INTRODUCTION

We are Tata Communications

A digital ecosystem enabler, part of India’s multibillion-dollar conglomerate, the prestigious Tata Group.

We enable the digital transformation of enterprises, globally - unlocking opportunities for businesses by enabling borderless growth, boosting product innovation and customer experience, improving productivity and efficiency, embedding agility and managing risk. Both today and in the future. With a customer solution orientated approach, proven managed service capabilities and cutting-edge infrastructure, we drive the next level of intelligence powered by cloud, mobility, IoT, collaboration, security and network services.

12,000+ employees worldwide

190+ Countries of operation

50+ entities across the globe

37+ diverse nationalities

~7,000+ customers (including 300 of the Fortune 500)

Top percentile of NPS®
Tata Communications’ secure connected digital experience (SCDX)

Our purpose
We are a global Digital Ecosystem Enabler with a mission to accelerate our customers’ success and leadership in the new world of business by providing a digital-first approach to solving their business challenges and enabling them to harness every opportunity available in their respective markets.
We assist enterprises in their digital transformation journey

**Why we exist**
Deliver a new world of communications to the industry and our customers

<table>
<thead>
<tr>
<th>CUSTOMER DRIVERS</th>
<th>Enabling borderless growth</th>
<th>Boosting product innovation and customer experience</th>
<th>Enhancing productivity and efficiency</th>
<th>Building agility</th>
<th>Managing risk</th>
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**PLATFORMS AND EXPERIENCE**
Customer intimacy
- Core Connectivity and Next Gen connectivity
- Collaborations and Connected Services
- NetFoundry
- Media Solutions
- Cloud, Edge and Security
- Voice

**COMMITMENTS**
- Sustainability
- Innovation
- Artificial Intelligence

**How we do it**

**Our DRIVE culture**
- Daring
- Responsive
- Inclusivity
- Venturing
- Ethical
We provide connectivity to the world
We provide connectivity to the world

**30%**  
Global internet routes carried by us

**#1**  
Enterprise data services in India

**80%**  
Cloud giants are connected to their businesses through us

**4 of 5**  
Global mobile subscribers connected through our network

**Leader**  
In Gartner’s Magic Quadrant for Network Services, Global - 9 years in a row

**#1**  
Wholesale voice provider submarine cable owner on-net mobile signaling (globally)
We belong to a 150+ year old legacy of shared value creation

We are part of the Tata group, India’s only value-based corporation - a visionary, a pioneer, a leader, since 1868.

The five core Tata values underpinning the way we do business are: Integrity, Responsibility, Excellence, Pioneering and Unity.

**Key Figures:**

- **US$106bn** group revenue
- **US$300+bn** market capitalisation
- **US$21.3bn** brand value
- **900mn** consumers
- **750000** employees
- **150+** countries
- **US$300+bn** market capitalisation
- **750000** employees
- **150+** countries
OUR EVOLUTION
Transformation is in our DNA

Our milestones to deliver a New World of Communications™

2002
Tata Group acquired 25% stake in VSNL, forming a truly powerful partnership

2003
VSNL International is launched; Opened offices in HK, SG, UK, US

2004
Tata Group acquired Tyco Global Networks, becoming one of the world’s largest providers of submarine cable bandwidth

2005
Acquired Tyco Global Network; Global Ethernet service connects North America, Europe and Asia

2006
Acquired Teliglobe; Global Ethernet service connects North America, Europe and Asia

2007
Signed MOU with International Telecom Service Providers linking India, Middle East and West Europe; Launched Transocean; Launched TCT as a new business focused on transformation services

2008
VSNL, VXL International & Teliglobe units as Tata Communications Limited

2009
Launched Cloud portfolio, Next Gen Ethernet Network; Collaborated with Google

2010
Tata Communications and Tyco Communications complete Tata INTRA Asia cable system

2011
Completed acquisition of BitGravity

2012
Launched Tata Global Network (India’s first round-the-world fibre optic cable network); F1 multi-year technology service and marketing agreement

2013
Launched Jamvare™ - Cloud based service, Shape The Future innovation programme; Official Managed Connectivity Supplier to Mercedes-AMG Petronas at F1

2014
Launched LoRaWAN® the most comprehensive cloud enablement platform with Google, Microsoft Azure and AWS

2015
Launched ultra-low power connectivity solution (LoRaWAN®), based on LoRaWAN® technology for IoT in India; Salesforce partnership

2016
Strategic partnership with 3T3Media to expand Data Centre business

2017
Launched Tata Communications MOVE™; Incubated NetFoundry under TTP; Expanded LoRaWAN® footprint in Europe, Middle East, AFR

2018
Acquired Iot and Mobility specialist, Telekens; Launched Cyber Security Response Centre in Chennai and Dubai; Principal partnership for CI (Centre for Digital Transformation)

2019
Spawn-off NetFoundry™ into a new independent subsidiary

2020
Acquired majority equity stake in Oasis, Smart 3P Europe SAS (Oasis), A leading eSIM technology provider; Launched Secure Connected Digital Experience (SCDX)

2021
Launched IZI™ financial cloud platform, Ethernet network services, Virtual Video Assisted Referee solution; Expanded Cisco partnership

2022
Recognised as a “Leader” by Gartner Magic Quadrant for Network Services, Global for the 5th consecutive year; Official Broadcast Connectivity Provider of Formula 1®
We engage with multiple industries

<table>
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<tr>
<th>Industry</th>
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<tbody>
<tr>
<td>AUTOMOTIVE</td>
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<tr>
<td>MEDIA &amp; ENTERTAINMENT</td>
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<td>SPORTS</td>
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<td>MANUFACTURING</td>
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<td>PHARMACEUTICAL</td>
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<td>INSURANCE</td>
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<td>HEALTHCARE</td>
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<td>TELECOM</td>
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<td>BANKING</td>
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<td>CONSTRUCTION</td>
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<td>SERVICES</td>
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<td>FINANCE</td>
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<td>ENERGY</td>
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<td>RETAIL</td>
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<td>IT/ITES</td>
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<td>CONSULTING</td>
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<td>REAL ESTATE</td>
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<td>E-LEARNING</td>
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<td>E-COMMERCE</td>
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<td>GOVERNMENT</td>
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**OUR CUSTOMERS**

We engage with multiple industries - representing some of the biggest brands

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<thead>
<tr>
<th>Amway</th>
<th>fuze</th>
<th>DNV</th>
<th>Petrofac</th>
<th>auto</th>
<th>general</th>
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<tbody>
<tr>
<td>MOTT MACDONALD</td>
<td>EUROPEAN TOUR</td>
<td>Official Global Connectivity Supplier</td>
<td>symrise</td>
<td>DETINE</td>
<td>Eclat MEDIAGROUP</td>
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<td>Indiabulls</td>
<td>FEDERAL BANK</td>
<td>LT Financial Services</td>
<td>HDFC</td>
<td>IDFC FIRST Bank</td>
<td>GMS GLOBAL MESSAGE SERVICES</td>
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<td>spicejet</td>
<td>Dabur</td>
<td>HT Media</td>
<td>Hewlett Packard Enterprise</td>
<td>TATA TECHNOLOGIES</td>
<td>AIRFRANCE KLM</td>
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<tr>
<td>FIS</td>
<td>HCL</td>
<td>Greenlam Industries Limited</td>
<td>ADITYA BIRLA</td>
<td>MMD Mobility and IOT (Pty)Ltd</td>
<td>NIIF IFL INFRASTRUCTURE FINANCING</td>
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<th>Telecommunications</th>
<th>Media</th>
<th>Manufacturing</th>
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<tr>
<td>Micromax</td>
<td>Tata ELXSI</td>
<td>Olam</td>
<td>RPG</td>
<td>Cerner</td>
<td>Microscan</td>
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<td>Care</td>
<td>IDFC</td>
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<td>VFS GLOBAL</td>
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<td>Personiv</td>
<td>Schneider</td>
<td>Purple</td>
<td>Wish Net</td>
<td>Broadcast Rental</td>
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<td>Informatica</td>
<td>Zydus</td>
<td>YuppTV</td>
<td>Ashok Leyland</td>
<td>Maruti Suzuki</td>
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<tr>
<td>Toyota Financial Services</td>
<td>Omega</td>
<td>MN World</td>
<td>Synechron</td>
<td>Phillips Carbon Black Limited</td>
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Leadership

A.S. Lakshminarayanan (Lakshmi)
Managing Director & Chief Executive Officer

Aadesh Goyal
Chief Human Resources Officer

Genius Wong
Executive Vice President - Core and Next-Gen Connectivity Services & Chief Technology Officer

Kabir Ahmed Shakir
Chief Financial Officer

Executive Vice President, Collaboration & Connected Solutions

Sivasamban Natarajan
CEO
Tata Communications Transformation Services Limited

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

Sumeet Walia
Executive Vice President - Chief Sales and Marketing Officer

Tri Pham
Executive Vice President - Chief Strategy Head

Troy Reynolds
Chief Legal and Compliance Officer
MACRO OVERVIEW

Our capabilities support emerging trends

We facilitate businesses to pursue digital transformation through navigating new and emerging technologies, to transition seamlessly into a more intelligent future.

**Platform economy**
7 of 10
Most valuable companies based on platforms
(Source: Bloomberg, Google)

**Managed services**
12.4%
Growth of global managed services between 2022 and 2027
(Source: Mordor Intelligence)

**Enterprise mobility**
5.7 billion
Mobile subscriptions by 2025
(Source: GSMA Intelligence)

**Internet of Things (IoT)**
73.1 ZB
Data will be generated globally, by 55.7 billion IoT devices by 2025
(Source: IDC)

**Cloud computing**
51%
Of the IT spending will shift to the cloud by 2025
(Source: Gartner)

**Hybrid SDN**
60%
Of enterprises will have implemented SD-WAN by 2024
(Source: Gartner)

**Cybersecurity awareness**
11.2%
CAGR (2020-25) for End-user spend for information security & risk mgmt
(Source: Gartner)

**Artificial Intelligence (AI)**
70%
of organizations planned to increase AI investments by 2025
(Source: Gartner)
Helping customers unlock opportunities through digital transformation - enabling borderless growth, boosting product innovation and customer experience, improving productivity and efficiency, building agility and managing risk.

**PHYSICAL**
- Primarily out of a trading office

**ONLINE**
- Internet trading through websites and mobile apps

**OMNI-CHANNEL**
- Mobile apps, social media, online trading portals, client portals, tablet app

**DIGITAL**
- Collaboration between physical and digital; cloud infrastructure

**CONTEXTUAL**
- Highly customer-centric; real-time trading; AI/ML, Big Data and advanced analytics, etc.
Recognised for excellence

We’re positioned as a Leader in the 2022 Gartner Magic Quadrant for Network Services, Global - 9 years in a row

Analyst take on Tata Communications

• Tata Communications IZO internet WAN offer provides an enhanced internet service with deterministic routing and end-to-end SLAs from customer sites to select cloud/SaaS applications with access from local ISP partners in more than 151 countries.

• Tata Communications has expanded its SD-WAN offerings to include a unique one based on technology from its NetFoundry subsidiary.

• Tata Communications Cloud connectivity service is available in a higher than average number of countries.
Analyst recognitions for fy22

IDC
Major Player in IDC MarketScape: Asia/Pacific Cloud Security Services 2021 | 1st time

Everest Group
Major Contender: Everest group IT Managed Security Services PEAK Matrix® Assessment 2021 | 1st time

ISG
Leader in ISG Managed (SD) WAN Services & Leader in SDN Transformation Services Provider Lens study- Australia

Leader in ISG 2021 (SD) WAN Services | Leader in SDN Transformation Services Provider Lens study- UK

GlobalData
Strong in GlobalData Global Industrial IoT Services: Competitive Landscape Assessment | 3rd time

GlobalData
Strong in GlobalData Global IP Exchange Services: Competitive Landscape Assessment | 1st time

Frost & Sullivan
Leader in Frost Radar: Asia-Pacific Managed SD-WAN Services Market

Frost & Sullivan 2021 Indian SD-WAN Company of the Year Award

Everest Group
Major Contender: Everest group (SD-WAN) Services PEAK Matrix® Assessment 2021 | 1st time

Frost & Sullivan 2021 Indian Managed Multi Cloud Company of the Year Award

Frost & Sullivan 2021 Indian Managed Security Services Company of the Year Award

Frost & Sullivan 2021 Indian Video Managed Service Provider Company of the year Award

Frost & Sullivan 2021 India Video Managed Service Provider Company of the Year Award

Forrester
Mid Size in Forrester Now Tech: European Managed Security Services Providers, Q1 2022

GlobalData
Leader in GlobalData Wholesale IoT: Competitive Landscape Assessment

GlobalData
Very Strong in GlobalData Global WAN Services: Competitive Landscape Assessment

GlobalData
Strong in GlobalData Global WAN Services: Competitive Landscape Assessment

Tata Communications - Internal
OUR COMMUNITY

Sustainability and CSR

ENABLING SUSTAINABILITY AS KEY DRIVER FOR BUSINESS INNOVATION & GROWTH

- We are uniquely positioned to deliver the digital future now while doing good for People, the Planet and Communities
- Our goal is to make a positive, tangible impact on the environment and society through our actions and through our products and services for our customers.
- Maintaining transparency and communicating our progress to stakeholders

H&S Management System (ISO 45001)
certification

MULTIPLE BEST EMPLOYER RECOGNITIONS

16 major/strategic facilities certified

Great Place to Work in India, Hongkong, Canada, US, UK, SG and Australia

Kincentric Best Employers - India 2021 for the sixth year in a row

22% Women in the workforce

4,800+ CERTIFICATIONS COMPLETED BY EMPLOYEES

with minimum 16 hours of effort

People

Planet

5.60 MU OF ENERGY CONSERVATION GLOBALY

Power consumption reduced globally due to energy conservation projects and implementation of business continuity plans

~21 MU:

Renewable energy sourced

9% Decrease

In water consumption as compared to FY21

Community

6,80,409 LIVES IMPACTED

65% women and girls 54% - affirmative action communities

19 long term projects

Presence across 14 states in India

International presence - Singapore

300+

Touchpoints with investors and analysts

20,472 VOLUNTEERING HOURS

Contributed by 4,039 volunteers to reach 92,269 lives

Space

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Space
Despite 2021 being a difficult year, we saw an improvement in per employee learning days, translating into a 35% increase in total learning person-days to 112,782. We view our success as a result of the unstinting commitment of our people and their efforts.

**Our greatest asset? Our people.**

<table>
<thead>
<tr>
<th>Can-do attitude</th>
<th>Collaboration</th>
<th>Continuous learning</th>
<th>Innovation</th>
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<tbody>
<tr>
<td>Mindset for growth and agility</td>
<td>Ownership and accountability</td>
<td>Problem solving</td>
<td>Skills transformation</td>
</tr>
</tbody>
</table>

- **100% (FY2021-22)**
  Learning via digital mode in Tata Communications Learning Academy

- **4778 (FY2021-22)**
  Certifications completed by employees with minimum 16 hours of effort

**Total outreach, impacting 6,80,409 lives**

which is also a result of community action undertaken by our employees. A total of 20,472 hours were channelized to improve the lives of the communities we serve as part of our CSR initiatives

**Certified as a Great Place to Work by Great Place to Work Institute**

(Australia, Canada, Hong Kong, India, UK, Singapore and USA)

- Best Employers in India for 2021 by Kincentric (erstwhile Aon) - 6th year in a row
- Best Workplaces in Telecommunications in India for 2021 by Great Place to Work Institute
- Best Organizations for Women for 2022 by The Economic Times
- Best Companies for Women in India for 2021 by Working Mother and Avtar - 6th year in a row
- Best Workplaces for Women in India for 2021 by Great Place to Work Institute
Thank you