HCLTech | Supercharging Progress™

Engineering the next

Digital and Traditional Engineering

Vijay Guntur
President, Engineering and R&D Services

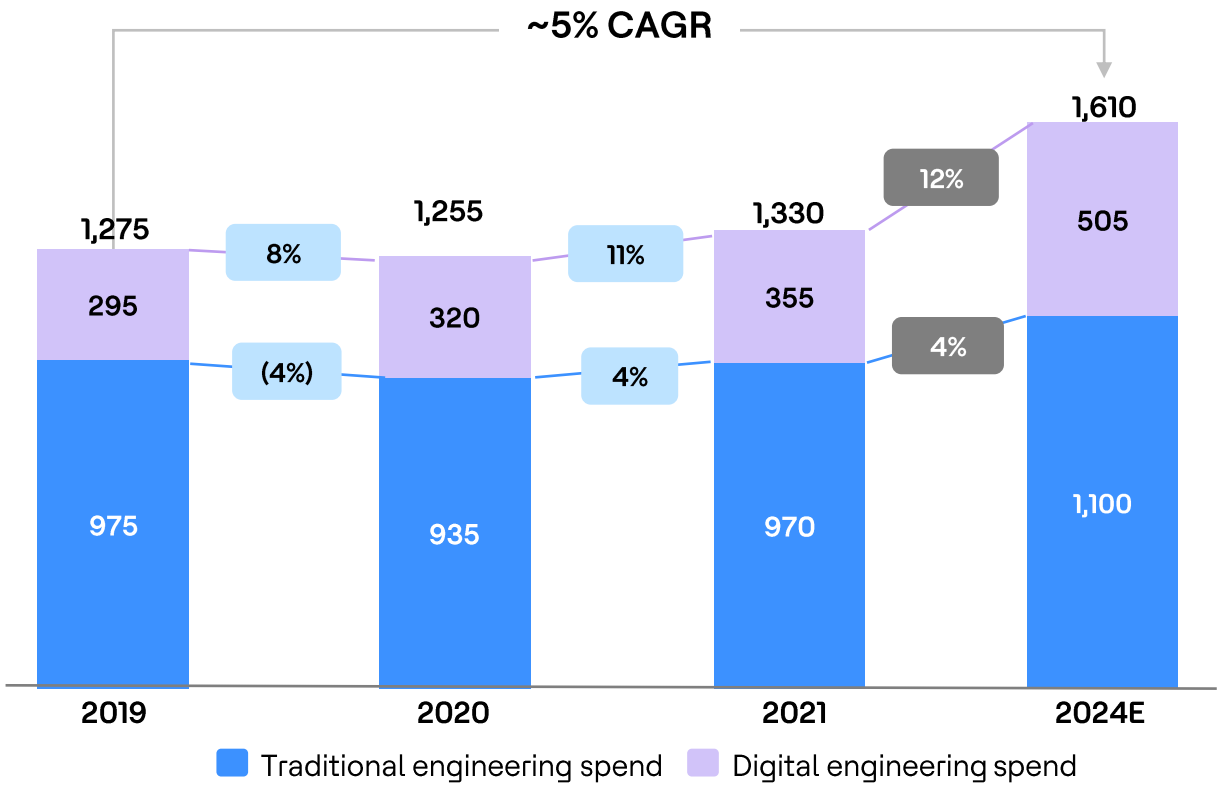
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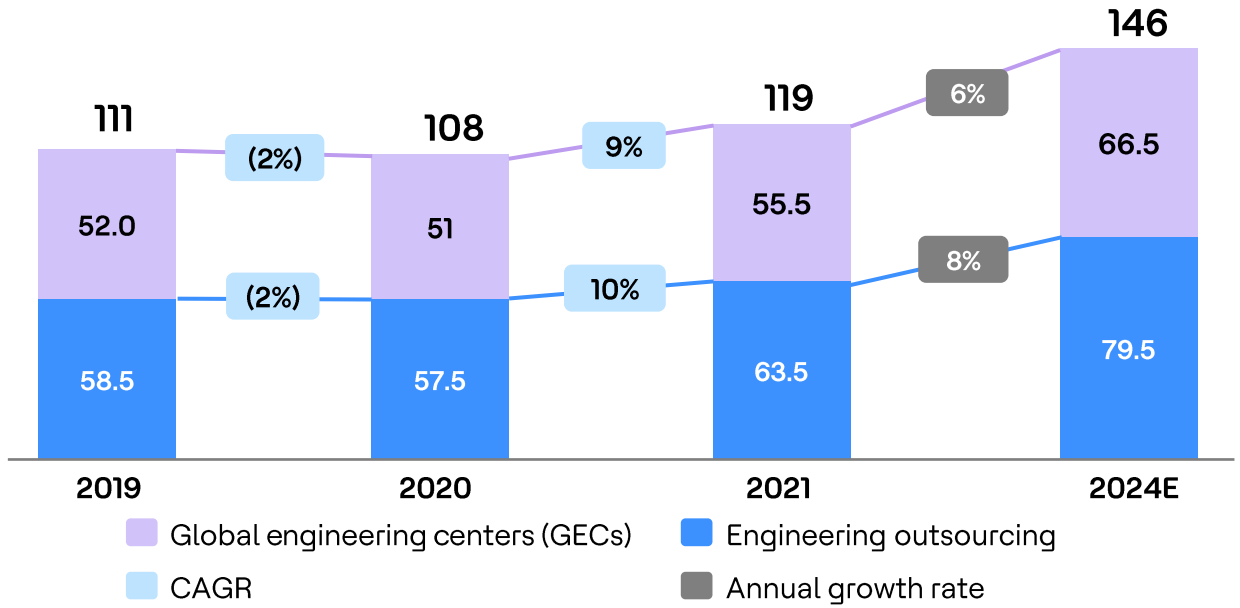
ER&D Sector is taking center stage

Digital Engineering with >12% CAGR is the primary growth driver

Global ER&D spend & share of digital eng. 2019-24E, $B



Growth & segmentation of ER&D global sourcing 2019-2024E, $B



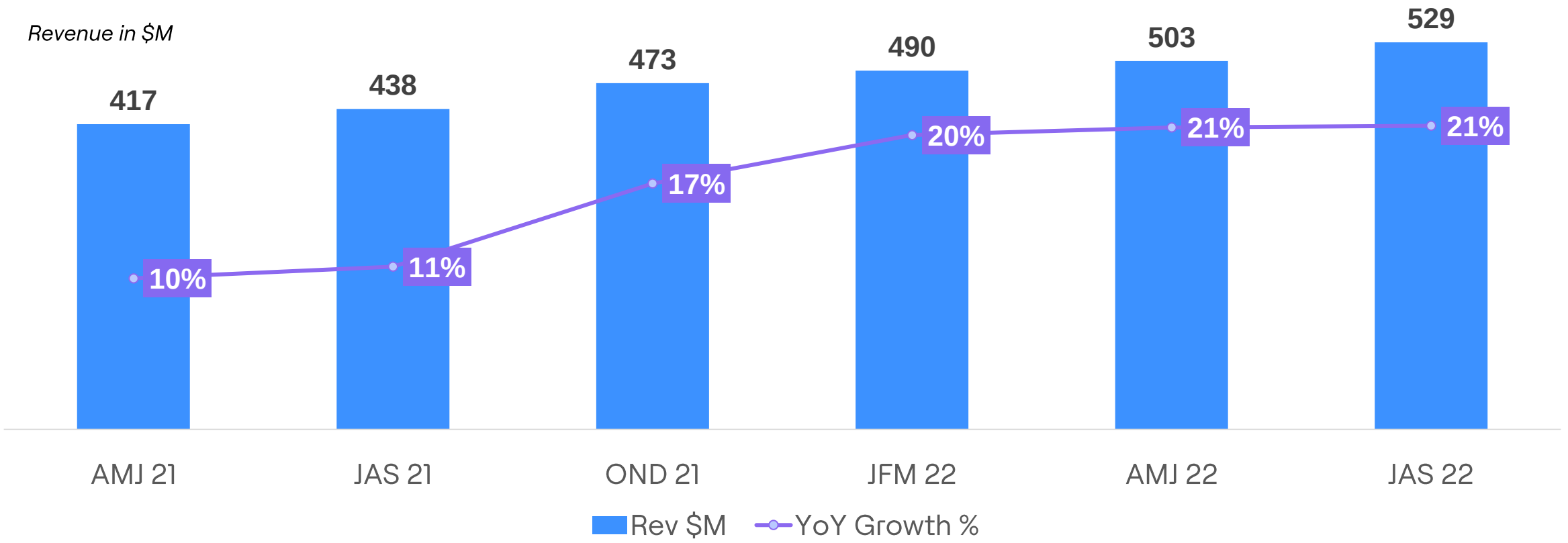
Digital Engineering mix in global ER&D spend will grow from 27% in FY'21 to 31% in FY'24. Global sourcing of ER&D spend is ~9%

Source: Everest Group (Mar 2022), HCLTech ERS

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ERS growing steadily

Quarterly revenues & growth rate

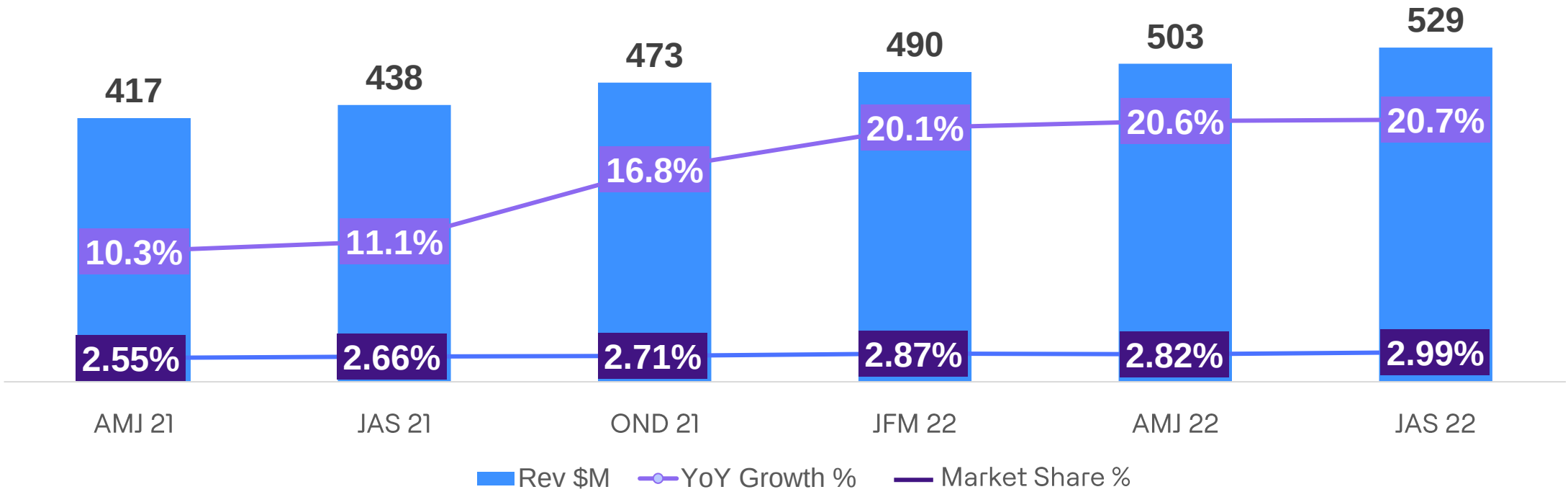


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ERS gaining market share

Quarterly revenue, growth rate & market share

Revenue in $M



ERS market share grew from 2.55% to 2.99% over last six quarters

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ERS positioning

Our Value Proposition

Accelerating "Time to Market" and "Time to Monetize" of products and platforms for global enterprises by adopting digital engineering led innovations

#1 Engineering Services provider

Everest Group's 2022 PEAK Matrix® provider of the year award for engineering services

Traditional Engineering

Product Engineering

Product R&D and sustenance

Operational Technologies

Modernizing manufacturing infrastructure and processes

Digital Engineering

Creating smart, intelligent, connected products and manufacturing processes

Enabling Technologies

IOT | AI/ML | AR/VR/XR | 5G | Cloud | Blockchain | Additive Manufacturing | Computer Vision | Digital Twin

ERS recognized as leader in every single competitive ER&D benchmark

Recognized as **# 2** player in **Everest Group Engineering Services Top 50™ 2022** List

Nov. 2022

Only service provider to be positioned in the **Top 2** in **both Digital Engineering and Overall Engineering R&D Services – Zinnov Zones** Engineering R&D Services 2022

Nov. 2022

Recognized as a **Leader** in **IDC MarketScape** Worldwide Manufacturing PLM Strategic Consulting and PLM Systems Integrator and BPO Services 2022

Nov. 2022

Positioned as a **Leader** In Everest Group's **Digital Twin Services PEAK Matrix® Assessment 2022**

July 2022

Positioned as a **Leader** In **ISG Provider Lens™ Digital Engineering Services** – Connected and Intelligent Operations – Discrete Industries, U.S. 2022

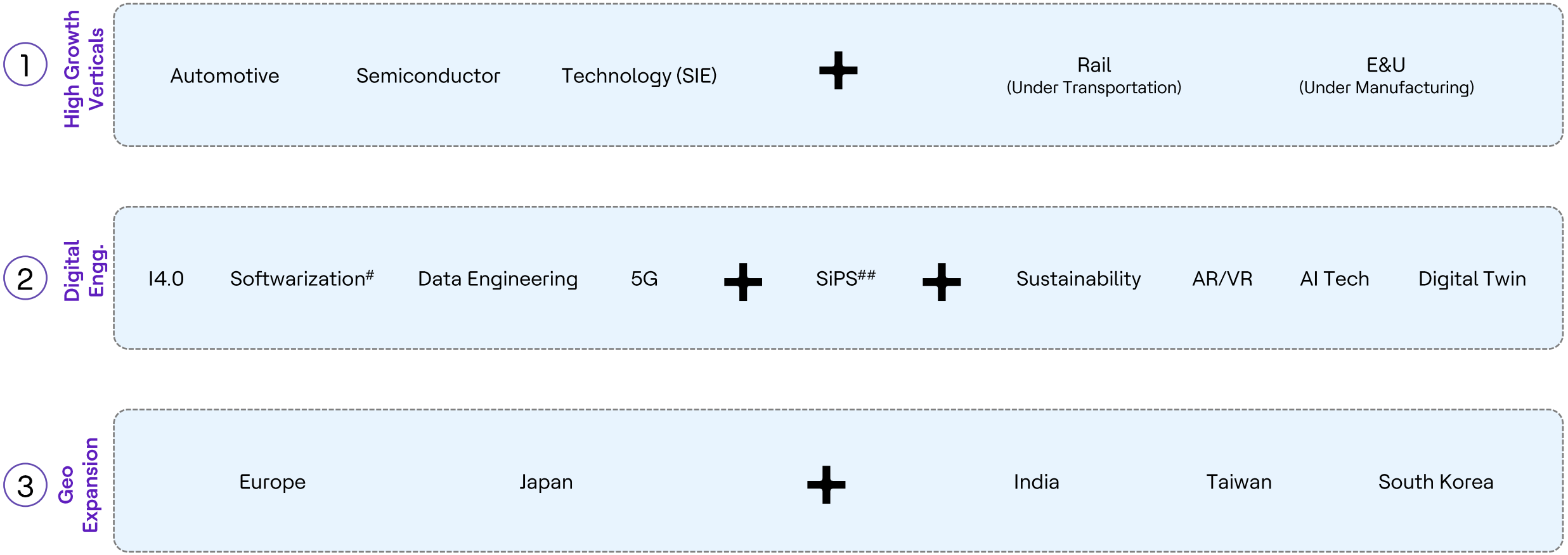
June 2022

Positioned as a **Leader** In **Avasant AR/VR/XR Services 2022 RadarView™**

May 2022

40+ Competitive benchmarks across 11 Studies by Leading Research & Consulting Firms like: Everest Group, Zinnov, ISG, Avasant, IDC, CIMData

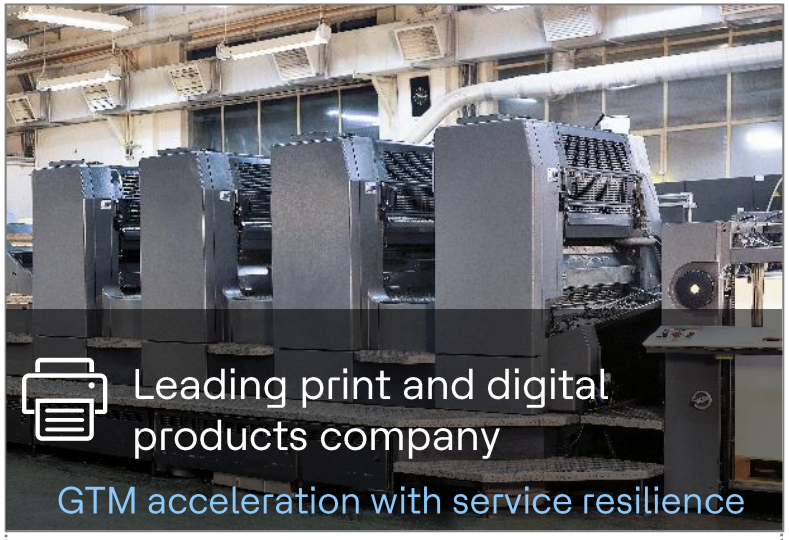
Big bet areas that supercharge our progress



Softwarization: Digital Platforms; Digital Commerce; Cloud Engineering
Silicon Platform Solutions

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Supercharging performance in select verticals



Leading print and digital products company

GTM acceleration with service resilience

Accelerated digital transformation with **Managed Services of 25% PODs** for print and personal systems

Enabled quick ramp-up of nearshore teams (**300+ FTEs across 3 continents**) with the right mix of Cloud, Data & Apps expertise



Global mobile manufacturing company

Silicon platform for next-gen mobile

Accelerated development of complex SoC meeting stringent product goals, reducing overall time for design closure by **8 weeks (~15%)**

Quick ramp up of global team experienced in advanced technology node ensuring quality and time-to-market commitments



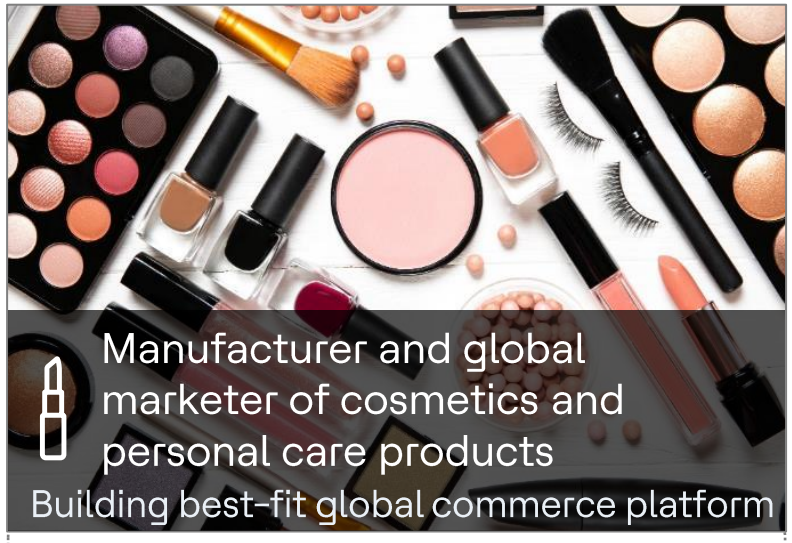
Leading electric vehicle battery manufacturing player

Connected factory platform

Enhanced customer's responsiveness to increasing market demand by improving predictability of manufacturing outcomes

The jointly developed platform helped in **saving 40% – 50% of cost of labor** for plant maintenance with significantly improved plant efficiency

Supercharging performance by adopting digital technologies



Manufacturer and global marketer of cosmetics and personal care products

Building best-fit global commerce platform

Build a single commerce platform that supports B2C, D2C and interactive digital channel

Helped client **expand to 40 global markets** while providing ability to customize locally



Leading renewal energy company

Root cause analysis of field failures

Connected the turbine and drive shaft sensors through a device gateway to the operational datahub.

Aggregation and normalization of drive train performance data. Superimposing field conditions on the simulation models. **Reduced field failure by 15%**



Leading biotechnology company

Decentralized clinical trials

End-to-end remote management of clinical trials, globally.

Developed and deployed Decentralized Clinical Trials (DCT) solution with enhanced data collection and patient experience resulting in **~20% efforts & time savings**

Supercharging performance across geographies

3 Geo Expansion



European home appliance manufacturer

Modernize manufacturing OT landscape

Roll out and application integration of Apriso global template solution covering requirements **across 30+ plants** in production execution, quality, inventory, etc.

Developed a manufacturing data lake and ingested data from shop floor and business systems. **20% reduction in effort** for MES roll-outs

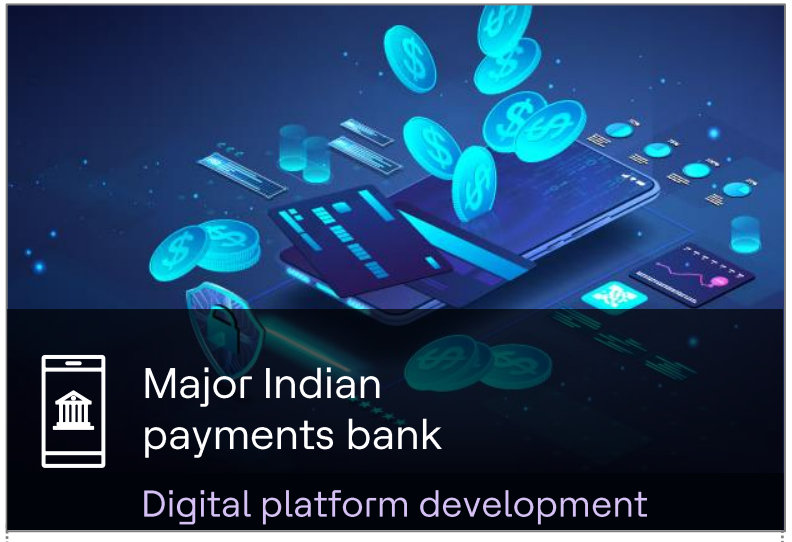


Asia headquartered electronic multinational

Enhancing employee safety using 5G

Mission critical use case to provide alert without delay for human safety

Track and monitor movement of people using 5GC Location Management Function (LMF) and alert/block them if they are nearing hazardous areas **ensuring 99% safety compliance**



Major Indian payments bank

Digital platform development

Enabled banking services access to SHG & EWS sections in rural India **(>50 Mn).**

Design and development of regulator compliant utility payment systems, internet banking, retailer & promoter Apps, consumer on boarding and other digital banking solutions

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In summary

Growth Market & Gaining Share

Significant headroom for growth, primarily driven by digital engineering (12% CAGR)

Market Access

63 out of 100 Top R&D spenders are our customers, many of whom are strategic partners for over a decade

Technology Investments

Investments in 100+ engg. labs, 60+ solution accelerators, 20+ CoEs on next-gen digital tech

Business Impact

Influenced $150B+ revenue for our customers, touching 2.5B+ human lives across the globe

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