



HQ/CS/CL.24B/16972B

June 26, 2020

Sir,

**Sub: Presentation to Analyst / Institutional Investor Meetings pursuant to Regulation 30(2) of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015.**

This is further to our intimation dated June 23, 2020 regarding the Tata Communications Analyst Meet scheduled through a virtual webinar on June 26, 2020

We attach herewith the presentation for the afore-mentioned Analyst Meet. The presentation is also available on the website of the Company.

Kindly take the same on your records.

Thanking you,

Yours faithfully,

For Tata Communications Limited

PP Manish Sansi

Company Secretary &

General Counsel (India)

To:

- 1) Security Code 500483, BSE Ltd, Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai- 400001.
- 2) Security Code TATACOMM, National Stock Exchange of India Limited. Exchange Plaza, C-1, Block G, Bandra Kurla Complex, Bandra (E), Mumbai, Maharashtra 400051

**TATA COMMUNICATIONS**

Tata Communications Limited

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Tel 91 22 6659 1968 email : manish.sansi@tatacommunications.com

CIN no. : L64200MH1986PLC039266 web site : www.tatacommunications.com

# WELCOME TO TATA COMMUNICATIONS ANALYST DAY

26<sup>TH</sup> JUNE 2020

**TATA** COMMUNICATIONS

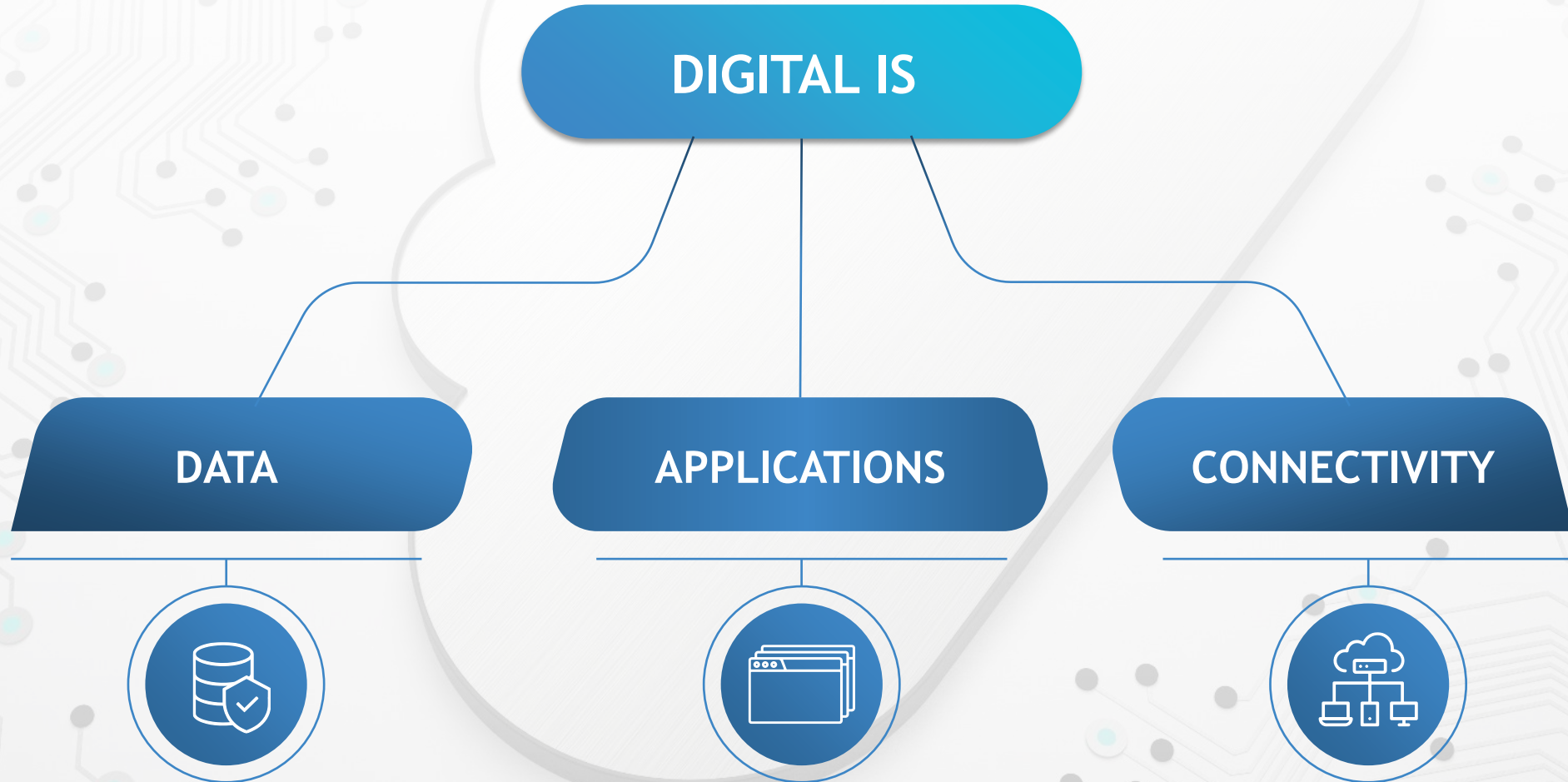


# Tata Communications, **Reimagined**

# 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.



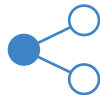
**MOBILITY & IoT**



**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

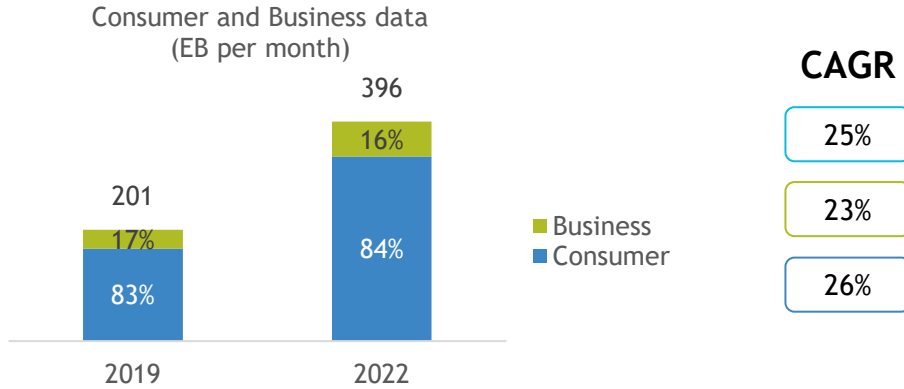
### Next Generation Connectivity

CAGR	0.2%
2022	\$145 Bn
2019	\$145 Bn

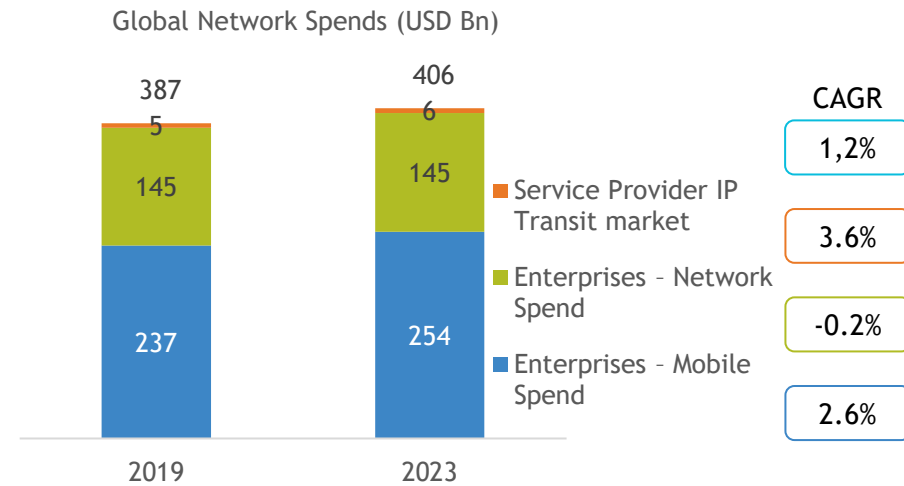
### Voice

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

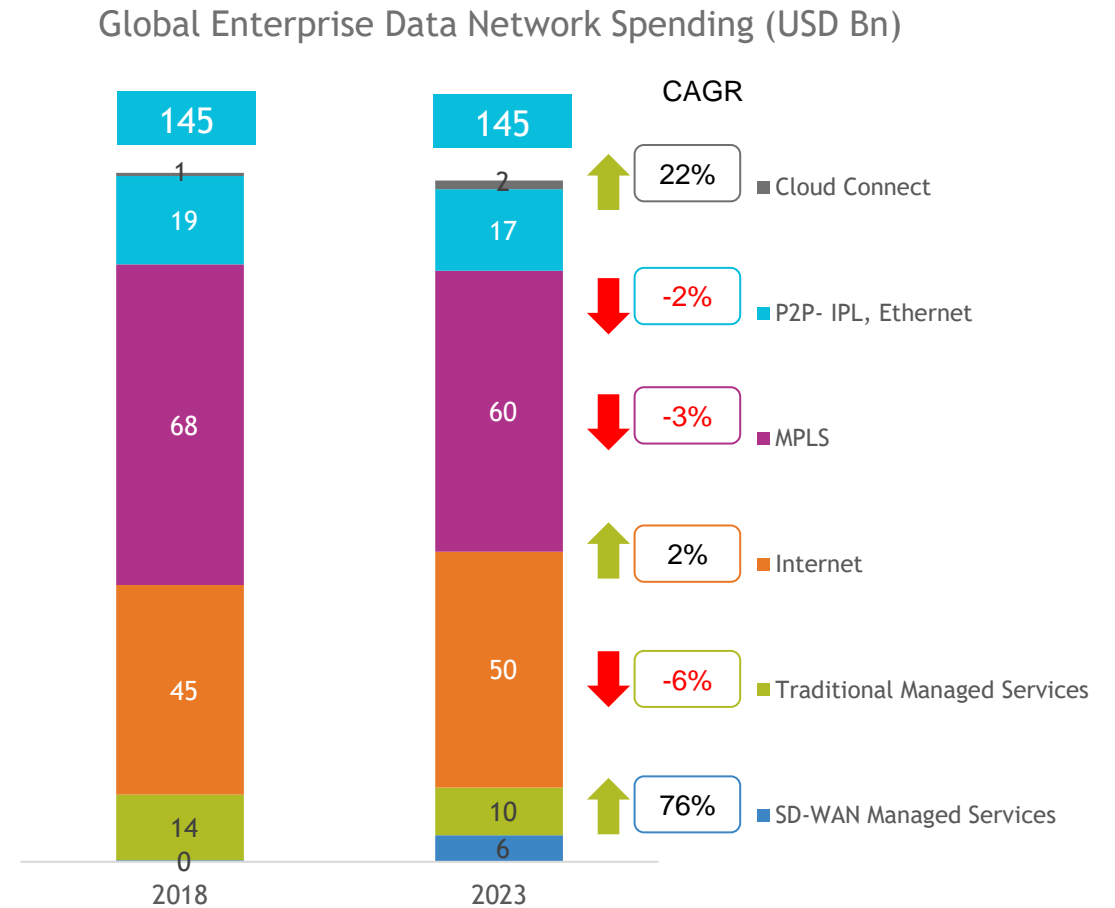
# SHIFT HAPPENING IN GLOBAL ENTERPRISE NETWORK SPEND



Source: Cisco VNI: Forecast and trends 2017-2022



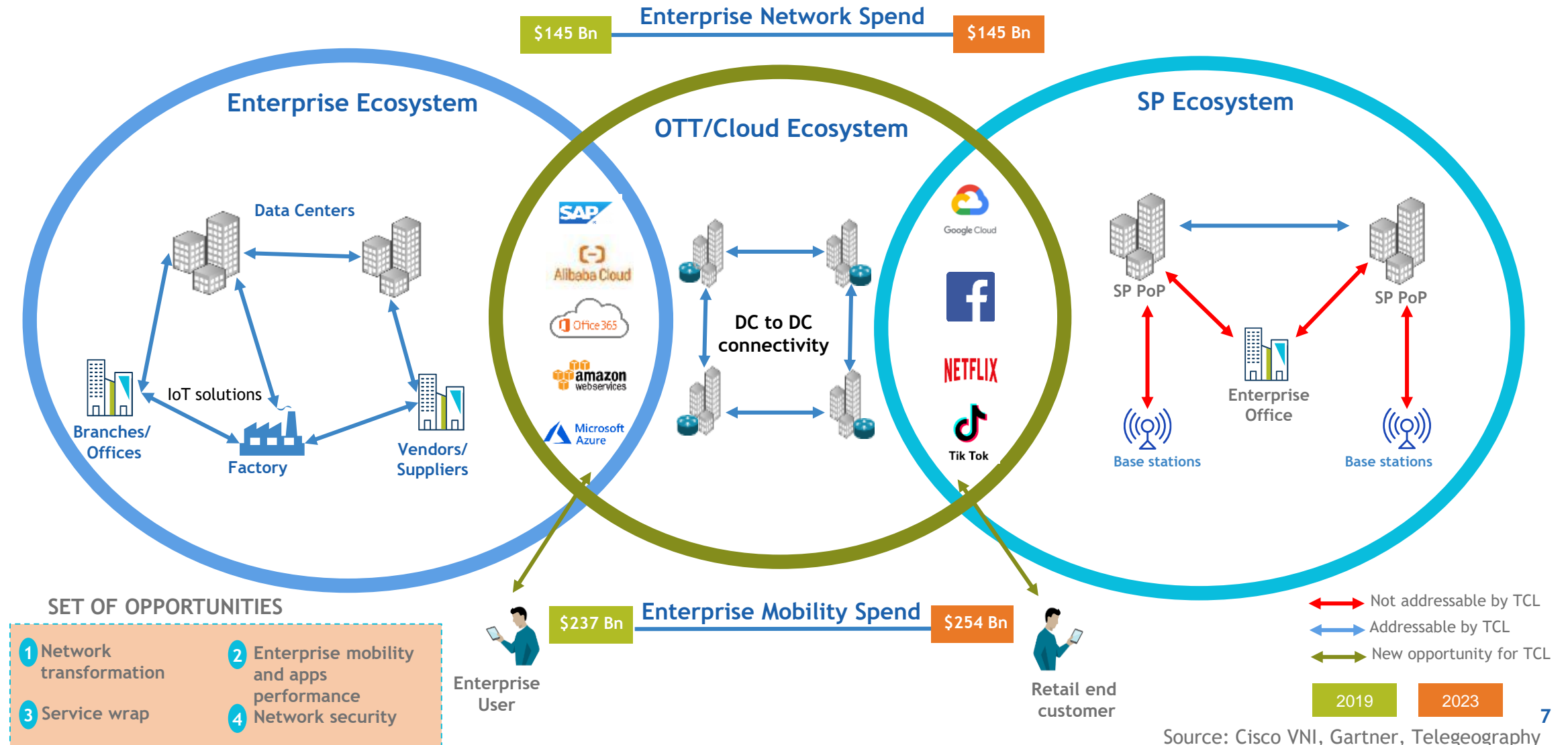
Source: Enterprise network and mobile spend from Gartner; SP IP spend based on internal estimates



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++<sup>1</sup>** - 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



<sup>1</sup> Includes Integrated WiFi and VNF and integrated network security

# SECURE CONNECTED DIGITAL EXPERIENCE (SCDX)

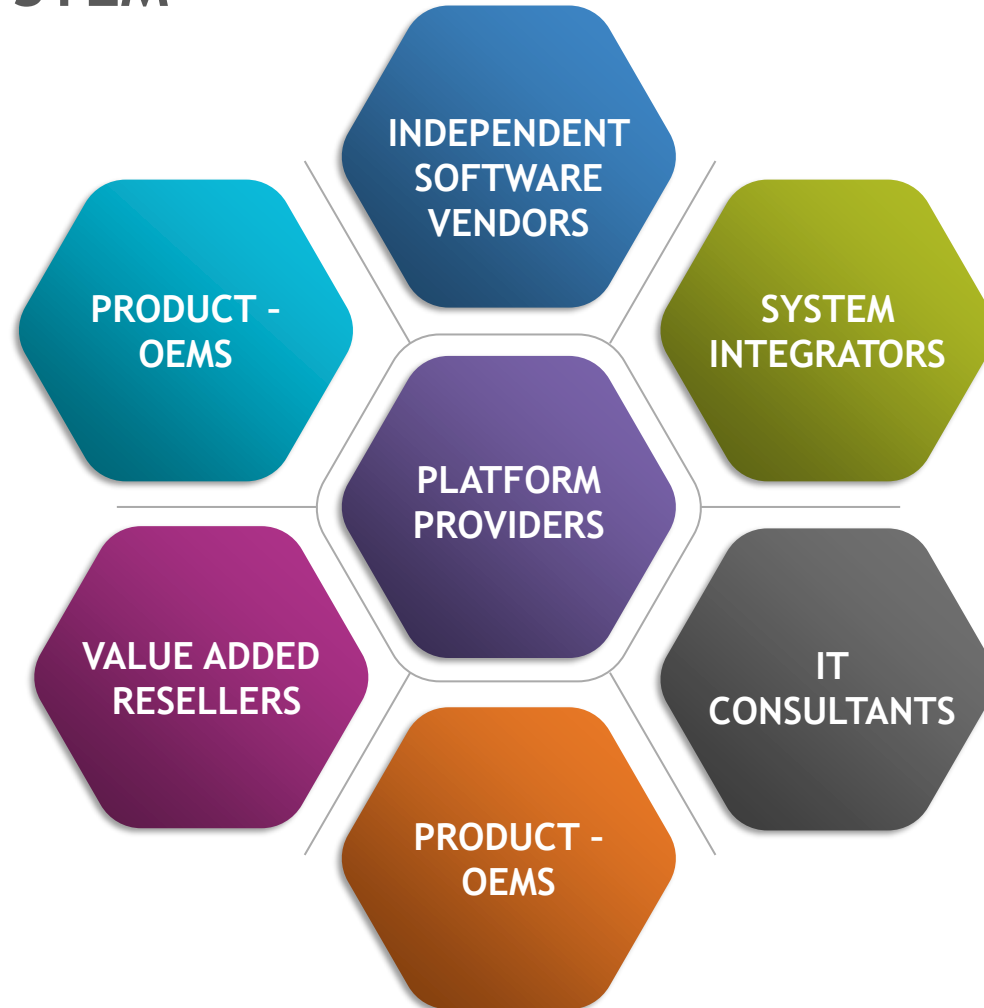
DIGITAL ECOSYSTEM ENABLER: INTRODUCING SCDX



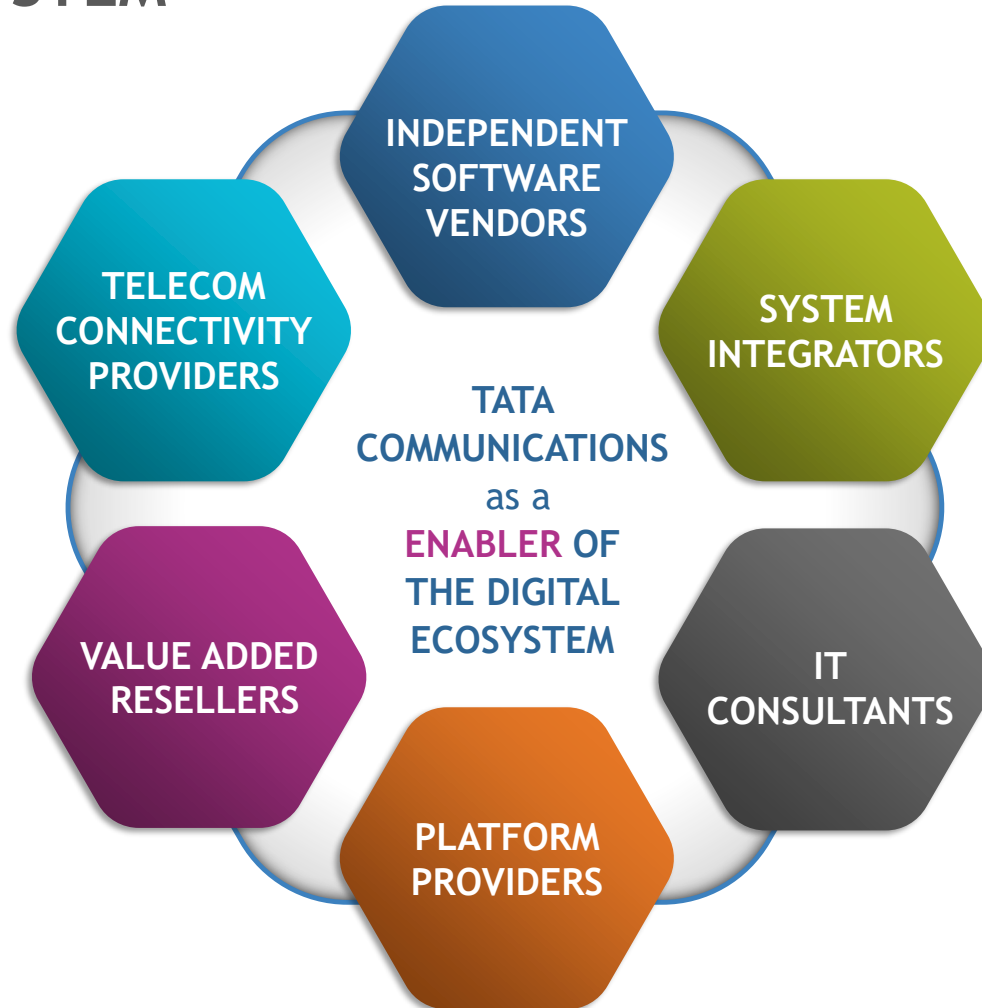
## Driving Principles

- **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**

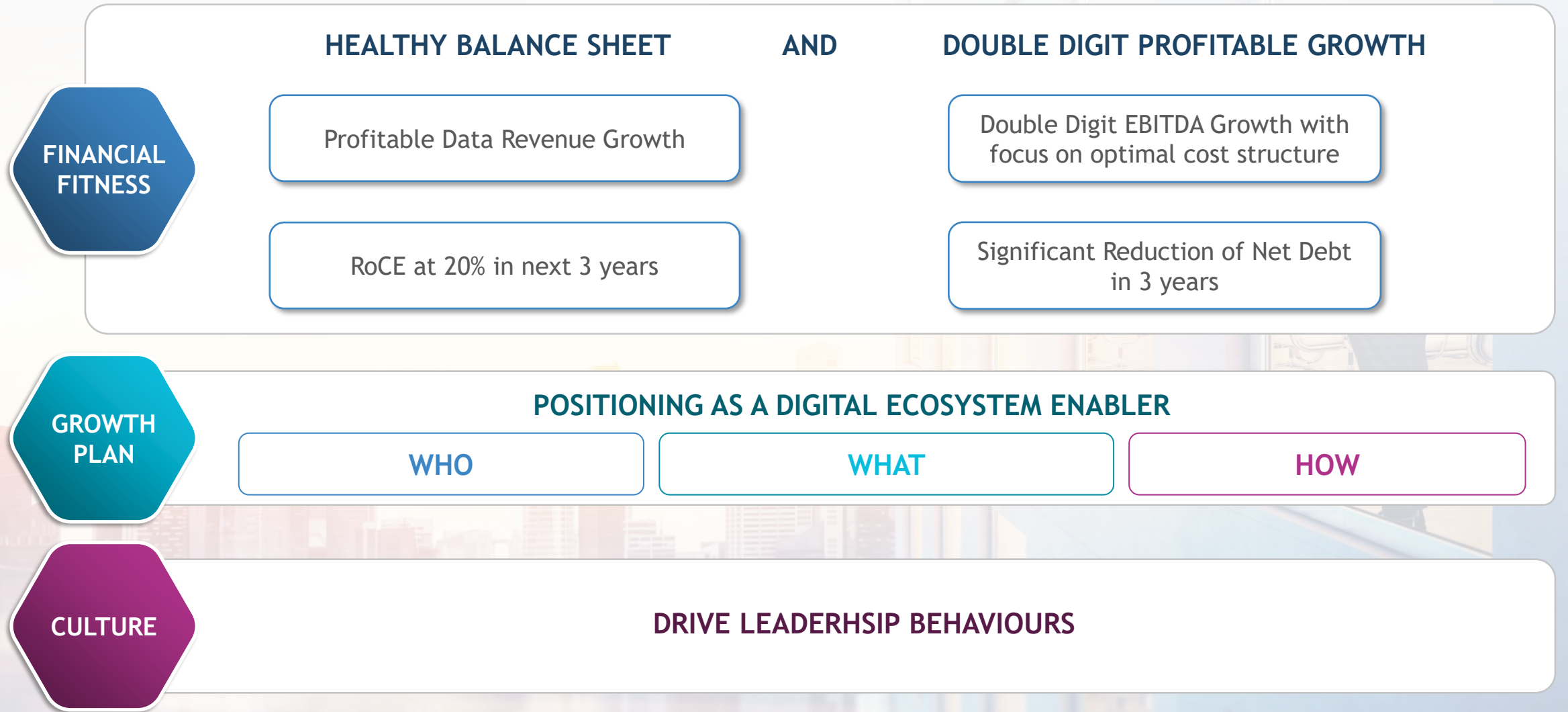
**WHAT**

**HOW**

**CULTURE**

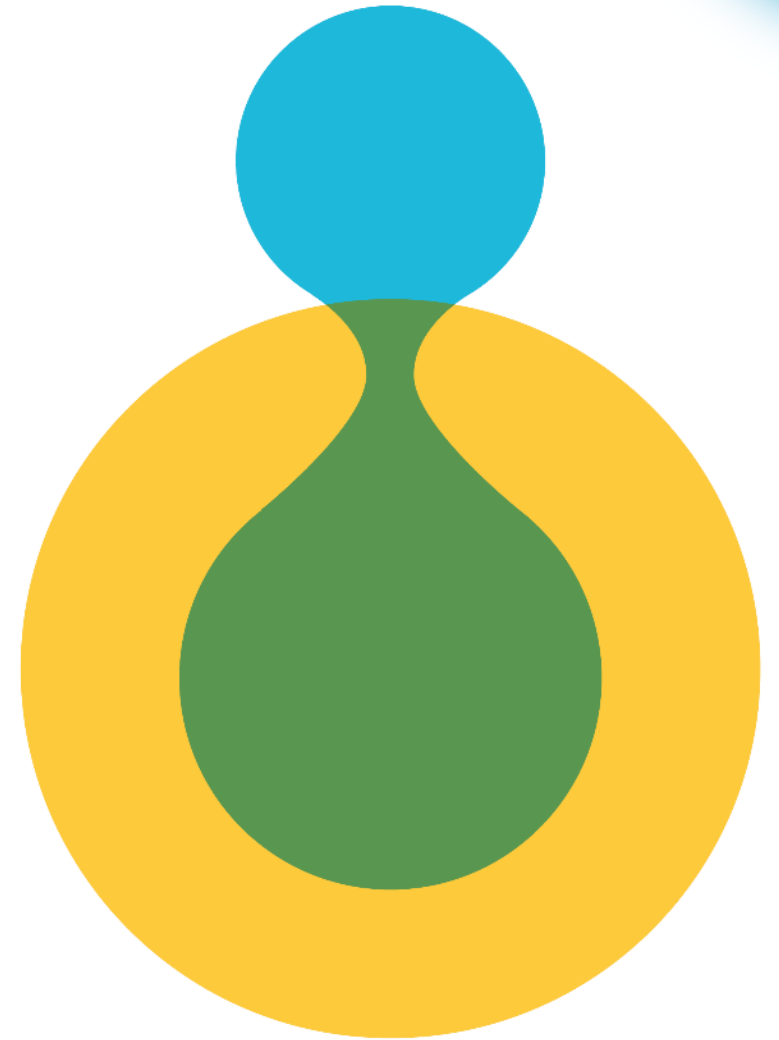
**DRIVE LEADERSHIP BEHAVIOURS**

# OUR STRATEGY





# Reimagining the customer experience



# SIMPLIFYING OURSELVES IN THE EYES OF THE CUSTOMER

**SEGMENTATION**

**SINGLE POINT OF OWNERSHIP**  
Named account owner

**EFFECTIVE ENGAGEMENTS**  
Customer service team  
Customer success manager

**OPTIMUS**

**DEEPER WITH FEWER**

**CLEANER STRUCTURE**

**OWNERSHIP OF OUTCOMES**

**AUTOMATION TRANSPARENCY**



# 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

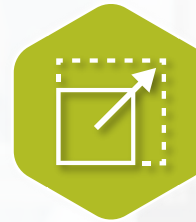
1.  
Capex  
efficiency

2.  
Platform  
based

3.  
Agile NPI



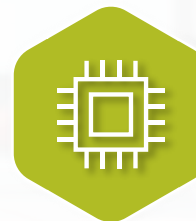
## 4 BUSINESS VALIDATIONS



**SCALABLE** revenues from  
products and services



**PROFITABLE** and  
improving over time

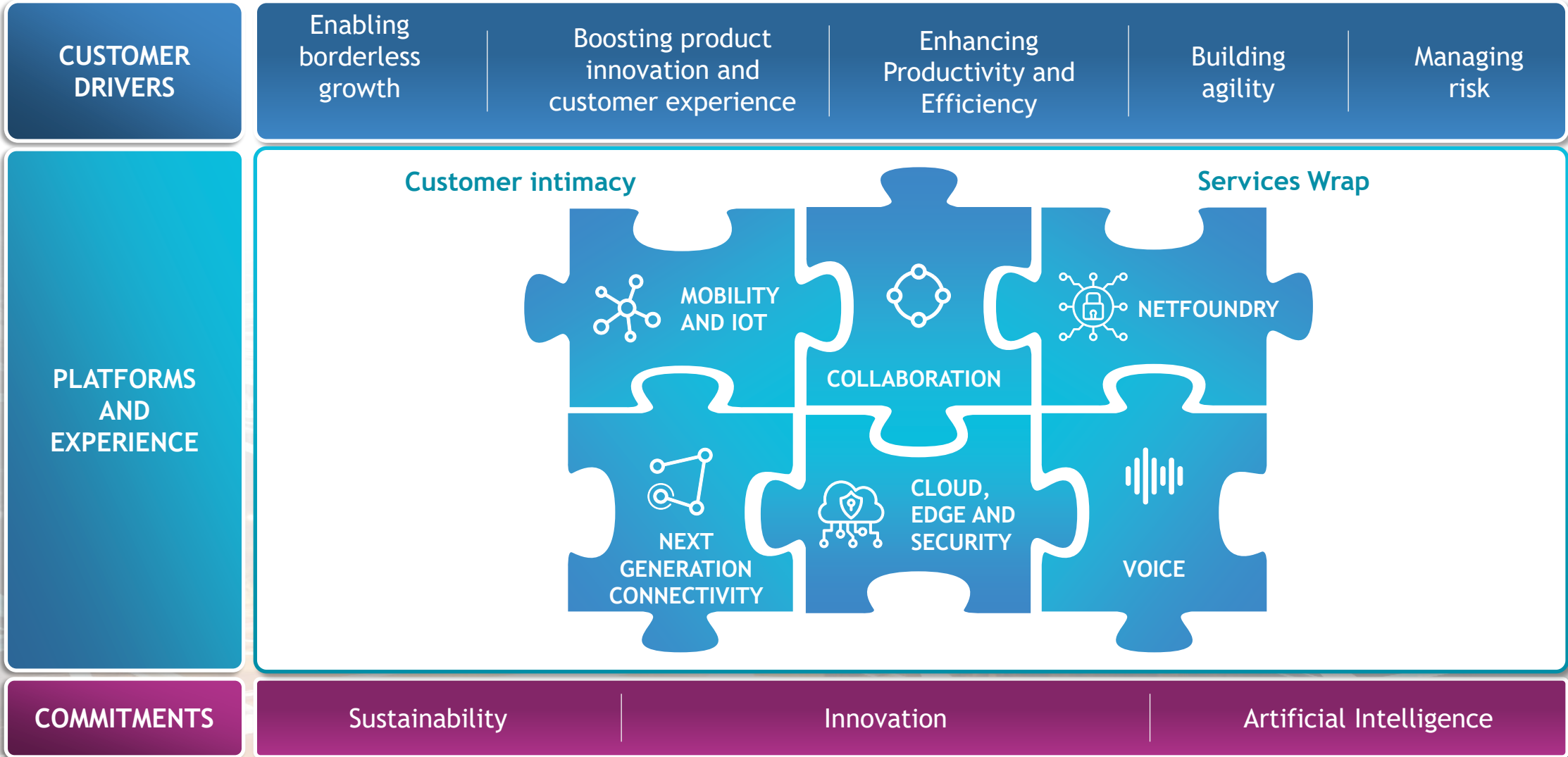


**RELEVANT** to industry  
trends and technology shifts



**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



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Thank you