



TATA COMMUNICATIONS

Welcome to the New World

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CORPORATE

21 FEBRUARY 2008

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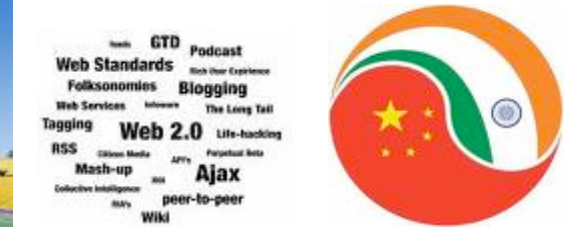
- **The New World**
- A New World of Communications
- The Tata Communications Journey



Our Market Environment



Globalization



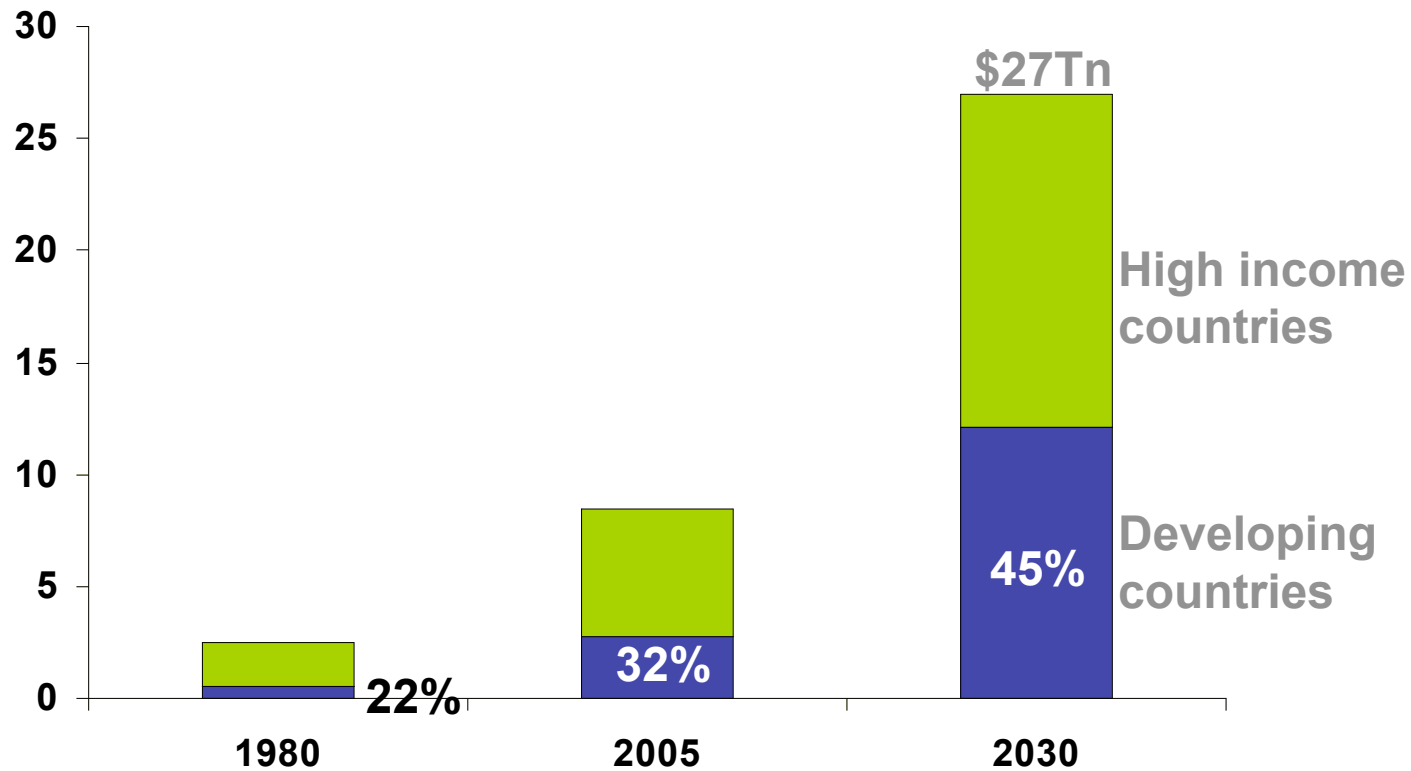
Web 2.0



India & China

Globalization & Increased Role of Developing Countries

Exports from Developing and Developed Countries, 2005-2030 (US\$2001 Trillions)

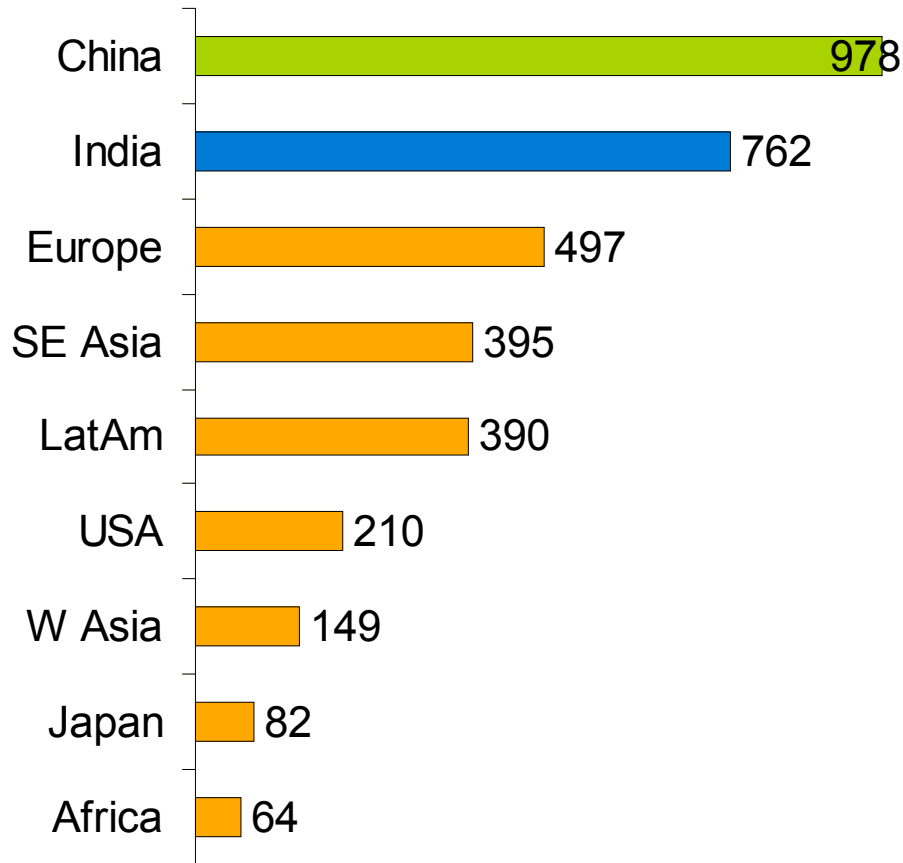


Source: World Bank

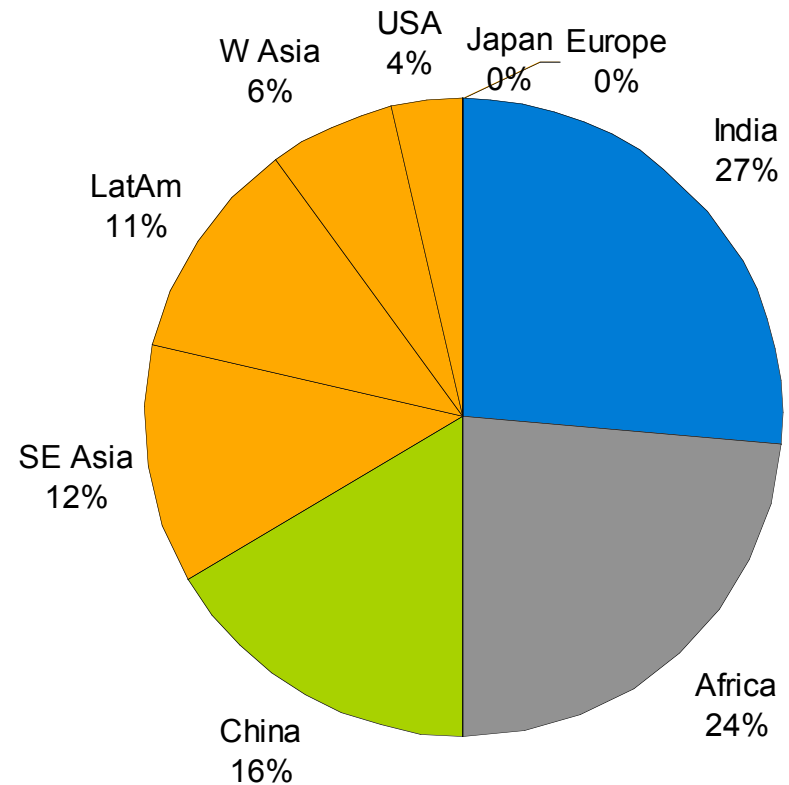


Growing Importance of India & China in the New World

Working Population 2010, millions



Addition to Working Pops 2005-2010

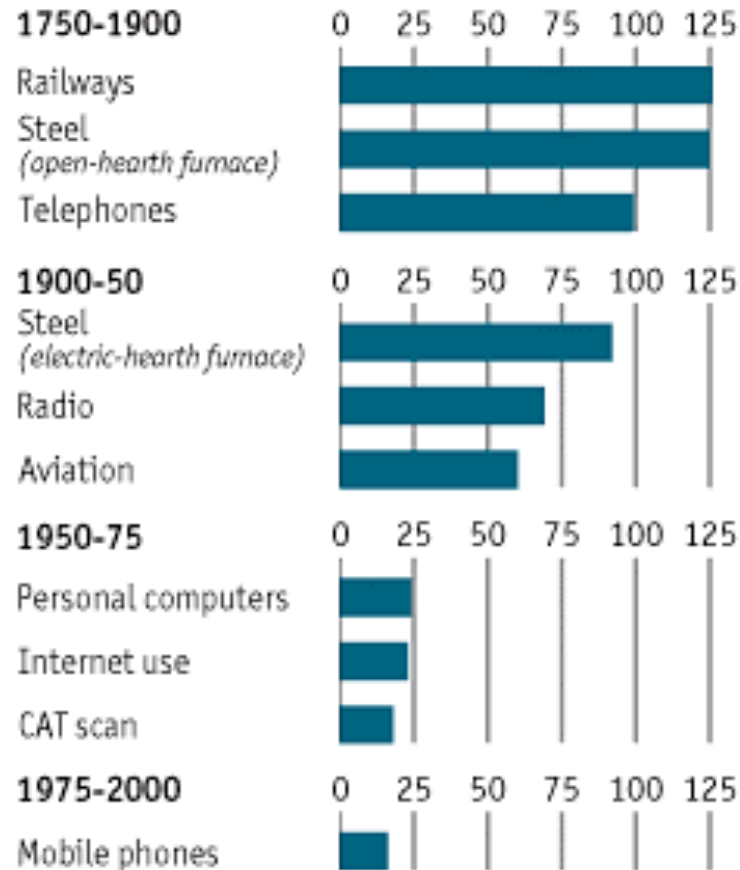


Source: Morgan Stanley; Tata Communications Research

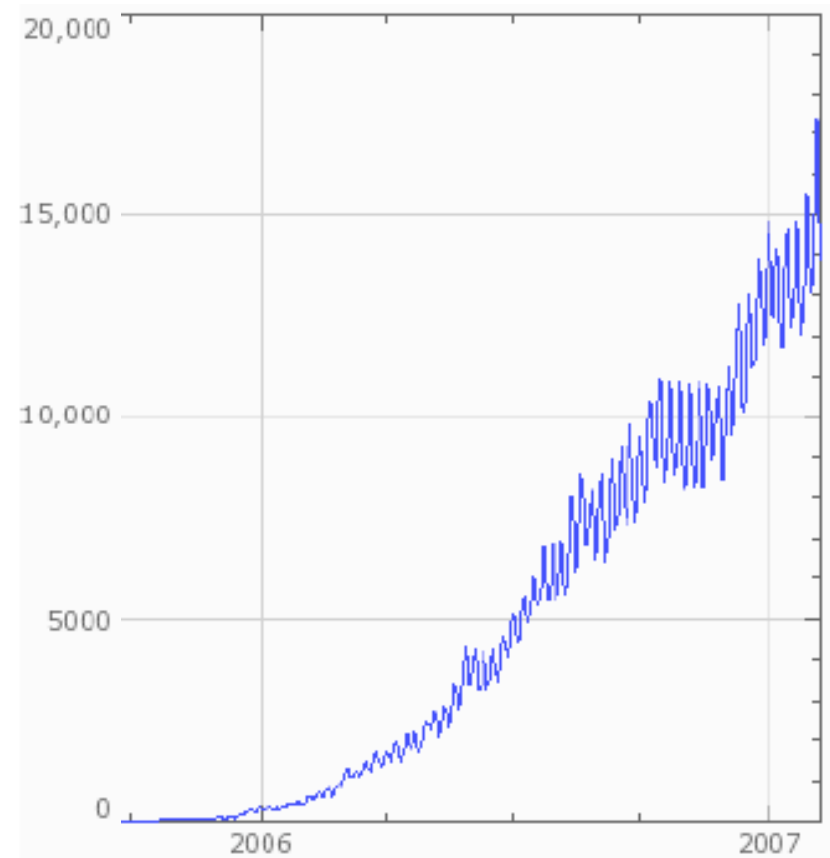


Rapid Consumer Adoption of New Products & Technologies

of Years for 80% countries adoption



YouTube Daily Page Views ('000s)



Source: The Economist, citing the World Bank; Alexa



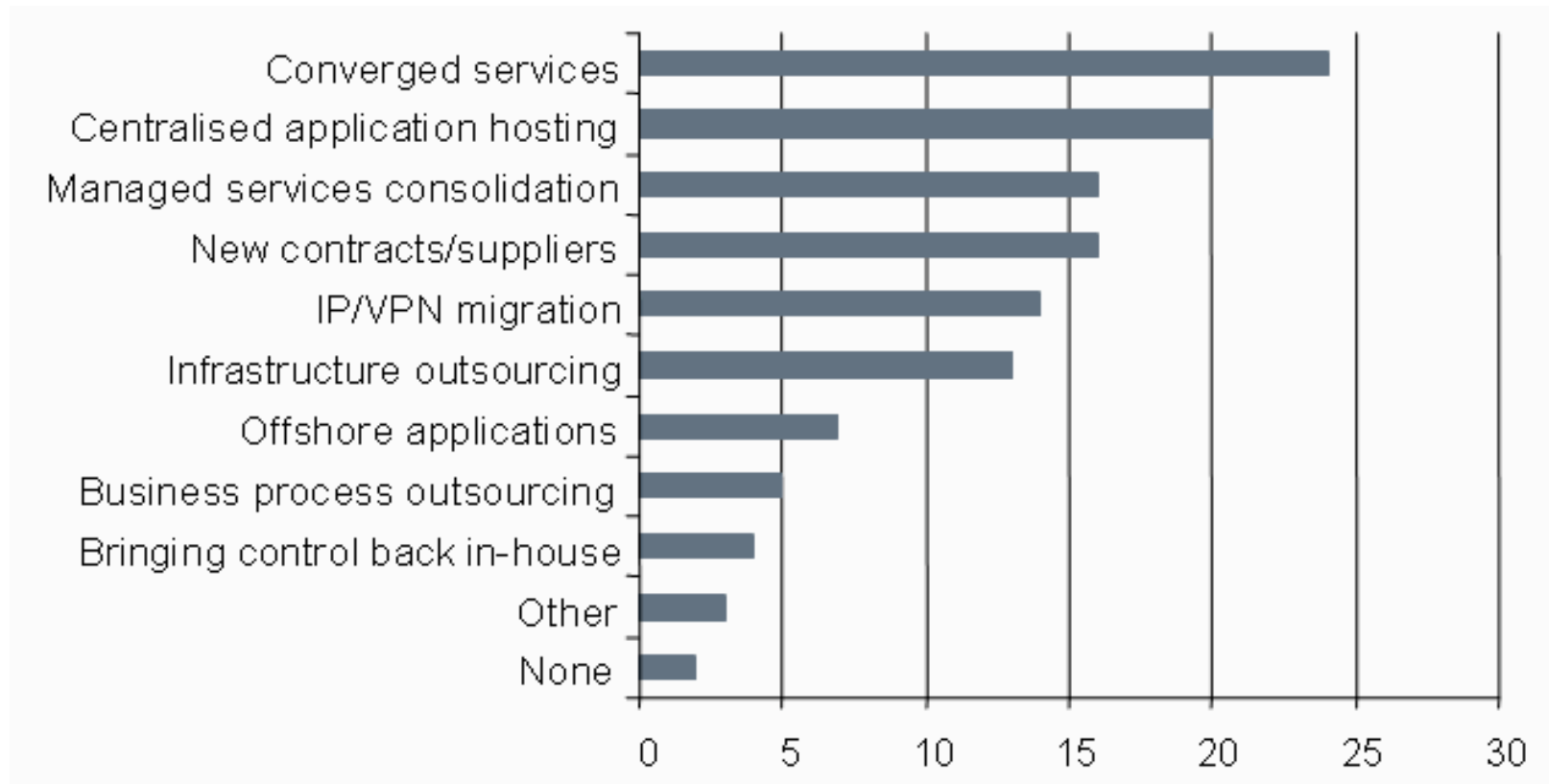
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Enterprises Demand Managed & Converged Services

New Sourcing Plans / Strategies being considered by CIOs

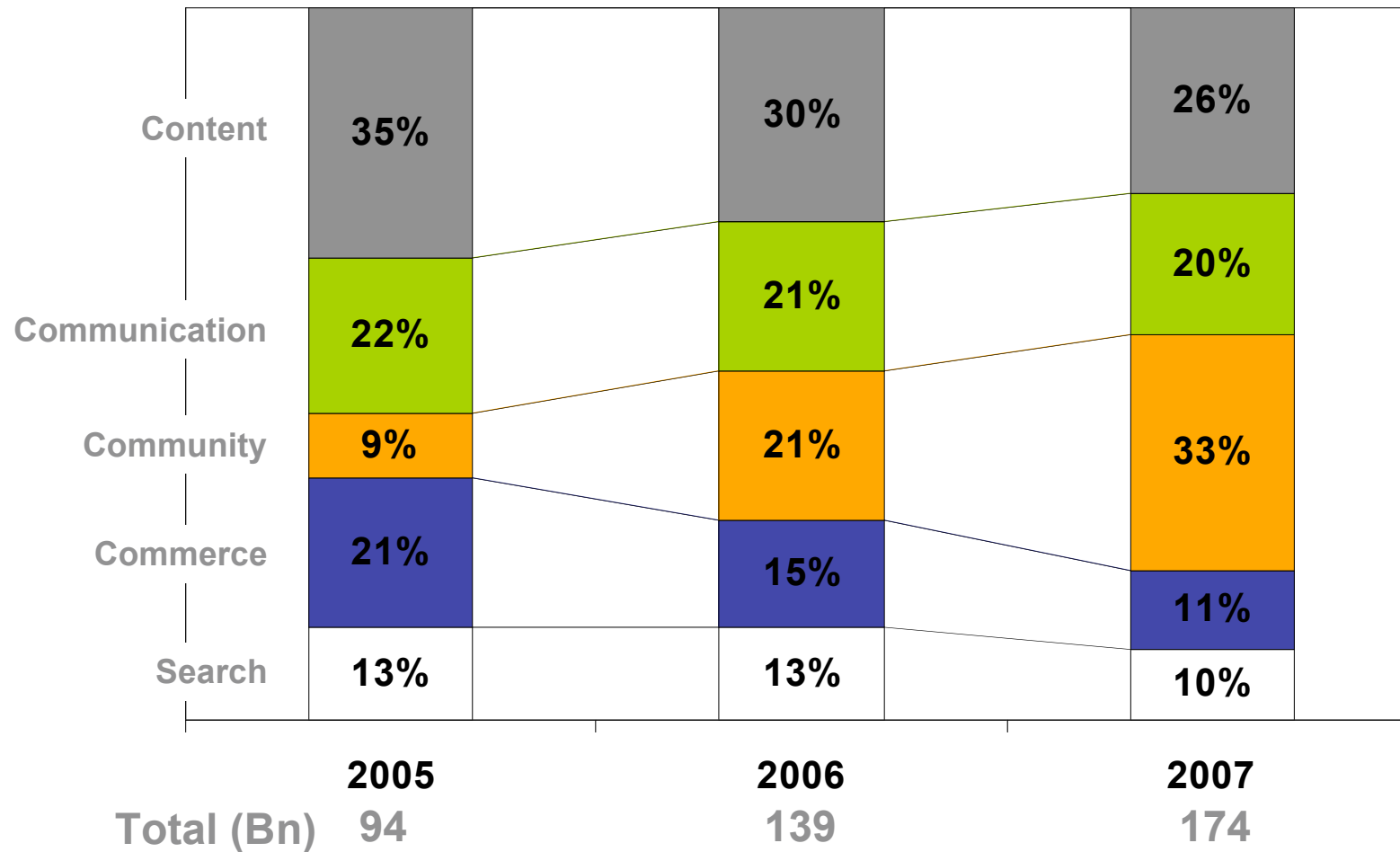


Source: Ovum



Consumer Networking is Back in Fashion

Internet Traffic Mix (PageViews)



Source: Nielson Netratings



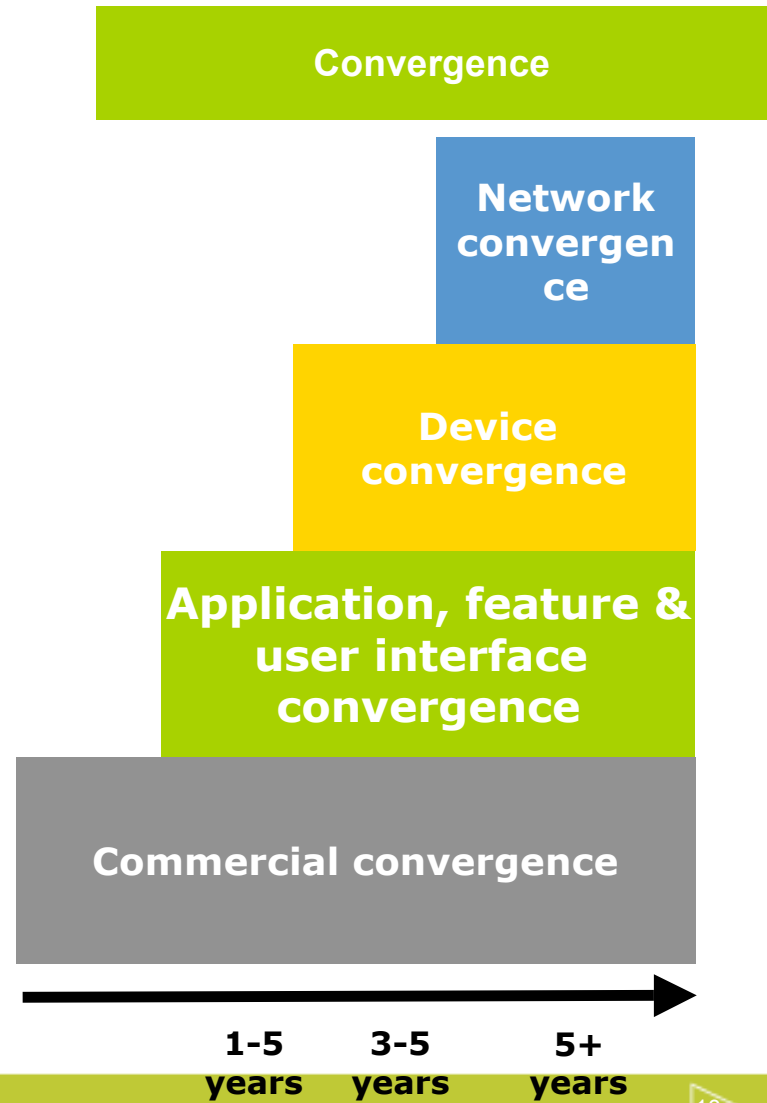
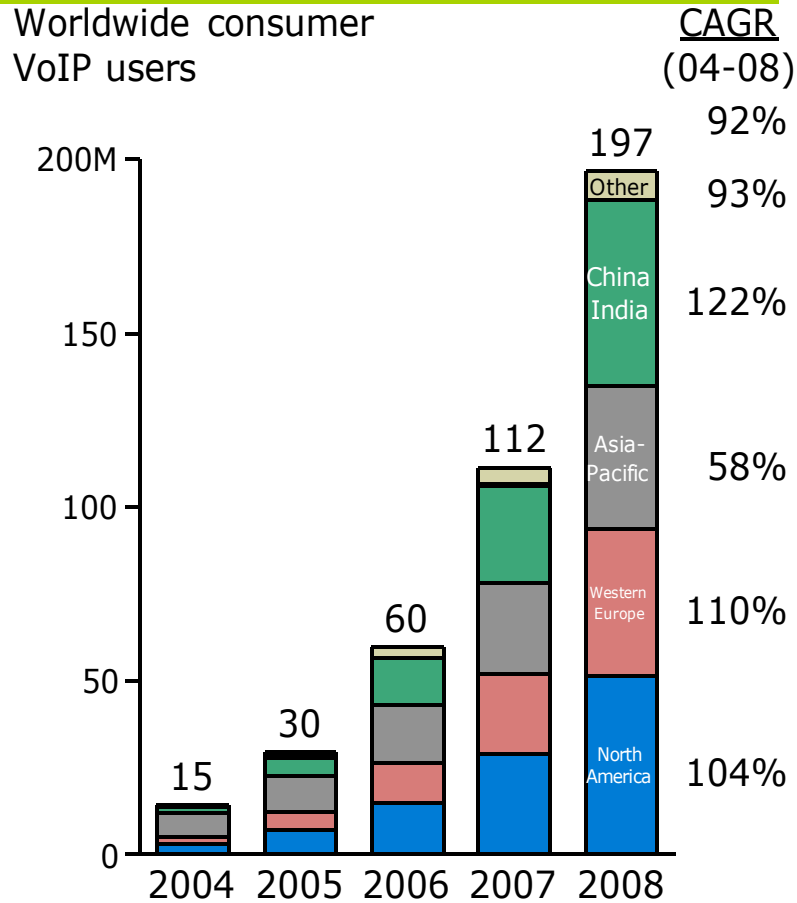
Video is the Driver of the Internet Now

Site	Unique Viewers	Rank	Videos	Rank	Minutes	Rank
Total Internet	133,646		9,076,567		24,163	
YouTube	66,146	1	2,369,151	1	6,253	1
Yahoo!	34,934	2	386,542	2	1,007	2
MySpace	32,399	3	267,164	3	730	3
AOL	22,550	4	148,111	5	403	6
MSN	16,318	5	137,968	6	283	7
Disney Online	13,907	8	182,416	4	189	12
iFilm	9,211	13	33,532	21	40	22
ESPN	7,733	18	75,389	12	98	16
Weather.com	6,498	21	14,262	28	11	29
Photobucket	6,230	22	14,943	26	16	27
ABC	3,089	26	17,709	24	10	30
Heavy.com	2,592	28	12,641	29	22	24
Facebook	2,454	29	7,064	30	13	28



What's happening around us?

VoIP users to increase globally at 60-120% CAGR



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Transformation to a Global Challenger

	VSNL (2002)	Tata Communications (2008)
Lines Of Business	<u>Monopoly</u> ILD Voice ILD (89%); Others (11%)	Voice, Data, IP, Mobility, Outsourcing, Broadband
Customers	Carriers; Retail (Dial-up)	Carriers, Large & Mid-sized Enterprises, Mobile Operators, Consumers
Reach	India-Centric Play; negligible global operations	Global Infrastructure, Global Customers
Financials#	Revenues: \$1.6 bn Market Cap: \$1.2 bn	Revenues: \$2 bn Market Cap: \$5 bn (Current)

March 31st of the year (FY02 and FY07)



Our Strengths

India Enablement

- #1 International and Enterprise data services in India
- Relationships with Top 2000 enterprises in India including Fortune 500 companies
- Best connectivity to India and expanded reach within

Global Submarine & IP Reach

- Owned cable network across the globe: \$1Bn investment
- Tier-1 Global IP Network and leading ISP in India
- Unique assets and connectivity in Asia, Middle East, Africa

Integrated Wholesale Services

- #1 wholesale international voice provider
- Suite of voice, data, IP, signaling and outsourcing services
- Over 1500 carrier relationships including 600+ mobile operators



Our Vision

Deliver a new world of communications to advance the reach and leadership of our customers



Major Investments: Cables

Existing Cables

OWN

- TGN-Atlantic
- TGN-Pacific
- TGN-Western Europe
- TGN-Northern Europe
- TGN-India Asia

CAPACITY

- SMW-3
- SMW-4
- SAFE/SAT-3
- others...

New / Planned

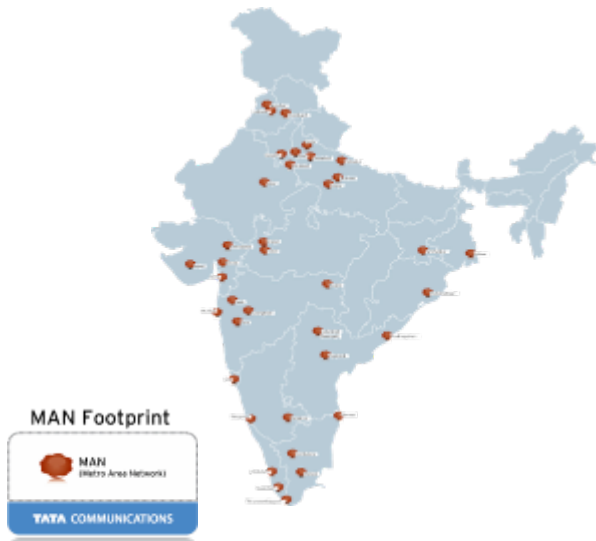
- **TGN-Intra Asia** S'pore-HK-Japan H2 2008
- **TGN-Eurasia** India-Europe H2 2009

- **IMEWE**
- **SEACOM**
- **Africa**



Major Investments | MPLS & Ethernet Expansion

- New IP, MPLS & Ethernet PoPs
- NNIs
- Fiber (MAN) roll-out in India



Major Investments | Managed Services

Managed IT Infrastructure Services

- Colocation Services
- Managed Hosting Services
- Managed Storage Services

Managed Security Services

- CPE-Based Services
- Cloud-Based Services
- Professional Services

Managed Application Services

- Audio and Web Conferencing Services
- Business Messaging & Collaboration Services
- Hosted Contact Center Services
- Managed Voice Services



Major Investments | WiMAX for Last Mile in India and South Africa

Businesses

- Supplement Fiber roll-out in major metros
- Expand access reach (~ E1) to all major business towns
- Current Status: 30 towns
- March 2009: 115 towns

Consumers

- Primary access mechanism for Broadband
- Provide reliable 1Mbps experience + content/apps
- Current Status: 1 city
- March 2009: 15 cities



Our Organization



5000 employees

20% outside India

37 nationalities

36 yrs avg age



Global Industry Recognition



The only Indian telco on the list – *BCG 2008 New Global Challengers*



2006 Best Wholesale Carrier Winner – *World Communications Awards*



2006 Best Pan-Asian Wholesale Provider – *Capacity Global Wholesale Awards*



CEO of the Year – N. Srinath: 2006 – *TelecomAsia*

Other recent awards:

- Atlantic ACM Excellence in Wholesale: 2008
- Frost & Sullivan #1 Enterprise Data Services Provider in India: 2007
- Voice & Data Top ILD Operator Award: 2001-2006



TAKING YOU FARTHER





TATA COMMUNICATIONS

Thank You

CORPORATE