

# Digital Business

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# Safe Harbor Statement

Certain statements in this release are forward-looking statements, which involve a number of risks, uncertainties, assumptions and other factors that could cause actual results to differ materially from those in such forward-looking statements. All statements, other than statements of historical fact are statements that could be deemed forward looking statements, including but not limited to the statements containing the words 'planned', 'expects', 'believes', 'strategy', 'opportunity', 'anticipates', 'hopes' or other similar words. The risks and uncertainties relating to these statements include, but are not limited to, risks and uncertainties regarding impact of pending regulatory proceedings, fluctuations in earnings, our ability to manage growth, intense competition in IT services, Business Process Outsourcing and consulting services including those factors which may affect our cost advantage, wage increases in India, customer acceptances of our services, products and fee structures, our ability to attract and retain highly skilled professionals, our ability to integrate acquired assets in a cost effective and timely manner, time and cost overruns on fixed-price, fixed-time frame contracts, client concentration, restrictions on immigration, our ability to manage our international operations, reduced demand for technology in our key focus areas, disruptions in telecommunication networks, our ability to successfully complete and integrate potential acquisitions, the success of our brand development efforts, liability for damages on our service contracts, the success of the companies / entities in which we have made strategic investments, withdrawal of governmental fiscal incentives, political instability, legal restrictions on raising capital or acquiring companies outside India, and unauthorized use of our intellectual property, other risks, uncertainties and general economic conditions affecting our industry. There can be no assurance that the forward-looking statements made herein will prove to be accurate, and issuance of such forward looking statements should not be regarded as a representation by the Company or any other person that the objective and plans of the Company will be achieved. All forward-looking statements made herein are based on information presently available to the management of the Company and the Company does not undertake to update any forward-looking statement that may be made from time to time by or on behalf of the Company.

# Top Performing Enterprises in Every Industry have Accelerated Digital Agenda in Past 2 Years



**73%**

Organizations where C-level execs are involved and focused in shaping company-wide digital strategy & rebalance investments



**65%**

More organizations scaling Data, Analytics & AI leverage



**59%**

Focused on Cloud adoption and Tech. organization, vendors to redesign to better support business strategy



**50%**

Organizations focused on Business/IT Operating Model Change

Source: *Prioritizing technology transformations to win, McKinsey Global Surveys, March 2022*

# Digital Transformation Creating New Deal Motions



## Operating Model Transformation

- Project to agile, product-oriented organizations
- Digital acceleration by combining ASM & AD spend
- Integrating Infrastructure & Application Service vendors



## Cloud Adoption

- Modernize applications and platforms through Cloud Native composable architectures
- Modern Data architectures, DataOps driving a data & insight driven culture
- Integrating Infrastructure & Application Service vendors



## Value Chain Transformation

- CX Transformation across B2B, B2C, B2B2C
- Omnichannel Commerce modernization
- Supply Chain transformation
- Core business platform modernization
- “Servitization”

# Value Chains in Every Industry are Being Reimagined



**BFSI**

- Payments anytime anywhere
- Open Banking
- KYC Modernization
- Sustainable lending
- Crypto Currency



**Manufacturing**

- Industry 4.0
- Operational & Supply chain Resilience
- Advance sustainability



**Retail & Consumer Goods**

- Supply Chain Resilience
- Dynamic Pricing
- B2B, B2C, D2C ecommerce
- Hyper Personalization



**Life Sciences & Health Care**

- Patient Care
- Claims & Processing
- Next gen HIS
- Preventive Care



**Telecom**

- 5G adoption, services and products
- Omni-channel (digital growth)
- Billing and Core Business Modernization
- Dynamic Pricing
- Servitization

**Business Drivers**

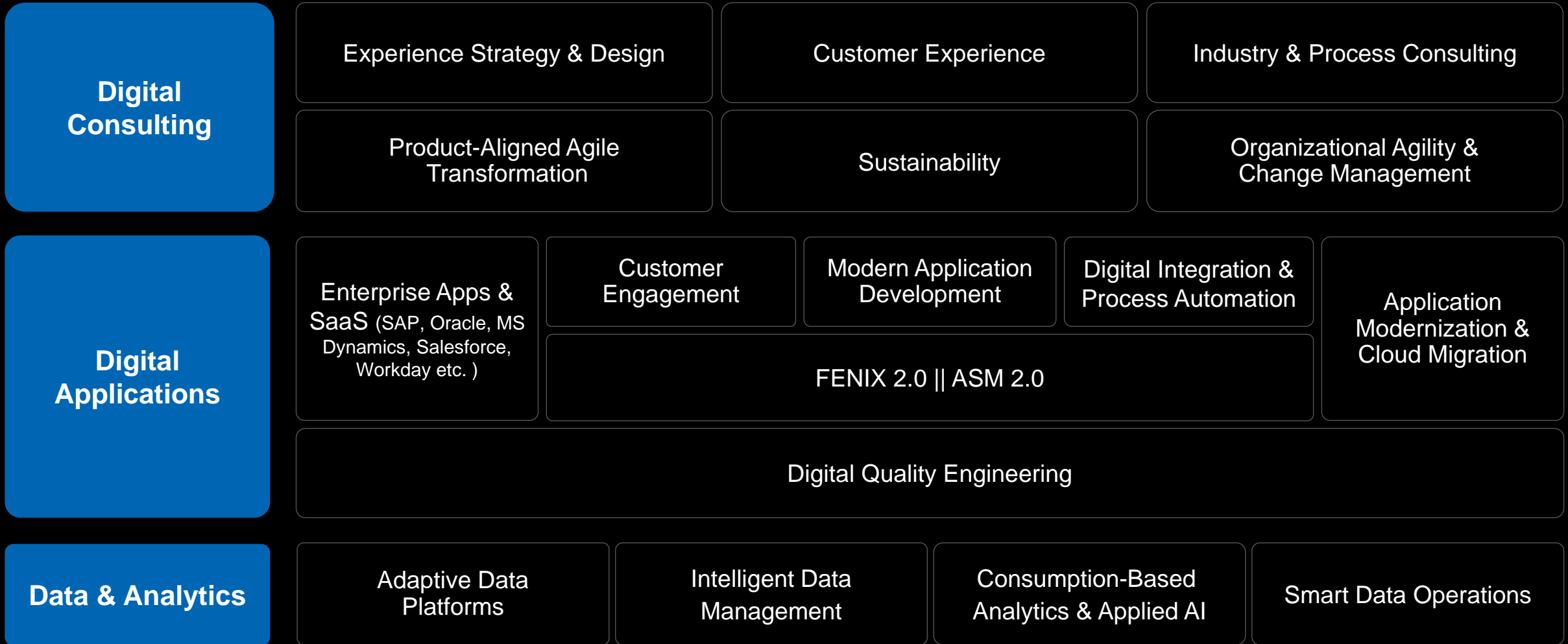
**Common Imperatives**

- CX (Customer, Partner & Employee) Engagement Transformation
- Leveraging Data Insights & AI
- Cloud Adoption



# Digital Business: A Differentiated Challenger

# Digital Business Services: Strategy to Execution



# HCL's Digital Business: A Differentiated Challenger



Experience in complex journeys of Business & IT Operating Model change through scaling Agile Delivery, Organizational Change Management

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Unique strength in integrating and transforming Application and Infrastructure Services

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Value Chain transformations through Application & Data modernization, Cloud Adoption, Analytical Insights and AI (Mode 2 Services is now 50% of our business)

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Strong 360° relationship with our extensive Partner Ecosystem across SaaS, Cloud, Enterprise Apps and Data Analytics

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Global Scaling capability of Digital Talent



# HCL's Digital Business: Strong Growth Since 2020

## Notable Customer Renewals

**54+**

Successful Customer Renewals with  
Enhanced Scope for Digital  
Transformation

## Notable Customer Wins

**66+**

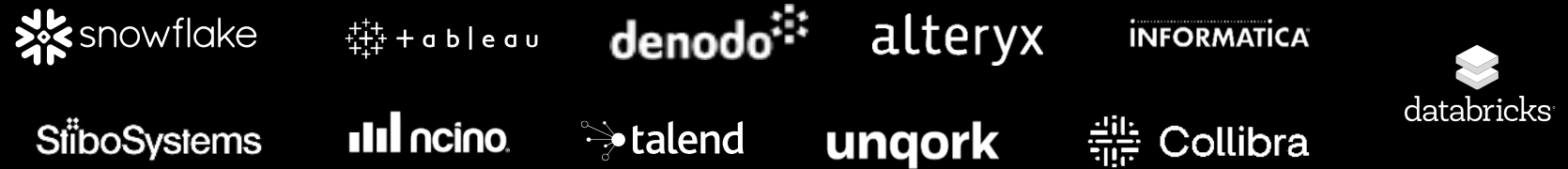
New Customer Wins as Digital  
Challenger with integrated Infrastructure  
& Application Services

# Strong Partner Ecosystem

## Application & Integration Partners



## Data and Analytics



## Cloud Ecosystem Partners



# Partnership Accolades



Summit Partner (only Indian SI to achieve this distinction without any M&A)



Platinum Partner and member of Partnership Advisory Board



Elite (Highest Level) Partner



Global Strategic Partner; 100% of SAP Customers willing to recommend HCL for SAP S/4 Hana; highest rating for S/4 Hana per Dec '21 Gartner Peer Insights



Elite (Highest Level) Partner

# Strong Analyst Recognition in Digital Capabilities

A Leader in 2021 Gartner® Magic Quadrant™ for Public Cloud IT Transformation Services, **Gartner**

A Leader in The Forrester Wave™: Application Modernization And Migration Services, Q3 2021, **Forrester**

A Leader in ISG Provider Lens™ Next-Gen ADM Services – AD & Scaled Agile US, UK, Nordics, Germany 2021, **ISG**

A Leader in ISG Provider Lens™, Digital Business - Solutions and Services - Digital CX Services, Digital Consulting, US, UK, Nordics, Australia 2021, **ISG**

A Challenger in 2021 Gartner® Magic Quadrant™ CRM and Customer Experience Implementation Services, **Gartner**

A Leader in ISG Provider Lens™ SAP HANA Ecosystem Services - SAP S/4HANA System Transformation - Large Accounts – US, UK, Nordics 2021, **ISG**

A Leader in Application Transformation Services PEAK Matrix® Assessment 2021, **Everest**

Digital CRM and CX, 2021, 2020, Leader in Digital Commerce, 2021 **Avasant**

A Leader in Enterprise Quality Assurance (QA) Services PEAK Matrix®, 2021, **Everest**

A Leader in ISG Provider Lens™ Digital Business - Solutions and Services - Sustainability & Decarbonization Services - US,UK,Australia 2021, **ISG**



# Digital Impact across Industry Verticals

# Financial Services: Select Case Studies

FY19



FY22

## Global US-based F50 Bank

- Legacy, project-based approach to IT
- Engaged to modernize technology stack

- Revamped cards/lending value stream
- Cultural change across Technology Organization
- Over \$30M annual revenue run rate

## Leading Asset Manager

- Legacy IT - lack of agility & automation
- Need for integrated platform management & cloud transformation

- Digital Operating Model driven by Automation and Service Consolidation along with Cloud Adoption
- Large anchor client in Investment Management domain

## Leading APAC Bank

- Operating Model Transformation
- \$5M/year revenues


- Digital Payments Transformation and Cloud Adoption
- >\$40M/year revenues

## Global Europe-based Bank

- Digital Challenger for Scaling Agile
- Engaged to modernize technology stack
- Under \$25M/year revenues

- Fintech Integration & scale-up
- Global KYC Process Transformation, Online Banking
- Over \$100M annual revenue run rate

**HCL**



# Digital Impact across Industry Verticals

# Telecom: Select Case Studies

FY19



FY22

## F500 Mobile Telecom Provider

- Operating Model Transformation (SaFE Agile adoption), Omni Channel Commerce, Legacy modernization
- Revenues >\$50M/year

- Agile-driven Product-centric Delivery Model
- Core Telecom Value Chain Transformation
- Digital Financial Services
- 100% Revenue Growth (> \$150M/ year)

## Top US Telecom Provider

- Entry as Challenger
- Digital Acceleration-driven legacy apps and platforms modernization


- Technology Stack Modernization & Agile Delivery Model
- Core Billing & Rating Platform Modernization
- Intelligent Core Data & Analytics
- Revenue growth to over >\$100M/year

## Leading European Telecom Provider

- Integrated Infra + Application Services
- Cloud Adoption (AWS)
- DevSecOps Adoption

- DevSecOps, Cloud Adoption and Agile Delivery
- > \$50M revenue growth





# Digital Impact across Industry Verticals

# Diversified Industries: Select Case Studies

FY19



FY22

## Global Food Manufacturer

- Legacy, project-based approach to IT
- Engaged on a Pilot Data modernization program (introduced as a challenger)

- Strategic partner post-vendor consolidation (among 3)
- Data Modernization and API/integration Primary Partner
- >\$20M/year revenues

## F500 Tools Manufacturer

- Integrated App and Infra managed services
- Replaced two primary and six secondary vendors

- Omnichannel Modernization on SFDC
- Digital Marketing Modernization
- >\$50M/year revenues

## APAC Dairy Processor

- Integrated Apps. & Infra. Services

- Technology Stack Modernization and Cloud Adoption
- 32% Revenue Growth

## European Utilities Provider

- Chosen for CX & Value Chain Transformation

- DevSecOps & Cloud Adoption
- Revenues Tripled

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# ***HCL***

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\$11.5 BILLION | 209,000+ IDEAPRENEURS | 52 COUNTRIES