

TATA COMMUNICATIONS

**20
25** | **COMPANY
OF THE YEAR**
Driving impact across the customer value chain

*RECOGNIZED FOR BEST PRACTICES IN THE
GLOBAL VIDEO-MANAGED SERVICES INDUSTRY*

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

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition 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.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

Adapting to a New Media Era: Strategic Shifts in the Video-managed Services Industry

The video-managed services industry is undergoing a significant transformation, influenced by several strategic imperatives reshaping how companies operate within an increasingly complex media landscape. One of the most impactful changes is the shift toward innovative business models. Companies are moving beyond offering individual services and embracing end-to-end solutions that leverage cloud-based infrastructure, edge computing, and remote production technologies. This new approach enables businesses to streamline workflows for customers, creating a comprehensive ecosystem that simplifies the media experience. By integrating services such as production, channel origination, and distribution, companies can better meet the evolving demands of broadcasters, content providers, and other industry stakeholders. This shift allows organizations to remain agile, responding quickly to market needs while creating new revenue streams through strategic partnerships and collaborations.

At the heart of this transformation is the adoption of disruptive technologies. As the demand for low-latency streaming, localized content delivery, and cloud-based solutions intensifies, companies increasingly turn to technologies such as artificial intelligence (AI), machine learning, and edge computing. These technologies optimize workflows, improve operational efficiency, and enhance the customer experience by providing more reliable and flexible services. By embedding AI into customer service processes and utilizing cloud infrastructure to streamline operations, companies can remain competitive, moving away from traditional broadcast models and effectively revolutionizing content management and distribution.

Additionally, the convergence of industries plays a crucial role in this transformation. Traditional sectors, such as broadcasting, telecommunications, and cloud infrastructure, are coming together to offer integrated solutions that benefit a wide range of customers. This convergence enables seamless content delivery across multiple platforms and creates opportunities for cross-industry collaboration that were previously unavailable. Integrating remote production technologies and sports broadcasting is a prime example of how industry convergence drives growth and innovation in areas beyond traditional media. These collaborations allow companies to explore new opportunities and expand their reach into diverse sectors, unlocking growth potential in untapped markets.

In this context, Frost & Sullivan identifies Tata Communications (Tata) as a key player in driving the transformation of the video-managed services industry. By embracing innovative business models and disruptive technologies, as well as fostering industry convergence, the company is adapting to the changing media landscape and setting new standards for delivering end-to-end solutions.

Tata Communications Drives Value by Leveraging Megatrends to Address Unmet Needs

Founded in 2002 and headquartered in Mumbai, India, Tata is a global leader in digital ecosystem enablement, providing secure, connected, and innovative solutions to enterprises worldwide. The company supports the digital transformation of over 300 Fortune 500 companies and routes approximately one-third of the world's Internet traffic while connecting businesses to 100% of the world's major cloud providers. With a mission to offer borderless and always-available solutions, Tata leads in cloud, mobility, Internet of Things, collaboration, security, and media services.

Innovative Offerings Address Unmet Needs

Tata redefines the media and entertainment industry by delivering comprehensive, end-to-end solutions that address the growing complexity of content production and distribution. As the industry shifts from traditional on-premises infrastructure to cloud-based technologies, broadcasters require seamless integration across transmission, production, channel origination, and distribution. Positioning itself as a trusted global partner, the company offers a fully integrated, cloud-first approach, allowing media organizations to scale efficiently without managing unfamiliar technologies. This holistic capability ensures high-quality, low-latency content delivery while simplifying operations.

Media Hub, Tata's proprietary cloud-based media asset management system, is a key innovation in this transformation. Designed to meet the evolving needs of modern broadcasters, Media Hub provides secure, highly available media storage with customizable workflow automation. Unlike third-party solutions, the platform allows content providers to store, manage, and access its media seamlessly while integrating with complementary services (such as tailored workflow orchestration, remote production support, real-time content collaboration, and automated media processing). Acting as a central hub, it also serves as a front-end interface for additional media services, enhancing efficiency and scalability. Continuous enhancements position Media Hub as an industry-leading solution, helping broadcasters streamline operations and manage digital assets more efficiently.

Beyond media storage, Tata advances video transmission capabilities significantly with solutions like Video Connect and MIMiC Transmission. Video Connect leverages next-generation access encoding technology, enabling low-latency, high-quality video transmission, which is critical for top-tier

broadcasters. Meanwhile, MIMiC Transmission, a cloud-native video transmission system, supports large-scale remote productions, such as those for sustainable motorsports events, handling up to 130 video feeds remotely. This system eliminates the need for extensive on-site production staff, reducing costs while maintaining top-tier production quality. Additionally, Tata integrates remote compute processing at event venues, offering essential services like intercom, security, and signal processing, enhancing operational efficiency further.

One of the company's most significant advancements is its 100-gigabyte integrated backbone, one of the largest investments in the industry. Now fully deployed and expanded, particularly in North America, this backbone integrates cloud and edge computing environments, enabling low-latency video processing and remote production for major sporting events like major global motorsports, sailing, and football leagues. With a presence in over 100 to 200 venues worldwide, ensures scalability and efficiency in global live event coverage.

To address the growing challenge of real-time content monitoring, Tata introduced MIMiC Monitor, a pioneering solution providing real-time, scalable monitoring of live and on-demand content across major digital platforms. While leading global over-the-top (OTT) and video on demand subscription-based streaming services companies and content owners manage hundreds of live channels and thousands of hours of on-demand content, MIMiC Monitor delivers a centralized, cloud-based dashboard that enables such companies to track and analyze their content quality. Already deployed

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- Rahul Agarwal
Associate Fellow & Director

and actively in use, this service is integral to some of the world's largest digital streaming operations.

Tata's cloud-first initiatives are rapidly replacing legacy infrastructure and on-premises models with highly scalable, flexible, and efficient solutions. Major media organizations, including leading multi-sports programming broadcasters in the Americas, are embracing the company's cloud-based playout solutions, such as 4K playout for a global cricketing spectacle and cloud-first channel playout infrastructure

for major professional sports leagues, reaching tens of millions of households in the region. These deployments demonstrate Tata's ability to deliver robust, cloud-native media services at scale, aligning with global broadcasters seeking to modernize their workflows.

Leveraging Megatrends for Value Optimization

Tata strategically aligns with key megatrends in cloud computing, AI, and digital transformation to drive innovation in media and entertainment. As the industry undergoes a fundamental shift from traditional on-premises infrastructure to cloud-based workflows, the company is at the forefront, enabling seamless channel origination, transmission, and production in the cloud. By expanding its cloud capabilities, Tata provides broadcasters with greater agility and cost efficiency, allowing them to adapt quickly to new rights acquisitions and evolving live sports demands. While mid-tier and niche content providers can already operate fully in the cloud, the company is focusing on migrating top-tier

production workflows to a cloud-first model, eliminating long upgrade cycles associated with on-premises equipment and empowering media organizations with scalable, future-proof solutions.

This cloud-first approach aligns seamlessly with Tata's global digital infrastructure and transmission capabilities. With the increasing number of broadcasters and content providers entering the live sports market, there is a growing demand for cost-effective, scalable content production. The company's cloud-based transmission and production ecosystem meets this need, supporting emerging and tier-one broadcasters.

Recognizing the inherent risk aversion among broadcasters, Tata capitalizes on its technical expertise to bridge the skills gap in cloud-based operations. Many media organizations lack the in-house capabilities to manage cloud migration and ongoing operations, presenting a major opportunity for Tata as a trusted technology partner. With its deep experience in cloud infrastructure, digital workflows, and end-to-end service management, the company is uniquely positioned to help broadcasters transition smoothly to the cloud, ensuring operational stability and cost optimization.

Beyond cloud adoption, Tata is advancing the integration of AI and large language models to enhance customer experience and network operations. One key initiative under consideration involves AI-powered diagnostics and escalation systems within its network operating centers. These centers serve as critical hubs for customers to report issues. AI-driven solutions could streamline troubleshooting, reduce resolution times, and equip first-line engineers with real-time insights, ultimately improving service efficiency and reliability. While still in the exploratory phase, AI-driven support represents a significant opportunity to enhance operational efficiency and customer satisfaction, reinforcing Tata's role as a forward-thinking technology leader.

Frost & Sullivan applauds the company for its innovative, cloud-first approach to transforming media and entertainment workflows, addressing critical industry challenges such as scalability, cost efficiency, and operational complexity. By leveraging megatrends in cloud computing, AI, and digital transformation, Tata enables broadcasters to transition seamlessly from legacy systems to next-generation cloud-based production and transmission. The company's end-to-end solutions, technical expertise, and commitment to innovation position it as a trusted partner delivering tangible value for media organizations globally.

Setting Standards: Tata Communications' Commitment to Client Satisfaction

Tata ensures the highest service standards through a comprehensive approach emphasizing rigorous testing, continuous monitoring, and strategic investments. The company works closely with technology partners to address compatibility issues across broadcast equipment and cloud-based services, recognizing the complexity of cloud workflows. Extensive testing is essential to ensure seamless integration across multiple components, while ongoing improvements to monitoring capabilities enhance service reliability. This proactive approach allows Tata to identify and resolve potential issues before they impact customers. Moreover, the company's global service centers, located strategically in Los Angeles, New York, London, and India, provide round-the-clock support, ensuring reliable transmission, production, and cloud-based workflows, accelerating the industry-wide shift to cloud adoption.

Tata delivers an exceptional customer experience by focusing on proactive service, robust systems, and customer satisfaction. A key strength is in the integration of best practices from Tata and The Switch, a highly reputable managed services provider in North America. This strategic merger allows the company to implement comprehensive global tracking and escalation processes. When issues arise, Tata tracks each through detailed discrepancy reports with clear escalation points, ensuring swift resolution. This meticulous approach is vital in an industry where various companies often handle workflows. By providing consistent and reliable solutions, the company strengthens client relationships and reinforces its position as a trusted service provider.

Customer feedback plays a crucial role in Tata's service refinement. It sends regular surveys to customers who have used the company's services, collecting Net Promoter Scores (NPS) that consistently range between 85% and 100%. (The company's NPS for 2025 is 91 for media-enabled services).¹ These high scores reflect its unwavering commitment to understanding and addressing customer needs. Regular account reviews with top customers ensure that any issue is identified and resolved quickly, while detailed capture systems and escalation processes guarantee effective problem-solving. This level of attention reinforces customer trust and satisfaction.

In addition, Tata differentiates itself by offering a broad range of products tailored to large, high-profile clients such as leading OTT streaming companies, sports broadcasters, and federations, as well as smaller broadcasters. By providing various price points and technologies, the company remains competitive and accessible to diverse clients. Tata also bundles services, combining transmission and production offerings to create comprehensive solutions that deliver greater value. This approach further enhances the customer experience, making the company a trusted and competitive leader in the media and communications industry.

Frost & Sullivan recognizes Tata for its commitment to meeting the evolving needs of its clients through its blend of reliability, strategic investments, and focus on customer satisfaction.

Brand Growth and Strategic Partnerships for Long-term Success

Tata leverages its strong foundation in the globally recognized Tata brand, renowned for its legacy of stability, long-term growth, and commitment to innovation. This association provides Tata with unparalleled credibility in the market, helping it stand out as a reliable partner for businesses worldwide. The company benefits from Tata's reputation for financial stability and its ongoing investments in cutting-edge capabilities, which are critical in maintaining a competitive edge, particularly in the fast-evolving media and communications space.

Tata invests strategically in key brand properties and industry partnerships to further enhance its brand equity. The company adopts a business-to-business marketing strategy targeting Chief Experience Officers through compelling use cases, such as those showcased in some of the world's largest motorsports and athletics sporting federations. These live proof-of-concept demonstrations allow Tata to engage with decision-makers directly, showcasing its technological prowess and ability to transform media ecosystems. This approach positions the company as a visionary expert and trusted global partner,

¹ Frost & Sullivan's Interview with Tata Communications, (January 24, 2025).

evolving its image from an established player to a thought leader within the media and entertainment sector.

In addition to its technological innovations, Tata is committed to sustainability and social responsibility, further strengthening its brand value. Initiatives like the Tata Communications sustainability drive at the International Broadcasting Convention, where partners and customers cycle to the event instead of using traditional transportation, align the brand with global sustainability goals. Partnerships with major global entities like Formula 1, Formula E, and MotoGP reinforce the company's brand as one that is cutting-edge in technology and committed to positive global change. Through these strategic efforts, Tata continues to enhance its brand equity, positioning itself as a forward-thinking leader in the industry and fostering deep, long-term relationships with customers and partners worldwide.

Financial Momentum and Future Prospects

Tata positions itself for sustained success through strategic agreements, key partnerships, and forward-thinking technology investment. The company expects strong momentum over the next three to five years, driven by transformative deals such as its agreement with the World Athletics. As the host broadcaster for all World Athletics Series events over the next five years and the upcoming Ultimate World Championships, Tata plays a pivotal role in the global sports media landscape, with high-profile events like the World Championship in Japan set for September 2025. Additionally, partnerships with leading

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- Ojaswi Rana
Best Practices Research Analyst

Latin American sports broadcasters and ongoing collaborations with Media Hub for critical customers generate substantial growth and add to an already healthy order book.

While the broader linear broadcast market faces challenges, including consolidation and profitability struggles, Tata benefits from its strategic focus on live sports broadcasting. The company establishes a strong presence in a growing industry by focusing on live sports content across traditional

linear and digital platforms. With the rising demand for sports broadcasting and streaming, Tata successfully insulates itself from the decline of linear television. Its investments in cloud and edge technologies ensure it remains at the forefront of the rapidly evolving media services industry, ready to support emerging digital platforms and capitalize on growth opportunities.

By committing to ongoing investment in cloud and edge computing, Tata is set to lead the shift toward cloud-based workflows. The opening of Victory Studios in Los Angeles in mid-2024 exemplifies this strategy, creating a next-generation sports production hub that reinforces the company's ability to deliver high-quality, cloud-driven production services. The integration of The Switch also supports Tata's expansion into South America, where it is deploying advanced technologies tailored to meet the region's evolving needs. At the same time, the company focuses on the booming live production services sector, mainly OTT platforms, reshape the global sports broadcasting landscape. Tata is building robust technology infrastructures by collaborating closely with these platforms to support the growing demand for live sports streaming.

Looking ahead, Tata is designing technology platforms proactively that align with the future needs of major broadcasters and sports organizations. This future-focused approach ensures the company remains ahead of industry trends, well-prepared to support customers' growth over the next decade. By investing strategically in technologies that match the evolving media and entertainment landscape, Tata reinforces its position as a trusted partner, ready to deliver advanced, scalable solutions for the future.

Conclusion

Tata Communications (Tata) is positioned to lead the transformation of the video-managed services industry. Its cloud-first approach, coupled with investments in artificial intelligence, edge computing, and remote production, allows the company to address market gaps while shaping future industry trends. Tata remains a step ahead of the competition by harnessing megatrends and implementing best practices in technology and service delivery.

The company's leadership focus on operational efficiency, price-performance value, and seamless customer experience across all touchpoints (purchase, ownership, and service) further strengthens its position as a trusted partner for global media players. Its dedication to delivering exceptional value, maintaining high service standards, and enhancing brand equity through sustainable practices enables it to foster long-term relationships with customers and partners. Tata meets the challenges of today's media landscape and lays a solid foundation for sustained success and growth in the evolving media ecosystem.

With its strong overall performance, Tata Communications earns Frost & Sullivan's 2025 Global Company of the Year Recognition 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 Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, 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 to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

