

TATA STEEL
WeAlsoMakeTomorrow



**Resilient.
Resolute.
Future-Ready.**

Corporate Brochure FY 2020-21



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GAS STORAGE, PORT TALBOT

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We provided **75%**
of the rebar steel used to
construct India's largest
rail-cum-road bridge.

we make
structures

BOGIBEEL BRIDGE, ASSAM

>45,000 MnT
of our steel used in 40 major
airports across India.

of tomorrow

KEMPEGOWDA INTERNATIONAL AIRPORT, BENGALURU



we make
landmarks

More than
4,000 sqm
of our ComFlor®80 composite
flooring system was installed
at the very top of the world's
tallest building.


BURJ KHALIFA, DUBAI



of tomorrow

~40,000 km
of our steel cables –
equal to the Earth's
circumference – helped
build the iconic bridge
over open seas in India.

BANDRA-WORLI SEA LINK, MUMBAI

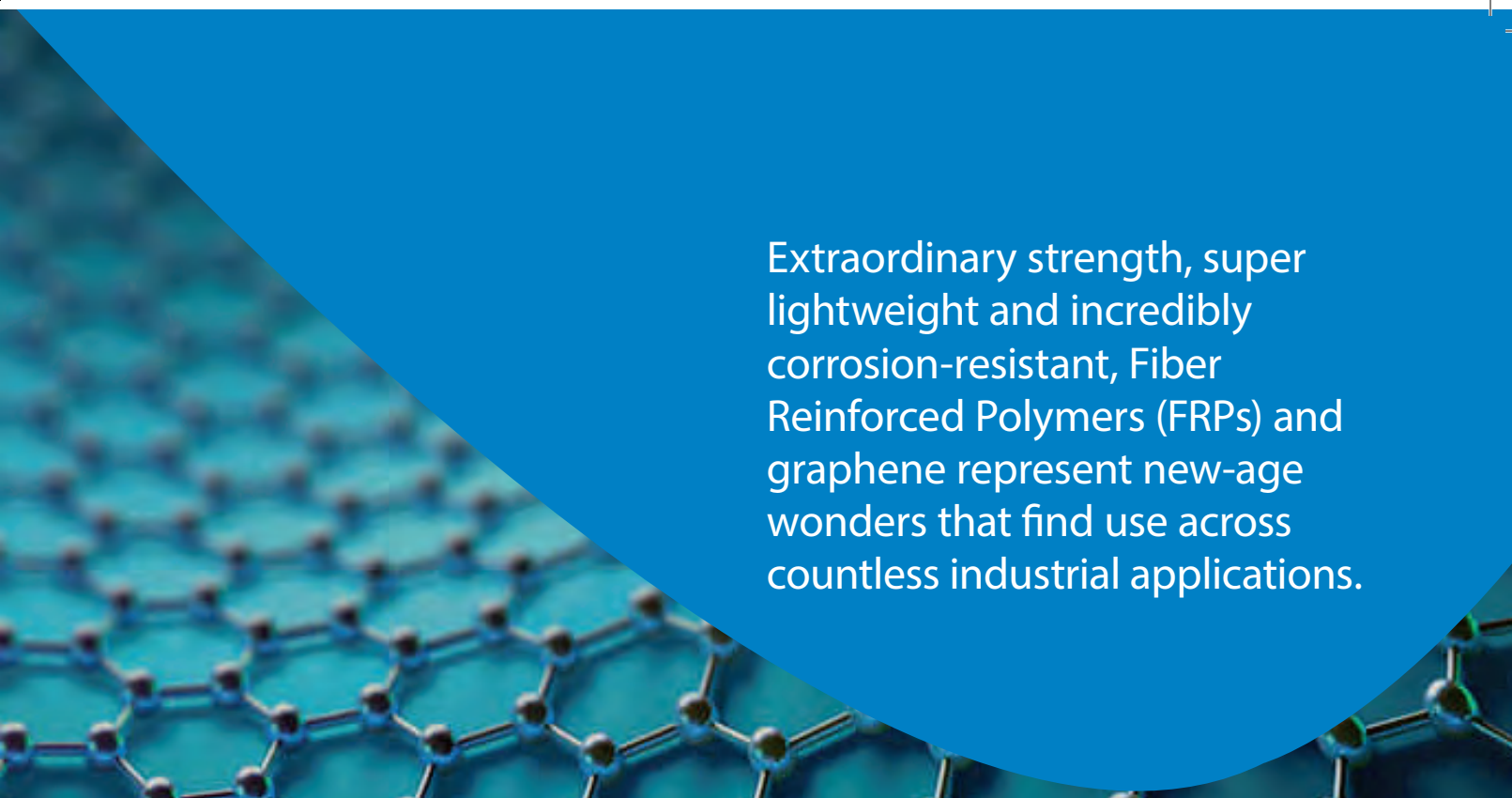


800 MPa
strength, more than 20%
lighter and greater flexibility for
superior aesthetics, HyperForm®
champions a mission to lower
vehicular CO₂ emissions and
augments fuel efficiency, without
compromising on safety.



we make
solutions

HYPERFORM® AUTOMOTIVE STEEL



Extraordinary strength, super
lightweight and incredibly
corrosion-resistant, Fiber
Reinforced Polymers (FRPs) and
graphene represent new-age
wonders that find use across
countless industrial applications.



of tomorrow

ALTERNATIVE MATERIALS

To increase diversity and inclusiveness, Tata Steel became the first company in India to engage women at its mining locations from September 1, 2019

we make
tomorrow

greener

We commissioned India's first steam ageing facility at Jamshedpur for accelerated weathering of LD slag to develop environment-friendly aggregates for road construction, replacing natural aggregates.

WOMEN @ MINES : NOAMUNDI IRON ORE MINES

ROADWAYS IN NORTHERN INDIA



a vision for tomorrow

The world as we know it would not be the same without steel. From the buildings we work and live in, to the vehicles we drive, from the iconic landmarks that define our city skyline, to the roads and bridges that bring us closer to each other, Tata Steel is everywhere, ensuring lives are safer and easier.

We strive to address society's biggest challenges, making the world's most versatile material even better. This desire to imagine and innovate helps us go beyond steel to champion a better tomorrow. Our foray into new solutions and technologies speaks of the consistent efforts we are making today to shape a future that is more humane, more liveable and filled with infinite possibilities.

HIGH-RISE IN EUROPE

About Tata Steel

The Tata Steel group is one of the most diversified steel producers in the world, with an annual crude steel capacity of 34 MnTPA. It comprises Asia's first integrated steel maker, Tata Steel Limited, together with its subsidiaries, associates and joint ventures; and an employee base of 65,000+.

A flagship entity of the 150-year-old illustrious Tata group, Tata Steel is one of the few global steel operations that is fully integrated – from mining to manufacturing and marketing of finished products.

From the House of Tata

The Tata group is a global business conglomerate founded by Jamsetji Nusserwanji Tata in 1868 and headquartered in Mumbai, India. Shaped by a lineage of sound and straightforward business principles, the group is built on a foundation of trust and transparency. This forms the basis of every business we, at Tata Steel, operate in.



Businesses at a glance

From an early foray into steel and automobiles, to staying abreast of the latest technologies, the Tata group is present in 150 countries and six continents. It operates through 30 companies that are segregated into 10 clusters.

-  Automotive
-  Steel
-  Information technology
-  Consumer and retail
-  Telecommunication and media
-  Infrastructure
-  Trading and investments
-  Financial services
-  Tourism and travel
-  Aerospace and defence

Values at the core

Our value system is not an adjunct to profits, but forms the very core around which each Tata group company works to create long-term stakeholder value based on 'Leadership with Trust'.



Integrity

We will be fair, honest, transparent and ethical in our conduct; everything we do must stand the test of public scrutiny.



Unity

We will invest in our people and partners, enable continuous learning, and build caring and collaborative relationships based on trust and mutual respect.



Pioneering

We will be bold and agile, courageously taking on challenges, using deep customer insight to develop innovative solutions.



Excellence

We will be passionate about achieving the highest standards of quality, always promoting meritocracy.



Responsibility

We will integrate environmental and social principles in our businesses, ensuring that what comes from the people goes back to the people many times over.



A look back

- 1868** Began as a trading company by Jamsetji Tata that had a capital outlay of ₹21,000
- 1903** Inaugurated Taj Mahal Hotel
- 1907** Established Tata Iron and Steel Company (now Tata Steel)
- 1941** Commissioned the Tata Memorial Hospital
- 1945** Established Tata Engineering and Locomotive Company (now Tata Motors)
- 1954** Incorporated Voltas
- 1968** Established Tata Consultancy Services (TCS)
- 1984** Forayed into the watch market with Titan Industries, a Joint Venture (JV) with the Tamil Nadu Industrial Development Corporation (TIDCO)
- 1994** Entered the Indian jewellery market with Tanishq
- 1998** Launched Tata Indica, India's first indigenously designed and manufactured car, and Tata Safari, India's first SUV
- 2000** Tata Tea (now Tata Global Beverages) acquired the erstwhile 160-year-old British Tetley group
- 2001** Entered the insurance space with two JVs: Tata AIG, this year, and Tata AIA in 2000
- 2006** Launched the Direct-to-Home (DTH) service Tata Sky
- 2015** Formed Vistara, Tata Sons' JV with Singapore Airlines
- 2018** TCS became the first listed Indian IT company to cross US\$100 billion in market capitalisation
- 2019** Tata Global Beverages and Tata Chemicals combined consumer brands to create Tata Consumer Products Ltd.
- 2020** Tata Motors launched Nexon EV, India's own electric SUV, kick-starting a new wave of e-mobility in the country

Tata group committed ₹1,500 crore in the fight against COVID-19

At home around the world

The Tata group has made significant investments in different geographies. With its ever-increasing international footprint, the group is now reaching out to customers in the farthest corners of the world.



Headquarters

- Mumbai
- London
- Dubai



Representative offices

- Washington DC
- Singapore
- Beijing



We make steel

Tata Steel is one of the world's most geographically diversified steel producers. With raw material operations in India and Canada, and manufacturing units spanning India, Europe and South-East Asia, we are self-sufficient in iron ore.



CAPACITIES

34 MnTPA
GLOBAL CRUDE STEEL



PRODUCTION AND SALES

28.54 MnT
STEEL PRODUCTION

28.50 MnT
DELIVERIES



FINANCIALS

₹1,56,294 crore
TURNOVER

₹8,190 crore
PROFIT AFTER TAX



Did you know?

Tata Steel is what connects the **London Eye, Kolkata's Howrah Bridge and Dubai's Burj Khalifa**. All three iconic structures have been built using our steel.

Our steel is found in **every model of Boeing and Airbus civil aircraft** in production today.

90,000 sq m of our steel, equal to almost 17 football fields, is building the new gem in London's skyline, 100 Bishopsgate Tower.

Growing from strength to strength

- Phase II of expansion of capacity at our Kalinganagar plant in Odisha, from 3 MnTPA to 8 MnTPA, will help us enter the automotive, general engineering and other value-added segments.
- The integration of Bhushan Steel, renamed Tata Steel BSL, has helped us expand our footprint in India significantly.
- We acquired the steel business of Usha Martin, through Tata Sponge Iron, renamed Tata Steel Long Products. This will enable us to participate in the growing market for long products.

Recognitions

- Business Today 'Best Company to Work For' in 2020
- Confederation of Indian Industry 3R Awards 2020 – Excellence in Waste Management
- Confederation of Indian Industry National Award for Excellence in Water Management 2020
- Sustainability Champions 2020 - Tata Steel India and Tata Steel Europe
- Certified as the Best Workplace in Manufacturing 2021 by Great Place to Work® Institute
- Top Employer for LGBT+ inclusion by India Workplace Equality Index (IWEI)
- Advanced 4th Industrial Revolution Lighthouse (Jamshedpur Steel Plant) by World Economic Forum
- Among Top 5 Steel Companies by Dow Jones Sustainability Indices (DJSI) Corporate Sustainability Assessment 2020
- Safety & Health Excellence Recognition 2020 for Digitalisation of Process Safety Performance Indicators (PSPI) driving better business results by worldsteel
- India's Most Valuable Metals & Mining Brand in 'India 100 2020' by Brand Finance Annual Report
- 14th amongst the Top 25 Global Brands in Mining, Iron & Steel by Brand Finance Annual Report
- Best Organisation Contributing in Sports through CSR by FICCI India Sports Awards 2020
- Climate Action Programme (CAP) 2.0° - Oriented Award by Confederation of Indian Industry
- Confederation of Indian Industry – Environmental Best Practices Award 2020 for Innovative Environmental Project
- Top 25 Innovative Indian Companies in 2020 ranked by Confederation of Indian Industry
- World's Most Ethical Companies 2021 ranked by Ethisphere®
- Silver Shield in the Manufacturing and Trading Sector for Excellence in Financial Reporting 2019-20 by Institute of Chartered Accountants of India
- 'Excellence in Digital Communications' and 'Excellence in Education and Training' – worldsteel's Steelie Award 2020
- Certified as a Great Place to Work organisation in India for the fourth time by Great Place to Work® Institute
- Rated 'A-' (Leadership band) for Climate Change disclosure and Supply Chain disclosure CDP

NOTE: ALL FIGURES ARE FOR FY 2020-21 (CONSOLIDATED)

UPSTREAM, KALINGANAGAR

A purpose that binds

The Tata group's value system directs the growth and business of all sectors we operate in.

Mission

Consistent with the vision and values of our founder Jamsetji Nusserwanji Tata, Tata Steel strives to strengthen India's industrial base through effective utilisation of staff and materials. The means envisaged to achieve this are cutting-edge technology and high productivity, consistent with modern management practices. Tata Steel recognises that while honesty and integrity are essential ingredients of a strong and stable enterprise, profitability provides the main spark for economic activity. Overall, the Company seeks to scale the heights of excellence in all it does in an atmosphere free from fear, and thereby reaffirms its faith in democratic values.

Vision

We aspire to be the global steel industry benchmark for Value Creation and Corporate Citizenship.

We make a difference through:

- Our People Our Offerings
- Our Conduct Our Policies
- Our Innovative Approach

Values

Our excellence is rooted in the value system of the Tata group.

-  Integrity
-  Responsibility
-  Excellence
-  Pioneering
-  Unity



Towards holistic excellence

- 1907** Tata Iron & Steel registered as a company
- 1910** Obtained the first colliery for Tata Iron & Steel, adding six more in the course of time
- 1911** Began successful operations of the first blast furnace
- 1912** Rolled out the first ingot of steel from the Sakchi plant; introduced an 8-hour working day
- 1918** Established India's first steel (coke) plant on June 18, as an enterprise financed by Indian capital and built by Indian workers
- 1955** Signed an agreement with Kaiser Engineers for a 2 MnT expansion programme
- 2007**
 - Acquired the London-based steel manufacturer Corus Group, thereby becoming one of the most geographically diversified and leading steel producers in the world
 - Commemorated 100th year, with the Indian Prime Minister unveiling the centenary postage stamp
- 2012** Created history by becoming the world's first integrated steel company to be awarded the Deming Grand Prize
- 2016** Began commercial production in Kalinganagar, our second integrated steel plant in India
- 2018** Acquired Bhushan Steel
- 2019**
 - Undertook the second phase of capacity expansion programme at Kalinganagar
 - Acquired Usha Martin's steel business through our subsidiary, Tata Sponge Iron Limited
- 2020** Tata Steel Mining Limited signed 50-year leases for Kamarda and Saruabil chromite mines

Diversified global footprint

Established in India as Asia's first integrated private steel company in 1907, Tata Steel, today, has flourished across five continents. Continuous improvement in our product and service portfolio, along with success in value-added services for customers, allows us to serve global growth markets.

Read more on P 24



THE NETHERLANDS
MANUFACTURING WORKS
Tata Steel IJmuiden



CANADA
MINING OPERATIONS
Iron ore



THE UK
MANUFACTURING WORKS
Port Talbot Steel Works



INDIA
MINING OPERATIONS
Iron ore
Coal
Chromite
Manganese
Dolomite
MANUFACTURING WORKS
Tata Steel Jamshedpur
Tata Steel Kalinganagar
Tata Steel BSL, Dhenkanal



THAILAND
MANUFACTURING WORKS
Tata Steel Thailand



SINGAPORE
MANUFACTURING WORKS
NatSteel

India

We are Asia's first integrated steel company with captive iron ore mines and collieries located near our manufacturing facilities in Jamshedpur and Kalinganagar. With a slew of organic and inorganic growth initiatives, we are strengthening our business in India and remain well poised to take advantage of the emerging opportunities in the country.

JAMSHEDPUR

Our flagship facility and Asia's first integrated steel works

[Read more on P 32](#)

KALINGANAGAR

India's largest single-location greenfield steel project

[Read more on P 34](#)

DHENKANAL

Tata Steel BSL's plant is one of India's largest integrated steel mills equipped with steelmaking and finishing facilities

One of the most profitable and lowest cost producers of steel in the world

14 MnTPA*
CRUDE STEEL
CAPACITY

5.6 MnTPA
CAPACITY OF
TATA STEEL BSL
FORMERLY KNOWN AS BHUSHAN STEEL

*INCLUDING TATA STEEL LONG PRODUCTS

Europe

Tata Steel is Europe's second-largest steel producer, establishing a presence in the continent after acquiring Corus in 2007. We have integrated steelmaking sites in IJmuiden, the Netherlands and Port Talbot, the UK. Our other downstream facilities across Europe produce a variety of special steels, ultra-pure re-melted steels and various rolling and coating lines.

IJMUIDEN, THE NETHERLANDS

Known for producing high-quality steel used in automotive, construction, packaging, batteries, tubes, industrial vehicles and white goods

PORT TALBOT, THE UK

Part of the strip product business of Tata Steel in the UK



A new high-tech robotic welding line, the largest in the UK, has been introduced at the automotive service centre in West Midlands

12.4 MnTPA
CRUDE STEEL
PRODUCTION CAPACITY

~50%
OF THE UK'S STEEL
REQUIREMENTS SUPPLIED
BY TATA STEEL UK

South-East Asia

Our South-East Asian operations began in 2004 with the acquisition of NatSteel, Singapore. This was further strengthened in 2005, when we acquired a majority stake in the Thailand-based steelmaker Millennium Steel. We are concentrating our efforts in the region to grow our value-added products and services portfolio, while strengthening our key steel operations in Singapore, Thailand and China.

NATSTEEL, SINGAPORE

One of the best steel producers of Singapore

0.75 MnTPA
OPERATING
CAPACITY

75%
OF SCRAP FROM CITY
CONSUMED IN PLANT

TATA STEEL THAILAND

Largest producer and distributor of long steel products in Thailand

1.4 MnTPA
ROLLING (FINISHED)
CAPACITY

10%
OF STEEL EXPORTED TO
GLOBAL DESTINATIONS



Canada

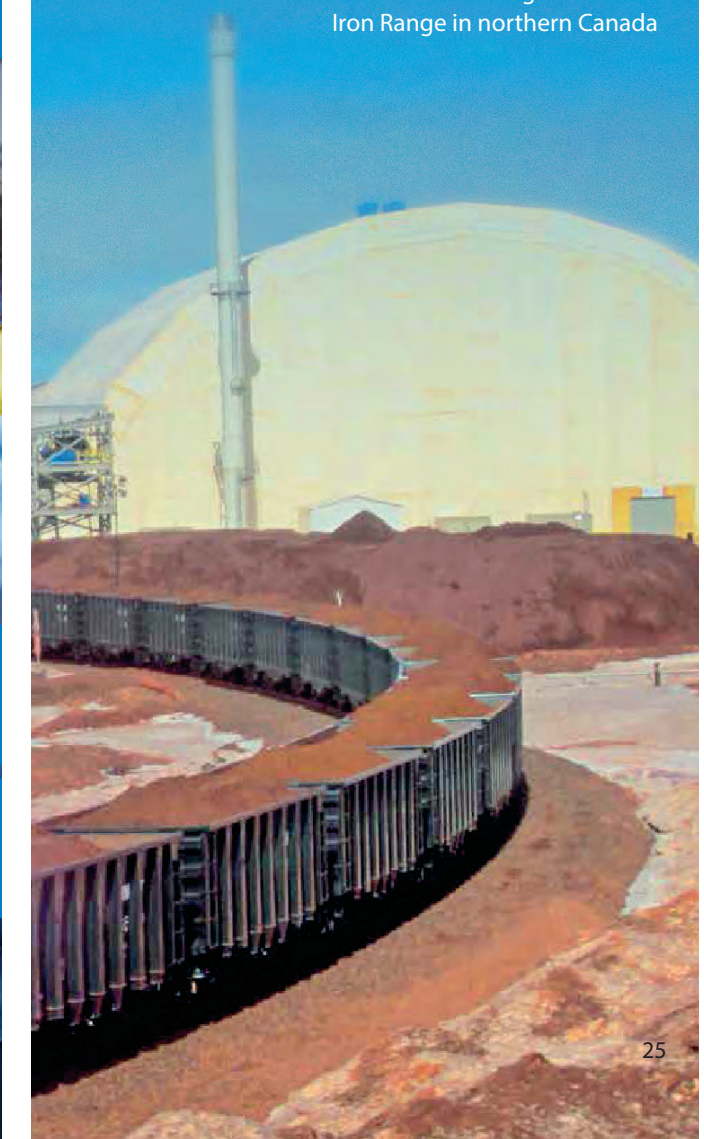
Tata Steel Minerals Canada is a JV between Tata Steel Limited (80%) and New Millennium Iron Corporation (20%). The JV aims to develop iron ore deposits in Quebec, and Newfoundland and Labrador in Canada and is involved in two major projects.

DIRECT SHIPPING ORE PROJECT

Involves mining, crushing, washing, screening and shipping the sinter fines and pellet fines to Tata Steel's European steel-making facilities

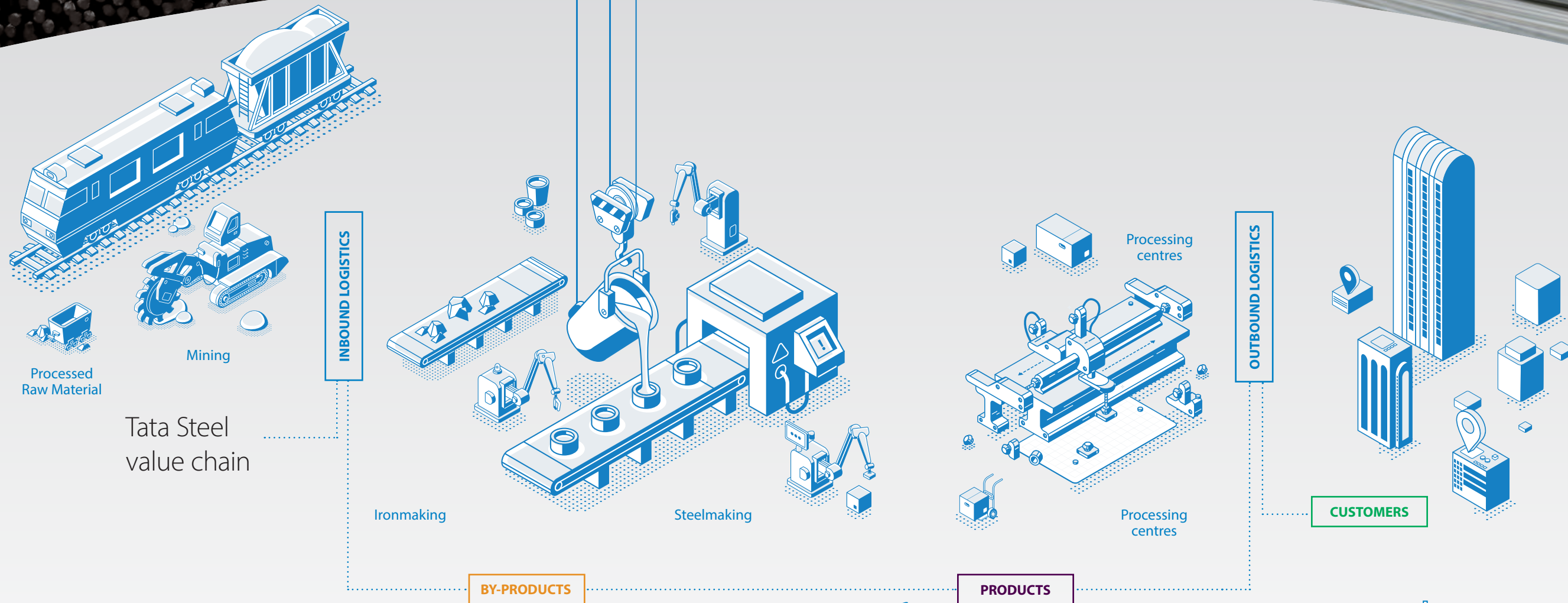
TACONITE PROJECT

Conducting a Feasibility Study of the LabMag and KeMag iron ore deposits, which form a part of the 150-km-long Millennium Iron Range in northern Canada



An integrated value chain

DOWNSTREAM, JAMSHEDPUR



Tata Steel is one of the few fully-integrated global steel producers, involved across mining, iron-making, steel-making, casting, rolling and finishing, and marketing and sales.



Mining

We adopt a holistic operating model encompassing a steel value chain and a raw materials value chain, along with downstream and allied businesses related to value-added products and solutions.



Manufacturing

We convert the raw materials to hot metal and crude steel through various supporting processes, including coke making, sinter making and pelletisation. On the one hand, the steel is cast into slabs, which are then rolled into flat products. On the other, the steel is cast into billets, which are then rolled into long products.



Marketing

We cater to an array of market segments in countries across the world with products and brands that fulfil different requirements.

Inside Tata Steel India

We are India's lowest cost producer of steel. Our history and journey are inextricably linked to the Indian growth story; and we have helped build the nation's industrial narrative, since the time we laid the foundation of India's first industrial city in Jamshedpur more than 100 years ago.



CAPACITIES

11 MnTPA
JAMSHEDPUR PLANT

3 MnTPA
KALINGANAGAR PLANT

5.6 MnTPA
CAPACITY OF TATA STEEL BSL
FORMERLY KNOWN AS BHUSHAN STEEL



PRODUCTION AND SALES

16.92 MnT
CRUDE STEEL PRODUCTION

155
NEW PRODUCTS DEVELOPED

17.31 MnT
DELIVERIES



FINANCIALS

₹ **91,037** crore
TURNOVER

₹ **28,587** crore
EBITDA

₹ **16,695** crore
PROFIT AFTER TAX

₹ **16,515**
EBITDA/TONNE



Did you know?

Tata Steel Kalinganagar is the first Indian plant to be included in the elite Global Lighthouse Network of the World Economic Forum for its leadership in applying Industry 4.0 technologies.

India's first steam ageing facility for 'accelerated weathering' of LD slag was commissioned at Tata Steel Jamshedpur.

UPSTREAM, KALINGANAGAR

NOTE: ALL FIGURES ARE FOR FY 2020-21 INDIA

Operational strength

In India, Tata Steel operates integrated manufacturing facilities in Jamshedpur and Kalinganagar, with captive iron ore and coal mines, a dolomite mine, a chromite mine and manganese mines spread across Jharkhand, West Bengal and Odisha.

Raw materials

The making of steel depends on natural resources such as iron ore, coal and other minerals, which constitute our key raw materials. Our steelmaking operations at Jamshedpur and Kalinganagar secure 100% of their iron ore requirement from captive sources and this remains one of our biggest operational strengths. It helps us maintain cost-competitiveness and derive production efficiencies, while insulating us against volatility in the open market.

Ferro Alloys and Minerals Division

- Largest non-steel business unit of Tata Steel
- One of the leading global producers of chrome alloy
- India's largest producer of ferro chrome and leading producer of manganese alloy

DOWNSTREAM, JAMSHEDPUR

Our footprint

(TATA STEEL LIMITED)

We are primarily involved in the business of mining, steelmaking and providing downstream value-added products and solutions. Our operational footprint has been indicated on the map.

DOWNSTREAM OPERATIONS

Tubes Manufacturing and Agrico

- 1 Jamshedpur

Wires Manufacturing

- 1 Jamshedpur
- 2 Tarapur
- 3 Pithampur
- 4 Indore

Bearings Manufacturing

- 5 Kharagpur

RAW MATERIAL LOCATIONS

Iron Ore Mines and Quarries

- 6 Noamundi
- 7 Joda East
- 8 Katamati
- 9 Khondbond

Opencast Coal Mines

- 10 West Bokaro

Underground Coal Mines

- 11 Jamadoba Group
- 12 Sijua Group

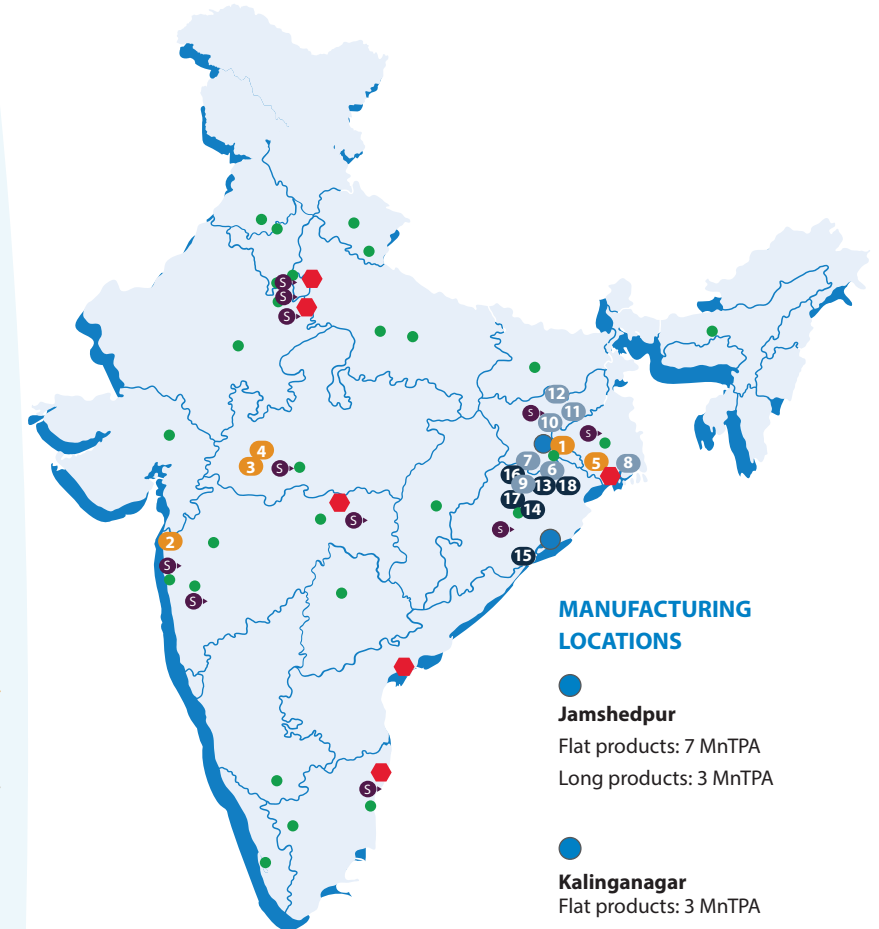
RAW MATERIALS REVENUE STREAM (Ferro Alloys and Minerals)

Ferro Alloys Plants

- 13 Joda
- 14 Bamnibal
- 15 Gopalpur

Manganese Mines

- 16 Joda West
- 17 Bamebari
- 18 Tiringpahar



6

Zonal Hubs

Delhi, Faridabad, Nagpur, Kolkata, Chennai and Vijayawada

38

Steel Processing Centres

SPCs across 11 locations (Jamshedpur, Kalinganagar, Chennai, Kolkata, Faridabad, Manesar, Pune, Mumbai, Indore, Delhi and Nagpur)

27

Sales Offices

18

Stockyards

262

Distributors

14,688

Dealers

Asia's first integrated steel plant

Tata Steel Jamshedpur (TSJ) is our flagship facility. From driving the first stake into the soil of Sakchi village in 1908 to becoming India's steel city, Jamshedpur (also known as Tatanagar) is the soul of the Tata story.



An industry benchmark

- TSJ sets the yardstick for specific consumption of energy, refractory, pulverised coal injection and coke rates in India
- Initiative to roll out process safety through a 'Centre of Excellence' methodology at Jamshedpur has been appreciated by World Steel Association as the 'Best Practice' of 2018 across the industry

Availability of critical manufacturing units

Our focus on asset management using data analytics and predictive modelling, has resulted in >90% availability of our key manufacturing units at Jamshedpur.

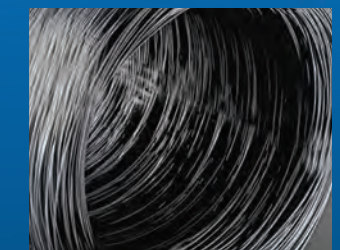
Key outputs



HOT ROLLED COILS



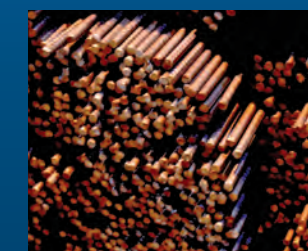
COLD ROLLED COILS



WIRE RODS



GALVANISED COILS



REBARS

India's largest single-location greenfield steel project

Tata Steel Kalinganagar (TSK) is our second integrated steel plant in India, manufacturing high-end flat products. Spread over 3,000 acres and commissioned in 2016, TSK attained production levels at its rated capacity in less than two years. We installed state-of-the-art equipment and modern facilities to achieve a highly cost-competitive and productive plant. TSK is designed to have a minimal water as well as carbon footprint.

Key digital enablers



**DATA-BACKED
DECISION-MAKING AND
REAL-TIME MONITORING**



**ADVANCED
ANALYTICS**



**HIGH-SPEED DATA
EXTRACTION**



**ARTIFICIAL INTELLIGENCE
MODELLING**



3D PRINTING



**PREDICTIVE MAINTENANCE
DEPLOYMENT**

Key operational highlights

- Fastest ramp-up of greenfield plant
- Fastest stabilisation of 3 MnT+ size blast furnace in the world
- 5% reduction in manufacturing cost
- 60% reduction in product development time
- Fastest time-to-market from order generation to fulfillment in Tata Steel

Fortifying tomorrow

Following the successful implementation of Phase I of the Kalinganagar Project in Odisha, we initiated the next phase of capacity expansion in Kalinganagar in FY 2018-19.

The project configuration and costs include investments in raw material capacity expansion, upstream and mid-stream facilities, infrastructure and downstream facilities. This will help us make value-added products like cold rolled galvanised and annealed products, as well as meet the requirements of automotive, general engineering and other high-end quality product market segments.



₹23,500 crore
CAPEX ALLOCATION



5 MnTPA
CAPACITY EXPANSION



48 months
EXPECTED PROJECT
COMPLETION

NOTE: ALL FIGURES ARE FOR FY 2020-21

Rich customer insight

Tata Steel is home to a comprehensive portfolio of products and brands, catering to multiple industries and segments. From the vehicle you drive, to the house you live in; from the bridges you cross, to the hand tools that you use; the steel we produce is an integral part of your everyday life.



'AQUANEST' - WATER VENDING KIOSK, NEST-IN



'PRAVESH' STEEL DOOR



SPECIAL PURPOSE BALL BEARINGS



HUB UNIT BEARINGS

SEGMENT Construction

Market Sub-segments

Individual House Builders (B2C)

Corporate and Government Bodies (B2B) (B2G)

Infrastructure (B2B)

Housing and Commercial (B2ECA)

Products and brands

Tata Tiscon (rebars), Tata Pravesh (steel doors and windows), Tata Shaktee (roofing sheets), Tata Pipes (plumbing pipes), Tata Structura (tubes)

Habinest (prefabricated houses), AquaNest Water Kiosks, Ezynest Modular Toilets, MobiNest (office cabins), Nestudio (rooftop houses), CanvaNest (EV charging station), Smart Easy Nest (for smart cities)

TMT rebars (higher dia rebars and corrosion-resistant steel)

Tiscon Readybuild (cut and bend bars), Tata Structura (tubes), PC Strands (LRPC)**, Tata Nirman (Fine Aggregates), Tata Aggreto (Coarse Aggregates), Ground Granulated Blast Furnace Slag (Binder in concrete), WAMA – GC for walling

SEGMENT Automotive

Market Sub-segments

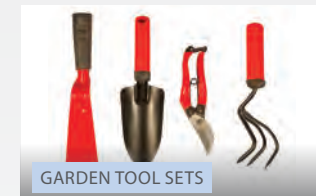
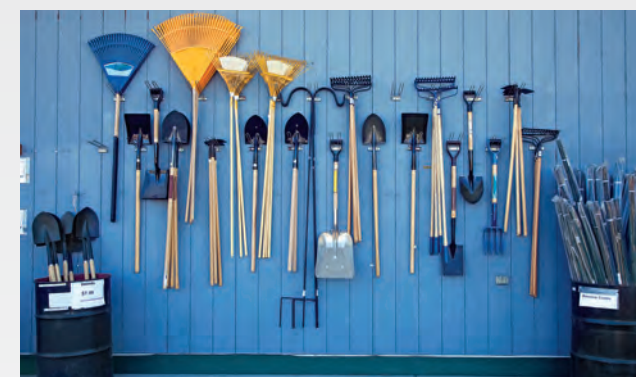
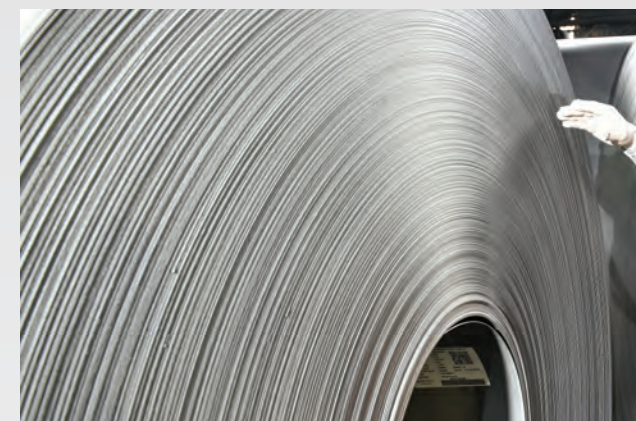
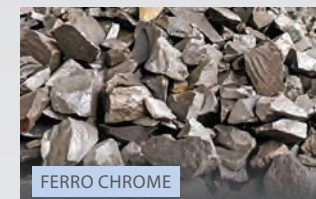
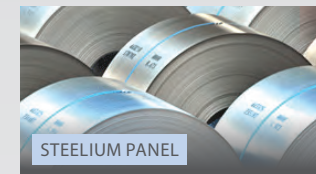
Auto OEMs* (B2B)

Auto Ancillaries (B2B) (B2ECA)

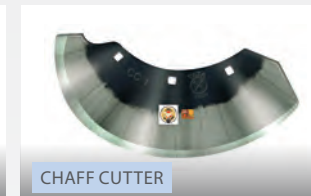
Products and brands

Hot-rolled (HR), Cold-rolled (CR), Coated Coils and Sheets

HR, CR, Coated Steel Coils and Sheets, Precision Tubes, Tyre Bead Wires, Spring Wires, Bearings



GARDEN TOOL SETS



CHAFF CUTTER

SEGMENT Industrial and General Engineering

Market Sub-segments

Panel and Appliances, Fabrication and Capital Goods, Furnitures (B2ECA)

LPG (B2B)

Welding (B2B)

Transmission Power and Distribution (B2B)

Process Industries (Cement, Power) (B2B)

Products and brands

Tata Steeliium (CR), Galvano (Coated), Tata Astrum (HR), Tata Structura (tubes), Tata Astrum Super (for fabrication)

Hot-rolled (HR)

Wire rods

Tata Astrum Super (for fabrication)

Tata Tiscrome (ferro chrome), Tata Ferromag (ferro manganese), boiler tubes, Tata Pipes, Tata Ferrosots (Secondary Steel), Blast Furnace Slag (Cement), Metallics (Secondary Steel), Coal Tar (Chemical Industry)

Notes: B2B – Business to Business; B2C – Business to Consumer; B2G – Business to Government; B2ECA – Business to Emerging Corporate Account
*OEM – Original Equipment Manufacturer
**LRPC – Low-relaxation Pre-stressed Concrete

SEGMENT Agriculture

Market Sub-segments

Agri Equipment (B2B)

Fencing, Farming and Irrigation (B2C)

Products and brands

Bearings

Galvanised Iron (GI), Wires, agricultural and garden tools, conveyance tubes

Board of Directors

The trust that Tata Steel has garnered in the past 110+ years is an irreplaceable asset created through the efforts of colleagues. Our leaders guide us towards a better tomorrow, as we take this legacy forward and seek opportunities to create new value in the age of accelerating change.



STANDING (LEFT TO RIGHT)

T. V. Narendran
Chief Executive Officer and
Managing Director

V. K. Sharma
Non-Executive Director

Petrus Blauwhoff
Independent Director

Deepak Kapoor
Independent Director

Saurabh Agrawal
Non-Executive Director

Koushik Chatterjee
Executive Director and
Chief Financial Officer

SITTING (LEFT TO RIGHT)

Aman Mehta
Independent Director

N. Chandrasekaran
Chairman

Mallika Srinivasan
Independent Director

O. P. Bhatt
Independent Director



A vision beyond operations

Our long-term strategy to be a global steel industry leader entails looking much beyond financial and operational objectives to create shared value for our stakeholders. True to our founding philosophy of 'profits with a purpose', we are deeply committed to building a business that remains as relevant and impactful tomorrow as it is today.

DOWNSTREAM, JAMSHEDPUR

Building on the three pillars of Innovation, Technology and Sustainability, we have embarked on a journey to not only make superior quality steel, but a better tomorrow as well.



Innovation

Our patents, new products, new materials and in-house technologies are aimed at making a positive difference to the society.



Technology

Our efforts to leverage both steel technology and digital interface are targeted at achieving service excellence.



Sustainability

Our initiatives help conserve natural resources while ensuring sustainable growth and fostering strong relationships with communities.

 Innovation

Creating new value

A continued emphasis on novel approaches keeps us ahead of the curve, amid changing customer needs, competition from alternative materials and a dynamic regulatory environment.



₹259 crore
R&D SPEND



109
PATENTS GRANTED



155
NEW PRODUCTS LAUNCHED

NEW PRODUCTS DEVELOPMENT, KALINGANAGAR | NOTE: ALL FIGURES ARE FOR FY 2020-21

Key support units

- Enhanced research facilities with state-of-the-art laboratories, an R&D team of 200+ researchers and collaborations/memberships with 50 premier technical institutes
- Innovation council that incubates novel ideas, enables implementation and advances research on new materials
- In-house platforms, such as Innovent, that identify key customer insights and translate them into tested and scalable business models



To generate
~10% of revenue
from new materials

Key outcomes

We are creating solutions that make a positive difference to the society with patents, new products, new materials and by developing in-house technologies for sustainable performance.

LOUVRE, ABU DHABI



NEW PRODUCTS

- Developed a 'new to the world' advanced high strength steel for automatic wheel disc application. Along with high strength, the material possesses high stretch-flangeability (formability) which will help wheel disc manufacturers produce complex shape and light weight wheel discs.
- Developed advanced high strength coated steel and obtained DP600GA (Dual Phase Galvannealed) and DP600GI (Dual Phase Galvanised) approvals.
- Obtained approval for the passenger vehicle skin panel, a first for Tata Steel, made from bakehardenable steel grade BH180GA.
- Commercialised Fe500 CRS (40mm) in long products segment and supplied to the construction of the new Parliament House.
- Collaborated with CII Green Business Centre and relevant stakeholders in the Indian Steel sector to develop GreenPro framework for steel rebars, for the first time in India. It enables the endusers to make an informed choice about buying steel having the lowest environment impact.

NEW & ADVANCED MATERIALS

- Graphene**
- Commissioned a 100 tonne-per annum integrated Graphene manufacturing plant - one of the largest single unit graphene production centres in the world.
- Composites**
- Entered into new products such as isolation cabins, modular toilets and Fiber Reinforced Polymer (FRP) staircase
 - During the pandemic, NMB in close coordination with the Services and Solutions team worked with group companies to design, build and install a 551-bed greenfield hospital in record time at Kasaragod, Kerala

Medical Materials and Devices

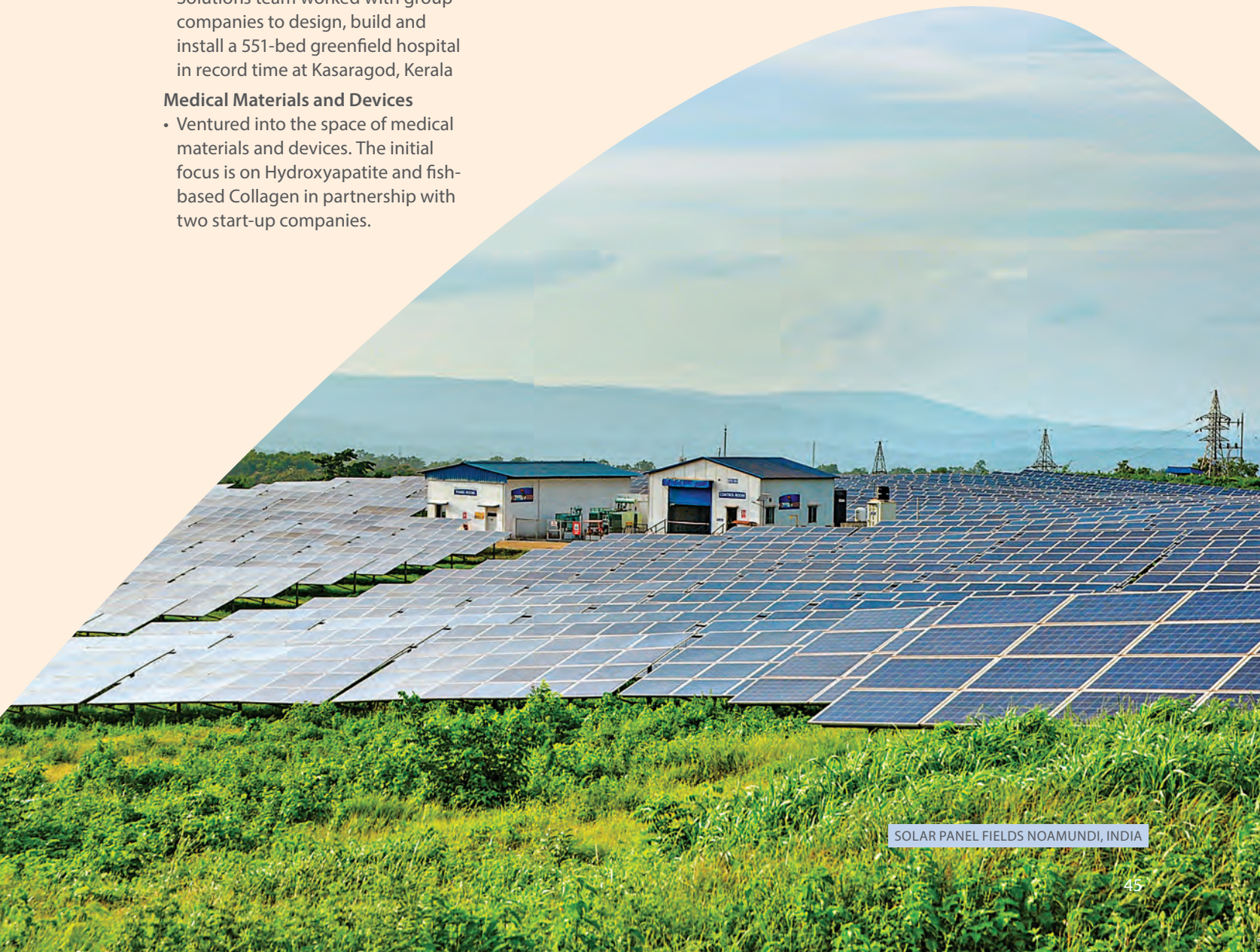
- Ventured into the space of medical materials and devices. The initial focus is on Hydroxyapatite and fish-based Collagen in partnership with two start-up companies.

PROCESS IMPROVEMENTS

- Focussing on reducing alumina in iron ore and ash in coal without impacting yield

ROAD AHEAD

- Accelerate innovation and technology leadership through strategic collaborations with multiple research and industrial organisations and partnerships with start-ups
- Grow adjacent revenue streams by commercialising in-house IP and knowledge through new products in new markets and services
- Achieve growth in other materials with world class technologies and products



SOLAR PANEL FIELDS NOAMUNDI, INDIA

 Technology

Achieving excellence in cost and service

As we gear up for the Industry 4.0, we are developing cutting-edge technologies and designing solutions that help transform processes, improve efficiencies and enhance customer experience.



367 kg/tonne of hot metal

IMPROVEMENT IN COKE RATE AT KALINGANAGAR

SECURITY OPERATIONS CENTRE, KALINGANAGAR | NOTE: ALL FIGURES ARE FOR FY 2020-21



Reach production capacity of 30 MnTPA in India

Maintain cost leadership

Manufacturing

- Coke rate is an important operating parameter for an integrated steel plant, impacting cost, CO₂ emission and energy intensity. During FY 2020-21, the coke rate at our Kalinganagar plant stood at 367 kg per tonne of hot metal.
- During the pandemic-impacted year, we revisited the various aspects of fixed cost to ensure reduced expenditure and maintain healthy cashflow. During the year, a total of 931 Shikhar25 projects were implemented and savings of ₹3,274 crore accrued across the organisation.

5.61 Gcal/tcs
ENERGY INTENSITY AT TSJ

6.24 Gcal/tcs
ENERGY INTENSITY AT TSK

₹3,274 crore
SAVINGS THROUGH SHIKHAR25

NOTE: ALL FIGURES FOR FY 2020-21

Digitalisation

We have embarked on a long-term digital technology-led business transformation programme to drive value creation.

Key outcomes

Through digital interventions across its value chain, we have been able to drive EBITDA improvements, remodel work practices by enhancing digital maturity and, in the process, have become more insightful, intelligent and agile.



DATA SECURITY

We have deployed a full-scale Security Operations Centre (SOC) to safeguard our IT and Operational Technology (OT) data and applications, which can analyse 30,000 events per second, resulting in proactive detection and defence from cyber threats.



PREDICTIVE ANALYTICS

We have developed multiple asset-specific algorithms to predict failures as well as residual life of equipment.



CUSTOMER INTERFACE

Our customer-facing digital platforms, Aashiyana, DigECA and Compass, have resulted in additional revenue and improved customer satisfaction. Through digital interventions, we achieved a 30% reduction in customer complaint resolution time.

ROAD AHEAD

- Accelerate innovation and technology leadership through strategic collaborations with multiple research and industrial organisations and partnerships with start-ups
- Grow adjacent revenue streams by commercialising in-house IP and knowledge through new products in new markets and services. Achieve growth in other materials with world class technologies and products

Committed to growing responsibly

FACILITATING YOUTH EDUCATION

Environment

Ranked among Top 5 in the Dow Jones Sustainability Indices for the global steel sector in 2020

Corporate Social Responsibility
Reached >1.61 million lives

People

745 tcs/employee/year employee productivity

NOTE: ALL FIGURES AS OF FY 2020-21



<2 tCO₂/tcs GHG emission intensity

Zero effluent discharge

Improving >2 million lives

25% diversity in workforce

Environment

At Tata Steel, we are in constant pursuit of minimising our environmental footprint and conserving the natural environment around us. Our philosophy of resource efficiency guides our investment decisions to monitor and mitigate the impact of our operations.

RAINWATER HARVESTING, NOAMUNDI IRON MINE



Emissions control



CO₂ EMISSION

Tata Steel aims to achieve emission intensity <2 tCO₂/tcs by 2025. Further, we aim to achieve CO₂ emission intensity of <1.8 tCO₂/tcs for Tata Steel India by 2030. We continue to implement Internal Carbon Pricing in our capital expenditure appraisal process with the shadow price of carbon at US\$15/tCO₂.

We are working on deployment of key enablers for deep decarbonisation, including the use of more scrap in steelmaking, use of alternate fuels such as natural gas and hydrogen, and deployment of carbon capture and storage/utilisation technologies.

- Highlights of our CO₂ emission reduction projects:
- Signed an agreement with Shell India Markets Private Limited to evaluate and co-develop short- and long-term options for improvement in energy efficiency, optimisation of demand around carbon-intensive products and services and others. Signed an MoU with the Council of Scientific & Industrial Research (CSIR) to collaborate on CCUS.
 - Renewable energy projects with a combined potential of ~150 MW have been initiated based on a phase-wise roadmap across sites

2.29 tCO₂e/tcs
GHG EMISSION INTENSITY AT TSJ

NOTE: ALL FIGURES ARE FOR FY 2020-21




SINTER PLANT, JAMSHEDPUR

DUST AND GASEOUS EMISSIONS

- Conducting Source Apportionment studies of Jamshedpur Works and its surrounding areas within a radius of 20 kilometres to identify key sources of air pollution, their contribution to overall ambient air quality in the region, and accordingly develop air quality management plans
- Continuous efforts for reducing stack emission load has resulted in the reduction of dust emission intensity by 34% and 62% since FY 2016-17 at TSJ and TSK, respectively.

0.29 kg/tcs
DUST EMISSION INTENSITY AT TSJ



Water management



TERTIARY TREATMENT PLANT, JAMSHEDPUR

- Specific fresh water consumption of TSJ (2.25 m³/tcs in FY 2020-21, excluding drinking water consumption) is one of the lowest in the steel industry in India
- Two Sewage-Treatment Plants (STPs) with capacity of 45 million litres per day (MLD) and 16 MLD have been installed in Jamshedpur City

2.25 m³/tcs
SPECIFIC WATER CONSUMPTION AT TSJ

Rated 'A-' for Climate Change and Supply Chain disclosure in CDP 2020

Confederation of Indian Industry 3R Awards 2020 awarded Tata Steel for Excellence in Waste Management



<2 tCO₂/tcs GHG emission intensity

GREEN BELTS IN JHARKHAND

Circular economy



Steel is 100% recyclable and we are setting the bar in the industry with our steel recycling business that will help meet the growing demand for steel in a sustainable manner. It will formalise the scrap market in India and help the country transition to a scrap-based steelmaking route for a more sustainable future.

- Achieved process solid waste utilisation of >99% at TSJ and TSK Focussed synergy initiatives have enabled knowledge transfer and horizontal deployment of best practices across our recently acquired facilities of TSBSL and TSLP.

- Tata Steel handle about >12 MnTPA of by-products spanning 25+ product categories comprising 250+ Stock Keeping Units (SKUs).
- Successfully commissioned our first steel scrap recycling plant of 0.5 MnTPA in September 2020 at Rohtak, Haryana.
- Commenced operations of a future-ready by-product processing and value creation centre with modern baling units and mechanised processing facility in Jamshedpur. The Metal Recovery Plant (MRP) is now operational at Dhenkanal and Gamharia plants.

0.21 m³/tcs
EFFLUENT DISCHARGE INTENSITY AT TSK

100%
TOTAL SOLID WASTE UTILISATION AT TSJ

NOTE: ALL FIGURES ARE FOR FY 2019-20

Biodiversity



While Tata Steel's current operations in India are not located in any of the identified biodiversity hotspots or protected areas, our mining operations (being extractive in nature) impact the flora and fauna in the region.

During FY 2020-21, we developed BMPs for Jamshedpur and

Kalinganagar, planted over 2.98 lakh saplings of native species across locations, developed a 12-hectare Ecological Importance Park on MSW Dumpsite at Jamshedpur and rejuvenated the 5.6 hectare CRM Bara Pond at Jamshedpur. By FY 2020-21, we have developed BMPs for 11 locations and plan to cover 100% of our sites by 2025.

ROAD AHEAD

- Continue investing in technologies to achieve the highest environmental performance standards
- Sustain LD slag utilisation at 100%
- Ensure no net loss of biodiversity at our mining locations

IMPACT ON SDGS



Corporate Social Responsibility

Our inclusive programmes give us the opportunity to work with and help communities flourish with us. We have partnered with various organisations and will continue to deepen our engagement with communities.



EMPOWERING GIRLS TO PURSUE SPORTS



Education

Thousand Schools Programme facilitates education for children, through better teaching and learning methods, while improving school governance through School Management Committees. A lockdown learning model was devised for rural children, especially girls facing challenges with access to digital devices and networks, potentially driving increased dropouts and permanent learning disruption.

Learning Beyond School is a fully-community-managed education resource centre that enables children to learn beyond school hours and become familiar with digital technology.

FY 2020-21 outcomes

- ~1.36 lakh children were provided learning support through the lockdown learning model

- A first of its kind non-financial partnership with the University of Turku, Finland is in place from February 2021 onwards to create learning content, combining best-in-class Finnish methods and the local context of our children

4,600 youth

REACHED THROUGH 54
COMMUNITY-RUN EDUCATION
RESOURCE CENTRES IN ODISHA

Residential camp schools, known as Masti Ki Pathshala, cater to children who are either dropouts or from vulnerable backgrounds engaged in child labour.

Saving Lost Childhood programme aims to reduce child labour in Jamshedpur.

FY 2020-21 outcomes

- 848+ children covered from ~3,000
- 'Children off The Streets' programme launched under Masti ki Pathshala and reached 87 children in three centres

187

CHILDREN MAINSTREAMED UNDER
MASTI KI PATHSHALA



Youth and sports

Empower youth by training stakeholders and providing them access to unparalleled sports facilities and nurturing sporting talent with career potential.

Outcomes

3,770

YOUTH ENGAGED THROUGH
DIFFERENT SPORTS ACTIVITIES



Health, drinking water and sanitation

Prioritising maternal and child health

FY 2020-21 outcomes

- Reached 56,545 mothers and children and enabled the reach of ASHA system to their homes
- Sexual and reproductive health knowledge to 3,770 adolescents

58,000

PEOPLE WERE REACHED OUT TO
ON THE HEALTH AND SURVIVAL OF
WOMEN AND CHILDREN BEFORE,
DURING AND AFTER CHILDBIRTH

Focus on water consumption and effluent discharge

FY 2020-21 outcomes

- Successfully completed the CRM Bara Rejuvenation Project, creating a larger rainwater harvesting facility leading to an improvement in local area water table
- Reusing treated town sewage water for industrial purpose at Jamshedpur works, recycling of industrial effluent at all sites and recovery of storm runoff water at Kalinganagar works enabled reduction of specific fresh water consumption

ASPIRE TO ACHIEVE SPECIFIC WATER CONSUMPTION OF 2 M³/TCS BY 2025 ACROSS ALL STEELMAKING SITES

 **Livelihood**

Technical education institutes improve employability of the youth in our community through professional skilling courses.

Ek Pahal is a skilling initiative to constructively engage prison inmates by imparting in-house training to enable them to secure gainful employment, both within and outside the jail.

Digital skills for rural children imparted through a classroom-on-wheels, **Kaushalyan**, using an air-conditioned bus with workstations, an LED TV display as well as a trained computer faculty.

Women Self-help Groups (SHGs) created in our communities to help impart skills and empower them to run an enterprise.


Outcomes
12,000

WOMEN REACHED UNDER EMPOWERMENT PROGRAMMES THROUGH SELF HELP GROUPS

Improve agricultural productivity by investing in enhanced irrigation facilities for the community, waste land development and other allied activities.

Outcomes
₹65,000

INCREASE IN THE INCOME OF 24,693 FARMERS THROUGH SEVERAL AGRICULTURAL RELATED LIVELIHOOD INTERVENTIONS

 **Tribal Identity**

Samvaad serves as an international platform for discussion among tribal communities.

- Reached 28,180+ people in FY 2020-21
- Samvaad 2020 went bridgital to keep the dialogue going with its YouTube channel having 10,300 viewers, participation of 157 tribes, 25 Indian states and four nations
- Through Aatithya (Tribal Cuisine), Jamshedpur citizenry enjoyed delicacies from home cooks belonging to 12 tribes across 10 states in collaboration with Indian Hotels Company Limited and delivery partner Zomato marking sales of ₹1 Lakh over five days of the Samvaad Conclave
- Rhythms of the Earth, the Samvaad Music Collective released the musical compositions Birsa Ker Raji curated in collaboration with eminent folk singer Padma Shri Mukund Nayak and Abua Disum Abua Raji (Our Land, Our Rule) marking the statehood day of Jharkhand
- During the COVID-19 pandemic, most of the language centres went digital to continue the language learning. 510 language learning centres are operational reaching 16,947 language learners

IMPACT ON SDGS



People

Investing in people, striving to be the employer of choice, while creating a safe and healthy workplace constitute key priorities for Tata Steel. Industrial harmony of 90-plus years and a century-old trade union is a testament to our culture of ‘working together’.



Occupational Health and Safety (OHS)

We have instituted policies that drive a culture of safety consciousness and prevention across our entire operations. Our commitment is reflected in the successful ramp-up of the Kalinganagar facility while maintaining the best practices in health and safety.

Elimination of safety incidents on road and rail to achieve safe, efficient and smart transport

Outcomes

- Zero road fatalities sustained over the last six years
- Deployment of model loading / unloading point at 13 locations
- Deployment of Driver’s Fatigue Monitoring System (DFMS) for heavy vehicle safety

Contractor safety risk management to engage and empower the sizeable contract workforce

Outcomes

- 745+ high-risk job vendors assessed; 68 were approved for 4-star rating and one for 5-star rating
- 21 training modules for critical equipment and process were developed under the Vendor Skilling-2.0 programme, leading to 311 contractor employees being certified as multi-skilled

Leadership capability building at all levels to achieve zero harm and promote a safety-positive behaviour

Outcomes

~25%

REDUCTION IN LOST TIME INJURIES

Competency and capability building to mitigate hazards and manage risks

Outcomes

- He Process Safety Management Centre of Excellence (PSM CoE) concept has been rolled out in 14 new departments across Tata Steel
- Received Safety and Health Recognition 2020 from worldsteel for its Best Practice in ‘Digitalisation of Process Safety Performance Indicators’ at the latter’s Safety and Health Recognition 2020

Process safety management to ensure effective control of risks at high-hazard operations

Outcomes

- Improved health index from 12.70 in FY 2019-20 to 12.83 in FY 2020-21
- Reduced workplace ergonomic risk factors through 47 ergonomic control measures
- Assessed actual exposure level of occupational health-related hazards in 12 departments through a Quantitative Industrial Hygiene Assessment

1.02%

IMPROVEMENT IN HEALTH INDEX



NOTE: ALL FIGURES ARE FOR FY 2020-21

FOSTERING DIVERSITY AND INCLUSION | NOTE: ALL FIGURES ARE FOR FY 2020-21



Employee productivity and capability development



We continued on our productivity improvement journey through various focussed initiatives. Technology and Agility played a crucial role in minimising the impact of COVID-19 on the organisational performance with our productivity remaining at 745 tonne/employee/year.

During FY 2020-21, we undertook several initiatives such as throughput improvement and other operational excellence projects, value engineering, cycle time reduction, along with efforts to identify redundancy through right skilling, Sunhere Bhavishya Ki Yojna (SBKY). We have made great stride in simplifying the organisation's structure, systems and processes.

745 tcs/employee/year
EMPLOYEE PRODUCTIVITY

₹1.99 lakh
PERSON-DAYS OF EMPLOYEE
TRAINING PROVIDED

NOTE: ALL FIGURES ARE FOR FY 2020-21



Diversity and inclusion

MOSAIC (the Diversity and Inclusion Committee) drives diversity and inclusion indicatives across the four aspects of Gender, Person with Disabilities (PwDs), LGBTQ+, and different sections of society (e.g., Affirmative Action Community) at Tata Steel.

During FY 2020-21, we deployed the first batch of 22 women as heavy machinery operators at the Noamundi iron mine, ensured active presence in Tata group's 'We@Tata' programmes, and introduced physical and digital infrastructural changes to make the workplace more inclusive. Continuous efforts are also being made on hiring as well as retaining and developing women leaders, which have led to an increase in gender diversity and a reduction in attrition of female employees from 8% to 6%.

We have rolled out unique policies to drive diversity and inclusion:

- Menstrual Leave, Employee Resource Group 'WINGS' for LGBTQ+ and Take Two Policy.
- Equal rights for LGBTQ+ employees to enable partners of our colleagues to avail all benefits meant for spouse
- Launched 'Indradhanush ke kai Rang' – a campaign to celebrate LGBTQ+ community



**25% diversity
in workforce**

ROAD AHEAD

- Best Workplace in Manufacturing Sector in India
- Improve employee productivity
- 25% diversity in workforce by 2025
- To be a benchmark in employee engagement and experience
- Achieve Zero Harm

IMPACT ON SDGS



Combating the pandemic with the nation

Combating COVID-19

The unprecedented health crisis triggered by the COVID-19 pandemic not only posed significant threat to human life, but also impacted livelihood.

As the containment measures brought economic activities to a halt, socio-economic fallout was significant. At Tata Steel, we rolled out multi-pronged programmes to ensure the health and safety of all stakeholders, while boosting healthcare infrastructure and providing immediate relief to the community.



Supporting the community

During the first wave of COVID-19, the Tata Steel Foundation (TSF) undertook a 10-point #CombatCovid19 programme, reaching out to more than 10.5 lakh people across India.

The programme was recalibrated in early 2021 and has reached over 4.5 lakh people since. The basic objectives remain:

- Enhancing public health systems capacity for communities
- Meeting deficits of material, information and well-being
- Creating economic and other opportunities to address sociological impacts of the pandemic

The primary emphasis in 2021 has been on expeditiously closing gaps in key consumables and equipment available with public health systems that serve communities in remote areas of Jharkhand and Odisha. These include ~50,000 home isolation kits, 3,78,000 testing kits, 10 ventilators and oxygen concentrators, while more than 6,000 oximeters and 2,000 thermal scanners have been provided to frontline health workers to aid effective early detection.

Vaccination remains one of the primary goals as well as challenges. Sensing the need to increase

awareness around vaccination, as well as drive large-scale vaccination, we adopted a three-pronged approach to bring communities in and around our operational areas on board. Our digital campaign, #ApnoKiSuno, focussed towards effective behavioural change communication through crowd-sourced videos from Village Heads on critical issues relating to vaccination. These videos helped secure 10,000+ registrations.

We are also helping people register online for COVID-19 vaccination. What began as an initiative in Odisha and Jharkhand has now turned into

Reached out to
10.5 lakh
LIVES DURING THE FIRST WAVE

6,000+
HOURS OF VOLUNTEERING

a nationwide campaign, reaching out to ~40,000 people through our #DigitalBridges programme. Moreover, it also helps reduce crowding in facilities that provide public services. Along with Tata Main Hospital, Jamshedpur and the state government, we are facilitating vaccination at seven centres in the city.

Our employee volunteering initiative, #FarRishta, has been activated to lend a helping hand at major vaccination centres in Jamshedpur. Till date, ~45,000 people have been reached out across seven states through more than 6,000 hours of volunteering.

Other initiatives under the #CombatCovid19 programme



#ThoughtforFood

Worked with the District Administration to provide warm wholesome meals to 50,000 families a day in the worst-affected settlements and slums in Jamshedpur



#StitchinTime

Engaged with communities to make 50,000 three-ply cloth masks for frontline health workers in need of Personal Protective Equipment



#CashforWork

Helping increase the average income of 1,000 households by promoting kitchen gardens, linking farm produce to markets, making bags from newspapers and creating art and textile designs



#HopeSprings

Designed modules with trained psychiatrists and happiness practitioners to pre-emptively address any trauma faced by migrant labour brought upon due to the pandemic

#FriendinNeed

Created a Suicide Prevention Centre with a team of dedicated volunteers, extending emotional support during the pandemic



Supporting our team members

We set up a 24x7 COVID-19 helpline for employees across locations to disseminate accurate and quick information, including those related to HR and medical.

Speak Up, a Coronavirus Guidelines Violation Reporting Helpline, was created and used extensively for reporting any violations of quarantine rules. For employees who lost their lives to COVID-19, we have extended our social security schemes to the family, including medical benefits; this policy covers both frontline employees and shop floor workers.

The pandemic also invalidated the traditional thinking of productivity being contingent on fixed hours of work within an office environment and bust many myths around remote working. We implemented an Agile Working Model

in November 2020. Flexible working provided employees the freedom to select work locations of their choice and helped them make decisions pertaining to their personal life to enable better work-life balance.

The new policies have encouraged a trust-based, outcome-driven culture as well as helped attract and retain the best talent available. Having invested in our digital platforms for improved connectivity, we could seamlessly implement the model to ensure continuity of work for employees in their respective environment, presenting more opportunities for them.

COVID-19 (contd.)



Medical support

We have set up health infrastructure at all our manufacturing and mining locations across Jharkhand and Odisha to ensure the health and well-being of our people and communities.

We coordinated with state governments and local administration to establish COVID Care facilities at all our operating locations.

The 1,000-bed Tata Main Hospital (TMH) at Jamshedpur in Jharkhand has 450 oxygen beds and 78 ventilator beds dedicated for COVID care. In addition, 100 oxygen beds have been provided to two subsidiary company hospitals and a 150-bed COVID care. Centre has been set up for asymptomatic patients and those showing mild symptoms.

In Odisha, the Tata Medica Super Specialty Hospital in Kalinganagar has 120 beds with provision of oxygen and ventilators dedicated to COVID Care, including a 15-bed ICU facility. Along with the Odisha Government and district administration, the NC Autonomous College at Jajpur has been converted into a 200-bed COVID Care Centre. At the Tata Steel BSL plant in Dhenkanal, a 200-bed COVID Care facility has been set up with oxygen supply and equipped with oxygen concentrators.

COVID Care facilities have also been set up at different locations. A total of 631 beds have been set up across our operational areas in Jharia, West Bokaro, Noamundi in Jharkhand as well as Joda and Gopalpur in Odisha.

We are establishing 1,500-bed COVID hospitals (facilities with oxygenated-beds) at all our manufacturing locations to augment the existing healthcare infrastructure.



Liquid medical oxygen

The second wave of the COVID-19 pandemic saw an increase in demand for oxygen for medical use. We are collaborating with all stakeholders to optimise the LMO supply chain.

We have been collaborating with the central and state governments to augment the supply chain of Liquid Medical Oxygen (LMO) in the country. Under guidance from the Steel Ministry, we have been supplying LMO from our steel plants at Jamshedpur in Jharkhand and Kalinganagar and Dhenkanal in Odisha.

Regular route optimisation exercises combining different modes of transportation such as roadways, rail and air transport have resulted in improvement of turnaround time of oxygen tankers and optimisation of the entire LMO supply chain. Further, a series of initiatives involving technological process improvements

at oxygen generating plants have led to an over eight-fold increase in LMO supplies from our plants from March to May 2021.

While there have been collaborative efforts from the Central Government, state governments and steel companies to manage the supply chain of LMO in the country, we have taken a proactive approach to set up large-scale COVID Care facilities with oxygenated beds close to our steel plants to enable usage of oxygen near its production source and reduce time taken for transportation of LMO to the extent possible.

55,000 tonne
LIQUID MEDICAL OXYGEN
SUPPLIED TILL MAY 2021



Directory of group companies

Name	Holding Type	Holding (%)
Tata Steel Special Economic Zone Limited	Subsidiary	100
Tata Steel Utilities and Infrastructure Services Limited (formerly Jamshedpur Utilities & Services Company Limited)	Subsidiary	100
Kalimati Global Shared Services Limited	Subsidiary	100
Rujuvalika Investments Limited	Subsidiary	100
T S Alloys Limited	Subsidiary	100
TSIL Energy Limited	Subsidiary	100
Tata Steel Downstream Products Limited (formerly Tata Steel Processing and Distribution Limited)	Subsidiary	100
The Tata Pigments Limited	Subsidiary	100
Tata Steel Foundation	Subsidiary	100
Jamshedpur Football and Sporting Private Limited	Subsidiary	100
Bhubaneshwar Power Private Limited	Subsidiary	100
Bamnival Steel Limited	Subsidiary	100
Bhushan Steel (Orissa) Limited	Subsidiary	100
Bhushan Steel (South) Limited	Subsidiary	100
Bhushan Steel (Madhya Bharat) Ltd.	Subsidiary	100
The Indian Steel & Wire Products Ltd.	Subsidiary	95.01
Subarnarekha Port Private Limited	Subsidiary	50.41
Adityapur Toll Bridge Company Limited	Subsidiary	88.50
The Tinplate Company of India Limited	Subsidiary	74.96
Tata Steel BSL Limited	Subsidiary	72.65
Haldia Water Management Limited	Subsidiary	60
Tata Metaliks Limited	Subsidiary	55.06
Tayo Rolls Limited	Subsidiary	54.91
Tata Steel Long Products Limited (formerly Tata Sponge Iron Limited)	Subsidiary	54.50
Creative Port Development Private Limited	Subsidiary	51
Angul Energy Limited (formerly Bhushan Energy Limited)	Associate	99.99
Bhushan Capital & Credit Services Private Limited	Associate	42.58
Jawahar Credit & Holdings Private Limited	Associate	39.65
TRF Limited	Associate	34.11
Tata NYK Shipping (India) Private Limited	Joint Venture	100
TKM Global Logistics Limited	Joint Venture	100
Naba Diganta Water Management Limited	Joint Venture	74
TM International Logistics Limited	Joint Venture	51
Jamshedpur Continuous Annealing & Processing Company Private Limited	Joint Venture	51
SEZ Adityapur Limited	Joint Venture	51
Mjunction Services Limited	Joint Venture	50
Tata BlueScope Steel Private Limited	Joint Venture	50
Jamipol Limited	Joint Venture	39.78
Himalaya Steel Mills Services Private Limited	Joint Venture	26
Industrial Energy Limited	Joint Venture	26
Medica TS Hospital Private Limited	Joint Venture	26
Nicco Jubilee Park Limited	Joint Venture	25.31

NOTE: ALL FIGURES ARE AS ON MARCH 31, 2021.



Tata Steel Limited

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