

BUILDING INTELLIGENCE INTO THE INFORMATION SUPERHIGHWAY

#UnlockExperiences

TECH MAHINDRA CME... DIVERSIFIED ACROSS GEOGRAPHIES & CUSTOMERS

Partner to All Major CSPs Worldwide

APAC

2 Conglomerates in ASEAN
Top 3 CSPs in Australia

Europe

Top 5 CSPs

North America

Top 3 CSPs in Canada
Top 4 CSPs in USA

LATAM

Top 3 CSPs

MEA

Top 6 Groups

PERCENTAGE OF REVENUE

Americas

46.8%

Europe

29.8%

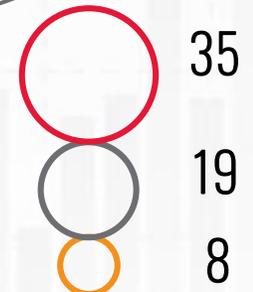
ROW

23.4%

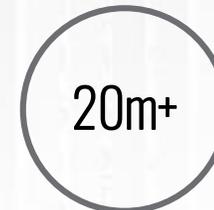
Growing the number of high value accounts



FY15



FY18



COMMUNICATION INDUSTRY **TRANSFORMATION & INVESTMENT PRIORITIES...**

Competition




Google fiber




Consumers



LIVE differently

WORK differently

PLAY differently

Technology



5G 5G

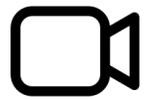
\$582 Billion

Market by 2026



50 Billion

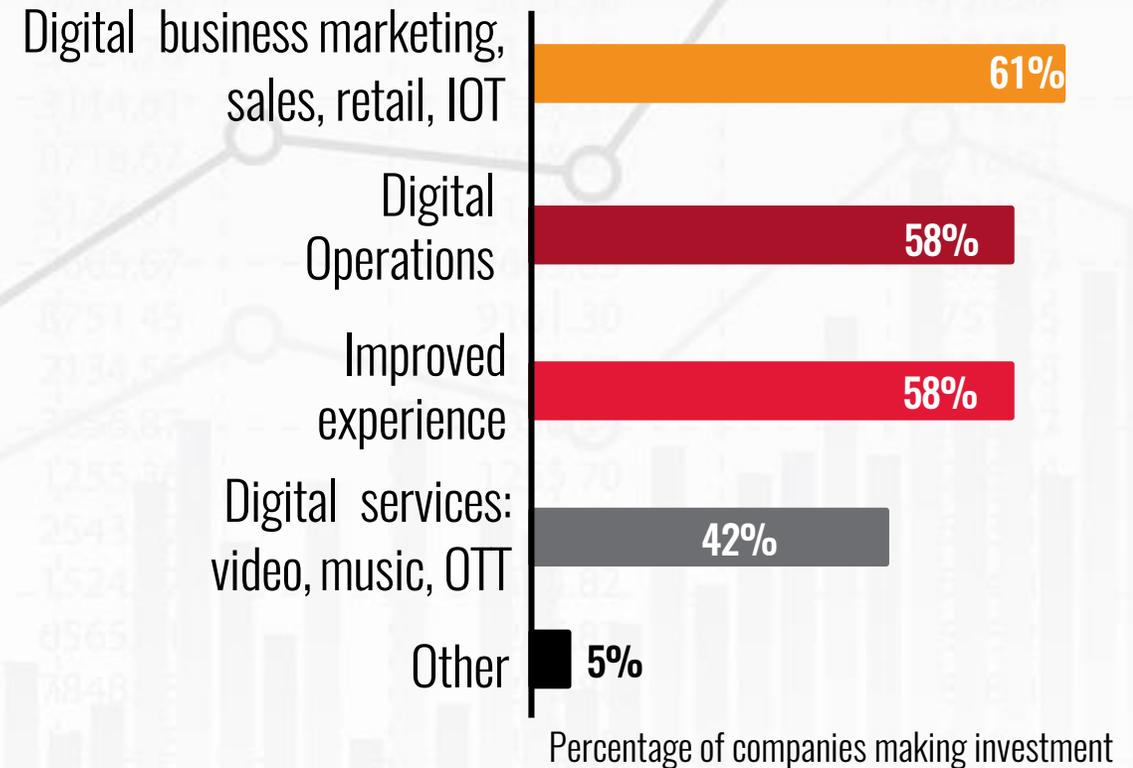
Connected Devices by 2029



\$1+ Trillion

Market by 2025

CSP Investment Focus Areas



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

TOWARDS A NEW IDENTITY



Content & Advertising



AT&T



M&E Provider



Content Distributor



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

Integrated Digital CX

Digital CX Platforms Physical

Internet Of Things

Enabling CSPs to holistically capitalize on IoT opportunities

Software Transformation

DevOps X-aaS BSS 2.0

Automation Microservices

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

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



MAKERS LAB
AN i5 INITIATIVE



Jt. GTM with Large Tier I Telco in KSA

Internet of Everything



VNF-Xchange

Network of the Future



Microservices Platform
for DIGITAL



Harmonizing AI

ARE ACCELERATING CSPs' BUSINESS TRANSFORMATIONS



RUN BETTER

Significant NPS Improvement

Tier 1 ANZ
Service Provider



CHANGE FASTER

Virtualized Networks

Tier 1 Telco in
US



GROW GREATER

IOT Track and Trace Solutions

Tier 1 Indian
Service Provider

Customer Experience Transformation

Major Service
Provider in UK

Digital Transformation using Microservices

Leading Telco in
US

THANK YOU

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for a **CONNECTED** Future

Connected World.
Connected Experiences.