BUILDING INTELLIGENCE INTO THE INFORMATION SUPERHIGHWAY

#UnlockExperiences
TECH MAHINDRA CME... DIVERSIFIED

Partner to All Major CSPs Worldwide

APAC
2 Conglomerates in ASEAN
Top 3 CSPs in Australia

North America
Top 3 CSPs in Canada
Top 4 CSPs in USA

LATAM
Top 3 CSPs

Europe
Top 5 CSPs

MEA
Top 6 Groups

ACROSS GEOGRAPHIES & CUSTOMERS

PERCENTAGE OF REVENUE

<table>
<thead>
<tr>
<th>Region</th>
<th>FY15</th>
<th>FY18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>21</td>
<td>15</td>
</tr>
<tr>
<td>Europe</td>
<td>35</td>
<td>19</td>
</tr>
<tr>
<td>ROW</td>
<td>50m+</td>
<td>20m+</td>
</tr>
</tbody>
</table>

Growing the number of high value accounts

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COMMUNICATION INDUSTRY TRANSFORMATION & INVESTMENT PRIORITIES...

CSP Investment Focus Areas

- Digital business marketing, sales, retail, IOT: 61%
- Digital Operations: 58%
- Improved experience: 58%
- Digital services: video, music, OTT: 42%
- Other: 5%

Percentage of companies making investment

Industry to see CSPs make significant investments in Customer Experience, IOT, Digital Ops, and Networks by 2020

Insight Research Report

- Competition
- Consumers
- Technology

LIVE differently
WORK differently
PLAY differently

Consumers

- Competition
- Amazon web services
- Google fiber
- Facebook

Technology

- 5G
- $582 Billion Market by 2026
- Connected Devices: $50 Billion Market by 2029
- $1+ Trillion Market by 2025
TOWARDS A NEW IDENTITY

Content & Advertising

Content Distributor

M&E Provider

Healthcare Provider

Digital Lifestyle Provider
TECH MAHINDRA 3-4-3 BUSINESS STRATEGY... TO ENABLE NEW CSP IDENTITY

3 MEGA TRENDS

- EXPLOSION OF CONNECTED DEVICES
- 5G AND BEYOND
- VIDEO ON ALL DEVICES

4 BIG BETS

- Digital
- CX Platforms
- Physical
- Internet Of Things
- DevOps
- X-aaS
- BSS 2.0
- Automation
- Microservices
- Software Transformation
- Network Of Future
- SDN/NFV
- NB-IoT
- vRAN
- VOLTE-as-a-Service
- OSS2.0/ONAP

ADDRESSING 3 CEO OBJECTIVES

- RUN BETTER
- CHANGE FASTER
- GROW GREATER

Enabling CSPs to holistically capitalize on IoT opportunities
EXECUTION OF 3-4-3

Platforms
TechM Developed IP
Accelerating CSP Tech Lifecycle

People
Digital Ready, Glocalized

Partners
Startup Ecosystem, to complement Global Alliances
OUR INVESTMENTS IN LINE WITH OUR STRATEGY...

- Digital CX
- Internet of Everything
- Network of the Future
- Microservices Platform for DIGITAL
- Harmonizing AI

Jt. GTM with Large Tier I Telco in KSA
Are accelerating CSPs’ business transformations

Run better

Significant NPS improvement

Tier 1 ANZ Service Provider

Change faster

Virtualized Networks

Tier 1 Telco in US

Customer Experience Transformation

Major Service Provider in UK

Grow greater

IOT Track and Trace Solutions

Tier 1 Indian Service Provider

Digital Transformation using Microservices

Leading Telco in US

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