



CORPORATE PRESENTATION

August 2022

A background image of the Earth from space, showing the curvature of the planet and city lights at night. A white network of lines and nodes is overlaid on the Earth, representing a global communication network. The top right corner of the image is dark blue with white stars.

CORPORATE PROFILE

TATA COMMUNICATIONS

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®

INTRODUCTION

Tata Communications' secure connected digital experience (SCDX)

Our purpose

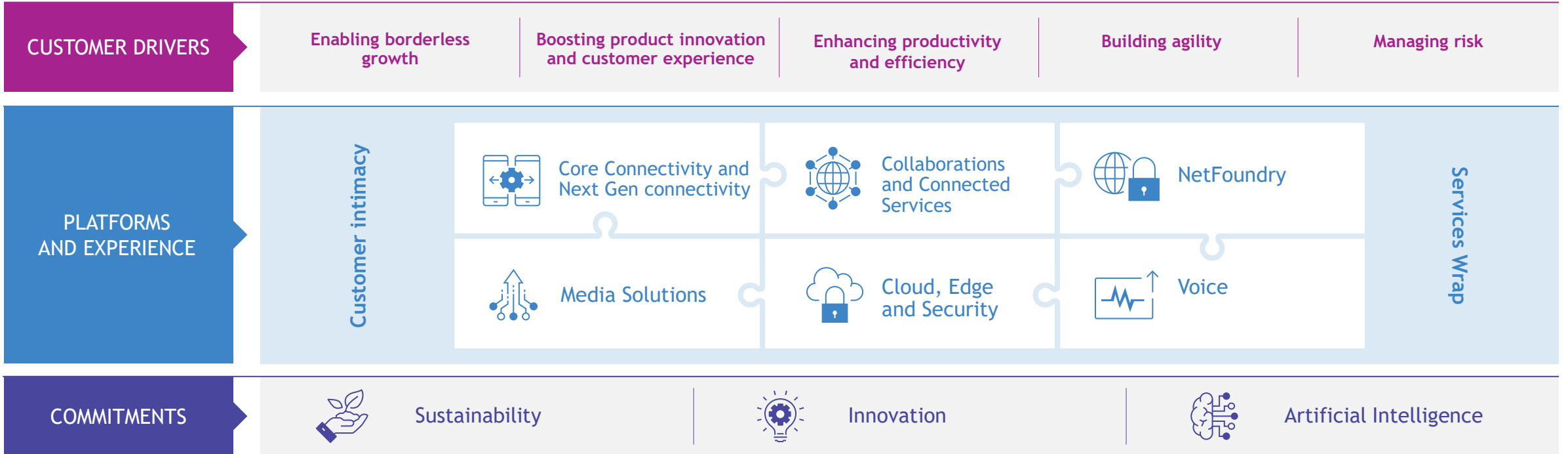
We are a global Digital Ecosystem Enabler with a mission to accelerate our customers' success and leadership in the new world of business by providing a digital-first approach to solving their business challenges and enabling them to harness every opportunity available in their respective markets.



We assist enterprises in their digital transformation journey

Why we exist

Deliver a new world of communications to the industry and our customers



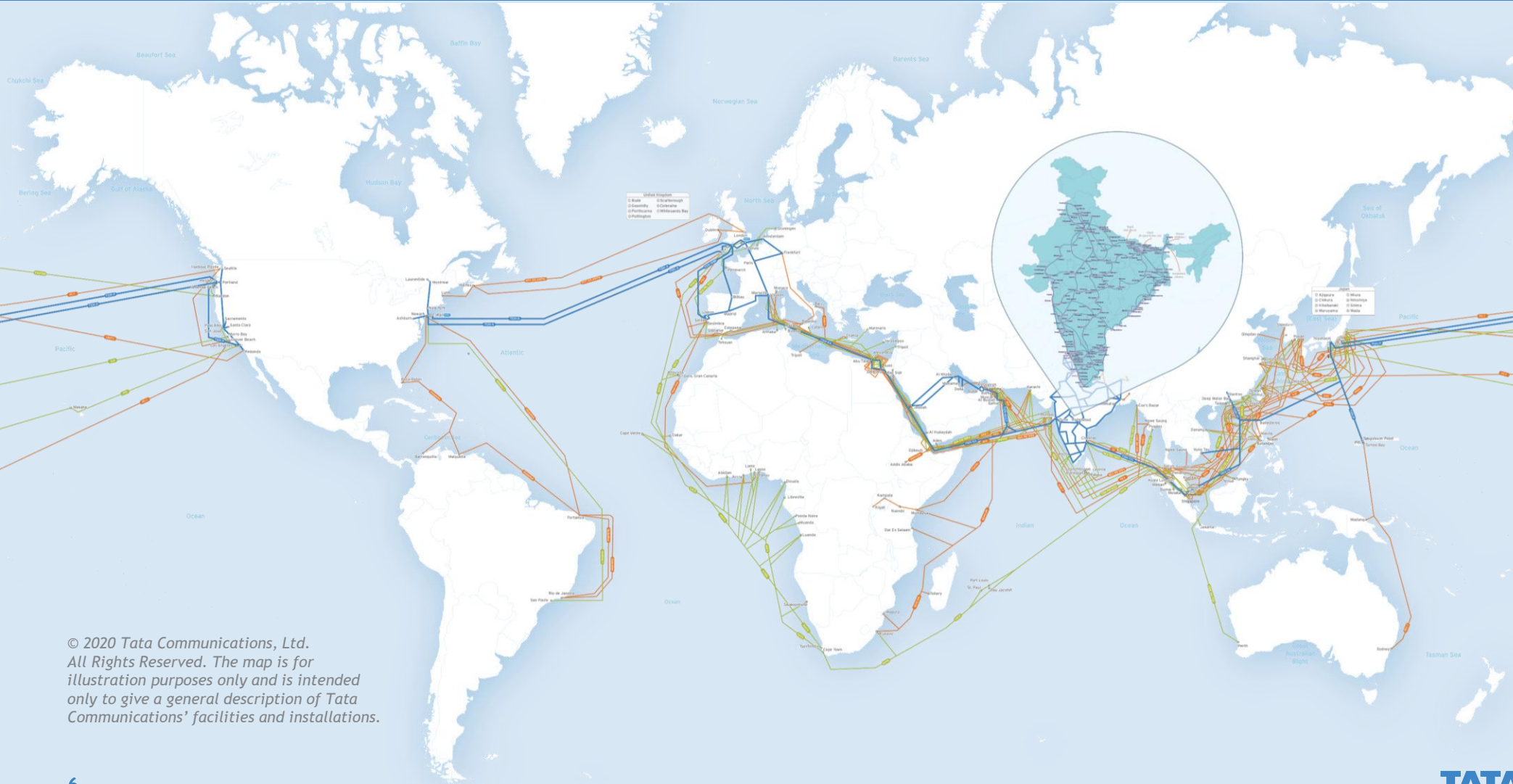
How we do it

Our DRIVE culture

Daring | Responsive | Inclusivity | Venturing | Ethical

OUR REACH

We provide connectivity to the world



IPL GLOBAL TGN, Consortium & Partner Cables Map

LEGEND

TGN Cables	TGN-Atlantic	TGN-Pacific
	TGN-Eurasia	TGN-TIC
	TGN-Gulf	TGN-WER
	TGN-Intra Asia	TGN-India NLD
	TGN-NER	
Consortium Cables	APCN-2	SAFE/SAT3
	BBG	SEABRAS-1
	FASTER	SEA ME WE3
	IMEWE	SEA ME WE4
	JUS	WACS
Partner Cables	AAE-1	FEA
	APG	FNAL
	ASE	GLOBENET
	C2C/EAC	GTT ATLANTIC
	EIG	I2I
	MAIN ONE	SJC
	PC-1	TEAMS
	PIPE (PPC-1)	UNITY
	SEACOM	
	SEA ME WE5	

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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.

US\$106bn
group revenue

US\$21.3bn
brand value

US\$300+bn
market capitalisation

900mn
consumers

750000
employees

150+
countries

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

Formed a wholly owned subsidiary in United States



2004

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



2005

Acquired Tyco Global Network, becoming one of the world's largest providers of submarine cable bandwidth



2006

Acquired TeleGlobe; 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 Trueroots; Launched TCTS as a new business focused on transformation services



2008

VSNL, VSNL International & Teleglobe unite as Tata Communications Limited



2009

Tata Communications and Tyco Communications complete TGN-INTRA Asia cable system



2010

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



2011

Completed acquisition of BitGravity™



2012

Launched Tata Global Network-Eurasia- world's first round-the-world fibre optic cable network; F1 multi-year technology service and marketing agreement



2013

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



2014

Launched IZO™ the most comprehensive cloud enablement platform with Google, Microsoft Azure and AWS



2015

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



2016

Strategic partnership with STTelemedia to expand Data Centre business



2017

Launched Tata Communications MOVE™; Incubated Netfoundry under STF; Expanded IZO™ footprint in Europe, Middle East, APAC



2018

Acquired IoT and Mobility specialist, Teleena; Launched Cyber Security Response Centres in Chennai and Dubai; Principal partnership for CII (Centre for Digital Transformation)



2019

Spun-off NetFoundry™ into a new independent subsidiary



2020

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



2021

Launched IZO™ 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 9th consecutive year; Official Broadcast Connectivity Provider of Formula 1®



We engage with multiple industries

 AUTOMOTIVE	 MEDIA & ENTERTAINMENT	 SPORTS	 MANUFACTURING	 PHARMACEUTICAL	 INSURANCE	 HEALTHCARE
 TELECOM	 BANKING	 CONSTRUCTION	 SERVICES	 FINANCE	 ENERGY	
 RETAIL	 IT/ITES	 CONSULTING	 REAL ESTATE	 E-LEARNING	 E-COMMERCE	 GOVERNMENT

OUR CUSTOMERS

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

TATA COMMUNICATIONS

OUR CUSTOMERS

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



HEALTH INSURANCE



TATA COMMUNICATIONS

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



OPERATING CONTEXT

TATA COMMUNICATIONS

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)

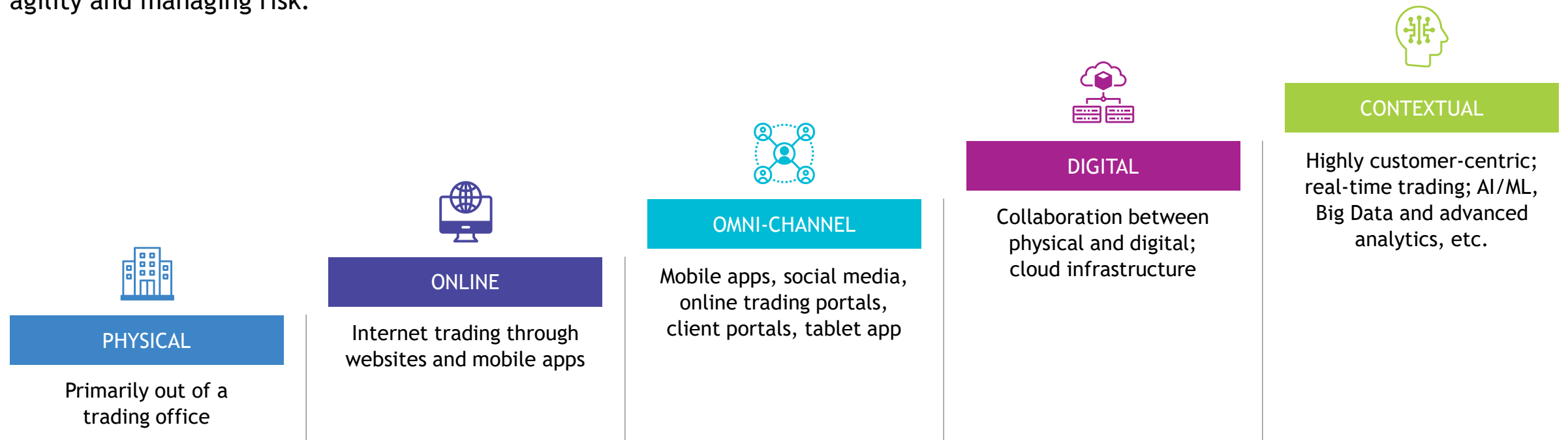
70%

of organizations planned to increase AI investments by 2025

(Source: [Gartner](#))

Solutions for every stage of digital maturity

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.



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.

Analysts: Neil Rickard, Bjarne Munch, Danellie Young, Karen Brown
 Publishing Date: Feb 2022

Analyst recognitions for fy22



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



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



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



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



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



Product Challenger in ISG Managed (SD) WAN Services-Nordics, US, Germany & SDN Transformation Services Provider Lens study- Nordics | 1st time



Frost and Sullivan Awards : Asia-Pacific SD WAN Competitive Strategy Leadership Award



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



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



Major Player in IDC MarketScape: Asia/Pacific (Excluding Japan) Managed Cloud Services 2021 Vendor Assessment | 1st time



Leader in GlobalData Wholesale Antifraud: Competitive Landscape Assessment



Leader in Avasant SD-WAN Managed Services 2020 RadarView™



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



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



Very Strong in GlobalData Collaboration and Communications Services



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



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



Frost & Sullivan 2021 Indian Cloud Interconnect Services Company of the Year Award



Strong in GlobalData Global WAN Services: Competitive Landscape Assessment



Leader in Magic Quadrant for Network Services, Global



Major Player in 2021 WW CDN Vendor MarketScape | 2nd time



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



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



Leader in GlobalData Wholesale IoT: Competitive Landscape Assessment



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	16 major/strategic facilities certified
MULTIPLE BEST EMPLOYER RECOGNITIONS	'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	Diversity mix among our new hires increased from 19% (FY20) to 21.7% (FY22)
4,800+ CERTIFICATIONS COMPLETED BY EMPLOYEES	with minimum 16 hours of effort



5.60 MU OF ENERGY CONSERVATION GLOBALLY	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



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

Our DRIVE culture

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.

Can-do attitude	Collaboration	Continuous learning	Innovation
Mindset for growth and agility	Ownership and accountability	Problem solving	Skills transformation

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

TATA COMMUNICATIONS