Infrastructure Services is a large Opportunity

Total IT Services market: $980Bn in 2015 growing to $1066Bn by 2017
Gartner Forecast: IT Services, Worldwide, 2012-2018, 4Q14 Update

<table>
<thead>
<tr>
<th>GEO</th>
<th>2015 Market share</th>
<th>CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>US &amp; Canada</td>
<td>39.2%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Europe</td>
<td>30.0%</td>
<td>2.1%</td>
</tr>
<tr>
<td>APAC</td>
<td>24.8%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Rest of the World</td>
<td>6.0%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Practice</th>
<th>2015 Market share</th>
<th>CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Datacenter</td>
<td>35.7%</td>
<td>7.3%</td>
</tr>
<tr>
<td>EUC</td>
<td>11.6%</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Network</td>
<td>11.8%</td>
<td>0.1%</td>
</tr>
<tr>
<td>SI</td>
<td>15.9%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Infra Consulting</td>
<td>5.5%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Product</td>
<td>19.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

Total market size of Renewal is ~$190Bn in next two years
Source: ISG

Large renewal market

Total market Size or renewal deals ($ bn)*

2014 112.95
2015 91.93
2016 97.31

“IS Outsourcing: Fastest growing segment: NASSCOM

Source: NASSCOM strategic review 2015

Source: ISG

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Wipro has Global Scale & Strategic depth

$2.1 Billion

700 Clients

19% YOY Growth

32,000 Employees

KPMG UK’s Pulse Survey rates Wipro as #1 Infrastructure Services Provider

Everest ranks Wipro as a "Major Contender" in the PEAK Matrix Assessment for Infrastructure Services (ITO) in 2013

*FY14 nos Including Products
We have the momentum (1 of 2)

USA
- **Manufacturing**
  DC Migration & Backup Redesign
- **E-commerce**
  DC, EUC and N/W Transformation & management
- **Apparel**
  DC, EUC &SD, Networking and security
- **Insurance**
  Total Outsourcing deal with Automation

CANADA
- **Power, Natural Gas**
  DC, EUC and N/w transformation & manage services
- **Postal**
  Infra OS- Utility based Model

Middle East
- **Chemical**
  Transformation for Service desk, EUC, N/w Security, Data center
- **Oil**
  DC management and Ops
We have the momentum (2 of 2)

IRELAND
- Banking
  - Datacenter outsourcing
- Construction
  - Integrated Apps+Infra+BPO
- Natural Gas
  - IT outsourcing

UK
- Banking
  - Optimization of platforms, core banking servers
- Construction
- Natural Gas
  - IT outsourcing

Continental Europe
- Steel
  - Platform integration and managed services
- Media
  - RIM of LAN wan video. Open source based hybrid cloud
- Manufacturing
  - Workplace transformation

AUSTRALIA
- Retail
  - Infrastructure transformation in DC, EUC and Network
- Media
  - EUC & SD management along with operations of IT network and Data Centre

JAPAN
- Pharma
  - Infrastructure-as-a-Service

INDIA
- Airport
  - Total infrastructure outsourcing
# Case Study – Global Consolidation

**Old World Scenario**
- Globalization and growth through M&A’s
- Focus on integration of newer entities

**Industry Challenges**
- Low R&D productivity
- Lack of sufficient pipeline of drugs coupled with patent cliff
- Increasing cost pressures

**Business Expectations**
- Global standardization through One Company & One Worldwide Vendor
- Shift from CAPEX to OPEX model for datacenters

**Ruthless Efficiency & Business Enablement Levers**
- Variabilization & IaaS models to meet business demands
- Globally standardized service with uplift for regional nuances
- Significant savings from existing de-centralized model

**Wipro Solutions & Differentiators**
- Multilingual delivery
- Outcome based pricing model to manage variations in demand (-20% to +30%)
- Deployment of ServiceNxt framework and automation tools like Fixomatic
- Centralized monitoring from India for global infrastructure

---

Largest Pharma company in Japan and a global leader with market presence in 70 countries and over 30,000 employees
Case Study - Business Linked KPIs

A leading British integrated support services company with a substantial portfolio of Public Private Partnership projects and extensive construction services

Old World Scenario
- Significant erosion of profit in previous year
- Needed huge cost take outs to the tune of 30-35% from IT

Industry Challenges
- Internal IT managed by internal team
- IT heads for projects were internal team
- IT for customer projects o/s to Accenture for the last 10 years

Business Expectations
- Replace incumbent and provide required cost take outs

Ruthless Efficiency & Business Enablement Levers
- Committed cost savings - TCO reduction by 30%
- 6% YoY productivity improvement
- Business linked KPI and SLA’s
- Variabilization through core flex delivery models

Wipro Solutions & Differentiators
- Automation, standardization and continuous improvement through platform based delivery
- Integrated IT BPO delivery for BLA transformation
- Infrastructure sharing across customer projects
Case Study - Business Transformation

A leading American specialty glass and ceramics manufacturing company, primarily for industrial and scientific applications

Old World Scenario
- Highly Distributed Environment with 112 globally distributed Sites - 25 countries & 5 Data Center in 3 continents

Industry Challenges
- Achieve important economies of scale that continue to reduce the cost and deliver superior quality for customers
- Increasing challenges in Data Privacy and Regulatory Compliance

Business Expectations
- Major and complex transformation for a First Time IT Outsourcer with standardized services across regions
- IT on a pure play 'Consumption Model' moving away from the legacy 'Buy & Stack-up' Models.

Ruthless Efficiency & Business Enablement Levers
- Globally standardized service across 3 continents & multiple remote sites
- Wipro to be the 'Virtual IT' organization and would take end-end responsibility of all underlying Third Party contracts

Wipro Solutions & Differentiators
- 20% of TCO into Build (Projects - uplift revenue) with 20 Infrastructure & Security Transformation Projects
- Largest Cloud Orchestration deal for Wipro on Converged Infrastructure with Global Disaster Recovery Sites
- Heavy Focus on Data Privacy and Regulatory Compliance
Case Study – National Critical Infrastructure

• 34 million passengers per annum capacity
• 5.4 million Sq ft. area
• 9 level passenger terminal building and 2 piers each 1.2 km long.
• 6 Common check-in islands -168 check-in counters
• 95 Immigration counters, 78 Passenger Boarding Bridges
• 6.7 million Sq. ft. of apron area
• Over 215000 Sq. ft. of retail space.
• 9 level passenger terminal building

ICT Offerings
• Application Infrastructure
• Services Support
• Security Support
• Network Support, Server Support, Active Directory Management
• Help Desk Services
• Asset Management Services
• Vendor Management
Changing Business Landscape

1. The rise of the digital economy
   (Connected devices, Internet of things)

2. The data monetization Gap
   (Scale & explosion in availability of data but lack of exploitation)

3. Blurring industry borders
   (Face of competition & pace of innovation)

Our Belief...
- Managing business will continue to get complex
- Cross industry phenomenon due to digitization of the Front office will lead to a lot of cross Industry innovations
- Using the data & meaningful insights to make decisions will be key to the growth.
### Changing Data Fabric – A Connected World

<table>
<thead>
<tr>
<th>Increasing Sources of Data</th>
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</thead>
<tbody>
<tr>
<td><strong>Machine / Device</strong></td>
<td></td>
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<tr>
<td>Sensors / IT Systems / Devices</td>
<td></td>
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<tr>
<td><strong>Customer Experience</strong></td>
<td></td>
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<tr>
<td>Contact, Emails, Voice, Video</td>
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<tr>
<td><strong>Social Interactions</strong></td>
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<tr>
<td>Networks like Twitter, FB..</td>
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<tr>
<td><strong>Market / Public</strong></td>
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<tr>
<td>Fin Markets, Open Data</td>
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</tbody>
</table>
Changing technology Landscape

Non-IT Devices

IT aware Devices

Redundant Hardware

Intelligent Software

Software Defined Everything

Changing technology Landscape

Intelligent Software

Software Defined Everything

Redundant Hardware

Non-IT Devices

IT aware Devices

Changing technology Landscape

Intelligent Software

Software Defined Everything

Redundant Hardware

Non-IT Devices

IT aware Devices
Wipro is responding to the new world

CxO’s Ask
- Agility
- Services Based
- Relevant Data
- Multi-system integrated
- Open Systems

Wipro Responds
- Open Cloud
- XaaS
- IoT
- Smart infra
- Open DC

Non-IT Devices
IT aware Devices

Intelligent Software

Software Defined Everything

Redundant Hardware
Bracing for the change

• New skill set required at all levels to manage “New World Infrastructure”

• Focus on Turnkey projects – Software defined infra, Smart city, Internet of things etc.

• Cross skill set needed in higher volume

• Pre tested, validated reference architecture and solutions

• Strategic alliances with niche technology players
# Case Study – Smart city

<table>
<thead>
<tr>
<th>Situation</th>
<th>Our Approach</th>
<th>Impact</th>
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<tbody>
<tr>
<td>• Digital-Lifestyle experience in the city – Villa owners &amp; Apartment owners in the Township&lt;br&gt;• Envisaged an integrated city solution&lt;br&gt;• City wide Network infrastructure</td>
<td>• Evaluate World class Home Automation products &amp; Technologies&lt;br&gt;• Integrated solution &amp; Platform which integrated all modules of the Digital Lifestyle experience Automation&lt;br&gt;• Network design &amp; Integration of all components on a Media Center PC&lt;br&gt;• Project Management capabilities&lt;br&gt;• Solution Documentation&lt;br&gt;• Preparing Sales &amp; Marketing Catalogue for the Digital Experience</td>
<td>• Encompassing aspects of a digital city of Home automation, Security, Communication &amp; Entertainment&lt;br&gt;• An Integrated service delivery model - Single Window Clearance, Integrated Bill etc&lt;br&gt;• Convergence of Broadband Internet, Wire line Voice and Television (IPTV, DTH )&lt;br&gt;• Flexibility for subscribers to choose between service providers&lt;br&gt;• Efficient Backend operations between various SPV through shared services. Shared Services becoming a Profit Center</td>
</tr>
</tbody>
</table>
Case Study – Smart University

Women only University, Riyadh with 50,000 students and 12,000 employees
Our Investment in IP & frameworks

- **ServiceNXT™** - Wipro's Blueprint for Next-Gen IT Monitoring & Mgmt Services
- **VirtuaDesk™** - Wipro’s Appliance based Desktop Virtualization Solution
- **FixOmatic™** - End User Service Requests & Datacentre Operations Automation
- **istructure™** - Wipro’s Public / Private Cloud IaaS / PaaS Offering
- **ROBODO™** - Integrated Appliance based solution for Remote Office-Branch Offices
- **SDi** - Wipro’s Blueprint for Software defined Storage & Network
- **InsightX™** - Application Led Discovery of Infrastructure & Dependencies for Rationalization & Optimization

- **Ready to Deploy Blueprints**
- **Award winning IPs & Solutions**
- **Top Partnership with OEMs**
- **Factory Model for Rollouts**
- **Manage & Own User Adoption**

- Accelerated Timelines
- Outcome based Pricing
- Extended Savings on RUN
Wipro’s AI framework - HOLMES

<table>
<thead>
<tr>
<th>NATURALLY INTERACTIVE</th>
<th>KNOWLEDGE REPRESENTATION</th>
<th>ALGORITHMIC INTELLIGENCE</th>
<th>LEARNING</th>
<th>REASONING</th>
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</thead>
<tbody>
<tr>
<td>CURATED KNOWLEDGE SYSTEM - WIPRO POLICIES</td>
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<tr>
<td>Predictive Analytics Engine</td>
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<tr>
<td>NLP Employee Engagement</td>
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<tr>
<td>Customer Support Help Desk Bots</td>
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<tr>
<td>Enterprise KYC Automation</td>
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<tr>
<td>DIGITAL BRANCHLESS BANK</td>
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<tr>
<td>SAP Application Management Bots</td>
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<tr>
<td>Intelligent Recruitment Agent</td>
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Context and Event Driven Services
Task & Process Automation, State Machines - FSM, CEP
Helpdesk Automation

Service Ticket

01
We create Machine Learning models using historical information, corpus of tickets, resolutions, assignments.

02
Alex an employee has an issue with his printer & types the problem into a natural language interface.

03
The bot receives the ticket and intelligently categorizes it assigning to the right personnel.

04
Once assigned to a category, the ticket is picked up by a relevant agent and another bot recommends to the agent a preferred solution.

05
A third bot will look into all the assignment of categorization, status of ticket and find out unresolved tickets.

06
The information about issues, problems, resolution from every ticket are fed back into intelligent categorization and assignment bot.

Bots are Created with Model, Natural Interaction Capabilities to Process Tickets. Deployed into Scalable Environments & Integrated with Help Desks

DIAGNOSIS
ANTICIPATION
RESOLUTION

METRICS
- 500,000 + tickets corpus
- 3500+ Categories
- 60+ Service Functions
- 10% reduction in transition time
- 95% accuracy in Infrastructure tickets handling
- 12,000 tickets handled per day
Thank You

Rohit Adlakha
Vice President, GIS