



*Tata Communications Recognized as the*

**2021**

**Company of the Year**

Indian Video Managed Services Industry

*Excellence in Best Practices*

## 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 &amp; 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

### *A Leader in Video Managed Services*

Video streaming as a phenomenon is proliferating as the number of individuals viewing video on multiple screens is significantly increasing. The industry faces the challenge of making content available across multiple screens for billions of viewers at scale. It also faces the challenge of the dependence of enterprises on legacy tools and services that are readily available. It lacks features like red button services videos on-demand and is not well equipped to transition from HD to 4k and consumption of live sports predominantly in 4k across multiple screens. Tata Communications successfully addresses these challenges by building a network that delivers content to billions of viewers, ensuring reliability and security at the convenience of individuals globally.

Over-the-top (OTT) media service providers changed the game for traditional cable operators by providing superior services and out-of-the-box experience, which is available through single-click video play that offers high quality and multiple data feeds. Tata Communications is well-placed to address industry challenges by understanding the specific changes in the industry and their evolving demands. The company works closely with the largest media organizations globally to place the business and the technology at its disposal to solve some of these problems.

Tata Communications, a leading global digital infrastructure provider, works closely with customers within the media and entertainment business unit catering to specific technology infrastructure and enterprise services requirements. The company delivers integrated video managed services with its

distinctive product, Video Connect, forming the backbone for live and file-based contribution and extends global distribution to broadcasters and aggregators. Its strong market position in India makes it a straightforward choice for content providers to meet their video services and managed service requirements. Its unique capabilities and market leadership make it a provider of choice for customers worldwide.

The company has an extensive privately-owned infrastructure, which gives it an upper hand in the market over peers with a solid footing in submarine cable systems, networks, data centers, cloud services, security at scale, and voice portfolio.

*“Tata Communications successfully deployed a virtual assistant referee called Virtual Video Assisted Referee (V-VAR), providing refereeing from anywhere remotely. The referees, umpires, and judges can connect from any part of the world, giving audiences a real-time experience of their decisions through its remarkable processing power and technology. The V-VAR solution was successfully implemented for a global sailing championship and remotely managed by its media operation centers in Pune and Chennai.”*

**- Rahul Agarwal,  
Associate Director**

It created a portfolio specifically for media and entertainment services using these robust capabilities. Frost & Sullivan notes that Tata Communications made an out-of-the-box experience for its customers by delivering contextualized (i.e., concrete and personalized) products and services. Operating as one of the world’s largest live video networks, the company upgraded its core to 100G uncompressed media, meeting the increasing bandwidth requirements and high demand for upload and download speeds of end-users. The 100G video backbone supports

more than 9,000 events globally, ranging from Indian cricket, American soccer, South Korean baseball, European motorsports events viewed by audiences worldwide.

As the demand for personalized viewing increases, Tata Communications widely supports live content video on demand and exhibits the potential to support a large share of channels globally. In India, the company manages over 90% of the sports content available to the Indian audience and further leverages its capabilities to create a diverse digital services portfolio. The company caters to the global video network hurdle by hatching a subset of its media backbone and extending cloud and edge workflows leading to a customized portfolio for live video.

Tata Communications' core differentiation is its ability to customize as per the requirements of C-level executives of enterprises for real-time events viewed by billions of people around the globe with no room for error. The delivery efficacy is unrivaled, ensuring the human eye notices no difference. As the COVID-19 pandemic disrupted business operations across the board, most organizations sent workers home. Employees found themselves in new working environments with the media and entertainment industry hit significantly. Tata Communications successfully deployed a virtual assistant referee called Virtual Video Assisted Referee (V-VAR), providing refereeing from anywhere remotely. The referees, umpires, and judges can connect from any part of the world, giving audiences a real-time experience of their decisions through its remarkable processing power and technology. The V-VAR solution was successfully implemented for a global sailing championship and remotely managed by its media operation centers in Pune and Chennai.

### ***Innovations Creating Differentiation: Reliable, Superior Quality, and Complete Ownership***

Tata Communications monitors emerging market trends and evolving customer demands closely and responds with novel solutions. Unlike most other providers, Tata Communications maintains its proprietary facility and can handle any situation with the complete ownership of a particular venue in any part of the world. It provides a low latency network to optimize high volumes of data with minimum delay. The low latency network and legacy-free internet protocol backbone allow the company to work with one of the largest sports federations and broadcasters globally. It empowers these organizations by offering remote production capabilities.

The company uniquely offers video contributions for various sporting federations to a remote location

*“Tata Communications impresses Frost & Sullivan with its low latency network and video connect as a product that enables remote production for some of the world’s largest sporting federations and broadcasters in the industry.”*

***- Ruman Ahmed,  
Best Practices Research Analyst***

while eliminating the need to travel of the production crew (200-300 members) depending on the size of the event without compromising the quality of productions from a remote location. The services significantly reduce the costs involved in logistics, travel, and other expenses. It also results in a greater retention rate of employees. It obviates prolonged travel (as long as 200 days in a year) for employees involved in the production, catering to the challenge of employee attrition.

With its forward-looking approach, Tata Communications is well-placed to tackle unprecedented times like COVID-19 as it works with the world’s top five sports broadcasters and sporting federations for deploying remote production. As the COVID-19 pandemic hit, businesses quickly adopted a remote work culture, accelerating the need for remote production in the media and entertainment industry. The company has an advantageous position with its experience, which helped sporting federations reopen various events. As the world slowly moves towards post-pandemic times and recuperates from the impact, multiple sporting federations and broadcasters are shifting to remote production at scale.

Using its cloud and edge capabilities, the company with its largest global video backbone has access to huge volumes of in-house content. The company deployed cloud workflow supports traditional technologies like channel playout services, transcoding, video storage, fast video transfer, and managing content at scale. Tata Communications supports the largest video OTT platforms for live events worldwide with its Ultra-Live VDN solution. The low latency video streaming solution minimized the latency delay between a piece of content viewed on multiple screens, drastically reducing the lag that earlier was around 12-60 seconds to zero. It provides the perfect orchestration for enhancing live experiences from any device or screen synchronously. Tata Communications impresses Frost & Sullivan with its distinctive features improving user interactions during these ongoing real-time events and offering an authentic broadcast experience from anywhere.

With its expertise, in-house technology, and complete solutions, the company actively focuses on helping the industry move forward. Tata Communications currently works with some of the largest sporting federations, broadcasters, and Esports companies for virtual content production. As content is readily available on its network, it creates a virtual mixer at the edge for a real-time experience delivering the outcomes remotely. The solution empowers production teams by virtualizing their

workflows and enabling remote operations. Tata Communications constantly innovates and upgrades its solutions to meet the ever-evolving industry demands and equips its customers and partners to be five to ten years ahead in time. The company works with partners on numerous proofs of concept incorporating the latest technology like fifth-generation mobile networks and private Long-Term Evolution.

### *Superior Customer Experience*

Tata Communications exceeds customers' expectations by understanding their specific needs and developing tailored solutions with roadmaps for seamless execution. This foundational approach establishes ongoing trust with customers for long-lasting relationships extending throughout the product and service lifecycle. It offers users a seamless and transparent viewing experience as it delivers 1000 remote production tier1 events with absolute accuracy. It effectively monitors processes and delivers desired results based on business outcomes it supports. The company simplifies users' experience with its skilled expertise, observing every technology deployed and analyzing different risks involved. Keeping the price-sensitive audience and their expectations in mind, the company offers cost-effective pricing methodologies creating a significant difference to end consumer experience while making the next generation of technology easily accessible.

The fundamental value proposition Tata Communications offers is end-to-end ownership of a particular business outcome with an acute focus on future-proof technologies. The company treats every project as a real-time deployment and not just an innovation or a vanity project integrating it with native cloud and edge applications and services. Tata Communications continually enhances customer journey by reducing barriers to entry, providing them with the most optimal solution for addressing their unique needs. The company positively impacts its customers by ensuring day-to-day quality and performance with its highly dynamic executive team.

## **Conclusion**

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As the availability of content increases across multiple screens, the industry faces the challenge of dependence on legacy tools and services that lack features like red button services and video on-demand services. It was not equipped to transition from high-definition video to ultra-high-definition image format. Tata Communications, a leading global digital infrastructure provider, successfully addressed these challenges by building a network delivering content to billions of viewers, reliably and securely, as per the convenience of viewers.

The company provides the industry's leading purpose-built service and offers an out-of-the-box experience by understanding the specific changes in the industry and their evolving demands. The company empowers customers with its largest global video backbone that has access to huge volumes of in-house content. Due to its most extensive privately-owned infrastructure, Tata Communications created a portfolio specifically for media and entertainment services using robust capabilities. The company delivers integrated video managed services with its unique product, Video Connect, forming the backbone for live and file-based contribution and extends global distribution to broadcasters and aggregators. With its leadership, robust capabilities, and unique products, Tata Communications earns Frost & Sullivan's 2021 Indian Company of the Year Award in the video-managed services industry.

## What You Need to Know about the Company of the Year Recognition

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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™.

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### 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)**

