FROST & SULLIVAN

TATA COMMUNICATIONS

2022
COMPANY
OF THE
YEAR

INDIAN SD-WAN
SERVICES INDUSTRY

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 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

IZO™ SDWAN: Enhancing Customer Experience, Improving Productivity and Efficiency, and Building Agility

Headquartered in Mumbai, India, Tata Communications, a subsidiary of Tata Group, is a digital ecosystem enabler for today's digital economy. The company is leading the Indian market, leveraging an end-to-end managed service solution through a single platform supporting all software-defined wide area network (SD-WAN) features. In 2021, Frost & Sullivan recognized Tata Communications for its leadership focus, implementation of best practices, and customer service experience and remains impressed with the company's continuing innovation and sustained leadership. The SD-WAN market and its adoption are still in the growth stage. Frost & Sullivan research analysts estimate that by 2021 the market was valued at ₹ 1192 million in India and expects to grow at a compound annual growth rate of 52.4% between 2021 and 2026 and reach about ₹ 9791 million by the end of the forecast period.

> *"Tata Communications' vision centers on enabling customers to embrace digital technologies and business models with the stated purpose of being borderless and always available. This vision connects deep-seated domain and operational knowledge with advanced technology to provide IZO™ SDWAN."*
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> *- Valentina Barcia,*
> *Best Practices Research Analyst*

Tata Communications' vision centers on enabling customers to embrace digital technologies and business models with the stated purpose of being borderless and always available domain and operational

knowledge with advanced technology to provide IZO™ SDWAN. This service allows customers to establish a reliable network, monitor their performance in real time, and efficiently route traffic to meet service level agreements.1 Tata Communications builds strong technological partnerships (e.g., Versa Networks, Fortinet, Cisco Viptela, Cisco Meraki, Silver Peak) with a multi-vendor approach to deliver scalable and secure access to applications in a hybrid cloud environment. The company is continuously refining its approach to SD-WAN services and offers the most comprehensive solutions in the market, spanning robust features and capabilities. Its product portfolio offers Network Integrated SD-WAN, Managed SD-WAN, and SD-WAN as a service, announced in Q3 of 2022, a pay-per-use model with flexible contract periods, simplifying users' purchase experience and migration to SD-WAN.

The company's compelling value proposition underpins its sustained success with its SD-WAN service provider leadership. Tata Communications acknowledges enterprises' need to manage highly complex networks due to multiple cloud connections and users working from home. Thus, the company's IZO™ SDWAN platform offers customers the flexibility of choosing which deployment they need and delivers the best-fit solution to scale their business, outpacing competitors and providing valuable benefits:

- **Simplicity**: Through a single unified platform, customers can truly embrace their network transformation journey with a seamless migration as Tata Communications uses a risk-mitigated delivery methodology.

- **Security**: The company guarantees consistent and reliable network performance at all times. With a distinctive underlay-overlay correlation, it also improves uptime.

- **Agile network**: SD-WAN makes using virtual private networks easier and more scalable while also improving the cost and efficiency of data transmission.[2]

"Tata Communications meets with clients to assess their specific needs and develop tailored solutions with roadmaps for seamless execution. This foundational approach establishes ongoing trust with customers for long-lasting relationships extending all through the entire IZO™ SDWAN service lifecycle."

- Kapil Baghel,
Senior Consulting Analyst

Tata Communications initiates regular enhancements to its services to ensure their optimal performance. The company's most recent development is the SPAED a secure private access solution, specifically designed for small retail formats, pop-up retail stores, remote workspaces, and automated teller machines. This new development is a plug-and-play customer premises equipment-based solution to help clients secure applications using available connectivity. It delivers performance reliability and agility, enhancing security and lowering clients' operational expenditures.

Providing Support throughout the Integration Process

With its customer-centric corporate philosophy, Tata Communications operates on the central tenet that its success depends on customer satisfaction. This philosophy permeates the company's daily practices. The company's customer success team has four roles (Technical Design, Project Management, Dedicated

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[1] https://www.tatacommunications.com/solutions/network/cloud-ready-networks/izo-sdwan/. Accessed September 2022.
[2] Ibid.

Service Manager, and Customer Support Analyst) filled with technical expertise to ensure a transparent, accountable, and stress-free experience. Additionally, the company has a dedicated support desk available 24/7 to monitor, manage, and look after the clients' capacity, identifying any risk and escalating as required.[3]

The company invests in various aspects of artificial intelligence (AI) and machine learning (ML) initiatives to improve customer experience. For example, regarding security, AI and ML solutions predict and prevent distributed denial-of-service attacks with the generation of alert and auto mitigation bases through the automatic detection of attack patterns. It also has an auto-diagnosis network event with continuous monitoring and correlation of overlay and underlay network events. Furthermore, the company conducts surveys to ensure high customer satisfaction, earning a Net Promoter Score of 84 points[4] and holding a position above the 75th percentile against the benchmark.[5]

Tata Communications meets with clients to assess their specific needs and develop tailored solutions with roadmaps for seamless execution. This foundational approach establishes ongoing trust with customers for long-lasting relationships extending all through the entire IZO™ SDWAN service lifecycle. Throughout the purchasing process, Tata Communications customizes its services with different options in the platform to clients' specific needs. In its platform-based approach, the company developed a guided journey that supports the customer and delivers a remarkable customer purchase experience.

In the first stage, on what the company calls Day 0, before implementation, the company's team defines and establishes the foundations to build a scalable, secure, high-performance service. On Day 0, the assessment, design, simulation, and validation take place to ensure a straightforward delivery. Once the definition phase is over, Day 1 follows up with the planning and governance, integration, and service turn-up. At this point, the company established the network delivery to drive business imperatives with structured control. Finally, on Day 2, the services are operating, and Tata Communications continues to monitor, manage, and support the network uptime with consistency, visibility, analytics, and simplified control.[6]

> *"We were facing a lot of challenges related to network availability and looking for a solution that could offer network resiliency and also enable us to track consumer behaviors in our stores. IZO™ SDWAN looked as a perfect solution with promising benefits. Having previously worked with Tata Communications, we know about their customer-centric culture, technological capabilities, market reach (especially in tier-2, tier-3 cities) and chose them as our preferred partner to implement IZO™ SDWAN."*
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> **-Vipin Gupta, Head of Technology and Digital Transformation, Starbucks India.[7]**

Frost & Sullivan finds Tata Communications brings exemplary support, enhancing the overall customer experience and positioning the company as a preferred partner.

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[3] https://www.tatacommunications.com/resource/products-solutions/network/simplifying-the-complex/ . Accessed September 2022
[4] https://gamma.tatacommunications.com/assets/wp-content/uploads/2022/07/Integrated-Annual-Report-2021-22.pdf. Accessed September 2022.
[5] https://www.tatacommunications.com/apps/online-sustainable-development-report-2021/Tata-Communications-2021.pdf. Accessed September 2022.
[6] https://www.tatacommunications.com/solutions/network/cloud-ready-networks/izo-sdwan/. Accessed September 2022.
[7] Ibid.

Tata Communications: On a Growth Trajectory

Tata Communications demonstrates high-growth potential. The company is well-positioned in the market with an industry-leading product that provides tremendous value in high-demand sectors. It is a public company listed on the Bombay Stock Exchange and the National Stock Exchange of India. In 2021, the company generated $2,303 million (₹ 17,100 Crore) in annual revenue, a 0.2% year-over-year increase from 2020.[8] Since its inception, the company has grown to more than 12,000 employees from 50 nationalities and 22 offices in 15 countries.[9]

"Tata Communications ensures a new level of network agility, flexibility, and visibility, thus playing a key role in our network transformation journey. When we started our SDWAN journey in India, with internet as a mode of communication, of all the providers, the quality of the network provided by Tata Communications was the best. With their high performing internet service, we experienced high uptime and service availability, thus enhancing the experience of our customers."

-S Ilanngo, Head of the Global Infrastructure, Birla Carbon.[10]

The company's impressive growth momentum and trajectory are a testament to its customer-centric approach, revolutionary services, and exceptional client deployment strategies, earning its clients' trust and loyalty and enabling it to capture more market share.

Conclusion

In the current digital era, enterprises face various challenges in managing complex networks to build and scale their business in an agile and frictionless way. Tata Communications allows its customers to embrace digital transformations by offering revolutionary services. The company addresses these unmet needs with a strong leadership focus that incorporates customer-centric strategies and exemplifies best practice implementation. Its software-defined wide area network (SD-WAN) service offers clients a secure, simple, and agile network ensuring seamless management. Tata Communications guides and supports clients through the entire IZO™ SDWAN service lifecycle, delivering a remarkable customer purchase experience. Moreover, the company constantly enhances customer experience with innovative technological initiatives. Tata Communications remains a trusted partner, earning a reputation for offering the overall best in the SD-WAN service provider market.

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

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[8] https://www.tatacommunications.com/press-release/tata-communications-delivers-strong-fiscal-profit-highest-in-11-years-board-recommends-a-dividend-of-inr-14-per-share/. Accessed September 2022.

[9] https://gamma.tatacommunications.com/assets/wp-content/uploads/2022/07/Integrated-Annual-Report-2021-22.pdf. Accessed September 2022.

[10] https://www.tatacommunications.com/solutions/network/cloud-ready-networks/izo-sdwan/. Accessed September 2022.

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)

The Growth Pipeline Company™