FROST & SULLIVAN

TATA COMMUNICATIONS

2022
COMPANY OF THE YEAR

INDIAN MANAGED SECURITY SERVICES 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 managed security 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

Industry Challenges – Then and Now

Founded in 1986 and headquartered in Mumbai, India, Tata Communications is a leading provider of managed security services (MSS) among telecommunication services companies. Its robust MSS portfolio equips enterprises with the necessary solutions to understand network flows and quickly identify cyber threats.

In 2021, Frost & Sullivan recognized Tata Communications for its commitment to innovation and customer-centric approaches and remains impressed with the company's continuing innovation and sustaining leadership. Frost & Sullivan finds that challenges in the enterprise MSS market increased over the past year as business operations transitioned from on-premise to cloud operations. In addition, cybersecurity became a top investment for businesses because of digital transformation, which drastically ignited in part from the COVID-19 pandemic, given the surge of ransomware and unknown attacks while employees worked remotely. Moreover, enterprise security teams struggled to maintain their cybersecurity operations as threats intensified. In addition, meeting the demand for in-house security teams to manage and monitor effectively and efficiently became an instant need to build back a secure architecture. Thus, the need for stronger MSS solutions backed by security-based analytics became a focal point.

While these challenges remain in the market, in 2022, Tata Communications uncovers the challenge security teams face while managing and ensuring the level of access privileges provided to the correct users remains adequate. Together these evolving challenges raise the need for a more robust MSS portfolio that can prioritize not only traditional services but also threat intelligence, advanced MSS, and professional security services.

Demonstrated Leadership through Continuous Product Innovation

Tata Communications creates innovative products by focusing on key domains, including network and infrastructure security, the cloud, content/identity security, governance, risk and compliance management, and threat management. The company developed and refined these processes over time, perfecting its approach. As a result, it expanded its MSS portfolio with new solutions thereby catering to different customer requirements.

Tata Communications offers the most comprehensive MSS portfolio in the market, spanning robust features and capabilities. Highlights include combining deep-seated domain and operational knowledge with advanced technologies such as deep analysis threat detection and response capabilities using artificial intelligence (AI) and machine learning (ML). It allows businesses to minimize risks in the cloud, guiding them during their transformation journey. Tata Communications runs a Center of Excellence for cybersecurity that commits to enhancing the customer experience. In addition, the company closely monitors emerging market trends and evolving customer demands, and then responds with novel solutions. With these enhanced innovation and customer-centric approaches, Frost & Sullivan expects Tata Communications to maintain a leading position and address needs of customers in the MSS market.

> *"Given the evolving challenges from the digital transformation and cloud adoption that force network and security architectures to change, Tata Communications addresses the need for accelerated access towards SASE with its network-agnostic solution, GSIGS 2.0."*
>
> *- Steven Lopez,*
> *Best Practices Research Analyst*

The company's vision centers around helping enterprises manage cyber threats as they transition from on-premise systems to the cloud. By doing so, Tata Communications enables enterprises to understand network workflows, providing quicker rule-based models that eliminate the burden from understaffed security teams. With a legacy of MSS leadership, the company's compelling value proposition underlines its continuous success. The company offers its customers services like secure access service edge (SASE), AI and ML-based real-time network analytic platforms, and cloud-service solutions. These services influence zero-trust practices that help build and manage an enterprise's regulatory and compliance needs.[1]

Given the evolving challenges from the digital transformation and cloud adoption that force network and security architectures to change, Tata Communications addresses the need for accelerated access towards SASE with its network-agnostic solution, Global Secure Internet Gateway Service (GSIGS) 2.0. Tata Communications notes GSIGS2.0 as the most significant use case currently integrating zero-trust access

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[1] *Asia-Pacific Managed Security Services Growth Opportunities* (Frost & Sullivan, August 2021)

with web gateways. As an improved version of its predecessor (GSIGS), GSIGS2.0 provides customers with advanced threat protection with a 24/7 Global Cyber Security Response Centre in India. As a significant offering, GSIGS2.0 provides unified coverage without requiring additional purchasing, upgrading, or managing multiple components in-house. With today's uptick in hybrid workplaces, GSIGS2.0 is ideal for helping quicken the shift to SASE. Tata Communications highlights that this robust solution regularly updates to reflect market conditions.[2]

> *"Frost & Sullivan commends the company for the open and connected approach to cybersecurity it provides its customers. By understanding and following MSS trends, Tata Communications develops solution enhancements that allow it to stay one step ahead in the industry."*
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Furthermore, Tata Communications' Enhanced Detection and Response (XDR) services allow security teams to respond faster to malicious events. The company makes its XDR services possible by offering a centralized approach that manages threats and reduces the average time to detection and response through automation using AI and ML. Given the changing work patterns from the digital transformation, XDR allows enterprises to remain secure.[3]

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A Customer-centric Approach Driving Unmatched Client Experience

Tata Communications goes beyond its extensive expertise and best-in-class capabilities, with customer value as a strategic imperative. Through the years, the company has earned a sterling reputation supporting customers' path toward the digital transformation of their operations.

Successfully managing multiple security operations centers (SOC) in India, its global engineering team continues to enhance portfolio features, such as adding intelligence-based improvements to its cloud SOC and ensuring that customer satisfaction remains at the forefront. Unlike other systems that collect data logs, provide a standard out-of-the-box platform, and inform customers with occasional remediation services, Tata Communications offers automated processes for each of these tasks. Through the automated processes, Tata Communications has improved prevention response times by 90%.[4]

The company maintains a steadfast momentum in garnering market leadership and continuous growth rates. It builds its services, collaborating closely with various stakeholders and partners to evolve alongside market needs and trends. Tata Communications' Customer Success Team consists of experts (account manager, solution architect, customer success manager, and program manager) dedicated to working alongside customers pre- and post-purchase. The company's transparent, frictionless, and balanced approach and close relationships position it as a partner of choice.

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[2] https://www.tatacommunications.com/resource/products-solutions/security/global-secure-internet-gateway-service-gsigs/ (Accessed October 2022)

[3] https://www.tatacommunications.com/products/security/managed-detection-and-response/ (Accessed October 2022)

[4] https://www.tatacommunications.com/resource/products-solutions/security/the-science-behind-security-2/ (Accessed October 2022)

Positioned for Growth

Since its inception, Tata Communications' sterling reputation and customer-centric framework have led to its coveted preferred partner status. Over the years, it added a range of new customers and partners to its established base.

In India, the company reports year-over-year revenue growth of close to 30% for cybersecurity, primarily from its distributed denial-of-service and SOC services. The company maintains a strong presence among customers in key vertical markets such as banking, financial services, insurance, government, manufacturing, and service providers. It observes that a significant portion of revenue growth comes from customers in small manufacturing firms, healthcare, retail, and banking subsidiaries. Frost & Sullivan believes the company is well-positioned to drive the MSS and cybersecurity space into its next growth phase, capturing market share and sustaining its leadership in the coming years. Frost & Sullivan applauds Tata Communications on its continued success and contribution to the MSS market.

Conclusion

As enterprises shift towards digital transformation, moving from on-premises work environments to the cloud, security teams struggle to maintain internal cybersecurity operations as threats intensify and network and security architectures change. Furthermore, data protection from security operations center (SOC) processes to managed security services (MSS) during the digital transformation increase identity vulnerability to cyber threats. Overall, Tata Communications addresses these unmet needs with a strong leadership focus that incorporates customer-centric strategies and exemplifies best practice implementation. It provides customers with a robust, comprehensive MSS portfolio that enables innovative, scalable, and flexible security. The solutions help reduce threat detection and response time using premier automation within its SOC processes. Tata Communications is a global company with a notable and strong presence in India and is one of the strongest players among telecommunications and data center providers. The company remains a trusted partner, earning a sterling reputation for offering the overall best in MSS and cybersecurity.

With its strong overall performance, Tata Communications earns Frost & Sullivan's 2022 Indian Company of the Year Award in the MSS industry.

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)