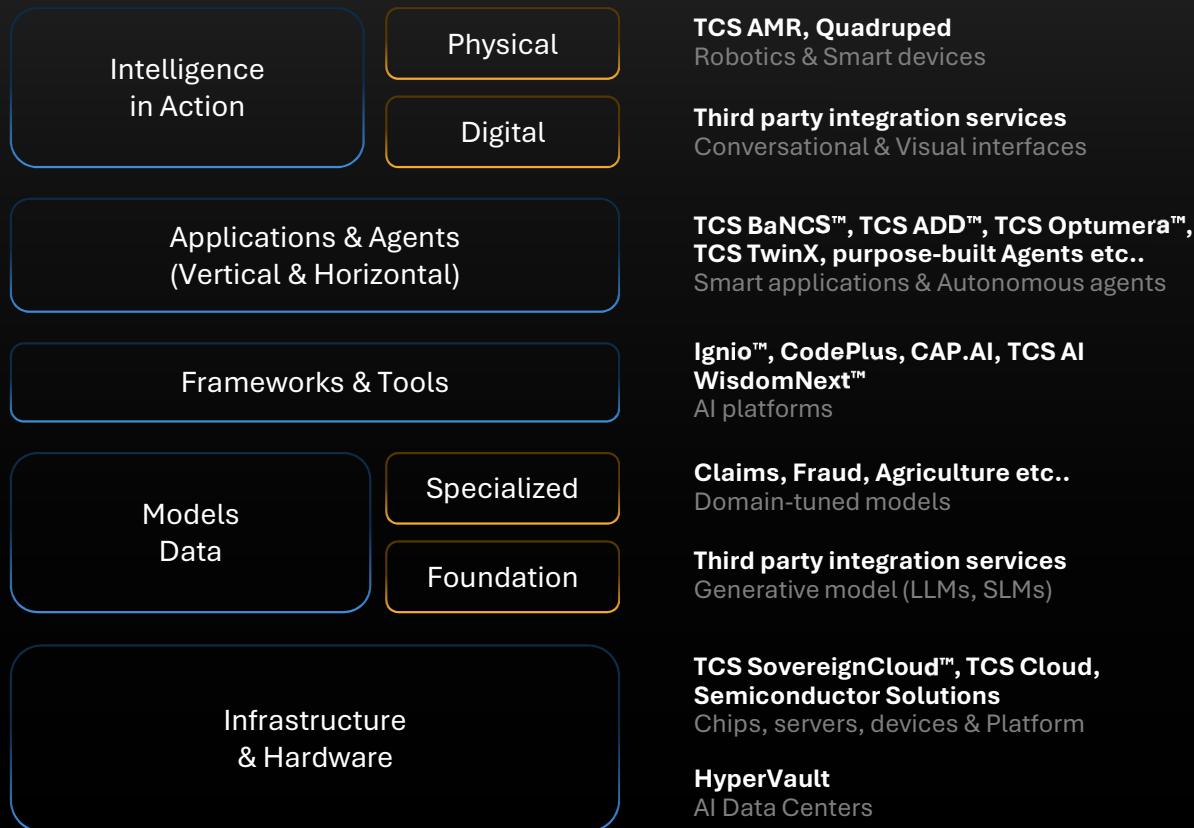


TCS AI Ecosystem

Mangesh Sathe



From Infrastructure to Intelligence



Gaining leadership in Full stack AI Services

Our aspiration is to be a strategic partner for our clients across the full AI tech stack. Towards this we will,

Build

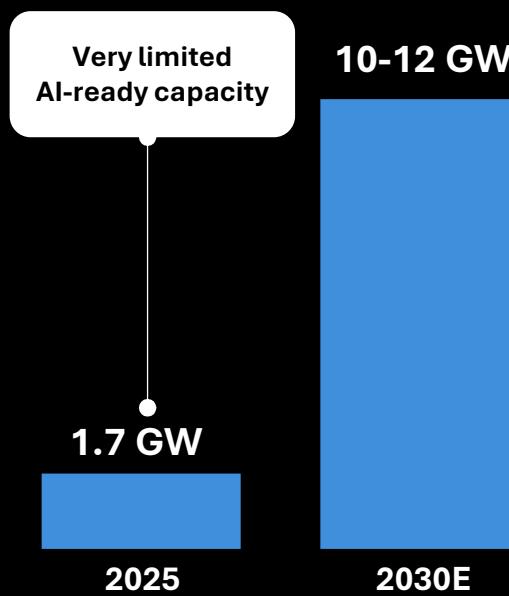
Talent, Intellectual Property & New Ventures

Partner

AI native, Hyperscalers & Big Tech

Acquire M&A, Top talent

Build: AI infrastructure to enable full stack AI services

India Data Centre (DC) Market (GW)	Customer Segments and Needs	Rationale for TCS
<p>Very limited AI-ready capacity</p>  <p>1.7 GW</p> <p>2025</p> <p>10-12 GW</p> <p>2030E</p>	<p>Hyperscalers</p> <ul style="list-style-type: none"> Liquid-cooled, high-density infrastructure Latency: Rapid builds near existing regions <p>AI Companies</p> <ul style="list-style-type: none"> High performance infrastructure with lower TCO Access to enterprise customers <p>Public Sector</p> <ul style="list-style-type: none"> Sovereign, resilient infra and operations AI-led unified governance <p>Private Sector</p> <ul style="list-style-type: none"> Full AI stack – Secure, Scalable, low TCO Enable modernization and AI-led business transformation 	<p>Position as one stop AI ecosystem orchestrator and transformation partner</p> <p>Deepen partnerships with Hyperscalers, AI companies & DC ecosystem</p> <p>Leverage deep domain expertise and group synergies</p> <p>Build capabilities to service high growth data centre market globally</p>

Build 1GW+ AI data center capacity | Strategic Partnership with TPG | Deploy mix of equity and debt

Partner: 360° collaboration with Hyperscalers, AI innovators, DC ecosystem

Key Focus areas:

AI Services

AI Infra

Cyber security

Cloud

Enterprise Solutions

Digital Engineering

Players

- **AI companies:** Models, Compute, Software
- **Hyperscalers**
- **Enterprise applications**
- **Sector-specific players**
- **Industrial OEMs**

Partnership framework

- **Mutual services:** AI Infra adding a new dimension to the partnership
- **Growth focus:** Joint focus on scaling revenue, market reach
- **Innovation and co-development:** Collaborative development of next-gen solutions

Select examples



AI, Cloud, Modernization, Industry Solutions



Cloud-native innovation, AI workflows



AI-led business transformation



Agentic AI solutions



AI-powered front-office transformation

Acquire: Strengthen our positioning to drive AI-first transformation

Key M&A Objectives

Accelerate AI capabilities
Tech & Advisory

Build deep domain expertise in high-growth areas
Cyber security, Cloud, Digital Engineering, Enterprise Solutions

Enhance market access

Case Study

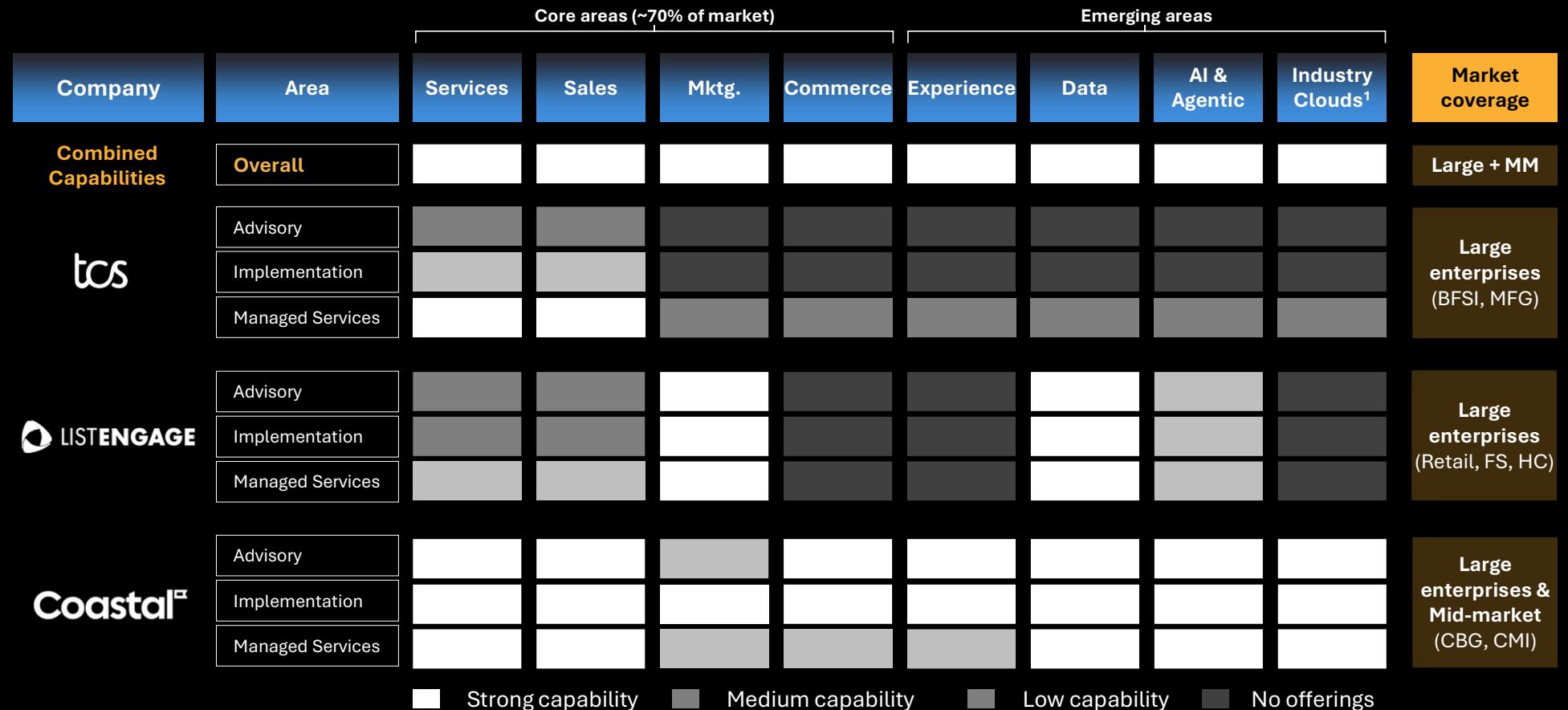
Market:
\$20B Salesforce services market in 2025 → \$ 30B by 2030

Strategy:
Leverage M&A to become Top 5 global Salesforce advisory firm

tcs + **LISTENGAGE** + **Coastal**

- ① Boosts **AI advisory services** for enterprises
- ② Enhanced portfolio to cover all **major Salesforce capabilities** (multi-cloud)
- ③ Deepened **strategic partnership with Salesforce**
- ④ **Cover key market segments** including mid-market
- ⑤ Onboarded **500+ seasoned talent base and leadership team**

Post acquisitions, TCS's portfolio now has all major SF capabilities and market coverage



Thank you

