



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

Focus on NTT DATA

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 the [Unified Communication & Collaboration \(UCC\) Specialist Services 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 UCC specialist services PEAK Matrix:

- **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

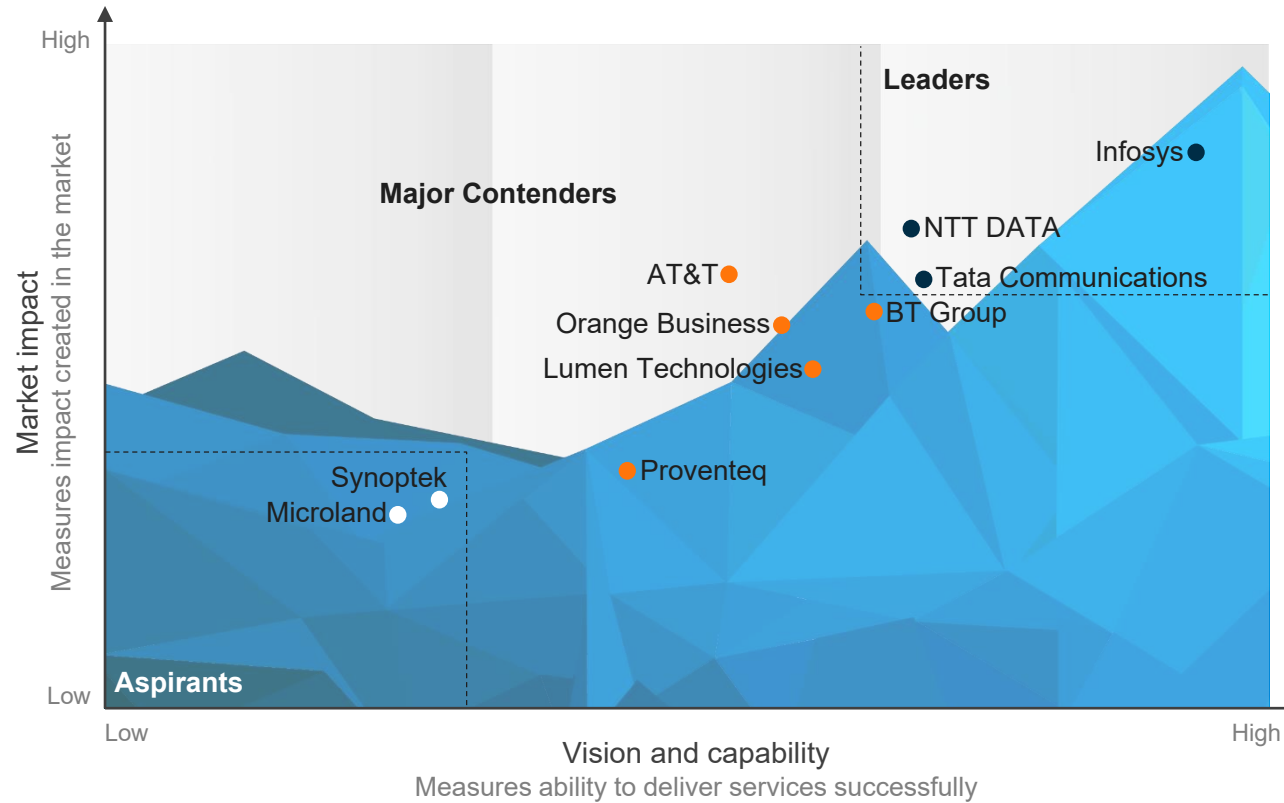
- Aspirants are approaching the market with a higher focus on certain portfolio segments of UCC services, rather than offering a balanced portfolio
- Nevertheless, they are focused on ensuring customer-centricity and strengthening ancillary functions such as analytics/automation to strengthen their mindshare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

Everest Group PEAK Matrix®

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

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

- Leaders
- Major Contenders
- Aspirants



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)

NTT DATA profile (page 1 of 4)

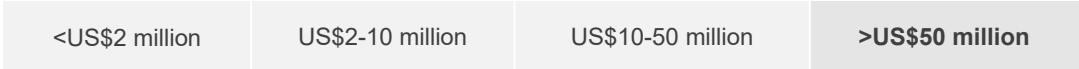
Overview

UCC Vision

NTT DATA strives to be a valued partner providing global coverage and being a one-stop shop, offering a full suite of modern communication and collaboration services. The major initiatives taken by NTT DATA toward its UCC vision are:

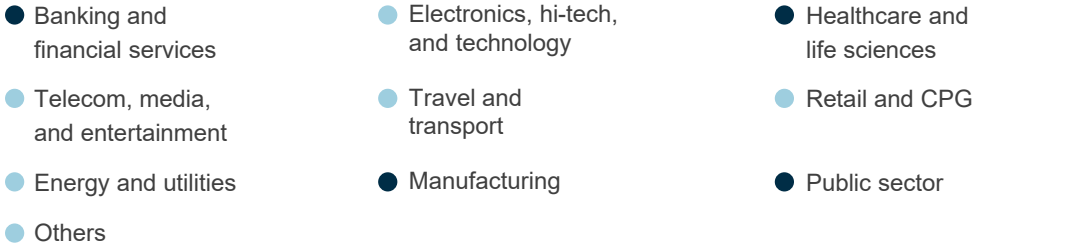
- Extended its global coverage by adding new countries such as China to its Cloud Voice Universal Calling Plans
- Introduction of value-added solutions such as NTT Extend for Microsoft Teams and Attendant Console for Microsoft Teams to enhance its collaboration portfolio
- Improved its managed services offering portfolio, providing clients with the flexibility to customize co-managed or fully managed support services based on their specific business requirements

Overall UCC specialist services revenue (2023)

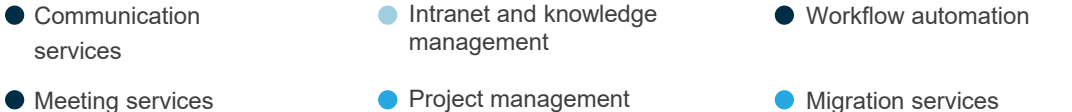


● Low (10%) ● Medium (10-20%) ● High (>20%)

Adoption by industry



Adoption by service segments



Adoption by geography



NTT DATA profile (page 2 of 4)

Key capabilities

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

Solution/IP	Capability/offering details
NTT DATA Cloud Voice	This solution leverages NTT DATA's tier-1 IP backbone and delivers regulated telephony services in 40 countries including China. It is integrated with Microsoft Teams, Azure communications services, Webex, Webex contact center, and Genesys Cloud and enables robust access to telephony on leading UCC and CX platforms.
Universal Provisioning Application (UPA)	This platform enables automated and/or self-service administration, provisioning, and service request management across multiple platforms including leading UCC technology providers (Microsoft and Cisco), leading CX providers (Genesys and Cisco), devices (end-user phones and endpoints, and meeting room systems), other elements of its UCC portfolio (cloud voice DDI, calling plan management and configuration, mobile line management, and compliance recording)
Universal Monitoring Application (UMA)	This platform enables end-to-end proactive monitoring of its client's UCC estate, both cloud and on-premises, including leading UCC technology providers (Microsoft and Cisco), leading CX providers (Genesys and Cisco), devices (end-user phones and endpoints, and meeting room systems), other elements of its UCC portfolio (cloud voice DDI, calling plan management and configuration, mobile line management, and compliance recording), and end-user UCC clients.
Knowler	This an AI-driven knowledge management solution that enables to understand contents coming from Office 365 and third-party systems with smart search engine, to align the right content to the right people based on search and recommendations. It efficiently finds valuable insights from structured and unstructured data, simplifying the process of searching, discovering, and sharing information.
TÖGÖ	This is an intranet-in-a-box solution on top of Office 365 to boost corporate communications, social collaboration in communities, and content sharing among users to improve employee engagement.
Nucleus	<p>This solution comprises of software products and a cloud-based platform and incorporates three key components:</p> <ul style="list-style-type: none"> • Nucleus command center that unifies and secures user access to command-and-control consoles • Nucleus AIOps that analyze system health and performance, automatically detecting and resolving issues • Nucleus Data Intelligence Fabric that automates data processes, and ensures quality control and governance <p>It optimizes the employee experience, fosters seamless collaboration, and delivers robust outcomes in the digital workplace services portfolio for clients.</p>

NTT DATA profile (page 3 of 4)

Investments and partnerships

Investments (representative list)

Investment name	Details
Training	Invested to upskill its service architects and professional services teams on Microsoft 365, Webex, Genesys Cloud, Nice CX One, Oracle, Audiocodes, Ribbon, Poly, and Crestron
Investments	<ul style="list-style-type: none"> • Participated in its early-stage partners' technical adoption programs to deliver the latest technology adapted as per client needs • Invested to automate provision, monitor, support, and billing platforms, on a standard services platform leveraged by most NTT DATA divisions (digital collaboration, networks, cloud, etc.) • Upskilled 300+ UCC experts with certifications in Microsoft and Cisco dedicated to digital collaboration service operations

Partnerships (representative list)

Partner name	Details
Microsoft	Leverages partnership with Microsoft to offer services in integrated technology platforms across cloud, networking, and security
Cisco	<ul style="list-style-type: none"> • NTT DATA holds global Cisco specializations and works with Cisco to innovate new technologies • Leverages this partnership with Cisco to deliver full-stack technology solutions and services from infrastructure to applications • Leverages this partnership for serving Fortune 100 companies and claims to serve 75% of them
Tango Networks	Leverages this partnership with Tango Networks to provide mobile technologies (eSIMs for Teams phone) to empower frontline workers
Luware	Leverages this partnership with Luware to provide attendant console for Microsoft Teams to receptionists and operators
Genesys	Leverages this partnership with Genesys to provide natively integrated CaaS capabilities to Microsoft Teams and Webex for clients that have dual requirements across UCC and CX
ASC	Leverages this partnership with ASC to provide compliance recording for Microsoft Teams










NTT DATA profile (page 4 of 4)

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 NTT DATA’s robust capabilities across monitoring, analytics, and self-service automation by leveraging its in-house accelerators such as NTT Universal Monitoring Application (UMA) and Nucleus
- Owing to the merger between NTT DATA and NTT, NTT DATA has capitalized on its telecom legacy and capabilities to position itself as an end-to-end UCC service provider, a strategy that is resonating well with enterprises
- Enterprises can expect strong intranet and knowledge management capabilities from NTT DATA, supported by its internal IP and solutions such as TOGO and KNOWLER
- NTT DATA leads with a security-by-design UCC vision, reinforced by its in-house IP solution NTT Universal Provisioning Application (UPA)
- Enterprises looking for a service provider to facilitate the transition to a platform-centric, vendor-agnostic model can leverage NTT DATA’s Service Platform to integrate their EX-CX requirements

Limitations

- Enterprises need to do careful due diligence before engaging with NTT DATA for large-scale advisory-based UCC engagements as its consulting and advisory capabilities lag peers
- To establish itself as a thought leader, NTT DATA must foster client mindshare through marketing investments in whitepapers, webinars, workshops, and client connects
- Its skewed vertical-wise presence may prompt enterprises to conduct further due diligence as it has very high adoption in verticals such as manufacturing and healthcare, and limited presence in verticals such as telecom and retail and distribution
- NTT DATA’s case studies and adoption proof points predominantly feature Cisco Webex and Microsoft Teams, which may not resonate well with enterprises prioritizing Google Meet and Zoom solutions
- NTT DATA’s end-to-end UCC services pitch and business value articulation needs to be improved further, as enterprises currently find it undifferentiated from its peers

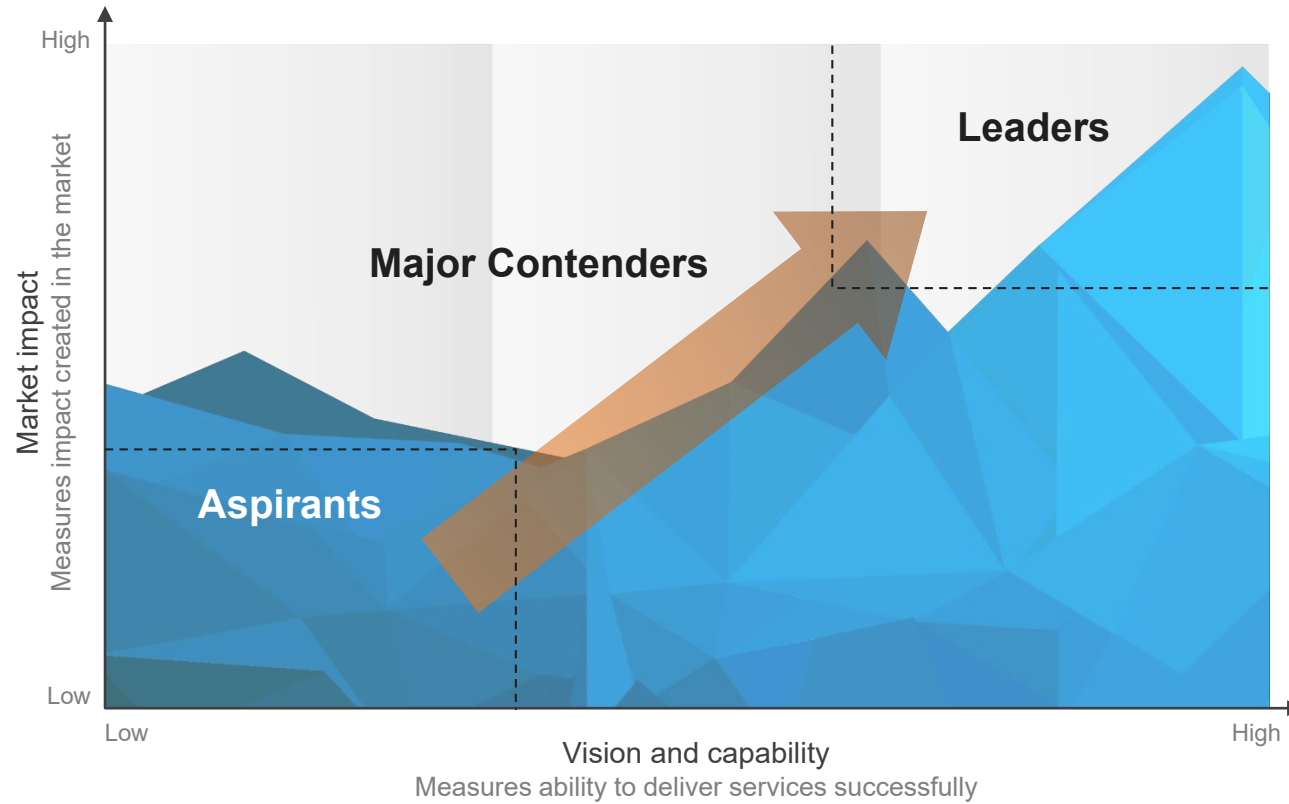
Appendix

PEAK Matrix framework

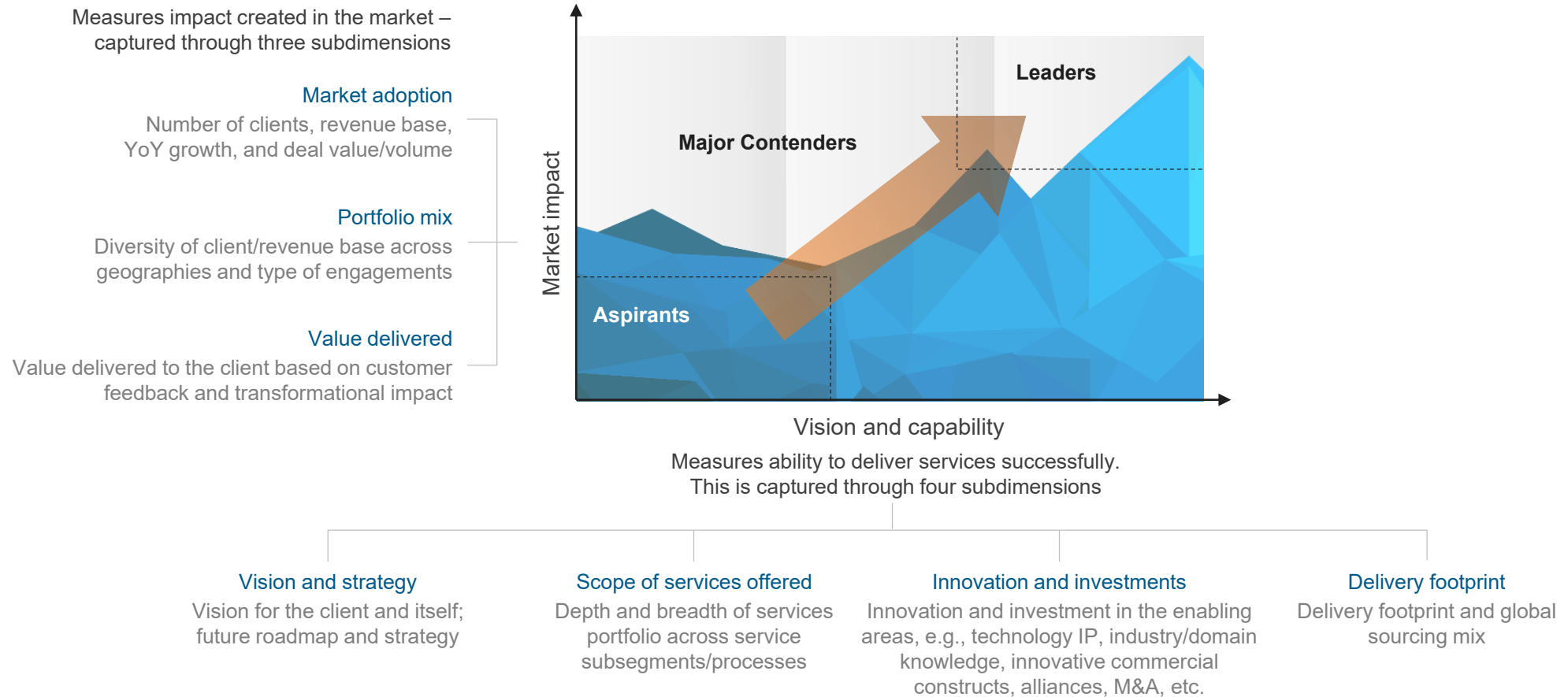
FAQs

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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