

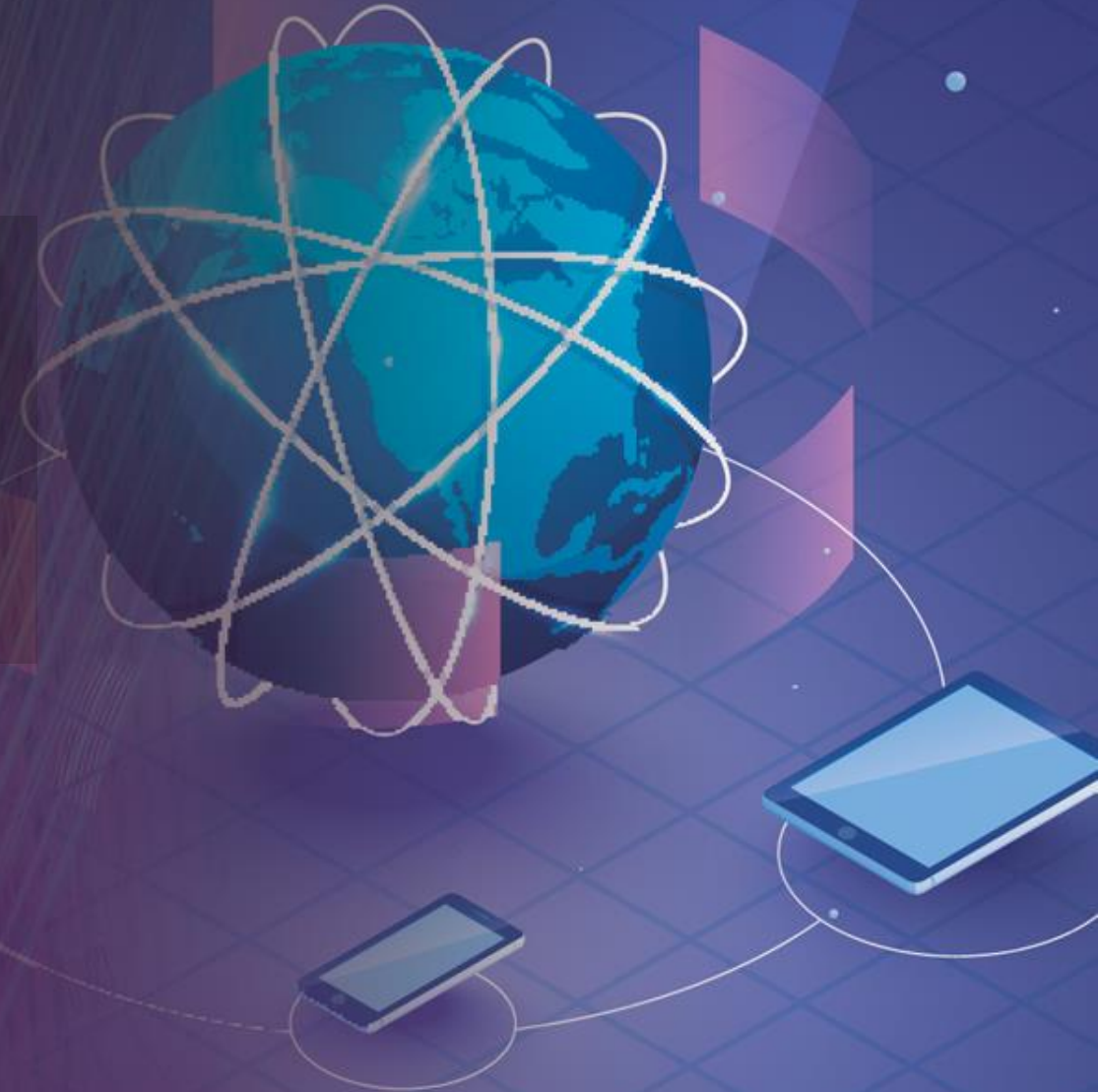


Synergize & Simplify

#COMETOGETHER

Communications & Media

Manish Vyas



Tech Mahindra in Telecom - At the Cusp of a new Decade

tmforum

5G Catalyst
Award



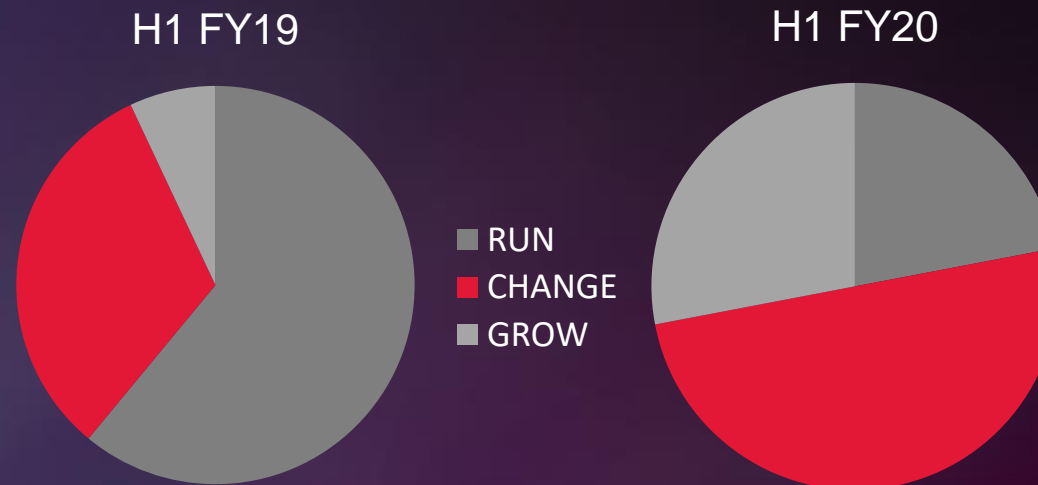
Partner of
the Year



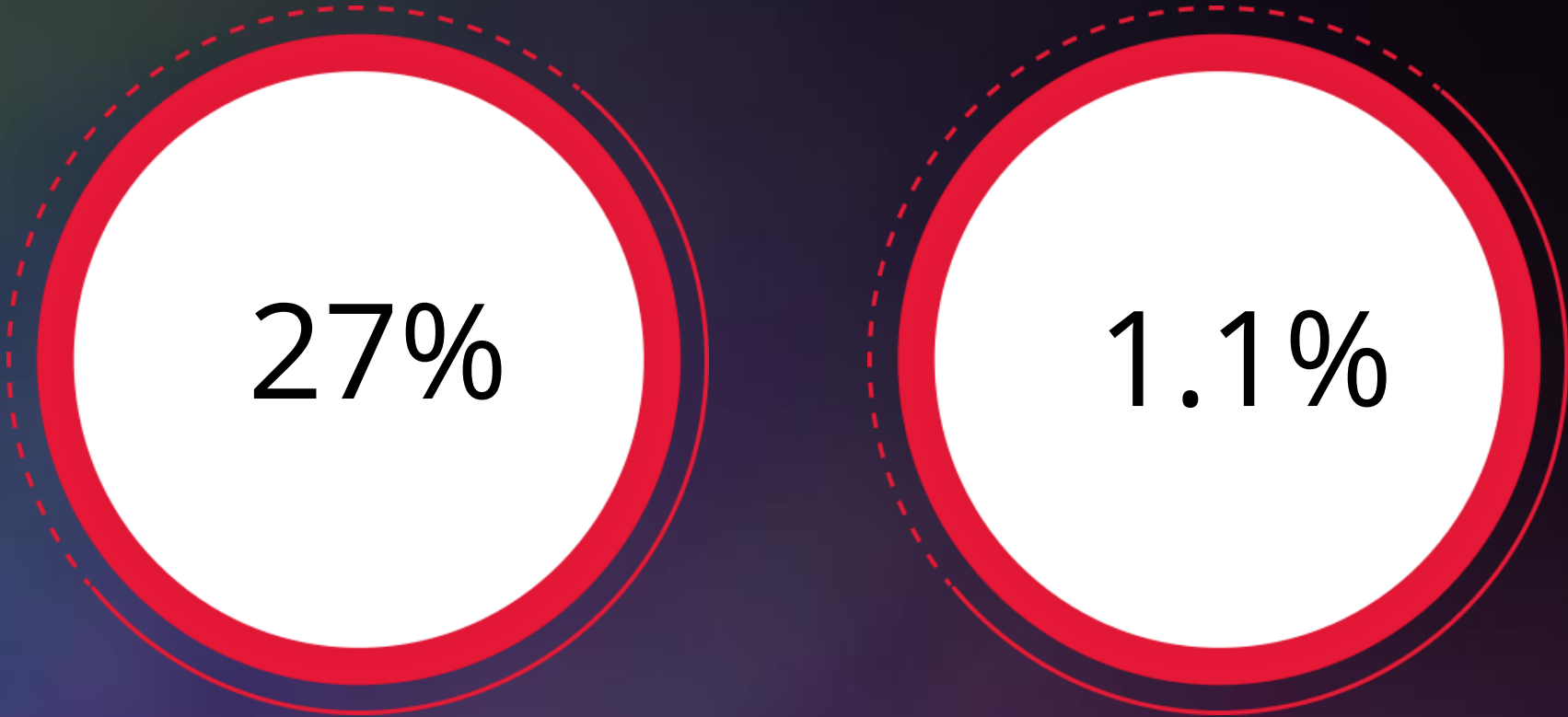
'Intel Network Builders'
Winner Circle
"Leaders Board"



200%
Increase in
CHANGE + GROW
Deal Wins



Telecom Industry



27%

1.1%

*IDC

“**NXt** Decade”

3 Mega Trends

5G

Revolution



Customer Of Tomorrow



Telco Media Convergence

Network
Modernization



\$281B
by 2021

IT
Transformation



\$26.5B
by 2021

CSP Operations



\$13.6B
by 2021

IT
Infrastructure



\$9.8B
by 2021

Security &
Privacy



\$6B
by 2021

Global M&E
Market



\$2.4T
by 2021

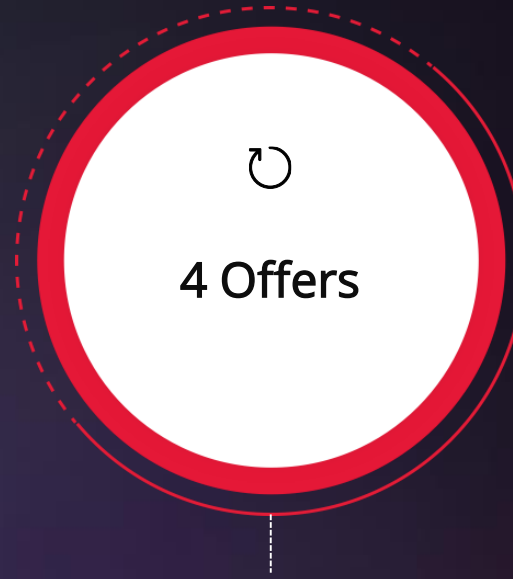
Reinforcing our strategy



THE 5G Revolution

Customer Of Tomorrow

Telco Media Convergence



Business.NXt

Experience.NXt

Platforms.NXt

Infra.NXt



Run
Better



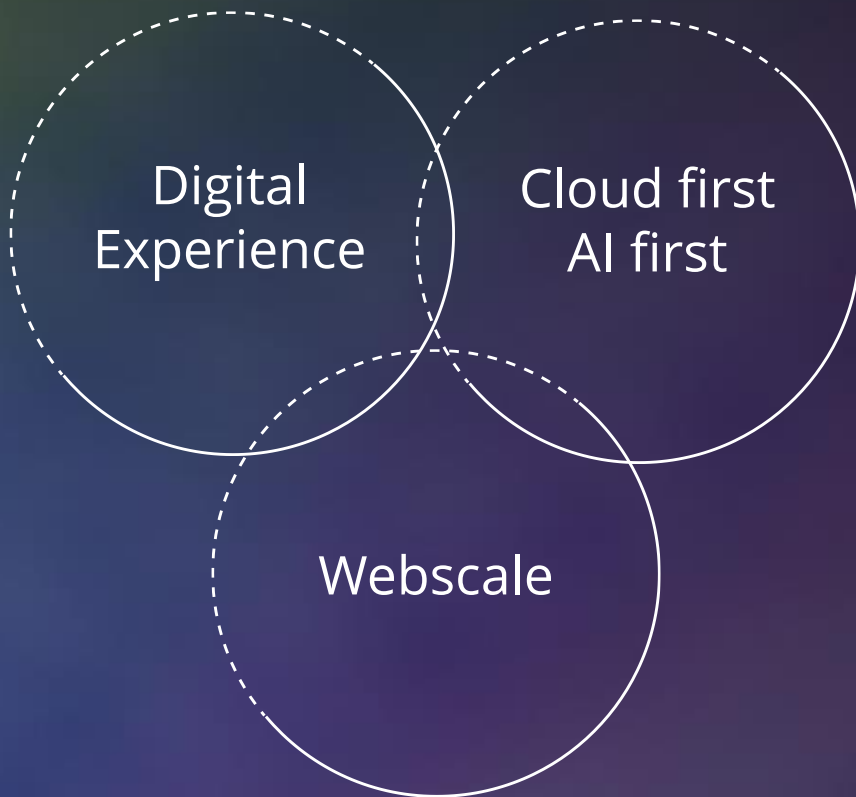
Change
Faster



Grow
Greater

Digital BSS

Urgent need to simplify systems to improve monetization.



Synergy & Scale
from Investments



DYNACOMMERCE

GAiA



CX Transformation

Growth \propto Improved customer engagement index

Customer Experience Market
to Expand 18.5% CAGR

80%

Real time
interaction
(B2B)

70%

Consumers want
Personalization



Human Centered

Applied Intelligence

OMNI-Channel

Transformation and New Cost structures



Multiyear Agreement to accelerate Leading CSP's Technology Transformation

Migration

Modernization

Infra as a Service

Network as a Service



Network Services – a differentiator

\$1.3 Trillion

CAPEX investments
in Networks

75%

Primarily
Driven by 5G



Data Traffic



Stagnant Revenue

4 KEY OPERATING PRINCIPLES



Leveraging Cloud



Cost Take Out



Co-Existence of
Legacy and new N/W's



New Revenue
Streams

Network Services – Our Right to Win

Our Network Bets

Network Cloud and
Orchestration

Network Analytics

Next Gen OSS

5G-4-E

Partners & Platforms

netOps.ai



VNF-Xchange

MEC

C3P

Engagements

APAC - Next Gen Telco

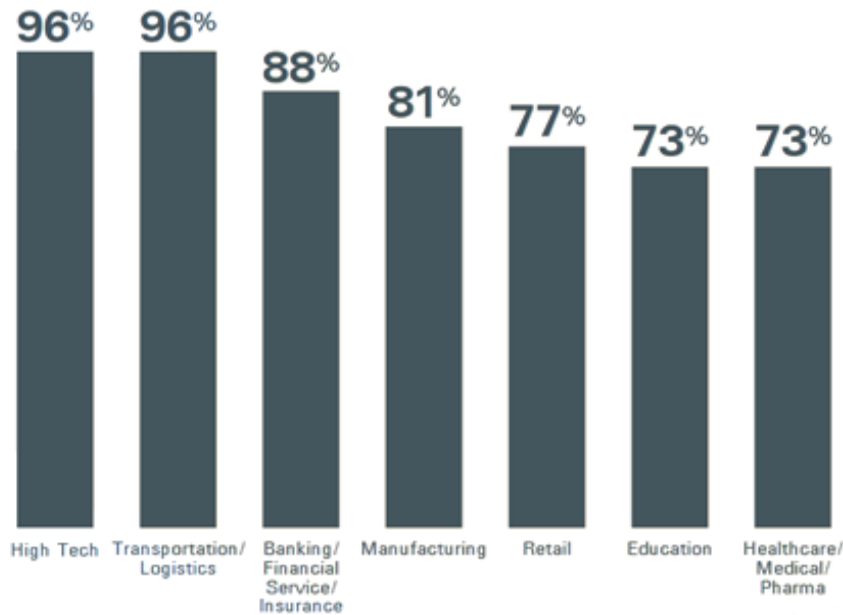
Europe – Largest CSP

US – Fastest Growing CSP

UK – Media House

5G – 4 – E

5G will have transformative impact on industries



TMForum Report

Partnering CSPs for industrial IoT

Network slicing

Private 5G network

Vertical 5G labs and

industrialization

Factory of the Future

COMVIVA

25*25

ATHONET

ESL PaaS

Media & Entertainment

Opportunities across RUN CHANGE GROW

Market Trends



Focus on
Direct to Consumer

5G Impact will be
exponential

Enabling Enterprises to



Shaping up our Future

NXT Gen Video

AI, ML and
Blockchain

5G Use Cases

Key Synergy bets to scale

VIE

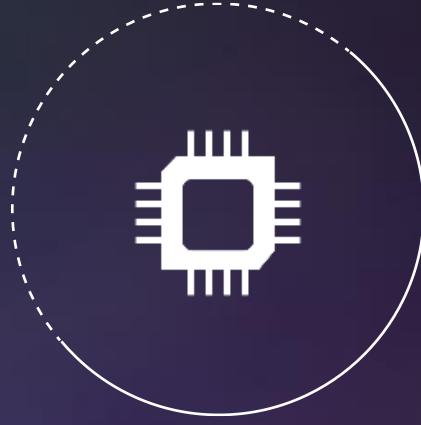
mad*power BORN

Synergy with OEMs and ODMs

Opportunities with an expanding ecosystem



R&D



Network Services



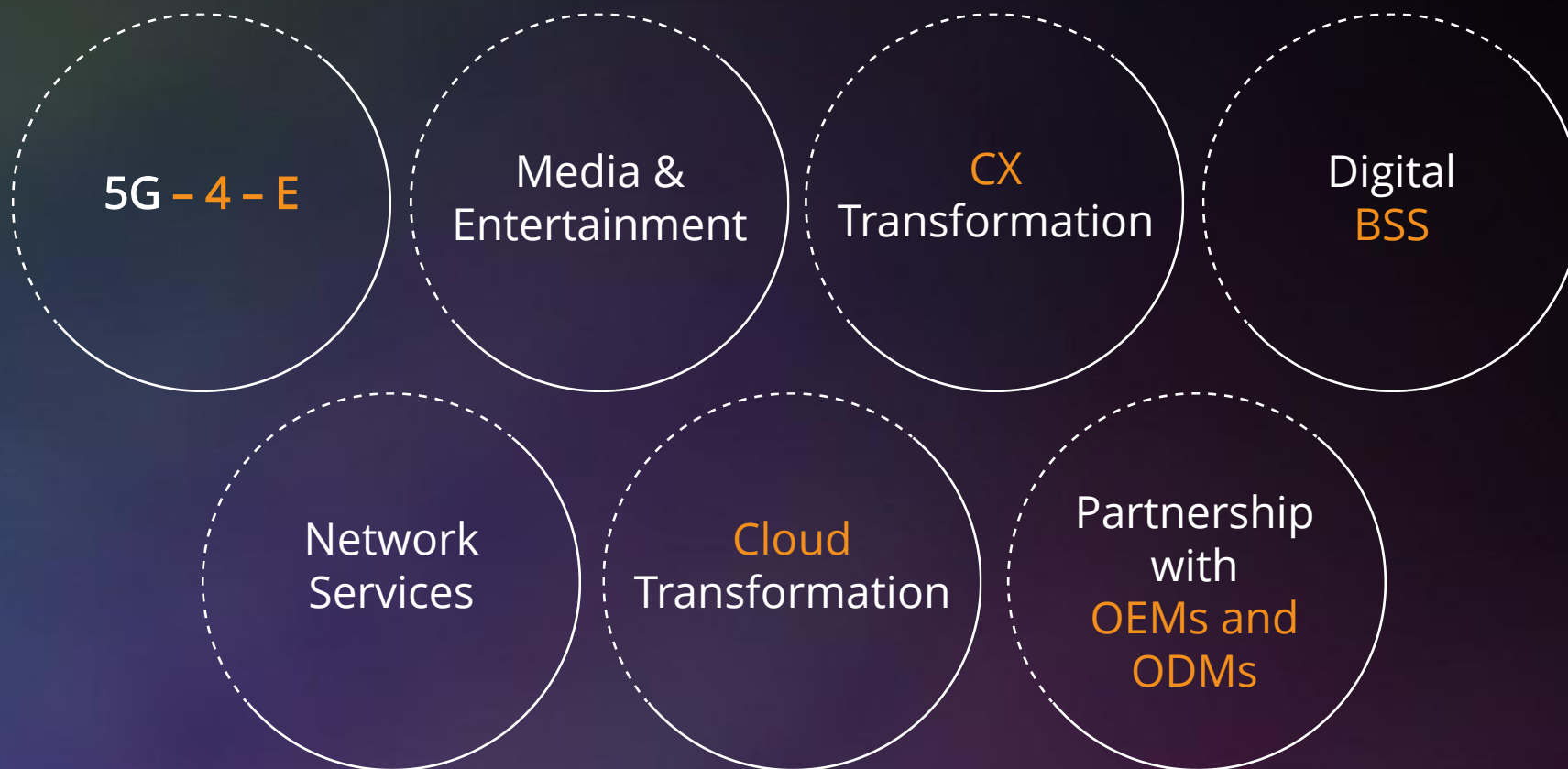
IT Transformation



IoT



Opportunities





Tech
Mahindra