

F R O S T & S U L L I V A N

2024 ENABLING TECHNOLOGY LEADER

*IN THE GLOBAL
CLOUD-CONNECTED
MOBILE UC INDUSTRY*

F R O S T & S U L L I V A N

BEST
2024 PRACTICES
AWARD



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. Tango Networks excels in many of the criteria in the cloud-connected mobile UC space.

AWARD CRITERIA	
<i>Technology Leverage</i>	<i>Customer Impact</i>
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

Commitment to Innovation and Creativity

For nearly two decades Tango Networks has been at the forefront of delivering enabling technologies for effective mobile business communications. Through relentless innovation and creativity Tango Networks continually evolves its solutions and market strategies to better address shifting customer requirements. The provider’s highly differentiated fixed-mobile convergence (FMC) and mobile unified communications

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- Elka Popova
VP of Connected Work Research

(UC) solutions address key industry trends, including the broad adoption of remote and hybrid work models, the influx of mobile-centric digital natives into the workforce, and increasing recognition of the need to better equip frontline and field workers—all of which are driving growing use of mobile phones for business purposes.

A 2024 global Frost & Sullivan survey of information technologies (IT) decision makers reveals that 96% of surveyed organizations support hybrid work models

and 93% expect to continue providing flexible work arrangements to their desk-based employees for the next three years. To power collaboration among distributed teams and support timely and effective employee interactions with customers, many organizations are adopting cloud telephony and unified communications as-a-service (UCaaS) solutions and are replacing desk phones with software-based calling and UC applications and/or mobile devices and services.

Many organizations are also leveraging advancements in business mobile communications to empower underserved workforce demographics, such as frontline and field workers. Although comprising a significant proportion of the global workforce, desk-less workers and campus roamers typically have limited access to communications tools tailored to their specific needs. By the end of 2026, 84% of surveyed organizations plan to provide mobile phones and/or tablets to their frontliners to boost worker productivity, better integrate frontliners with the rest of the organization, and improve workers' ability to support an excellent customer journey.

Younger workforce generations, including Millennials and Gen Z, are also driving more extensive adoption of mobile phones and services for business use. By growing up with mobile devices and being familiar with the flexibility and richness of mobile communications, younger employees expect their employers to provide them with the same capabilities at work.

Expanding use cases for mobile business communications, improving mobile network coverage and mobile phone capabilities, and decreasing mobile service costs are leading to broad adoption of mobile phones and service plans across organizations. IT decision makers in Frost & Sullivan's survey report that, on average, 48% of employees use mobile phones as primary communications devices today and 53% are likely to do so by 2027. In response to this trend, 95% of organizations will be providing mobile phones and 94% will be providing business mobile voice and data plans to some or all their employees by the end of 2026.

Tango Networks recognizes that growing adoption of mobile communications delivers numerous benefits, but it also presents challenges to customer organizations. Most businesses have already invested in sophisticated, typically wireline and desk-based, communications systems and services to access robust private branch-exchange (PBX) features, as well as additional UC capabilities such as video meetings and group chat. Such organizations are typically adding mobility capabilities by adopting disparate mobile voice and data solutions that are not integrated with existing business communications assets, thus creating technology silos within their communications environments.

Plain-vanilla mobile voice and data services, provided by MNOs and traditional mobile reseller channels, on their own are not integrated to UC platforms, so do not support extension dialing, hunt groups, professional auto attendants, call recording, call handing (transfer, forward, park, etc.), and other business calling policies and features. Therefore, businesses are looking to integrate mobile devices with existing telephony and UC solutions to gain the benefits of mobility without compromising on the richness and control of business features.

Tango Extend, Tango Networks' flagship business mobility solution, enables integration of mobile devices with leading PBX and UCaaS solutions to provide businesses with maximum flexibility and choice. Leveraging eSIM technology, Tango Extend enables a second calling line on the mobile device using the employee's business phone number and identity associated with the organization's phone system. With this visionary design, organizations can quickly mobile-enable their employees without the need to rip and replace their telephony solutions or employees' existing mobile devices and plans.

Tango Networks' creativity and innovation also extend to the channels that bring its solutions to market. As a mobile virtual network operator (MVNO) Tango Networks enables a broad range of service providers

not possessing mobile capabilities of their own, including telecom operators, UCaaS providers, managed services providers (MSPs), and systems integrators, to deliver mobile solutions to business customers. This approach enables Tango Networks to launch services quickly in multiple geographies and vertical industries to tap into a large addressable market.

Commercialization Success and Application Diversity

Tango Networks partners with hundreds of mobile operators to ensure robust global coverage for Tango Extend. In March 2024, the provider launched Global Pass, which provides Tango Extend subscribers with a single fixed-rate mobile service across 39 countries including 16 home countries and 23 home-away (roaming) countries in Europe and North America. Global Pass enables frictionless, hassle-free mobile communications for employees travelling or working in various international locations. Tango Networks is looking to extend Global Pass to other countries and world regions, including Africa, Asia-Pacific and Latin America, in the near future.

To address customer diverse UC requirements, Tango Networks is integrating its mobile services with leading cloud PBX and UCaaS platforms, including Cisco BroadWorks and Webex Calling, NetSapiens, Microsoft Teams Phone, and various open-source telephony solutions. These partnerships enable Tango Networks to capture the vast majority of installed cloud PBX and UCaaS users, as well as capitalize on the rapid growth rates of the leading platforms. Demand for native mobile calling among cloud PBX and UCaaS users is expected to grow as awareness of FMC solutions and their benefits increases, creating considerable growth opportunities for Tango Extend.

Tango Networks is also rapidly expanding its reseller channel by developing partnerships with dozens of service providers of varying size, capabilities, and geographic presence.

Publicly named partners include NTT, CallTower, Clarity, Nuwave, OneCloud Networks, PureIP, Redcentric, SpectrumVoIP, and SUMOFIBER. Recent partnerships with AudioCodes, SIPPIO, Tata Communications and Cisco also enable Tango Networks to more directly power Microsoft Teams Direct Routing and Operator Connect and Cisco Webex cloud-connected providers. Going forward, the provider's rapidly expanding reseller roster will likely accelerate subscriber growth and provide Tango Networks with a competitive advantage against others with potentially similarly positioned business models.

Price/Performance Value

Resellers determine the Tango Extend end-user price based on their business models and the value they believe it provides to customers. However, it is typically offered for up to \$10 per user per month on top of a UC user seat license and an existing wireline calling plan, which makes it affordable for most organizations that recognize the considerable benefits.

Tango Extend users typically leverage BOYD phones, which enables the customer organization to save the costs of providing corporate-liable devices and mobile plans to their employees. By switching to mobile-only communications, organizations can also eliminate desktop phones, which results in a reduction of hardware and phone maintenance and lifecycle costs. Environmentally-conscious organizations also see the reduction in mobile and/or desktop phones as an opportunity to reduce their carbon footprint.

Tango Extend benefits go much beyond cost savings to address important shortcomings of the common mobility approaches among businesses. Within most organizations, mobile phones and services are disparate from business telephony systems, which negatively impacts company costs, user experiences and productivity. Importantly, the siloed approach also creates security, privacy, and governance concerns that expose the organization to financial penalties and cyberattacks.

To enable access to business voice and collaboration (e.g., video meetings, group chat) features on mobile devices, many organizations adopt mobile apps or browser-based UC clients from their UC provider, typically requiring WiFi or mobile data coverage, which may be limited or unreliable in certain locations.

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Using an app, rather than a native mobile dialer, also often creates reluctance among business users to leverage the corporate service. Many employees, therefore, use their personal phone number and service instead, which exposes their personal contact information to business associates, as well as opens the door to compliance violations, poor record keeping, and security vulnerabilities for the organization.

In other scenarios, UCaaS/cloud PBX providers connect directly to mobile operators’ networks to enable native mobile calling with business features for customers. In this approach, companies can only leverage the mobile UC service within the specific mobile operator’s network coverage and often only with the respective operator’s approved and/or compatible mobile phones. This is particularly limiting for distributed

organizations as it prevents them from consolidating providers and harmonizing contract terms, prices, and user experiences across business sites.

Tango’s eSIM approach for BYOD enables the most natural calling experience—using the mobile dialer—while providing the user with the business calling features supported on the company telephony system and delivering these capabilities across geographies and types of mobile phones. This design also protects the user’s private number and spares them any costs associated with business calling and/or texting. It allows the company to keep an accurate report of employees’ business interactions, record calls and messages for compliance purposes, and retain ownership of customer information when employees leave.

Customer Purchase and Ownership Experiences

The Tango Extend purchase experience is frictionless. Depending on the UC provider, the mobile service entitlement may already be included in the user license (e.g., Cisco Webex Go, powered by Tango, is included in the Webex Calling Professional license) or can be purchased from the cloud PBX/UCaaS service provider. Users within an organization using Microsoft Teams Phone can easily download the Tango Extend eSIM installer from within the Teams App Store. Then, whether using MS Teams or Webex, they

receive an e-mail from their IT department and simply scan the unique QR code it contains with their mobile phones. This installs their additional business eSIM, paired with Teams or Webex. Upon completion of these intuitive steps, users can begin making and receiving mobile calls using their company-assigned UC number, as well as access the corporate directory and use extension dialing and call-handling features, voicemail, call recording, and business SMS. At that point, the mobile phone rings simultaneously with the desktop UC app.

The Tango Networks' model provides considerable flexibility to businesses by enabling comparable experiences across UC platforms and providers, mobile devices, and mobile operators. Through integration with leading cloud telephony platforms, Tango Extend can provide mobile UC capabilities to tens of millions of business users. If a company changes cloud UC providers, the probability of adopting another solution that integrates with Tango Extend is considerably high. Similarly, Tango Extend can be supported on a broad range of mobile phones that are unlocked and support eSIM technology. Organizations can easily provide mobile UC capabilities to new employees or to employees replacing their devices with new ones. By leveraging Tango Networks' mobile network, Tango Extend is independent of users' personal mobile providers, which reduces the hassle for both end users and the organization when users switch providers.

Overall, Tango Extend provides organizations with a cost-effective, non-disruptive, reliable, and compliant mobile communications solution which only requires one existing business number, leverages a single global mobile tariff, and can be bought through a single supplier. Rapid onboarding and deployment flexibility truly differentiate Tango Networks' approach from the complex purchase and ownership experiences associated with alternative solutions.

Conclusion

Keen awareness of organizations' need for flexible and cost-effective, yet feature-rich mobile business communications solutions has informed Tango Networks' highly differentiated solution design. Creative partnerships with mobile operators, a broad spectrum of resellers, and leading UC providers represent another key aspect of Tango Networks' growth strategy and market approach.

For its strong overall performance, Tango Networks is recognized with Frost & Sullivan's 2024 Global Enabling Technology Leadership Award in the cloud-connected mobile UC industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

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)**

