

FROST & SULLIVAN

TATA COMMUNICATIONS

2022
COMPANY
OF THE
YEAR

INDIAN VIDEO
MANAGED 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 video managed services space.

AWARD CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
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

Reshaping the Media, Sports, and Live Events Industry

Established in 1986, Tata Communications is a global digital ecosystem enabler reshaping the media, sports, and live events industry through its robust media platform and solution stack. Its state-of-the-art media native cloud and edge capabilities are supported by next-generation workflows and a 100 gigabytes (GB)-enabled video backbone. Strengthened by its delivery capacity and solutions-orientated approach, it manages global distribution for 3,000+ television channels and facilitates 18,000 live events, including the remote production of 750+ events and 10,000 hours of monthly service support. Renowned by its customers and partners for innovation, agility, and global reach, the company is a leader in the video managed services space. In 2022,

“With continuous improvement as a strategic imperative, the product development team commits itself to acquire new skill sets, specifically when it comes to cloud, edge, and digital workloads. As software-as-a-service deployments will rely more and more on media native cloud and media native edge, this will be Tata Communications’ priority to fuel its next wave of growth.”

**- Riana Barnard,
Best Practices Research Analyst**

Frost & Sullivan recognized Tata Communications for an outstanding service portfolio based on its extensive privately-owned infrastructure and remains impressed with the company’s continuing innovation and sustained leadership.

Demonstrated Leadership through Continuous Product Innovation

Tata Communications creates innovative products by leveraging its deep engineering and domain experience, collaborating with the world's largest sporting federations, broadcasters, and digital platforms to handle complex workflows. The company developed and refined these processes over many years, perfecting its approach. For example, three years before the 4K resolution became prevalent, Tata Communications was ready to broadcast it. It also experimented with remote production for four years before the COVID-19 pandemic hit. Conscious of the high expectations, the company works closely with regional and global customers and partners in a proof-of-concept (POC) environment to solve their unique challenges. More than 40 engineering-driven POC project deliveries every quarter allow this digital ecosystem enabler to trial next-generation technologies ahead of its competitors. As a result, Tata Communications deployed its 100 GB upgrade to its global video infrastructure in 2022, which is now fully operational and supports some of the most extensive remote video production, processing, and transmission deployments. Furthermore, the company prioritized its media native cloud capabilities. Addressing the requirement for proximate processing of video and managing content at an edge location for a particular infrastructure, Tata Communications established 26 media edge locations across the Americas, Europe, and Asia. This media edge infrastructure also supports low-latency video streaming for millions of individuals.

Tata Communications offers the most comprehensive solution portfolio in the media and sports domain, spanning robust features and capabilities. The most significant part is its unique media ecosystem (i.e., a media workflow engine sitting on the company's native cloud and media native edge) that allows customers and partners to manage video at scale. Organizations can use Tata Communications' in-house-developed applications and software tools to aggregate content onto the digital enabler's cloud and edge, seamlessly distributing it from the media platform. It is a critical capability because video needs to be treated differently (than data) on cloud and edge infrastructure. Bolstered by its media-focused platform, solution stack, and deep expertise, the company positions itself as a leader in the market.

Tata Communications' leadership team closely monitors emerging market trends and evolving customer demands, then responds with novel solutions. Most of the core team members have been part of the journey for the past decade or more, working with specific partners in the industry to address significant technical challenges. With continuous improvement as a strategic imperative, the product development team commits itself to acquiring new skill sets, specifically when it comes to cloud, edge, and digital workloads. As software-as-a-service deployments will progressively rely on media native cloud and media native edge, it will be Tata Communications' priority to fuel its next wave of growth. The company's executive-level managers ensure they have the right team in place and cultivate an environment where employees can learn, absorb, and harness new concepts, keeping a step ahead in the market.

With this leadership focus, Frost & Sullivan expects Tata Communications to sustain its leadership in the video managed services industry.

Customer Service Excellence: The Rosetta Stone

Tata Communications' solution 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 towards remotely producing and distributing content at scale. For example, Tata Communications demonstrates how to solve a typical issue at a premier sports venue. The network crashes when thousands of spectators in the crowd try to access the internet on their phones. By utilizing its edge capabilities extensively, Tata Communications recreates a hyperlocal edge, enabling the broadcaster to deliver video without relying on the local (or mobile) internet at the venue. On the

"Conscious of the high expectations, the company works closely with regional and global customers and partners in a proof-of-concept (POC) environment to solve their unique challenges. More than 40 engineering-driven POC project deliveries every quarter allow this digital ecosystem enabler to trial next-generation technologies ahead of its competitors."

**- Rahul Agarwal,
Associate Fellow and Director**

back of its successful deployment of technology infrastructure at scale, Tata Communications continues to learn and innovate in the fast-evolving sports and live media environment, which is crucial from a service standpoint. When more than a billion people view a cricket match, the reliability of its service is integral to the customer experience. It is one of the core reasons customers choose to partner with Tata Communications, proven by its above-industry Net Promoter Score of 84. Empowering its service team to resolve any issue at the first point of contact is a key success factor. In addition, its forward-looking

approach to exploring advancements in a POC environment deepens the company's domain knowledge to add value. Delivering excellence by defining the best fit with industry-level open standard or in-house-developed applications and software, Tata Communications' seamless approach and close relationships position it as a partner of choice.

Recipe for Success

Since its inception, Tata Communications' sterling reputation and customer-centric framework have led to its coveted preferred partner status. The company is globally recognized for its agile and seamless workflow across the media value chain. It delivers a superior service, reinforced by strong collaboration with local partners and customers to ensure best-in-class solutions and support. Because of its unique ability to cross-pollinate learning across regions, Tata Communications drive innovation to achieve unprecedented excellence. Over the years, it added a range of new customers to its established base, increasing its revenue growth threefold in 2022.

Use Case

Tata Communications' global end-to-end managed network services empower Formula 1 to achieve unprecedented scale. It delivers unparalleled speed, scale, and performance by transferring 100+ video feeds and 250+ audio channels in under 200 milliseconds. Specifically, Tata Communications' cutting-edge technology infrastructure connects a 1.55 billion broadcast audience across 180+ territories, transferring 500 TB every race weekend at an average time of 200 milliseconds. Moreover, by leveraging Tata Communications' remote production and distribution capabilities, Formula 1 reduces its traveling freight by 34% to advance sustainability.

Frost & Sullivan believes the company is well-positioned to drive the video managed services space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

Conclusion

As the COVID-19 pandemic changed individuals' daily habits, content consumption exploded. Viewers are now consuming more than 50 hours of content weekly and expect new forms of content, which fuels a significant transformation in the industry. The massive migration to the cloud and the consumption of live sports, predominantly in 4k across multiple screens, accelerate the demand for technology infrastructure that will enable remote live production and video streaming accessible to audiences in every part of the world. Overall, Tata Communications addresses this unmet need with a strong leadership focus that incorporates customer-centric strategies and exemplifies best practice implementation. Its extensive privately-owned infrastructure includes a 100 gigabytes uncompressed media backbone, 400+ media hotspots across 125 cities, 26 edge locations, and seven regional locations. Its global end-to-end managed network services allow customers to handle complex workflows seamlessly and deliver unparalleled speed, agility, scale, and performance. The company remains a trusted partner, earning a reputation for offering the overall best while reshaping the video managed services industry.

With its strong overall performance, Tata Communications earns Frost & Sullivan's 2022 Indian Company of the Year Award in the video managed services 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)**

