FROST & SULLIVAN

TATA COMMUNICATIONS

TATA COMMUNICATIONS RECEIVES THE 2023 COMPANY OF THE YEAR AWARD

Identified as best in class in the Indian SD-WAN service provider industry

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 service provider 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

A Robust Strategy that Addresses Customers' Needs

Headquartered in Mumbai, India, Tata Communications (a subsidiary of Tata Group) is a digital ecosystem enabler for today's digital economy. The company provides software-defined wide area network (SD-WAN) services through an end-to-end managed solution. Tata Communications stands out for providing an integrated and holistic SD-WAN solution for enterprises in India. This commitment to excellence earned the company the recognition of Frost & Sullivan in 2021 and 2022. Frost & Sullivan applauds the company's strategy toward building a secure network transformation portfolio.

> *"Tata Communications has earned a sterling reputation for building an empire around integrity, excellence, pioneering, responsibility, and unity. The company has remarkably established itself as a trusted partner in clients' digital transformation journeys owing to its industry expertise, forward-thinking approach, and dedicated customer success team."*
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> *- Kapil Baghel*
> *Senior Consulting Analyst*

As the trend for hybrid, multicould, and hyperconnected ecosystems increases, businesses realize that installing and managing multiple SD-WAN sites is complex. Managed service providers offer the expertise and technology needed to streamline operations and integrate varying operational systems from different access providers. Therefore, managed SD-WAN services are gaining traction, as exemplified in the 2023 Frost & Sullivan survey of network decision-makers, where 86% of the respondents indicated

their preference toward buying a fully managed SD-WAN or co-managed service.[1] Considering this emerging driver, Tata Communications developed IZO™ SDWAN, its unified service management platform that delivers scalable and secure access to applications, leveraging worldwide private and public cloud infrastructures.

IZO™ SD-WAN includes different services to fulfill specific clients' requirements, enhance customer experience, and cover a broader portion of the addressable market. For instance, Flex SD-WAN is Tata Communications' managed service for enterprises facing complex technology integrations. Leveraging its extensive partner network (e.g., Versa Networks, Fortinet, Cisco Viptela, Cisco Meraki, Silver Peak) and modular approach to managed services, the company offers these clients unparalleled delivery models and technology flexibility. To further improve customer experience, Tata Communications is investing in innovative technologies such as the Internet of Things, artificial intelligence (AI), and cloud computing. By integrating these novel technologies, SD-WAN services become more automated, enhancing speed and accuracy, network management, providing faster real-time insights, and performing predictive detection of anomalies.

In 2022, Tata Communications updated its SD-WAN offering to be more suitable for cost-sensitive businesses by integrating cost effective SD-WAN options. First, the company embedded SD-WAN-as-a-service, an end-to-end consumption model simplifying customers' journeys, into its solution. Moreover,

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> *- Valentina Barcia*
> *Best Practices Research Analyst*

it allows a digital and predictable experience that empowers customers to add new sites, perform order-managed modeling, and gain access to lifecycle management. Secondly, Tata Communications built an in-house secure private access solution, SPAED, converging network and security into one platform. SPAED uniquely provides reliable performance and agility while improving safety and reducing client operational costs. This service uniquely benefits retail, small/medium-sized businesses, and logistic segments, as it ensures an essential mix of SD-WAN, local area network, and security capabilities.

Boosting its SD-WAN perspective, Tata Communications integrates cloud-based security with its SD-WAN, resulting in a secure access edge (SASE) service offering. This offering combines hybrid SASE and hosted SASE in an efficient as-a-service model, simplifying the complex process of merging security and network functionalities. Seamlessly managing large-scale and small operations, flexible pricing, and an innovative product portfolio, Tata Communications stays ahead of the competition. Furthermore, the company's customization of its solutions to address a heterogeneous range of customer's needs is a significant differentiator. With this comprehensive portfolio, Frost & Sullivan's research analysts find that Tata Communications' is positioned to remain a leader in the Indian SD-WAN service provider market.

An Exceptional Commitment to Deliver an Outstanding Customer Experience

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[1] *Managed SD-WAN Services, Global, 2023* (Frost & Sullivan, August 2023)

Customer-centricity is a fundamental aspect of Tata Communications. The company's dedicated customer service team supports clients 24/7, ensuring they receive a distinctive service every time. Over and above, in 2022, Tata Communications' SD-WAN services experienced exceptional growth driven by the company's commitment to converting proof of concepts into commercial deployments. Moreover, Tata Communications provides array of services for customers to experience SDWAN during their purchase journey, such as Customer Environment POCs (cPOC) and Virtual Experience Platform (VEP), a digital platform to experience its solutions. Through these cPoCs, Tata Communications helps clients make an informed decision when purchasing the solution, enabling them to select the services that best fit their requirements. Building upon this impressive growth, the company extended its client base, seizing opportunities in Indian banking and financial services. For example, through its end-to-end automation approach, Tata Communications helped one of India's largest public banks. As a result, the client improved its delivery velocity for enterprise estates five times and reduced the fault rates by 30%.

On Day 1 (delivery phase), Tata Communications delivers the solution within the client environment, holding a first-time right deployment rate of 99.8%. After the service is operational, on Day 2 (Operate & Optimise phase), the company actively monitors its performance, meeting with customers periodically to assess policy optimization and ensure the solution meets clients' evolving needs.

Tata Communications' continuous enhancement of TCx, its all-in-one platform, further propels its commitment to delivering remarkable customer experiences. TCx is the cornerstone of how the company leverages a single interface where clients can order services, download insightful reports, access analytics dashboards, and monitor real-time service performance and also provide self-service capabilities. Improving upon this integration, Tata Communications embedded AI and machine learning into TCx, automating the solution, enabling a digital end-to-end customer journey (from design to management), and reducing implementation timelines.

Tata Communications has also introduced many value-added services to improve the customer experience and make their SDWAN adoption journey seamless. One of the packages is Value Driven Network Assessment: before implementing SD-WAN services (Day 0), the company conducts a value-driven network assessment to define objectives with the proper design and validation. This process improves performance by up to 60% while reducing the total cost of ownership by 25%.[2]

Additionally, Tata Communications has gained the praise of its clients through its noteworthy approach of enabling each of its customers to operate their tailor-made solutions. Based on reviews, Tata Communications achieved a 4.6 out of 5 score in client satisfaction for its SD-WAN managed services.[3] Ultimately, Tata Communications' stack of value-added services spanning the entire customer experience makes it stand out in the SD-WAN service provider Indian market.

Positioned for Growth

Tata Communications is at the forefront of the fiercely competitive market, shaping the industry's trends with a deep-rooted history of purpose-fit innovation. In 2022, the company achieved robust success,

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[2] https://gamma.tatacommunications.com/assets/wp-content/uploads/2023/06/integrated-annual-report-2022-23.pdf. Accessed September 2023.
[3] https://www.gartner.com/reviews/market/network-services/vendor/tata-communications. Accessed September 2023.

recording double-digit revenue growth and increasing its consolidated revenues by 8.2% compared to 2021.[4] Moreover, its core connectivity business for the fiscal year 2022-23 grew by 5.7%.[5]

Tata Communications has earned a sterling reputation for building an empire around integrity, excellence, pioneering, responsibility, and unity. The company has remarkably established itself as a trusted partner in clients' digital transformation journeys owing to its industry expertise, forward-thinking approach, and dedicated customer success team. Notably, in 2022, the company's employee engagement score from its annual survey increased by 1% since 2021, reaching 87%.[6]

Frost & Sullivan believes Tata Communications is poised to maintain its position as an innovator in the SD-WAN field due to its solid capabilities to address current and future industry challenges.

Conclusion

With a thorough focus on continuous improvement, Tata Communications strengthens its software-defined wide area network (SD-WAN) services service portfolio to expand its client base, considering market trends and client requirements. With a comprehensive SD-WAN offering, Tata Communications addresses unmet needs, benefiting large enterprises and small and medium businesses in high-value industries, including retail, baking, financial services, and logistics. Through the IZO™ SDWAN platform, the company successfully delivers cost-efficient and personalized solutions combined with automation, innovative capabilities, and a customer-centric approach, positioning it as a partner of choice.

With its strong overall performance, Tata Communications earns Frost & Sullivan's 2023 India Company of the Year Award in the SD-WAN service provider industry.

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[4] https://gamma.tatacommunications.com/assets/wp-content/uploads/2023/06/integrated-annual-report-2022-23.pdf. Accessed September 2023.
[5] Ibid.
[6] Ibid.

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)