Tata Communications Recognized as the

2021

Company of the Year

Indian SD-WAN Services Industry
Excellence in Best Practices

FROST & SULLIVAN

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Tata Communications excels in many of the criteria in the SD-WAN services space.

AWARD CRITERIA

Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Tata Communications: Provider of Industry-Leading SD-WAN Services

Tata Communications, a subsidiary of Tata Group, provides cutting-edge Software-Defined Wide Area Network (SD-WAN) managed services that allow companies across different industries (e.g., automotive, healthcare, manufacturing, and many others) to optimize their operational efficiency and achieve real-time access control and threat protection. By leveraging its expertise in SD-WAN services and maintaining a stellar position among its clients across different economic segments, the company provides a high level of security to clients' data and communication. It outpaces its competitors in the SD-WAN services market.

"Tata Communications has been continuously advancing its IZO platform with an overlay of SD-WAN to ensure that networks are more intelligent, secure, and programmable. Thus, such an approach allows the company to participate in large-scale multi-country partnerships with agile SD-WAN solution at competitive pricing, aiding global enterprises in transitioning their networks towards combined usage of mobility, internet, and cloud services."

- Maksym Beznosiuk,
Best Practices Research Analyst

Notwithstanding solid competition and a challenging economic environment, Tata Communications advances its efforts in SD-WAN managed services, improving its position in the market and bringing high-performance SD-WAN services to customers worldwide.

At the same time, despite the COVID-19 adverse impact on business, Tata Communications experienced 8.2% organic growth in 2021, mainly driven by the conversion of the Proof of Concepts into commercial deployments.[1] It has allowed the company to build up its artificial intelligence (AI), Internet of Things (IoT), and cloud computing. In this regard, the company intends to incorporate its SD-WAN capabilities with AI and IoT to leverage new market opportunities.

Tata Communications has been continuously advancing its IZO platform with an overlay of SD-WAN to ensure that networks are more intelligent, secure, and programmable.[2] Thus, such an approach allows the company to participate in large-scale multi-country partnerships with agile SD-WAN solutions at competitive pricing, aiding global enterprises in transitioning their networks towards combined usage of mobility, internet, and cloud services. Frost & Sullivan believes that Tata's substantial financial success and commitment to innovative practices will enable the company to advance the commercialization and implementation of its cutting-edge SD-WAN services and solutions across numerous market segments to attract new potential customers worldwide.

Tata Communications also broadens its strategic collaboration with companies across various industries worldwide. For instance, in October 2021, the company expanded its global strategic partnership with Cisco, a worldwide leader in internet technology, to enable businesses with flexible and easy to deploy, manage, and assess Informational Technology infrastructure for ensuring swift and effective access.[3] Namely, Tata Communication enabled Cisco Meraki's onboarding on its ecosystem to provide a suite of next-generation cloud-managed wireless fidelity (Wi-Fi) services based on the cutting-edge SD-WAN and Wi-Fi 6 technology services across different industries such as retail, manufacturing, healthcare, and hospitality. The partnership allows Tata Communications to ensure more effective lifecycle management and advanced user experience to enterprises' stakeholders with higher agility, efficiency, and security.

Frost & Sullivan recognizes that Tata Communications meets customers' needs and exceeds their expectations as multiple clients and partners value the top-performance and business impact of its SD-WAN services.

Providing Companies with Industry-leading SD-WAN Solution

Today, retail, manufacturing, healthcare, hospitality, and other market segments increasingly rely on cloud-based data and applications. However, as many utilize traditional wide-area inflexible and slow networks, they cannot innovate, scale up, and offer new services at speed. Thus, these companies seek SD-WAN solutions that can help them handle software-defined internet-based hybrid networks more effectively to gain a competitive edge and lower costs. Moreover, they pursue SD-WAN incorporation to swiftly roll out applications and bandwidth across their network and branch locations.

Tata Communications is the leading SD-WAN managed service provider in the Indian SD-WAN space and offers an IZO™ SDWAN solution that allows clients to harness the power of the internet and cloud computing to ensure high agility, boost efficiency, and minimize costs.

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[1] https://beta.tatacommunications.com/wp-content/uploads/2021/06/Tata-Communications-Limited_Annual-Report_2020-21.pdf
[2] https://beta.tatacommunications.com/wp-content/uploads/2021/06/Tata-Communications-Limited_Annual-Report_2020-21.pdf
[3] https://www.prnewswire.com/in/news-releases/tata-communications-and-cisco-systems-expand-global-strategic-partnership-801436576.html

Specifically, its solution offers several competitive advantages such as:

- **Efficiency.** The company's solution provides users with access to a cloud infrastructure across emerging and developed markets. Hence, they can gain tools to ensure instant deployment and effective management of their branch office networks around the globe. At the same time, the IZO™ SDWAN solution is highly flexible. It can work smoothly with cloud deployments and hybrid WANs, allowing users to utilize entirely legacy branch office equipment and newer solutions eradicating the need to handle multiple service contracts or providers. Simultaneously, with edge virtualization, users can use less equipment at their facilities and roll out new services and applications. Thus, the IZO™ SDWAN solution relies on automation to ensure effective delivery and operation, particularly the delivery of the live network for compliance and testing auditing.

- **Security and Reliability.** The company's solution allows clients to identify potential threats across numerous clouds thanks to robust and integrated security and versatile analytics. To this end, the IZO™ SDWAN solution comes with a built-in next-generation firewall, end-to-end segmentation, standardized information gathering, and proxy tools.

- **Versatility.** Users can utilize the company's IZO™ SDWAN solution across different verticals such as manufacturing, healthcare, banking, and finance. For instance, users can migrate to cloud-based healthcare applications in the healthcare segment, ensuring stability and non-interruption of administrative and patient services. In this regard, users can implement end-to-end segmentation to access private data and prevent unauthorized access.

- **Comprehensive Customer Support**. Tata Communication provides versatile customer support during and after implementing the IZO™ SDWAN solution. To this end, the company has over 4,000 specialists across its five contact centers ready to provide versatile customer support. Specifically, the company ensures initial evaluation of clients' requirements to ensure effective deployment of its SD-WAN solution. The company also ensures reporting and monitoring to ensure its SD-WAN solution's complete visibility and top performance. Moreover, IZO™ SDWAN ensures smooth service transition and migration via implementation and the verification stages to measure the migration's success and provide in-depth technical design and the risk management plan. Additionally, Tata Communications offers regular auditing and frequent monitoring and reporting to identify potential risks and challenges before their emergence.

Thus, the company's IZO™ SDWAN solution enables clients to optimize their organizational efficiency. At the same time, with real-time access management and overlay-underlay correlation, clients can also reach higher reliability and cost-efficiency while achieving a faster return on investment and flexibility.

Proven High Performance and Reliability

Frost & Sullivan research analysts applaud Tata Communications for its SD-WAN services' high-quality performance and efficiency, as the following use case demonstrates:

Best Practice Example. Tata Communications helped Hager Group, a French-German original manufacturer of electrical installations in commercial, residential, industrial, and hotel buildings, improve network stability and user experience from managed SDWAN.[4] Hager Group looked for a way to facilitate its global connectivity with a cloud-ready network as it was not satisfied with the MPLS links from its service provider. By utilizing Tata Communications' IZO™ SDWAN solution, Hager Group ensured advanced and reliable connectivity, allowing it to bolster its business activities. Such a step, in turn, paved the way toward cost savings and higher productivity. At the same time, Tata Communications' solution also helped the client achieve an adequate and uninterrupted network that ensures seamless and flexible connectivity for its internal customers and unparalleled performance in cloud applications.

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> *Best Practices Research Analyst*

Frost & Sullivan believes that Tata Communications provides industry-leading SD-WAN services enabling clients to enhance their network performance and roll out applications and bandwidth rapidly across the network and branch locations. Moreover, Frost & Sullivan finds that Tata Communications is well-positioned to capture higher SD-WAN managed services market share in the foreseeable future.

Conclusion

Many healthcare, hospitality, banking, retail, and other market segments seek tools to help cope with software-defined internet-based hybrid networks more promptly to roll out applications and bandwidth across their network and branch locations.

Tata Communications leads the Indian SD-WAN market by providing an IZO™ SDWAN managed solution that enables customers to utilize internet and cloud computing tools to step up agility, enhance efficiency, and lower costs. The company's IZO™ SDWAN solution helps clients achieve improved operational efficiency and higher visibility through a complete managed service journey from design, deliver, operate and optimize phases. At the same time, with real-time access management and increased security, clients can also reach higher reliability and cost-efficiency while achieving a faster return on investment and flexibility.

With its unparalleled hands-on SD-WAN technology experience, customer-oriented approach, Tata Communications earns Frost & Sullivan's 2021 Indian Company of the Year award in the Software-Defined Wide Area Network industry.

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[4] https://www.tatacommunications.com/resource/products-solutions/network/hager-group-builds-next-gen-network-ecosystem-with-sd-wan/

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends: Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.
Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Mega Trend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)