EMPOWERING TOMORROW

INVESTOR MEET 2023

7TH June 2023
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.
WE ARE DELIVERING ON OUR ‘REIMAGINE’ STRATEGY
### OUR ‘REIMAGINE’ STRATEGY

<table>
<thead>
<tr>
<th>Financial Fitness</th>
<th>Truly Compliant</th>
<th>Fit to Compete</th>
<th>Fit to Grow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Growth Plan</strong></td>
<td><strong>Who</strong></td>
<td><strong>What</strong></td>
<td><strong>How</strong></td>
</tr>
<tr>
<td>Customer Shift</td>
<td>Customer Shift</td>
<td>Product to Platform Shift</td>
<td>Business Model Shift</td>
</tr>
<tr>
<td>Key segments focus</td>
<td>Scalable and differentiated platform offerings</td>
<td>Right operating model</td>
<td>Delivering and monetizing superior customer experience</td>
</tr>
<tr>
<td></td>
<td>Automation, Innovation and AI at the core</td>
<td>Sustainability at the core</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Culture</th>
<th>Ownership and Accountability</th>
<th>Collaboration</th>
<th>Continuous Learning and Upskilling</th>
<th>Growth Mindset</th>
<th>Innovation and Problem Solving</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Automation, Innovation and AI at the core, Sustainability at the core.
CUSTOMER SHIFTS HELPING GOING DEEPER WITH FEWER

**Million Dollar Club**
- +33 New Customers Added (FY20-FY23)

**5 Million Dollar Club**
- +10 New Customers Added (FY20-FY23)

**Benchmark NPS**
- NPS remains in Top Quartile

<table>
<thead>
<tr>
<th>Million Dollar Club</th>
<th>FY20</th>
<th>FY21</th>
<th>FY22</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;$1 Mn Customers</td>
<td>200</td>
<td>206</td>
<td>216</td>
<td>233</td>
</tr>
<tr>
<td>New Additions</td>
<td></td>
<td></td>
<td></td>
<td>17</td>
</tr>
</tbody>
</table>

Refers to accounts with revenues greater than USD 1 and USD 5 Mn respectively.
PRODUCT TO PLATFORM SHIFT IS ACCELERATING DATA REVENUE GROWTH

Incremental Data Revenue (in ₹ Cr)

FY22: 180
FY21: 723
FY23: 1,317

FY23 Data Revenue Growth YoY 10.3%
ESG COMMITMENTS

TATA COMMUNICATIONS

People
Fostering the Right Winning Mix

- Multiple Great Place to work recognitions
- Focus on Diversity & Inclusion - 21.8%
- Learning Academies set up for critical roles across the value chain

Planet
Our Long-term Sustainability Goals

- Carbon Neutral by FY30 | Net Zero by FY35
- Customer GHG emission reduction potential of 20x our emission by FY27
- Become Water neutral
- Zero waste to landfill by FY27

Community
Project School of Hope & Empowerment (S.H.E)
3 Mn Women lives positively impacted, goal to reach 5 Mn by Dec 2024

Project Nanneer
Lake restoration in Chennai, saved 10 Cr liters of water since Sep 22, planted 6000 native trees
Plan to create a butterfly habitat
FINANCIAL TURNOVERD - THE REIMAGINE STRATEGY IS DELIVERING

**EBITDA Margin (%)**
- FY20: 19.3%
- FY23: 24.2%

**PAT (₹ Cr)**
- FY20: -86
- FY23: 1,796

**Data Revenue (₹ Cr)**
- FY20: 11,876
- FY23: 14,096

**EBITDA (₹ Cr)**
- FY20: 3,289
- FY23: 4,318

**EBITDA Margin (%)**
- FY20: 19.3%
- FY23: 24.2%

**ROCE %**
- FY20: 11.1%
- FY23: 28.3%

**Consolidated KPIs**

**CAGR 5.9%**
- FY20: 11,876
- FY23: 14,096

**CAGR 9.5%**
- FY20: 3,289
- FY23: 4,318

- FY20: -86
- FY23: 1,796
- FY20: 11.1%
- FY23: 28.3%
USHERING IN THE NEXT PHASE OF TRANSFORMATION
STITCHING RIGHT CAPABILITIES FOR ACCELERATED GROWTH

Product to Platform Shift

Evolution from a Platform to a Digital Fabric

Increasing Customer Relevance Quotient

Accelerated Growth
THE FUTURE IS HYPERCONNECTED ECOSYSTEMS

Real Time
Always ON - Anywhere ON
Seamlessly Collaborative
Intelligent & Always Learning
INCREASING RELEVANCE IN THE ERA OF HYPERCONNECTED ECOSYSTEMS

Hyperconnected ecosystems enable customers’ needs of

- Borderless Growth
- Superior Experiences and Innovation
- Productivity and Efficiency
- Business Agility
- Managing Risks
HYPERCONNECTED ECOSYSTEMS: CHANGING AUTO BUSINESS MODELS (OEMS TO MOBILITY SERVICES)

CASA trend necessitating “hyperconnected-ness” for enabling a V2X Ecosystem

Connectivity

Shared Mobility

Alternate Drive Trains

Advanced Driver Assistance Systems
TATA COMMUNICATIONS

OUR DIGITAL FABRIC HELPS CUSTOMERS SUCCEED IN THEIR HYPERCONNECTED ECOSYSTEMS

Customer’s own suite of applications

APIs

- DILISA* enabled Analytics & Reporting
- Zero trust security across the Digital Fabric

Platforms & Solutions

Cloud | Network | Edge

- Connected & Intelligent Infrastructure
- IoT Solutions
- Private Networks
- Connected Solutions

*Device Intelligence, Locational Intelligence & Situational Awareness

Tata Communications
Digital Fabric

End-To End visibility & management, intelligent & easy to consume through APIs

*8x6 to 963x540*
OUR KEY STRENGTHS
WE CONTINUE TO INVEST IN OUR DIGITAL PORTFOLIO

Connected & Intelligent Infrastructure
- IZO™ Multi Cloud Connect
- IZO™ Internet WAN
- IZO™ SD-WAN & SASE
- NexGen Connectivity
- IZO™ Private Cloud, Fin Cloud
- IZO™ Kubernetes Solutions
- Cloud
- Cloud SOC
- Network Security
- Cloud Security
- Cyber Security

Digital Platforms & Solutions
- Connected Solutions
- Private Networks
- Mobility & IoT Platforms

Connected Experiences
- Customer Interaction Platform
- Communication & Collaboration Solutions
- Media & Entertainment Solutions
OUR MOATS

Network Strengths

Owned Global
SubSea network underpinning Connectivity Solutions

1/3rd of Internet routes
are connected directly to us

Extensive Coverage
Providing connectivity solutions to customers across 190+ countries & territories

100%
cloud giants are connected through us

100% coverage
in all Tier III/IV DC Eco-system in India

Increasing Customer Relevance

B2B Specialist
with an Industry leading NPS

Unparalleled breadth and richness
in our platform and solution offerings delivering superior customer experience

Coverage from 20+ Analyst Houses
with industry recognitions across our platform offerings

Global Recognition
in Gartner Magic Quadrant for network services for 10 years in row

Financial and Cultural Enablers

A CommTech Organization
driving digital transformation

Healthy Financial KPIs
with high ROCE and improving Debt coverage

Unique Digital Fabric
enabling enterprise transformation

Incubating new solutions
and capabilities through the 1/3/30 strategy
WELL POSITIONED AS THE COMM TECH PLAYER

**Traditional TELCOS**
- Larger focus on wireless services
- Commoditized services
- Enterprise business about leveraging wireless investments
- Horizontal offerings
- High Capex, low ROCE business

**COMM TECH**
- Enterprise focused
- Customer centric platform approach
- Focus on digital solutions
- Curated Scalable, secure & differentiated offerings
- Healthy ROCE business

**System INTEGRATORS**
- Enterprise focused
- Software based solution stack, manages improvements to a client's tech stack
- Focus on deployment-to-operation lifecycle of a complex IT solution
- Curated solutions
- Very high ROCE business
THE THREE PILLARS ARE DRIVING US TOWARDS AMBITIOUS GROWTH

Digital Fabric Capability + Our Moats = Comm Tech Play
WHAT WILL ALL THIS TRANSLATE TO
We will become
The Digital Fabric
enabling enterprises to succeed in their
Hyperconnected Ecosystems.

Ambition to Double our Data Revenues by FY27
EMPOWERING TOMORROW

DELIVERING ACCELERATED GROWTH

7TH June 2023
THE CEO PRIORITIES ARE WITNESSING A SHIFT

CEO Strategic Business Priorities for 2023 and 2024 - Top 10

<table>
<thead>
<tr>
<th>Category</th>
<th>2023 %</th>
<th>2022 %</th>
<th>Change from 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Management</td>
<td>69%</td>
<td></td>
<td>+63%</td>
</tr>
<tr>
<td>Efficiency &amp; Productivity</td>
<td>46%</td>
<td></td>
<td>+36%</td>
</tr>
<tr>
<td>Environmental Sustainability</td>
<td>25%</td>
<td></td>
<td>+19%</td>
</tr>
<tr>
<td>Corporate Action</td>
<td>6%</td>
<td></td>
<td>+5%</td>
</tr>
<tr>
<td>Workforce</td>
<td>2%</td>
<td></td>
<td>-2%</td>
</tr>
<tr>
<td>Technology related</td>
<td></td>
<td>-2%</td>
<td>-2%</td>
</tr>
<tr>
<td>Growth</td>
<td></td>
<td>-5%</td>
<td>-5%</td>
</tr>
<tr>
<td>Financial</td>
<td></td>
<td>-6%</td>
<td>-6%</td>
</tr>
<tr>
<td>Products &amp; Services</td>
<td></td>
<td>-18%</td>
<td>-18%</td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td>-45%</td>
<td>-45%</td>
</tr>
</tbody>
</table>

Change from 2022

- Cost Management
- Efficiency and Productivity
- Sustainability

Occupyng greater mindshare in FY24

Source: Gartner CEO and senior business executive survey, 2023
OUR PORTFOLIO AND EXPERIENCE MAKES US EXTREMELY RELEVANT TO THESE KEY THEMES

<table>
<thead>
<tr>
<th>Cost Transformation</th>
<th>Productivity and Experience</th>
<th>Sustainability</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Internet-first, cloud-first network transformation</td>
<td>- Customer interaction platform</td>
<td>- Remote work / production</td>
</tr>
<tr>
<td>- Cloud strategy optimization</td>
<td>- Connected workforce solutions</td>
<td>- Cloud based managed services</td>
</tr>
<tr>
<td>- Hybrid workforce enablement</td>
<td>- Connected solutions</td>
<td>- Hybrid workplaces</td>
</tr>
</tbody>
</table>
OUR ADDRESSABLE UNIVERSE IS EXPANDING

New Customer Segments

New Buying Centres

New Areas of Participation
OUR GTM STRATEGY IS BUILT TO ACCELERATE OUR GROWTH ACROSS MARKETS & SEGMENTS

- Top Accounts
- Growth Accounts
- Wider Acquisition Propositions
- Alliances
- Driving Large Enterprise Growth
- Strengthen India Leadership
- Accelerating Emerging Enterprises
- Wallet Share Growth through Enhanced Relevance
- International Markets Growth Focus
SUCCESS MARKERS INDICATE MOMENTUM IN GROWTH FOR THE YEAR AND BEYOND

- Large Deal Count up by 84%
- PPR up by 10%
- 50% Growth in New Logo In 2 Years
- 50% Growth in DP&S Funnel in 2 years
- 61% of Revenue from Top 100
- 70% of Emerging Enterprises orders serviced via Low Touch Digital Platform
WE CONTINUE TO DEEPEN OUR CUSTOMER ENGAGEMENT

Team Structure
Customer Success Team
- Client Partner
- Enterprise Architect
- Customer Success Manager
- Program Manager

Customer Connect
- Discovery Workshops
- Exec Connects
- Customer Forums
- Innovation Bootcamps

Competency Build
- Industry COEs
- Technology COEs
- Innovation Labs
- Academies

Market Facing Strength
Sales Velocity
Industry Leading NPS
Funnel Add 33%
# Enabling the best in class connected car experience

- **Always On, Always Connected Solution**
- **Intelligence platform to drive next gen digital services for car users**

## Delivering ‘modern luxury’ experience to customers across every touchpoint

## Efficient Industrial operations across Manufacturing and Logistics value chain

## Enhancing organization wide efficiency and collaboration

### Our Impact Area

- **Smart factory enablement**

### CASE STUDY – DELIVERING CUSTOMER VALUE ACROSS ALL AREAS

<table>
<thead>
<tr>
<th>Business Area</th>
<th>Customer Imperative</th>
<th>Our Impact Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product and Service</strong></td>
<td>Enabling the best in class connected car experience</td>
<td>• Always On, Always Connected Solution</td>
</tr>
<tr>
<td><strong>Customer Experience</strong></td>
<td>Delivering ‘modern luxury’ experience to customers across every touchpoint</td>
<td>• Customer interaction platform for seamless real-time, omni-channel experience</td>
</tr>
<tr>
<td><strong>Industrial Operations</strong></td>
<td>Efficient Industrial operations across Manufacturing and Logistics value chain</td>
<td>• Smart factory enablement</td>
</tr>
<tr>
<td><strong>Digital Enterprise</strong></td>
<td>Enhancing organization wide efficiency and collaboration</td>
<td>• Agile and cost-efficient infrastructure build on Internet-First, Cloud-ready approach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Secure Digital Experience for the workforce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hybrid workplace enablement</td>
</tr>
</tbody>
</table>
Leadership position across 28 flagship analyst reports across the portfolio

Turnaround Enterprise of the Year

CEO of the year
Cloud Technology
Enterprise Network Transformation Provider

Managed Multi Cloud Company of the Year
SD-WAN Company of the Year
Managed Security Services Company of the Year
Video Managed Services Company of the Year

10 Years of being leader in the Gartner Magic Quadrant for Network Services

MWC, Barcelona
DIGO - Personal Data & Identity
AND STRENGTHENING OUR MARKET POSITION

Live Capability Showcases

- F1
- Formula E
- MotoGP
- Dig World Tour

Experiential Engagement

- Customer Experience Centre
- Innovation Labs
- Operation Centers

Industry Partnerships

- CII-Tata Communications Centre for Digital Transformation
- GSMA
- FICCI
- ITU

250+
Senior customer executive engagements on-site

500+
Customers visited our experience centre, labs and operation centres

3000+
Organisations engaged through the CII-CDT initiatives
## WHAT WILL COLOR OF OUR SUCCESS LOOK LIKE IN FY ‘27

<table>
<thead>
<tr>
<th></th>
<th>FY23</th>
<th>FY27</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lead India Market</strong></td>
<td>#1</td>
<td>Continue #1</td>
</tr>
<tr>
<td><strong>International Markets</strong></td>
<td>Peripheral</td>
<td>Strong Challenger</td>
</tr>
<tr>
<td><strong>Revenue from Million Dollar Accounts</strong></td>
<td>35%</td>
<td>Over 50%</td>
</tr>
<tr>
<td><strong>Digital Portfolio</strong></td>
<td>32%</td>
<td>Over 50%</td>
</tr>
</tbody>
</table>

- **28,000 Cr.** FY27
- **14,096 Cr.** FY23

**2x in 4 Years**
KEY TENETS OF OUR FINANCE STRATEGY
FINANCE STRATEGY

Key Pillars

- Truly Compliant
- Fit to Compete
- Fit to Grow
WE ARE DELIVERING ON OUR FINANCE STRATEGY

Automating & Simplifying Processes
Eyeing returns (ROCE)
Optimising Costs and improving tax efficiency
Establishing a robust CAPEX framework
Improving working capital and cash flow conversion
Driving Profitable Growth and reinvesting towards building capabilities

Investment in Infrastructure and Innovation
Invest in adding people capabilities across markets

Strengthening our Media and Connected Solutions business via inorganic route

Switch

Oasis

Invest to sharpen our platform capabilities

New Opportunities & White Spaces

Scaling up existing investments to increase our relevance to customers and accelerate growth

SHARPPENING OUR FIT TO GROW ENGINE

METICULOUS

STRATEGIC FIT

VALUE CREATION
Tata Communications Media Business

Revenue: INR 579 Cr.
Revenue Growth CAGR (3 years): 33%

G-to-G Video Transport Market Share: 25%

---

USD 58.8 Mn 100% Stake

- Enabling access to US Sports market
- Acquiring live video production capabilities

---

Region to Region Video Transport

Market Size:
- $800 Mn
- US Market Size: $320 Mn

Video Production

Market Size: $1 Bn

---

DRIVING THE RIGHT GROWTH OPPORTUNITIES

Increasing Relevance to Customers

- Improve GTM / Platform capabilities
- Adjacent opportunities and white spaces
- Strengthen portfolio and drive scale

Improving Balance Sheet and Growth Momentum

28,000 Cr. FY27

14,096 Cr. FY23

Data Revenue Growth
OUR AMBITION

Data Revenue
2x by FY27

23-25% EBITDA Margin

USD ~300 Mn Capex

Net Debt to EBITDA <2x

ROCE > 25%

40
CONNECTED INFRASTRUCTURE - SIGNIFICANT PART OF OUR DIGITAL PORTFOLIO

Total Digital Portfolio Revenues FY23

4,539 Cr.

CAGR 19.2% (FY20-23)

1,961 Cr.

43% Share in Digital Portfolio

Next Gen Connectivity + Cloud, Hosting & Security
CONNECTED INFRASTRUCTURE DRIVES KEY BUSINESS OBJECTIVES

THE WHY
- Reimagined & Improved Networks
- Converged Security
- Multi-Cloud Connectivity
- Enhanced User Experience

THE WHAT
- Future Ready
- Performant
- Programmable
- Secure

BUSINESS OBJECTIVES ENTERPRISES ACHIEVE
- Borderless Growth
- Innovation and Experience
- Productivity and Efficiency
- Business Agility
- Manage Risks
Disparate solutions, multitude of policies and management complexity
CONNECTED INFRASTRUCTURE SIMPLIFIED

Full spectrum of product & services, single policy ownership and transparency (TCx)
CONNECTED INFRASTRUCTURE - OUR KEY PROPOSITION

**Right to Play**
- World’s most comprehensive predictable and dependable internet connectivity platform that is built for business
- **160 countries** - Connected Infrastructure offering
- Multi-Cloud Connectivity - On-demand multi-cloud connectivity
- Technology expertise combined with virtual simulation platforms & integration test labs
- Accelerating Investments in Connected Infrastructure based on a multi-year technology road map

**Right to Win**
- Single point of ownership - to deliver on enterprise business objectives
- Depth of capabilities - 500+ Connected Infrastructure Engineers, large-scale global transformation experience
- Drive value - engage regionally, deliver globally, financially optimized first-time right delivery, enhanced security controls, regulatory compliant solutions, greater solution availability through automation & best practices
- Customer experience focus - TCX - Single window for information, intelligence & insights driven by Artificial Intelligence (AI)
GLOBAL SECURE CONNECTED INFRASTRUCTURE FOR A MEDICAL TECHNOLOGY FIRM

Globally distributed factories, offices & employees | Internet first, cloud first approach!

IZO™ Hybrid WAN | Managed SD-WAN | Cloud Firewalls | Secure Web Gateway | Multi-Cloud Connect | Managed Services

- 39 countries across the globe with 200+ sites
- Performant network that supports voice, video & collaboration securely
- End-to-End Secure internet transport and anywhere application access
- Simplified policy, capacity and operations management
- Fully-managed services with TC²
ENHANCING CUSTOMER EXPERIENCE ACROSS STORES - INTEGRATED LAN & WAN

Multinational food chain enhancing their customer experience through high-speed internet and secured Wi-fi access in stores

Managed Wi-fi & LAN | IZO™ SDWAN | Internet Access Service

Consistent & superior customer experience across all Store locations in India

- Currently 300+ Stores Expanding to 350+
- Persona Based Traffic Segregation - Increased Security for Enterprise applications
- Fully-managed Services with Tata Communications
- Business Value Enhancement through superior customer experience
- Future ready Platform to launch new customer engagement & loyalty programs
## CONNECTED INFRASTRUCTURE MARKET SIZE

<table>
<thead>
<tr>
<th>Addressable Market CAGR*</th>
<th>IZO™ INTERNET WAN¹</th>
<th>IZO™ MULTI-CLOUD CONNECT²</th>
<th>MANAGED Wi-Fi and LAN³</th>
<th>SDWAN + Network Security⁴</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY24</td>
<td>$94 Bn</td>
<td>$2.7 Bn</td>
<td>$11.9 Bn</td>
<td>$9.1 Bn</td>
</tr>
<tr>
<td>FY27</td>
<td>$98 Bn</td>
<td>$4.3 Bn</td>
<td>$15.1 Bn</td>
<td>$14.7 Bn</td>
</tr>
</tbody>
</table>

### USE CASES

- **Enabling WAN network transformation from MPLS based to Internet & Hybrid**
- **Enabling Site to Multi-cloud and Cloud to Cloud connectivity**
- **Enabling new deployments & existing setup Transformation to Next Gen Wi-Fi based architectures**
- **Policy driven WAN & Security management enabling integrated Network + Security controls, visibility and operations simplicity**

---

¹ 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.

² Based on TechSci Research Report 2018–2028; approx. 25% of the market will qualify as target addressable market for Tata Communications.

³ Based on Omdia Report March 2023 for WLAN Market.

OUR EXPERTISE TO GROW IN THIS AREA IS WELL-RECOGNIZED

Leader in Avasant SD-WAN Managed Services Radar View 2022-2023

Leader in Cyber Resiliency Services 2022 (Global recognition)

Major contender - PEAK Matrix for IT Security 2022 (2nd year in a row)

Leaders in Secure Access Service Edge (SASE) for UK

Leaders in Managed SDWAN Services for Singapore & Malaysia 2022

Major player in Asia / Pacific MSS MarketScapes 2022

Recognised as a Leader in the 2023 Gartner® Magic Quadrant™ for Network Services, Global
SPEND A DAY WITH ME...
INCREASING RELEVANCE IN OUR PLATFORM SOLUTIONS

Total Digital Portfolio Revenues FY23

- 4,539 Cr.
- 1,534 Cr.
- 465 Cr.

Collaboration
34% Share in Digital Portfolio

Connected Solutions
10% Share in Digital Portfolio
**UNDERSTANDING THE OPPORTUNITY LANDSCAPE OF OUR PLATFORM SOLUTIONS**

<table>
<thead>
<tr>
<th>Sector Served</th>
<th>Market Size FY24</th>
<th>Market Growth CAGR%</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFSI, Healthcare, Automotive, Logistics, Technology</td>
<td>$19.7 Bn</td>
<td>22% (2022-2027)*</td>
</tr>
<tr>
<td>ITES, BFSI, System Integrator, Hi-Tech Manufacturing</td>
<td>$9.6 Bn (CY2023)</td>
<td>6% (2023-2025)***</td>
</tr>
<tr>
<td>Metals &amp; Mining, Manufacturing, Oil &amp; Gas, Auto, Pharma, Smart City</td>
<td>$28.0 Bn</td>
<td>17% (2021-2026)</td>
</tr>
<tr>
<td>Automotive, Aviation, MVNO's, Microelectronics</td>
<td>$39.0 Bn</td>
<td>14% (2021-2025)**</td>
</tr>
</tbody>
</table>

*Source: IDC forecast, Gartner forecast, Bain analysis
**Source: Gartner market data source
***Source: Tata Communications Digo market data source: Gartner
****Source: Gartner market data source: Omdia market report

*Bain Communications DIGO market data source: Gartner
**MOVE market data source: Bain internal study
***Source: Gartner market data source: Omdia market report
UNDERSTANDING THE OPPORTUNITY LANDSCAPE OF OUR PLATFORM SOLUTIONS

Use Case

- Omnichannel Marketing Campaigns
- Brand Engagements via Virtual and Human Agent
- Bespoke Workflows

Right to Win

- Global Compliance
- Secured information channel
- Connectors across channels
- Strong enterprise presence

- GlobalRapide: Platform-agnostic service provider; Assessment, Migration, End-to-End Management & Automation
- Jamvee™: Global PSTN and mobile calling and messaging app

- Secured, economical
- End-to-End UCaaS solutions
- Voice and data platform and networks spanning across 110+ countries
UNDERSTANDING THE OPPORTUNITY LANDSCAPE OF OUR PLATFORM SOLUTIONS

Use Case

• Connected Operations
• Connected Workers
• Connected Utilities
• Smart Cities

Right to Win

• End-to-End IoT solution (Device to Analytics)
• Access or network agnostic

• Connected Mobility, & Airlines
• Software-Over-the-Air update
• Digital MVNO

• Global QoS
• Contextual, On-demand, Multi-model connectivity
• Born Connected
• Analytics / AI for Business Use Cases
THE UNBOXING...!
A pan-Indian company with over $2 Bn in GMV and 0.3 Mn delivery partners

Challenges

- Outsourced Multiple Call Centres
- Delivery Personnel and Contact Centre Productivity
- Inbound Calls Waiting time
- Need for Unified Platform
- Longer Customer Wait Time

Solution

- SMS
- Chat
- Voice
- IVR, Call Recorder

TATA COMMUNICATIONS DIGO AND INSTACC ENHANCES CUSTOMER EXPERIENCE FOR INDIA’S LARGEST ONLINE QUICK COMMERCE AGGREGATOR
A pan-Indian company with over $2 Bn in GMV and 0.3 Mn delivery partners.

**Benefits Achieved**

- **10%** Reduction in Login Hour Discrepancy
- **8 min reduced time to call back**
- **15%** Agent Optimization
- **0.7%** First Time No Resolution reduction & **30s** AHT Reduction
- **Reduced applications & Unified Platform - Improved Operational Efficiency**
- **Significant** Improvement in Customer Satisfaction

TATA COMMUNICATIONS DIGO AND INSTACC ENHANCES CUSTOMER EXPERIENCE FOR INDIA’S LARGEST ONLINE QUICK COMMERCE AGGREGATOR
A global luxury auto company with over $20 Bn in revenues and an emotionally rich brand equity.

### Challenges
- Unreliable Connectivity
- High Connectivity Costs
- Poor Customer Experience
- High Touch Operations

### Solution
Tata Communications MOVE™ provided intelligent, context-aware connectivity everywhere and at scale to enable infotainment and telematics services.

The intelligent connectivity solution gathers network insights from multiple sources and delivers data insights on Quality of Service (QoS).
AUTOMOTIVE MANUFACTURER EMBARKS ON ITS CONNECTED CAR JOURNEY WITH TATA COMMUNICATIONS MOVE™

A global luxury auto company with over $20 Bn in revenues and an emotionally rich brand equity

Benefits Achieved

- KYC Compliance through Single Interface
- Improved Over-the-Air (OTA) Updates
- Secured Telemetry Data Delivery
- 20% Reduction in overall Connectivity Cost
TATA COMMUNICATIONS IOT SOLUTIONS: INTELLIGENT LIGHTING TRANSFORMS SAUDI ARABIAN STREETS

One of the largest cities in Saudi Arabia with a population of over 1 Mn looking to improve citizen safety and energy efficient public infrastructure

**Challenges**
- High Energy Consumption
- High costs of operations & maintenance
- Citizen’s Safety risks due to low lighting
- Environmental impact due to improper energy planning

**Solution**
End-to-End deployment of Smart Street Lighting solution enabling control over 80K+ lights through a suite of device, application and network
TATA COMMUNICATIONS IOT SOLUTIONS: INTELLIGENT LIGHTING TRANSFORMS SAUDI ARABIAN STREETS

One of the largest cities in Saudi Arabia with a population of over 1 Mn looking to improve citizen safety and energy efficient public infrastructure.

Benefits Achieved

- **~20%** Energy Savings
- **~50%** Reduction in Cost of O&M
- **94.5%** Lamp-Glow Rate, Improving Citizen Safety
- **~10000 MTCO₂e** Carbon Savings per year
Thank you