



Everest Group Unified Communication & Collaboration (UCC) Specialist Services PEAK Matrix® Assessment 2024

Focus on Tata Communications

April 2024



Introduction

As more and more enterprises have realized that the hybrid workplace model is here to stay, the demand for efficient communication and collaboration services within organizations remains steady. This increased demand spans all regions and industries and is expected to maintain its strong growth trajectory in 2024, as enterprises strive to adapt to the ever-evolving UCC landscape. Further, the market is experiencing a proliferation of innovative offerings centered around artificial intelligence, generative AI, immersive solutions, and integrated security, acting as accelerators for growth.

With enterprises seeking providers that can enable effective UCC services and guide them through the trinity of Employee Experience (EX), productivity, and cost optimization, the necessity for UCC services specialist providers has been underscored. These specialists are gradually becoming integral to broader digital workplace services engagements, either independently or in collaboration with other service providers and technology providers, owing to their unique value proposition and focused expertise.

In this research, we present an assessment and detailed profiles of 10 UCC specialist service providers featured on UCC Services Specialists PEAK Matrix® Assessment 2024. The assessment is based on Everest Group's annual RFI process conducted over Q4 2023 and Q1 2024, interactions with leading UCC specialist services providers, client reference checks, and ongoing analysis of the UCC services market.

The full report includes the profiles of the following 10 leading service providers featured on the [Unified Communication & Collaboration \(UCC\) Specialist Services PEAK Matrix® Assessment 2024](#):

- **Leaders:** Infosys, NTT DATA, and Tata Communications
- **Major Contenders:** AT&T, BT Group, Lumen Technologies, Orange Business, and Proventeq
- **Aspirants:** Microland and Synoptek

Scope of this report

Geography: Global

Industry: 10 leading UCC specialist service providers

Services: UCC specialist services

UCC Specialist Services PEAK Matrix® characteristics

Leaders

Infosys, NTT DATA, and Tata Communications

- The Leaders in UCC specialist services have forged a successful business ecosystem, driven by years of capability building and experience across the UCC segments
- Leaders continue to differentiate themselves within the UCC market by maintaining an end-to-end UCC services portfolio, long-term vision, strategic investments in competencies and capability development (internal IP/tools), and involvement in partner launch programs and collaborative offerings. They are also engaging with both marquee and niche partners through joint go-to-market initiatives and solution co-creation
- They are progressively integrating cloud-based workplace solutions into their delivery and are quick to develop products and solutions on next-generation technologies such as generative AI and immersive collaboration
- Additionally, Leaders focus on showcasing their one-stop capabilities to enterprises, while also emphasizing on technical expertise, niche focus areas, and industry-specific offerings

Major Contenders

AT&T, BT Group, Lumen Technologies, Orange Business, and Proventeq

- Major Contenders portray depth in UCC services implementation and operations capabilities. However, they showcase limited capabilities in complex end-to-end transformation and have segmented expertise across UCC services segments
- They have made specific investments to enhance their delivery capabilities, talent strategy, and partnership GTMs, while concurrently focusing on developing tailored offerings and Intellectual Properties (IP) dedicated to UCC services
- These providers are prioritizing high market impact in terms of YoY growth and value delivered to clients, while increasing portfolio coverage and gaining expertise in prioritized verticals

Aspirants

Microland and Synoptek

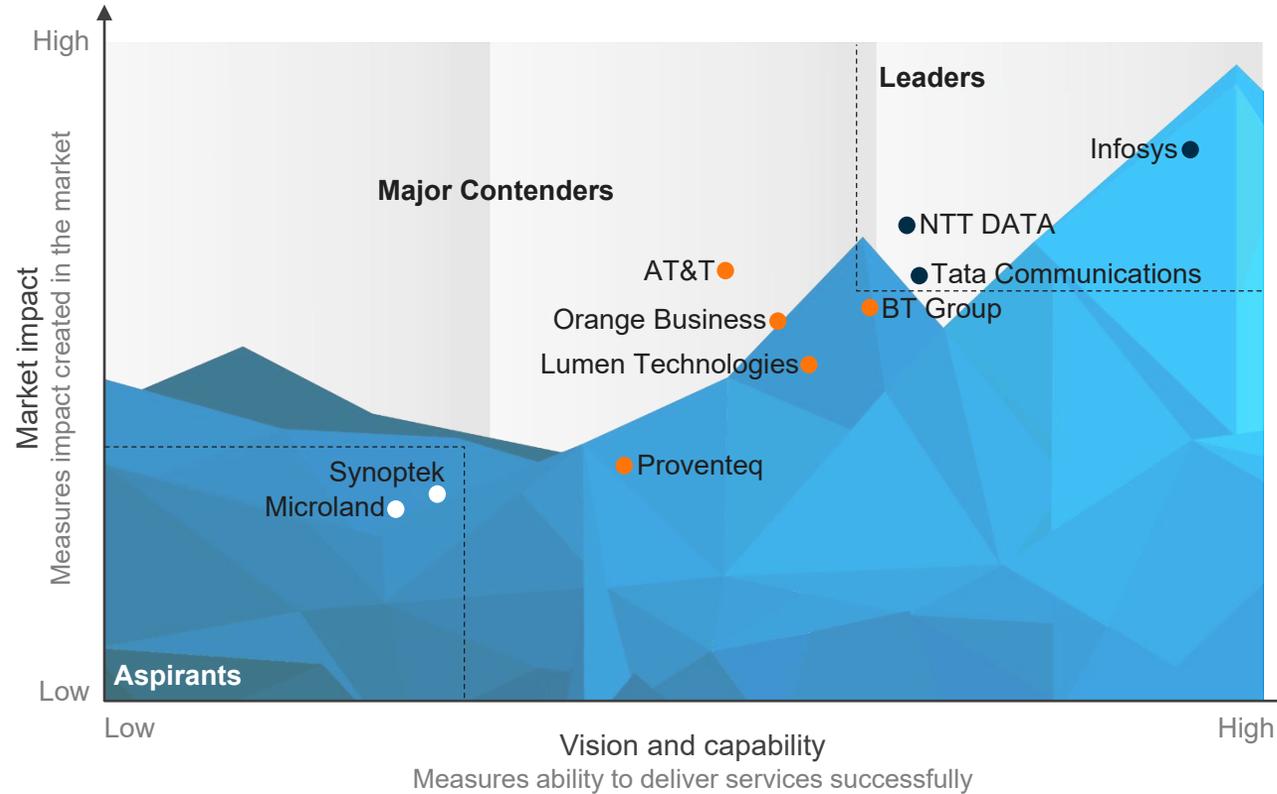
- Aspirants are approaching the market with a higher focus on certain portfolio segments of UCC services, rather than offering a balanced portfolio
- Nevertheless, they are focused on ensuring customer-centricity and strengthening ancillary functions such as analytics/automation to strengthen their mindshare and positioning

Everest Group PEAK Matrix®

Unified Communication & Collaboration (UCC) Specialist Services PEAK Matrix® Assessment 2024 | Tata Communications is positioned as a Leader

Everest Group Unified Communication & Collaboration (UCC) Specialist Services PEAK Matrix® Assessment 2024^{1,2}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Lumen Technologies, Microland, and Orange Business excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

² Analysis for NTT DATA is based on its capabilities as part of NTT Group (serving businesses outside of Japan)

Source: Everest Group (2024)

Tata Communications profile (page 1 of 5)

Overview

UCC Vision

Tata Communications' UCC vision is to stand as a global leader in providing comprehensive communication solutions, offering a diverse portfolio that includes cloud voice, collaboration and communication applications, and managed services. Its aim is to grow its portfolio by 15% in the coming year. The major initiatives toward this growth include:

- Launch of JAMVEE, a cloud-based voice calling application serving frontline and roaming workforces
- Focus on endpoint device monitoring and management
- Addressing the increasing demand for meeting room devices and endpoint capabilities
- Focus on strengthening OEM partnerships with Microsoft, Cisco, Zoom, and Google
- Emphasis on security and compliance solutions
- Expansion into the Indian market

Overall UCC specialist services revenue (2023)

<US\$2 million	US\$2-10 million	US\$10-50 million	>US\$50 million
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● Low (10%) ● Medium (10-20%) ● High (>20%)

Adoption by industry

● Banking and financial services	● Electronics, hi-tech, and technology	● Healthcare and life sciences
● Telecom, media, and entertainment	● Travel and transport	● Retail and CPG
● Energy and utilities	● Manufacturing	● Public sector
● Others		

Adoption by service segments

● Communication services	● Intranet and knowledge management	● Workflow automation
● Meeting services	● Project management	● Migration services

Adoption by buyer group

● Small (annual revenue <US\$100 million)	● Medium (annual revenue US\$100-500 million)	● Large (annual revenue >US\$500 million)
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Adoption by geography

● North America	● Europe	● Asia Pacific	● Rest of the World
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Tata Communications profile (page 2 of 5)

Key capabilities

Key capabilities (proprietary solutions/IP/products) (representative list)

Solution/IP	Capability/offering details
JAMVEE	This solution offers voice calling business application on the cloud for the frontline and roaming workforce, with calling, messaging, and PBX functionality, which can run on a browser, mobile, or desktop.
Fraud prevention as a service	This solution offers fraud prevention as a service, deployed on Tata Communications' cloud voice infrastructure, utilizing AI-driven capabilities to detect, protect, and mitigate international telecom fraud. It helps track activity, while identifying fraud trends and gauging risks through a fraud prevention portal, intelligent fraud management system, fraud prevention APIs, dialer detector, fraud analytics, and subscriber traffic management system. Further, it claims to block six million fraudulent voice calls a month, while constantly running up to four million tests a year on quality and fraud prevention.
Modular framework for managed services	GlobalRapide for managed services offers a modular framework across the customer life cycle to an enterprise moving to the cloud through a combination of automation tools and people to make the whole process agile and business-friendly. It further provides management and monitoring services through Intelligent Collaboration Monitoring (ICM) dashboard.
Integrated platform	It is an integrated platform that spans cloud voice, collaboration and communication applications, Bring Your Own Carrier (BYOC), and managed services, providing seamless connectivity throughout the technology stack.

Tata Communications profile (page 3 of 5)

Investments

Investments (representative list)

Investment name	Details
Certification	Invested to train pre-sales solution consultants and IP engineering teams and provide certification on different programs, including CCIE, CCNA, CCNP, MEF CECP, along with cloud-and OEM-related programs such as for AWS, VMWare, Microsoft certified trainings, and Cisco
Investments	Invested to establish an interactive experience center, included with a digital toolkit, at its Mumbai location
Collaboration	Engaged in several leading Indian and global universities to collaborate in R&D activities and support to build national talent in the space of cybersecurity, network, and AI, which would impact the UCaaS portfolio too. Some of the key associations are: <ul style="list-style-type: none"> • Collaborated with Harvard University to work on a few cutting-edge research ideas with the Network and AI department of Harvard University • Collaborated with various Indian universities such as SASTRA for graduate trainees who undergo a two-year structured program to train in the field of cybersecurity
Talent development	Invested to increase hiring for previous years in next-generation products focused on delivery, engineering, and customer success roles
Vendor/Partner engagement	Regular interactions and training sessions with partners and vendors to update them on UCC offerings and roadmaps to help deepen GTM strategy

Tata Communications profile (page 4 of 5)

Partnerships

Partnerships (representative list)

Partner name	Details
Microsoft	<ul style="list-style-type: none"> • Leverages partnership to offer cloud voice and managed services through the Microsoft Teams direct routing or Teams Operator connect channels • Simplifies management of hardware in this partnership with other hardware providers • Claims to be the first partner for Microsoft Teams direct routing, among the top five for Operator Connect globally, and one of the three partners for India
Cisco	Leverages partnership with Cisco to offer services including calling, conferencing, and other wholesale offerings; Cisco is further leveraged as a hardware partner as well
Poly	Leverages partnership with Poly to tailor solutions for smart meeting rooms and other workforce connectivity needs
Zoom	Leverages partnership with Zoom to be recommended as a carrier of choice as part of the BYOC approach
AudioCodes	Leverages partnership with AudioCodes to tailor solutions for smart meeting rooms and other workforce connectivity needs
Google	Leverages partnership with Zoom to be recommended as a carrier of choice as part of the BYOC approach
Yealink	Leverages partnership with Yealink to tailor solutions for smart meeting rooms and other workforce connectivity needs

Tata Communications profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact

Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Enterprises can benefit from Tata Communications’ robust capabilities across analytics, security, and fraud prevention through its AI-powered Fraud-Prevention-as-a-Service offering (FPaaS)
- Enterprises seeking a service provider with end-to-end UCC capabilities will benefit from Tata Communications’ well-rounded portfolio. It presents balanced focus and offerings for both legacy and next-generation UCC services
- Tata Communications leads with an experience-centric UCC vision, which is supported through its cloud-based calling platform JAMVEE
- Clients have highlighted strong domain expertise and strategic client management as its key strength areas
- It leverages its partnership with TCS through One Tata, presenting strong cross-selling and upselling potential for UCC engagements through its joint propositions, such as Smart Meetings

Limitations

- Enterprises looking for a service provider with innovative UCC services might find Tata Communications lagging, given its limited investment in next-generation technologies such as automation, AI/ML, and IoT
- Tata Communications’ case studies and proof points revolve around Cisco Webex and Microsoft Teams and hence it might not resonate well with enterprises that prioritize Google Meet and Zoom solutions
- Enterprises in Europe should do further due diligence on Tata Communications due to its limited presence and market adoption in this region
- Tata Communications may be perceived as falling behind by some enterprises seeking robust change management capabilities, as its current UCC solution portfolio lacks maturity in this regard
- Some clients have highlighted the necessity for increased digitalization in the ordering process as a key area for improvement

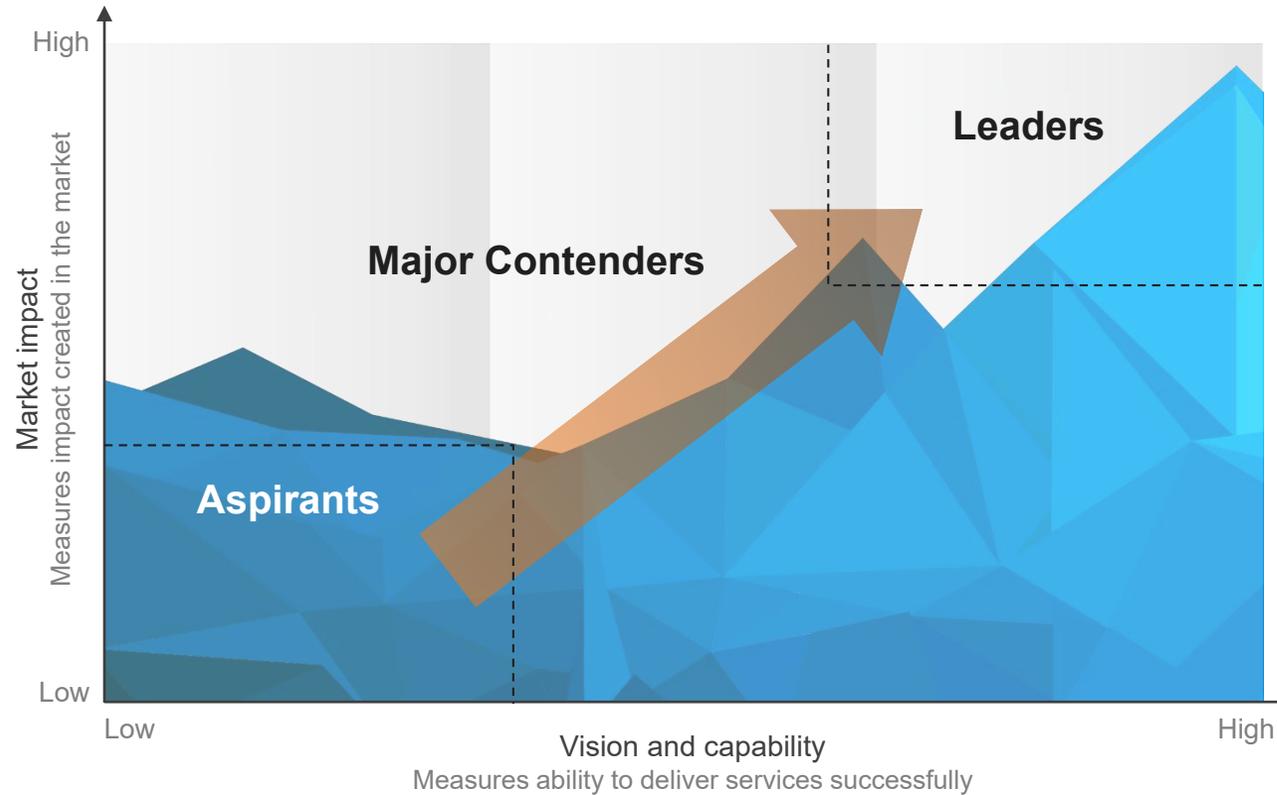
Appendix

PEAK Matrix framework

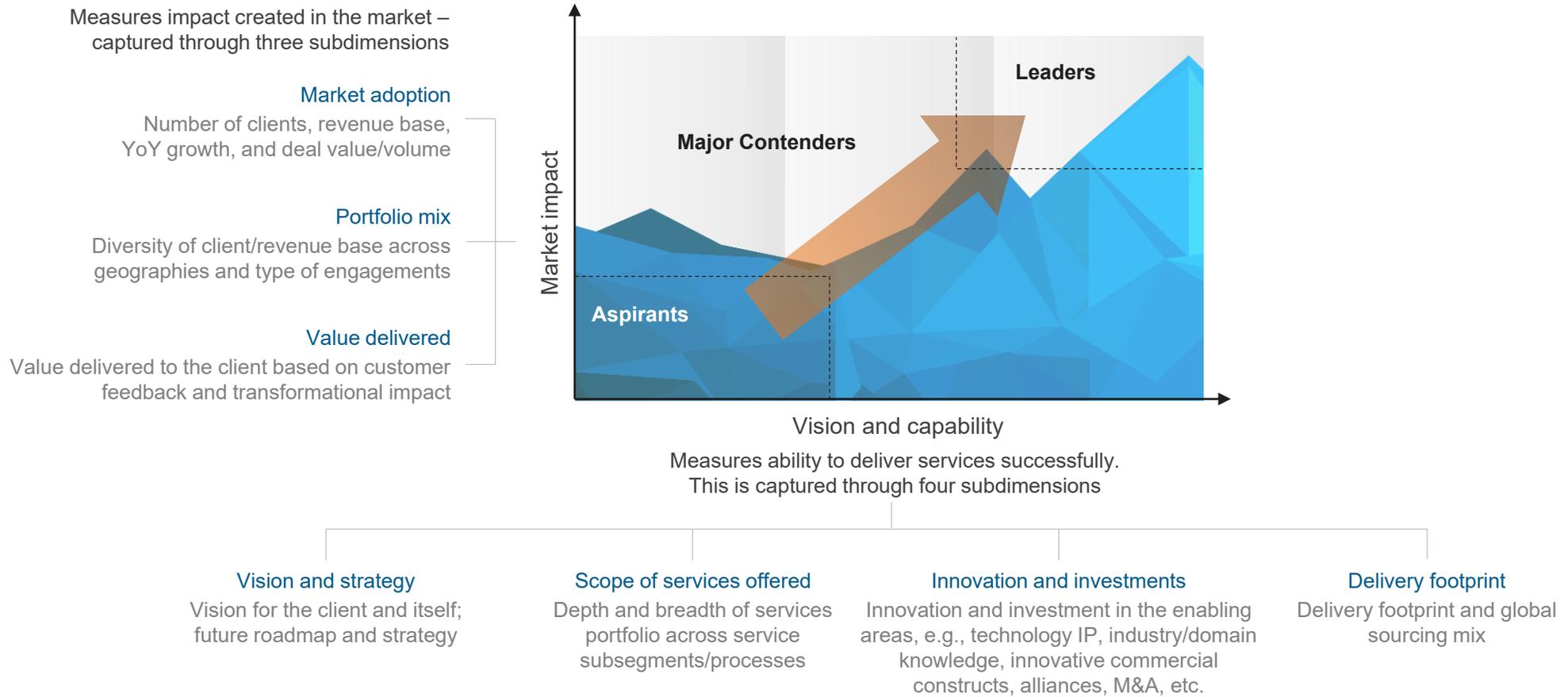
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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