FROST & SULLIVAN

TATA COMMUNICATIONS

TATA COMMUNICATIONS RECEIVES THE 2023 COMPANY OF THE YEAR AWARD

Identified as best in class in the Indian unified communications service industry

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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 unified communications 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

Market Snapshot

Cloud communications services and intelligent devices have taken center stage in recent years due to abrupt and disruptive changes. Globalization, rapidly evolving workforce demographics, shifting customer requirements, and technological advancements have revolutionized how and where people work. Unified communications and collaboration developers and providers have opportunities to co-innovate with their customers, technology ecosystems, and channel partners to change the nature of business communications amid great potential and significant hurdles.

Based on its global information technology investment decision-maker survey, Frost & Sullivan identified top trends, including hybrid work and new work styles, office experience modernization, mobility mainstreaming, tech giants' influence, artificial intelligence (AI) entrenchment, software-as-a-service (SaaS) proliferation, and alternative sales motions, which create growth opportunities in business communications across infrastructure, services, applications, devices, and workspace domains.[1] In addition, unified-communication-as-a-service (UCaaS) benefits (e.g., improved business continuity, predictable economics, and support for evolving work styles and business models) allow providers to tap new customers and expand deployments in existing accounts more broadly and deeply.

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[1] *Unified Communications and Collaboration Market Outlook: Top 10 Predictions for 2023* (Frost & Sullivan, December 2022)

![Frost & Sullivan logo]

Tata Communications: Positioning to the Leadership Spot

Tata Communications, previously known as VSNL, was founded in 1986 and is headquartered in Mumbai, India. It was the sole provider of Internet backbone services in India then and is still the country's only tier-one Internet service provider. Over time, Tata Communications has strategically acquired leading companies, such as Tyco Global Network (2004) and Teleglobe (2005), to strengthen and expand its business. Tyco Global Network owned a subsea cable system that connected North America, Asia, and Europe, while Teleglobe, based in Canada, provided wholesale voice, data, Internet Protocol (IP), and mobile signaling services. The company also formed the Tata Indicom Enterprise Business Unit (TIEBU), which offers IP Multi-Protocol Label Switching data services to large enterprises in India. In February 2008, Tata consolidated the assets of VSNL, Tyco Global Network, Teleglobe, and TIEBU under a single global brand.

"With over 1,600 communications service provider relationships and over 700 mobile network operator voice interconnections, Tata Communications is a leader in wholesale voice, carrying a staggering 32 billion minutes. Leveraging its extensive supplier network and one of the most comprehensive voice ecosystems in the world, the company ensures unparalleled connectivity and superior call quality for its customers."

- Riana Barnard
Best Practice Research Analyst

Today, Tata Communications is a subsidiary of the Tata Group. It has evolved into a digital ecosystem enabler and communication technology (commtech) company with a diverse product portfolio that offers solutions for collaboration, connectivity, cloud hosting, security, and media services. The company specializes, among other areas, in providing global telecommunication solutions for businesses. Its services range from layer 1 voice services like access numbers, domestic voice numbers, and voice termination services to layer 2 application services and layer 3 end-to-end managed services that cater to specific business needs, such as collaboration, CPAAS, and contact center applications.

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Frost & Sullivan recognizes that Tata Communications is well-positioned to take advantage of new growth opportunities, solidifying its position as a leader in the unified communications service provider space.

Purposeful Innovation

Migrating to a cloud-based collaboration solution is a complex process that requires careful planning. It involves moving from legacy systems to a single cloud-based platform efficiently and transitioning from time-division multiplexing infrastructure to session initiation protocol (SIP) and number portability. In addition, it necessitates standardizing the user experience, consolidating platforms and vendors, establishing a geo-redundant architecture, ensuring high voice quality, simplifying regional complexities and overall management, and adhering to international and in-country regulatory compliance and security requirements.

Tata Communications closely monitors emerging market trends and evolving customer demands, perfecting its approach before responding with novel solutions. With Tata Communications GlobalRapide, the company has brought together its cloud voice platform, collaboration and communication applications, and integrated managed services for migration, end-to-end management, and automation of UCaaS. The collaboration platform spans robust features and capabilities, including proactive monitoring, regulatory compliance, and enhanced fraud prevention. It drives return on investment (ROI) and adoption through personalized SaaS insights and analysis and offers expert services for optimized UCaaS deployment. Most importantly, it is simple to use and facilitates access from any device, enabling distributed teams to work more efficiently together. Key highlights include:

- The enterprise-to-enterprise collaboration stack allows for rapid deployment and streamlined onboarding using automation tools and capabilities. A centralized dashboard enhances visibility, control, and monitoring, facilitating faster decision-making.

- A unified application (app) for all collaboration workloads (calling, meeting, messaging, and sharing) delivers a superior employee experience. The solution manages multiple UCaaS products and supports all customer types. Other features include adoption and change management tools and practices, proactive monitoring, and best-in-class service level agreements (SLAs).

By automating private branch exchange (PBX) assessment and migration with complete SaaS training and adoption, GlobalRapide improves ROI and simplifies endpoint management, helping customers maximize business benefits. Moreover, the company recently enhanced its GlobalRapide portfolio by introducing Tata Communications JAMVEE, a cloud-based voice-calling app that offers calling, messaging, and PBX functionality. JAMVEE runs on browsers, desktops, and mobile devices, making it easy to integrate with any enterprise communication application to expedite onboarding and simplify management. Moreover, JAMVEE is regulatory compliant and incorporates fraud prevention application programming interfaces (APIs), detection mechanisms, and alerting features to protect confidential information throughout all interactions.

Frost & Sullivan believes Tata Communications will drive the unified communications service provider space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

Steps Taken to Ensure Quality and Reliability

With its customer-centric corporate philosophy, Tata Communications operates on the central tenet that its success depends on customer satisfaction. The company provides international long-distance services using an advanced routing platform and over 300 direct routes to global telecommunication providers. The service helps optimize traffic volumes, maximize margins, and offer superior voice quality and competitive rates. The company's national long-distance capabilities include voice and data connectivity, IP-based services, and managed network services. Additionally, Tata Communications offers mobile application-to-person (A2P) capabilities that allow customers to integrate messaging services into their apps and improve customer experiences. With direct reach to 325 mobile operators and longstanding relationships with major over-the-top players, social networking sites, and ride-share services, Tata Communications has become a trusted partner for A2P messaging services, facilitating critical transactional traffic in a timely and efficient manner.

Tata Communications has built strong capabilities that address a broad spectrum of needs across verticals. The company meets with customers to assess their specific needs and develop tailored solutions with roadmaps for seamless execution. With a legacy of market leadership, the company's compelling value proposition underpins its sustained success.

Its global International Organization for Standardization (ISO)-certified SIP connect solutions **maintain the highest international standards**. Moreover, in 2022, the company has made impressive improvements in supplier resiliency, with a 43% increase in Local Number Portability Service and a 25% increase in International Toll-Free Service.[2]

Because of its **unparalleled network and coverage** of local routing through PoPs in 13 locations across four continents, Tata Communications outperforms its competitors and promotes ongoing trust to reinforce long-lasting customer relationships throughout the service lifecycle. Its network handles one in every seven calls made globally, a testimony to its service reliability. Notably, along with its international reach, the company has extensive domestic coverage, including heavily regulated countries like India and Thailand.

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- Siddharth Misra
Growth Advisory and Strategy Consultant

Furthermore, the company empowers organizations to **achieve cost savings and a rapid** ROI through its flexible billing models and industry-leading rate structures. Specifically, its on-net connectivity to leading UCC cloud providers helps large organizations with high international traffic to secure up to 60% cost savings while delivering improved performance.[3]

Tata Communications offers an **AI-powered fraud prevention service** across all its platforms and APIs. Apart from proactive monitoring and blocking, trend analytics, it also conducts around four million tests annually to guarantee service quality and prevent fraudulent activities. These tests cover calling line identification delivery, echo, latency, and proper release code reception.

The company **simplifies administration and reporting** through automated portals and APIs for end-users and administrators, coupled with a highly skilled team (96% are CCNA/GSIP school-certified professionals) to proactively monitor customer incidents, saving up to 80% on operational time.[4]

Tata Communications continues to receive high praise for its innovative solutions and commitment to customer success.

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[2] https://gamma.tatacommunications.com/assets/wp-content/uploads/2023/06/integrated-annual-report-2022-23.pdf. Accessed November 2023
[3] Interview with Tata Communications on 2 November 2023
[4] Ibid.

Tata Communications: On a Growth Trajectory

Despite a growing preference for end-to-end single-vendor software environments, Tata Communications identified opportunities for integrations and multi-vendor settings due to customer budget, performance, compliance, and security considerations. Moreover, leading UCC original equipment manufacturers (OEMs) have catapulted to the top of several market segments, specifically team messaging, meetings, room conferencing, and PBX. Attracted by the coopetition and ecosystem opportunities these UCC OEMs offer, Tata Communications partnered with Microsoft and Cisco to include their products and solutions in its portfolio.

For instance, its ONE PARTNER offering realizes Microsoft Intelligent Communications' vision through a single vendor solution. Impressively, Tata Communications also created bundled offerings through several value additions. By adding carrier-grade service quality, SLAs, and support, Tata Communications enables Microsoft Teams at a global scale. It delivers an optimized Microsoft Intelligent Communications experience, extending the reach to emerging countries and deploying enterprise-wide toll-free numbers.

Pioneering the art of enhancing offerings based on the changing requirements of global businesses, Tata Communications establishes itself as a trusted partner in implementing an organization's digital communication platform, whether in terms of integration with legacy systems or implementing new solutions from scratch. In a specific use case, Tata Communications developed a solution for a customer with 5,000 meeting rooms spread across 72 different countries. The challenge was to procure devices for all 72 countries, send people to inspect and design the sites, deliver the hardware, complete the meeting rooms, ensure monitoring and management through a single platform, and effectively manage it all. By doing some of the work in-house, using other vendors, and integrating all the components seamlessly into its offering, Tata Communications provided an end-to-end solution that addresses every requirement to exceed the customer's expectations.

Frost & Sullivan believes Tata Communications is uniquely prepared for today's demands and exceptionally positioned for tomorrow's needs. The company's clear strategic vision and execution underpin its partner-of-choice status and sustainable growth for years to come.

Conclusion

Migrating to a cloud-based collaboration solution can be quite complex, as it requires efficiently consolidating multiple vendors. The transition also involves creating a geo-redundant architecture, standardizing user experiences, consolidating platforms and vendors, and adhering to compliance and security regulations across different regions. Tata Communications addresses these unmet needs with a strong leadership focus, incorporating customer-centric strategies and exemplifying best practice implementation.

Tata Communications GlobalRapide is a multi-layer offering that combines cloud voice and unified communications as a service (UCaaS) platforms with a fully integrated portfolio of managed services. It helps organizations assess, migrate, deploy, adopt, manage, and measure their UCaaS transformation. With GlobalRapide and JAMVEE (its cloud-based voice-calling application), Tata Communications provides a simplified user experience, multiple cloud-calling plans, enhanced interoperability, advanced

monitoring, and secure collaboration. With this service, customers can focus on their core business while the provider monitors and manages session border controllers, endpoint devices, and interoperability while ensuring regulatory compliance. Tata Communications remains a trusted partner, earning a reputation for offering the overall best in the unified communications service provider space.

With its strong overall performance, Tata Communications earns Frost & Sullivan's 2023 India Company of the Year Award in the unified communications service provider market.

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)