



AT&T Business Recognized for

2021

Competitive Strategy Leadership

European Managed
SD-WAN 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. AT&T excels in many of the criteria in the European managed SD-WAN services space.

AWARD CRITERIA	
Strategy Innovation	Customer Impact
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Strategy Effectiveness

European-based enterprises are increasingly embracing digital transformation, and the rapid implementation of cloud strategies is driving the demand for software-defined wide-area networking (SD-WAN) services.

“With its comprehensive portfolio of managed SD-WAN, AT&T has established a strong presence in the European region. The company provides co-managed and fully managed services across verticals, such as retail, manufacturing, and transportation. During 2020-2021, the company has recorded significant client wins in Europe, the majority of which have involved complex deployments.”

- Divya Prasad, Senior Industry Analyst

With its comprehensive portfolio of managed SD-WAN, AT&T has established a strong presence in the European region.

AT&T follows a multi-vendor approach, offering both fully managed and co-managed solutions from Cisco, Fortinet, Palo Alto Networks, Silver Peak, and VMware. AT&T offers managed SD-WAN integrated with cloud, voice/unified communications (UC), WI-FI/LAN, and security. In addition, AT&T offers FlexWare devices that leverage both software-defined networking (SDN) and network function virtualization (NFV) to enhance network management.

The company manages SD-WAN deployments across Europe, and key verticals include retail, manufacturing, and transportation. During 2020-2021, the company has recorded significant client wins in Europe, the majority of which have involved complex deployments, such as running SD-WAN over third-party networks, including Internet and multiprotocol label switching (MPLS).

Competitive Differentiation

AT&T offers a wide choice of SD-WAN solutions, a strong underlay and overlay infrastructure, and significant customer flexibility, thereby providing customers with a holistic offering. Unlike its

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competitors, AT&T provides a wide choice of options across both underlay (e.g., broadband and dedicated Internet, bring-your-own-access, and MPLS) and overlay (e.g., key SD-WAN technologies, appliance delivery, and NFV). Another key differentiation is that the company provides customers with flexibility by giving site-based, customized service-level agreements (SLA), thus optimizing the return on their SD-WAN investments.

With its innovations, enhanced security features, wide choice of deployment options, and strong partner ecosystem, the company offers a superior

and uniquely extensive range of SD-WAN solutions in the market.

Customer Purchase and Ownership Experience

AT&T maintains a strong focus on customer relationships through various assistance centers, dedicated sales teams, and trained support staff that can solve customers’ networking-related issues. The company has built vast capabilities in all aspects of SD-WAN deployments (e.g., network design and pre- and post-sales support) through its team of expert engineers based in Bratislava. These experts provide end-to-end managed SD-WAN services to support aspects such as delivering network design, integration, operations, and pre- and post-sales support. AT&T offers customers the benefit of a dedicated team that can review SD-WAN deployments on an ongoing basis, taking corrective measures as required.

Following a consultative approach to SD-WAN, the company offers extensive capabilities to meet customers’ complex networking needs and design their global transformation plans. The company is constantly aiming to meet customers’ security needs, with a high focus on offering secure access secure edge (SASE) frameworks to customers.

Price/Performance Value

AT&T’s pricing strategy is competitive and attracts customers, despite the COVID-19 impact on the market. The company supports key customers and manages their costs by offering value-based propositions. In addition, customers are offered flexible pricing options that are based on use and can vary depending on the service chosen, such as license size, installation type, bandwidth use, maintenance requirements, and any other services.

Brand Equity

AT&T, as an incumbent telecom provider in the US market, has a strong brand value that it can leverage globally. The company delivers its SD-WAN offering and comprehensive managed services to various countries worldwide, supported by highly skilled technical resources. Europe is the second-largest market for AT&T, with its managed SD-WAN services with notable deployments in the region. AT&T's marketing activities drive its in-country sales in Europe, and the company regularly invites customers from these countries to participate in small-scale, interactive customer events to share the latest insights on AT&T's offerings, all of which contribute to the company's continued growth.

Conclusion

AT&T, a leading telecom service provider, continues to advance its position in Europe by helping enterprises move toward digital transformation. The company's comprehensive managed SD-WAN solutions support businesses' rapidly growing requirements as they move to the cloud. AT&T is creating immense value for the entire ecosystem with its continual focus on innovation and by forging strong technology partnerships.

For its strong overall performance, AT&T earns Frost & Sullivan's 2021 Competitive Strategy Leadership Award in the European managed SD-WAN services industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes Best Practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

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

