

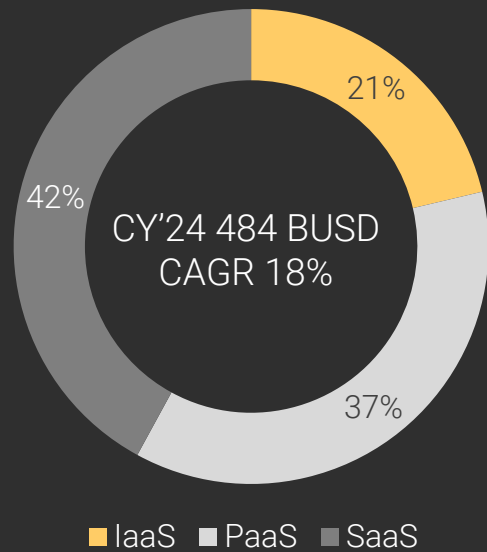
CLOUDIFICATION OF EVERYTHING!



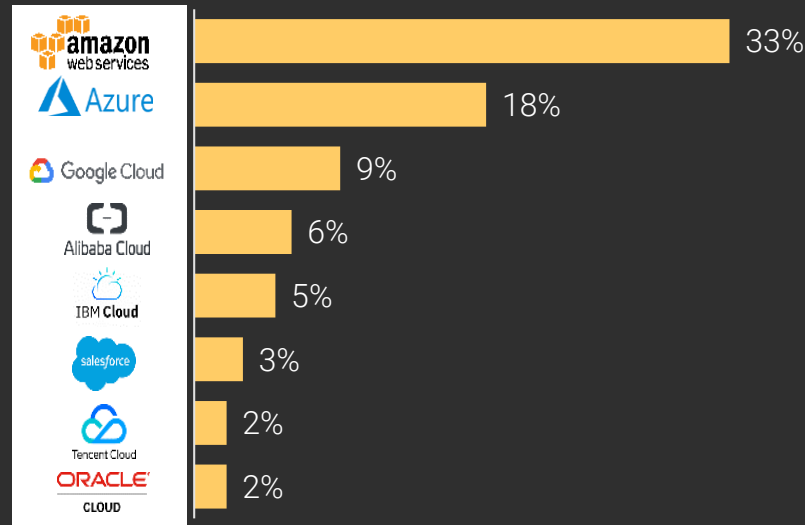
Sudhir Nair

CLOUD MARKET TRENDS

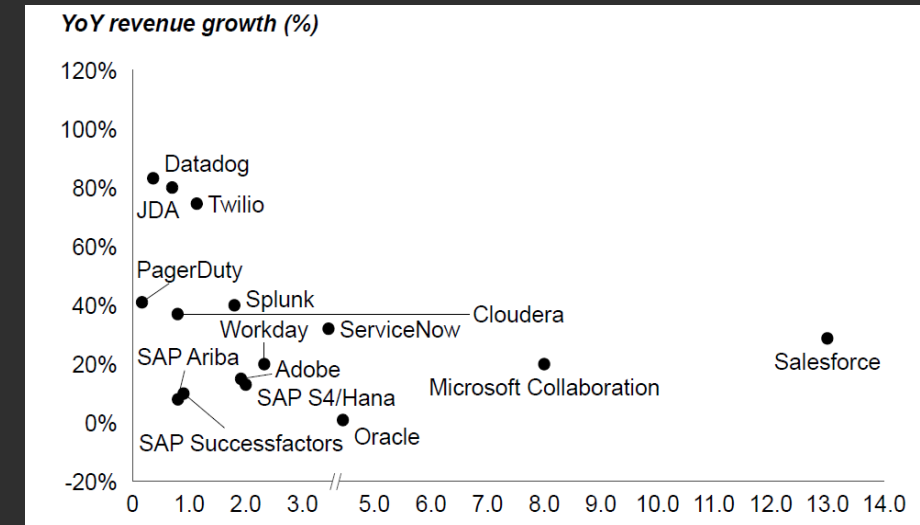
IaaS + PaaS + SaaS Market Share



IaaS + PaaS Market Share FY'24 : 292 Billion



SaaS Market Share FY'24 : 192 Billion



TRENDS & INFERENCES

Hybrid Multi Cloud is the 'NOW' normal

AWS leads the CSP Pack, with Azure closing in!

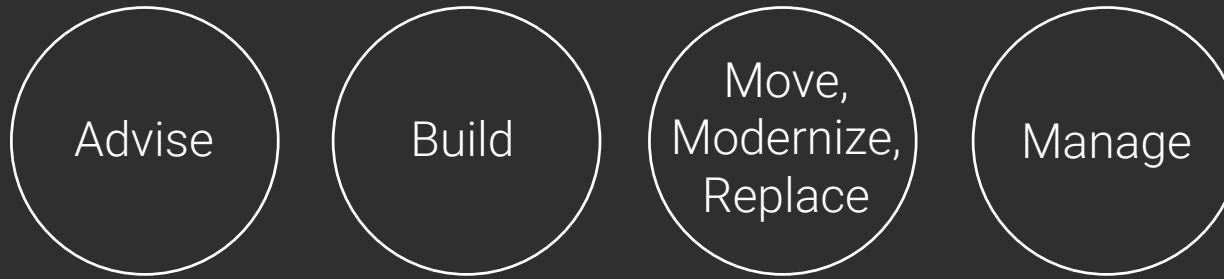
Vertical SaaS gaining momentum

Focus is beyond TCO reduction : Agility, Speed to Innovate, CX

Source: Summary from Mck, Gartner Market Data

CUSTOMER JOURNEY

4
STAGES



THE JOURNEY



TOP PRIORITIES FOR CLIENTS

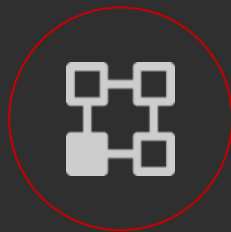
- TCO Reduction
- Monetizing Datacenter Exits
- Speed to Innovate
- Customer Experience
- Everything as a Service

TOP OPPORTUNITIES FOR SIS

- SaaS Implementation
- Application Modernization
- Cloud Ops & FinOps
- Critical/ Volumetric Workload Migration



INDIVIDUAL OR
GROUP OF
APPLICATIONS



BU LEVEL
INITIATIVES



ENTERPRISE
TRANSFORMATION

STATE OF THE BUSINESS

ICS REVENUE \$ 900 Mn+
Growing at 22%

SIGNIFICANTLY HIGHER YIELD,
LEVERAGING PLATFORMS



BOOKED TCV: 2X
TTM over previous period

INDUSTRY LEADER
POSITIONING



STRATEGIC PARTNERS



THE TECH MAHINDRA ADVANTAGE

1

PROVEN ABILITY TO
DELIVER LARGE SCALE
CLOUD XFMN

2

BEST IN CLASS
FRAMEWORKS &
ACCELERATORS

3

DEEP FOCUS ON
AUTOMATION

“

TECH MAHINDRA EXCELS IN DESIGN,
DEVELOPMENT & DEPLOYMENT OF AN
OPERATIONAL READY PUBLIC &
PRIVATE CLOUD PLATFORM UPON
WHICH TELECOM COS CAN BUILD
THEIR BIZ PROCESSES & NETWORKS OF
THE FUTURE

”

A LEADING CLOUD PROVIDER

DIFFERENTIATING FOR SUCCESS: A1

Client Case
Reference:
LEADING
TELCO



THE ENGAGEMENT

Transformation of IT
infrastructure & apps at
scale

Accelerating the
digitization of Telco

Reduce/ Retire Physical
DC

TECH MAHINDRA ADVANTAGE

Scaled up to be the
largest partner in the
Transformation Program

Cloud Factory leveraged
frameworks to increase
velocity & quality of
migration

100% automated
migrations using
Infrastructure as Code
and DevOps



DIFFERENTIATING FOR SUCCESS: A2

Client Case
Reference:
LEADING
INSURER



THE ENGAGEMENT

100% multi-country cloud migration within 3 years

Transform to Digital Platforms

Move to 'as a Service' mode across technology towers

TECH MAHINDRA ADVANTAGE

Strong domain knowledge: 300+ insurance applications in play

100% Automated Apps deployment through CI/CD

Cloud Ops & FinOps with committed YoY savings



DIFFERENTIATING FOR SUCCESS: B

Inhouse
developed IPs &
Accelerators



Reskill
70%
of IT Workforce
by 2024



RACE

Reskilling Academy for Cloud Executive

OUR BIG BETS

Chasing
4 Big Bets
to **dominate**
TAM in excess of
\$ 100+ Bn



1

ToS & Large
AMS Deals

2

DataCenter
CaveOuts

3

Scaling SaaS &
Hyperscalers

4

NETOPS.ai



ID
INVESTOR DAY

Tech Mahindra