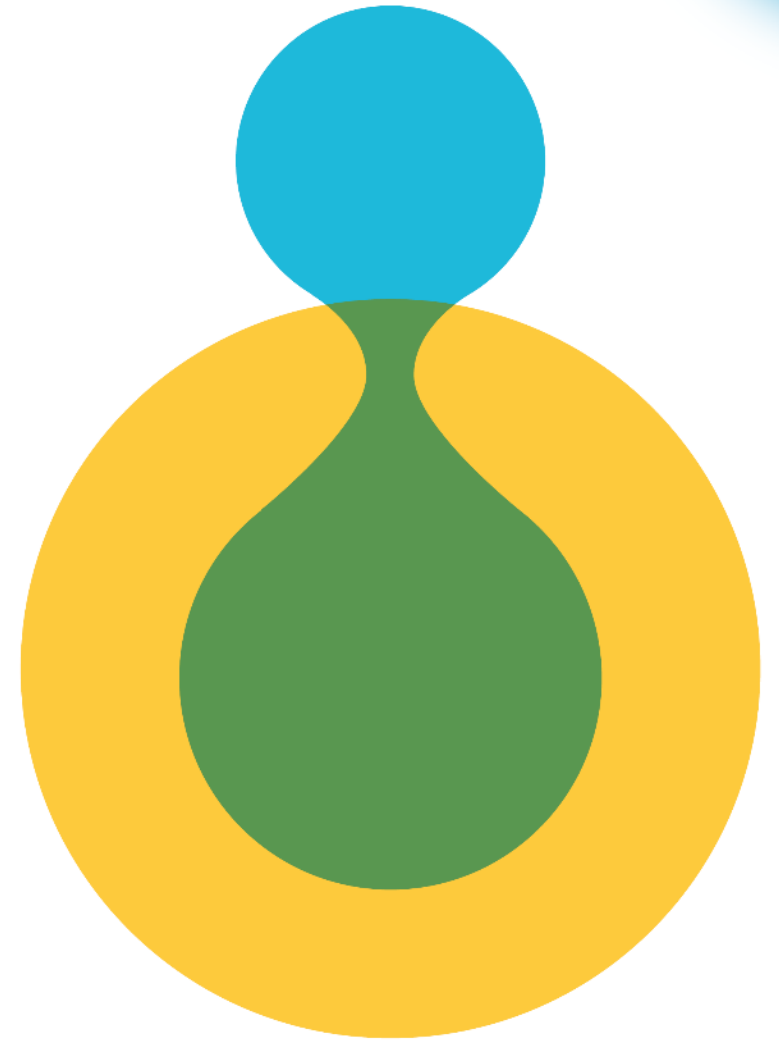
CULTURE

DRIVE LEADERSHIP BEHAVIOURS

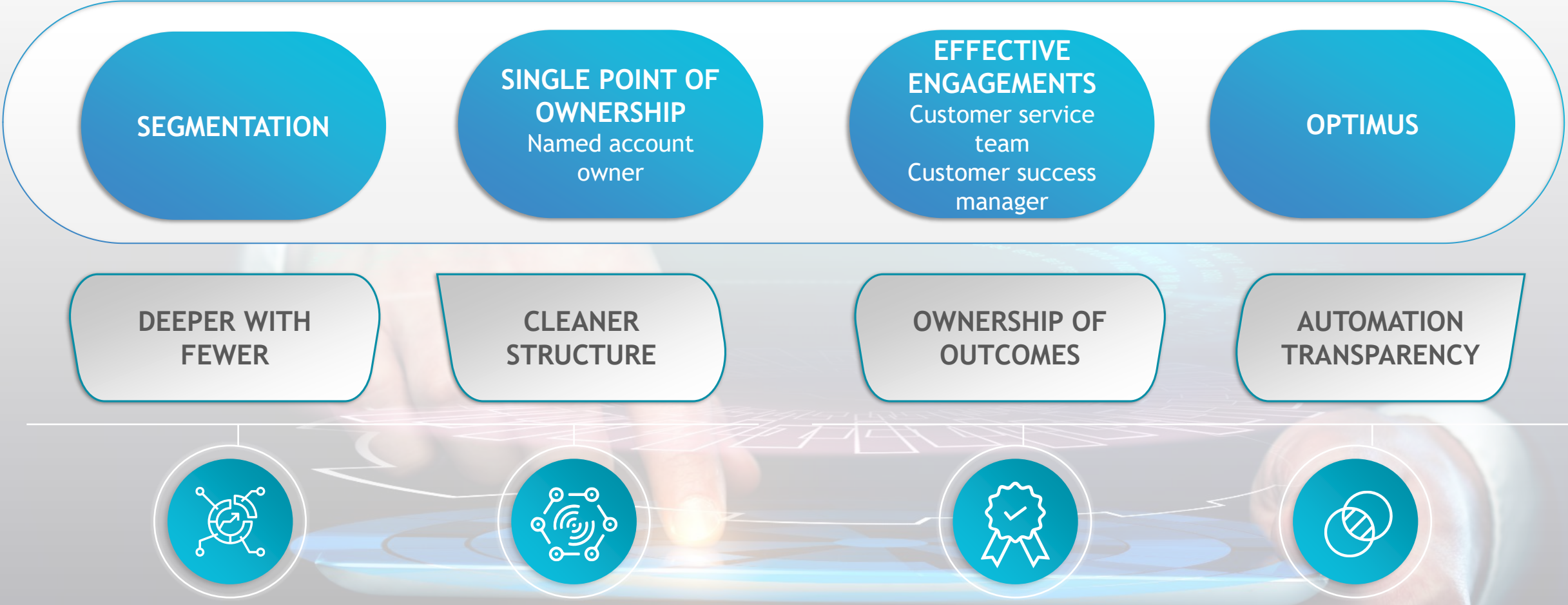
OUR STRATEGY



Reimagining the customer experience



SIMPLIFYING OURSELVES IN THE EYES OF THE CUSTOMER



TRANSFORMING THE LIVE MEDIA INDUSTRY ONE EVENT AT A TIME

Our infrastructure spans the world to allow end-to-end programme delivery at any scale. We promise consistency, reliability and speed of content distribution.

LIVE EVENT SERVICES



Manage distribution for **800+** television channels across US, Europe & Asia



5000+ live events delivered, over **750** remotely produced



Reaching over **2 Bn+ sports fans** With sports content delivered through 90% of ALL Global sports broadcasters



10,000+ TB Content storage & transfer approx. 1.5 million standard DVDs

Pathbreaking technology ownership

- Frost & Sullivan's Managed Services Provider of the year for Video Services (Two years in a row)
- Leadership quadrant in Omdia's Global Video CDN Services scorecard
- World's first truly live 4K 360° video streamed from a race
- Pioneering next-gen media infrastructure supporting world's majority of global sports events through production, distribution & consumption
- Media focused cloud & edge services supporting the industry to transition to a virtualised environment enabling safe re-opening of sports events
- Helping media broadcasters' transition from traditional satellite delivery to Fiber/IP based delivery & supporting their digital OTT ambitions
- Dominant leadership position:
 - LIVE 4K Tier 1 Global sports contribution & distribution
 - Global Motorsports distribution (Mainly European)
 - India sports market (IPL, PBL, PKL)
 - Remote Production for Global sports events

KEY CUSTOMERS



Reimagining the platform

FOCUS ON BUILDING THE RIGHT PRODUCTS

3 DESIGN PRINCIPLES

1.
Capex
efficiency

2.
Platform
based

3.
Agile NPI



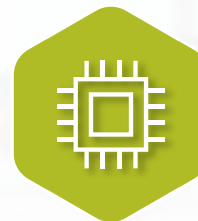
4 BUSINESS VALIDATIONS



SCALABLE revenues from
products and services



PROFITABLE and
improving over time

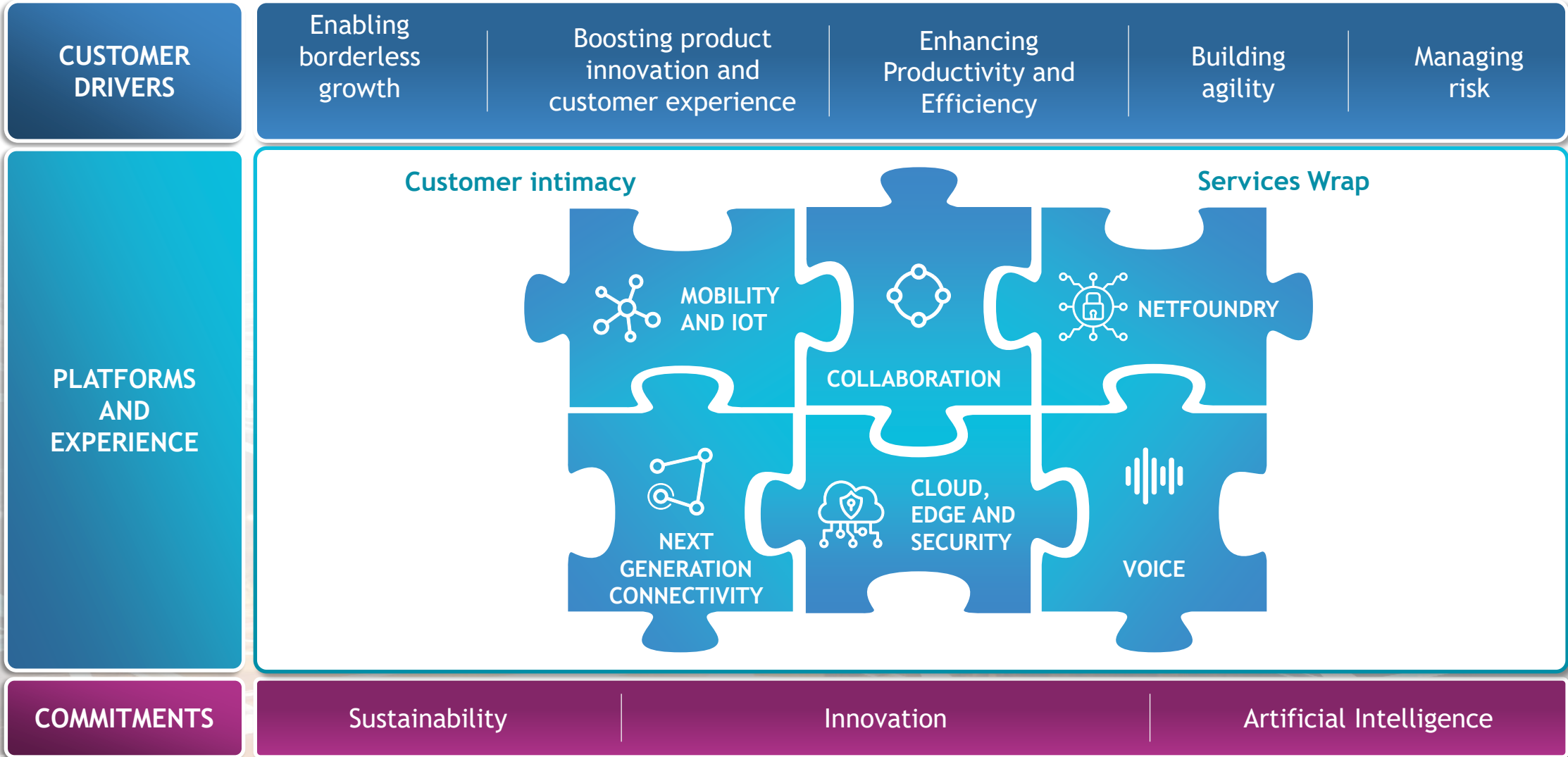


RELEVANT to industry
trends and technology shifts



DIFFERENTIATED product
and service design

ENABLING ENTERPRISE DIGITAL TRANSFORMATION



OUR NET PROMOTER SCORE (NPS)

YEAR 2019:

55

OUR NET PROMOTER SCORE (NPS)

YEAR 2020:

70

TATA COMMUNICATIONS



Thank you