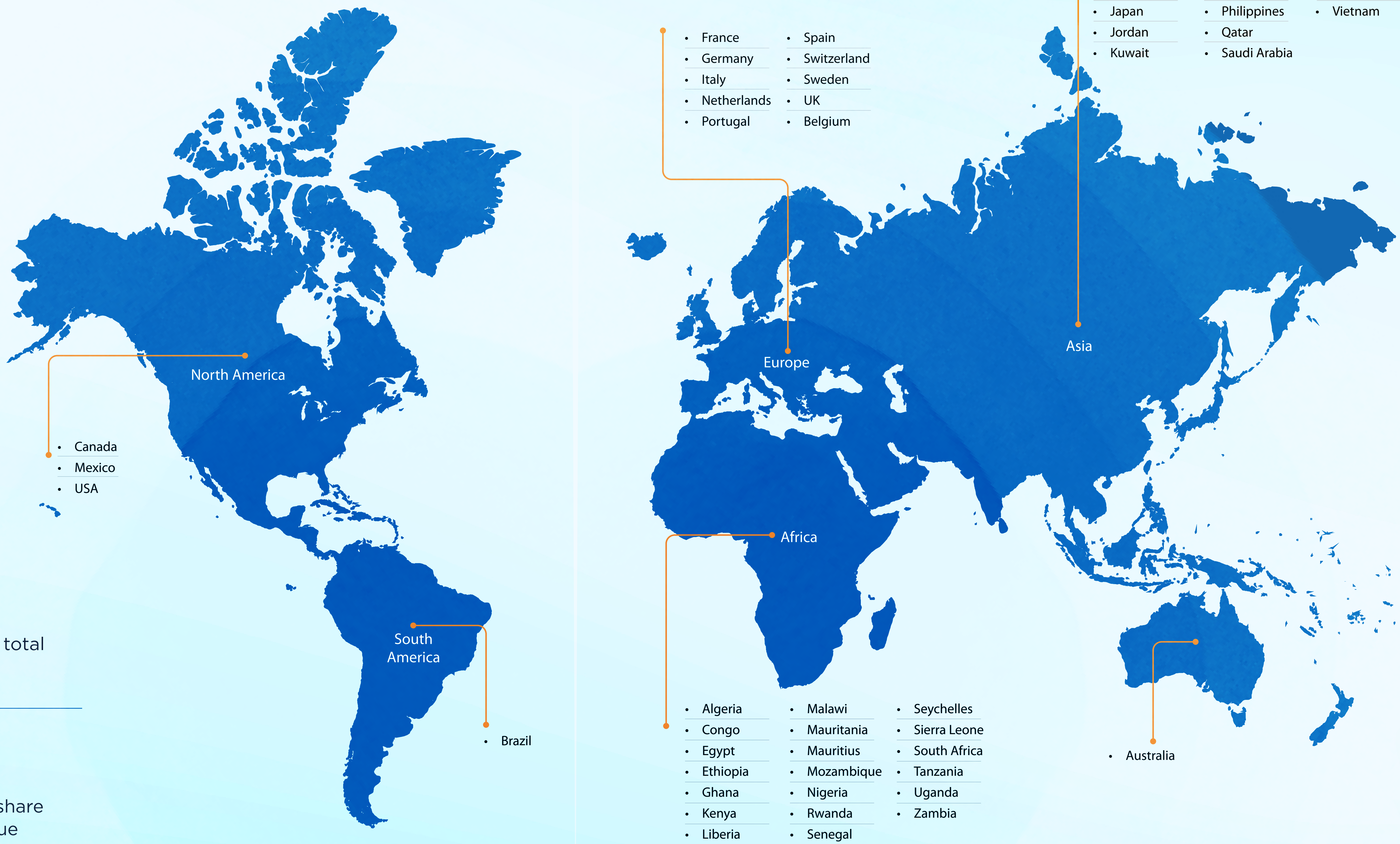
# Our Global Footprint




**52%**
India share of total revenue

**48%**
International share of total revenue

# Building a Global Engineering Enterprise

The global engineering and infrastructure landscape is entering a defining decade. Nations are investing at unprecedented levels to strengthen energy security, modernise industries, build resilient infrastructure and accelerate the transition to lower carbon economies. At the same time, rapid advances in artificial intelligence, digital engineering and advanced manufacturing are redefining how projects are conceived, designed and delivered. Together, these forces are reshaping global investment patterns and creating significant opportunities for engineering organisations that possess the scale, capability and agility to respond.

Alongside these structural shifts, geopolitical developments are fundamentally altering the global business environment. Supply chains are being reconfigured to improve resilience, manufacturing ecosystems are becoming increasingly regionalised, and governments are prioritising strategic industries such as semiconductors, clean energy, defence, data centres and critical minerals. Clients are looking beyond technical capability alone. They seek engineering partners who understand local markets, can mobilise global expertise and provide integrated solutions across the entire asset lifecycle. These changes reinforce the direction that Tata Consulting Engineers has been steadily building over the past several years. Our international strategy is not based on geographical expansion alone. It is centred on creating a globally integrated engineering enterprise that combines deep domain expertise, multidisciplinary capabilities and local market understanding to solve increasingly complex challenges. We are selectively strengthening our presence in markets where long-term investment fundamentals remain strong and where our engineering capabilities create meaningful differentiation.

North America remains a key pillar of this strategy. The integration of TCE USA has significantly enhanced our ability to participate in one of the world's largest engineering markets by combining local execution with TCE's global engineering expertise. Europe continues to offer attractive opportunities across the energy transition, green steel, recycled metals, sustainable manufacturing and industrial decarbonisation. While current geopolitical dynamics in the Middle East may temporarily moderate investment activity, the region's long term commitment to economic diversification, industrial development, water infrastructure and smart cities continues to present significant opportunities. Across Asia Pacific, accelerating investments in power infrastructure, advanced manufacturing and value addition across metals and industrial supply chains are creating opportunities well aligned with our engineering strengths. At the same time, the global realignment of critical mineral supply chains and the increasing focus on energy security are expected to unlock substantial long term opportunities across resource rich and economically stable regions of Africa.

Our approach to growth extends well beyond entering new geographies. Increasingly, our competitive advantage lies in our ability to operate as **One Global TCE**. By integrating expertise across business units and geographies, supported by our Global Delivery Model, we are able to assemble multidisciplinary teams that respond to complex client requirements with speed, consistency and technical excellence. This collaborative model enables us to leverage the best capabilities across the organisation while maintaining the flexibility needed to respond to diverse regional requirements.

As engineering projects become larger and more interconnected, clients increasingly expect a partner who can support every stage of the asset lifecycle.

Our Owner's Engineer and Project Consultant approach, combined with engineering, project management, digital and sustainability capabilities, enables us to create solutions that improve project certainty, optimise lifecycle performance and deliver long-term value. Equally important is our commitment to building enduring customer relationships founded on trust, technical excellence and a deep understanding of our clients' strategic objectives. Technology will also play an increasingly important role in shaping international competitiveness. Artificial intelligence, digital engineering, advanced analytics and intelligent project delivery are transforming how engineering services are delivered. By embedding these capabilities across our global operations, we are enhancing productivity, strengthening collaboration and improving the quality and consistency of outcomes for our clients worldwide.

Looking ahead, we remain confident in the long-term outlook for the engineering industry. The demand for sustainable infrastructure, advanced manufacturing, energy transition and resilient industrial assets will continue to grow across every major region. Our focus will remain on disciplined, profitable growth, strengthening strategic partnerships, expanding our global capabilities and investing continuously in our people, technology and engineering excellence. By combining the trust of the Tata brand with a globally integrated delivery model and a relentless commitment to client success, we are building an engineering enterprise that is prepared not only to participate in the future of global infrastructure but to help shape it.

“ The future belongs to engineering organisations that can combine global expertise with local insight, innovation with disciplined execution, and technology with trusted partnerships. Our ambition is not simply to expand our footprint, but to create enduring value for clients across the world's fastest evolving industries.

Rajat Kaushal
Chief Business Officer & Head ISMG