

FROST & SULLIVAN

AT&T

2022
MARKET
LEADER

UNITED STATES
DEDICATED INTERNET
ACCESS INDUSTRY

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 dedicated Internet access space.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

Product Differentiation

The underlay network is at the core of the digital transformation and lays the foundation for enterprises to adopt upcoming technologies. With evolving technologies, businesses need reliable Internet to support mission-critical applications that rely on high-speed, robust, and secure connectivity.

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**- Amrit Singh,
Senior Industry Analyst**

AT&T’s fiber-based dedicated Internet access (DIA) service delivers on all these aspects, serving about 9 million customer locations in the United States and growing. The DIA service leverages AT&T’s massive IP backbone that manages 465 petabytes of traffic every day, analyzes 670 billion data transactions, and issues 100 billion potential probes for vulnerabilities. AT&T has an expansive global network, with multi-protocol label switching (MPLS) available in close to 200 countries and with DIA available in 67 countries. In addition,

the company is present in over 470 data centers across the United States, offering speeds up to 1 Tbps. Frost & Sullivan notes that AT&T's extensive network footprint is a key differentiator in the global network services market.

Building on its uniquely strong and extensive core network, AT&T offers several products and services, along with its DIA service, that support the network services demand of different business segments. In addition to core network transport capabilities, including wireless, Ethernet, MPLS, and Internet, the company provides a dynamic overlay fabric that enables application-aware intelligent connectivity from cloud to edge, primarily driven by SD-WAN technologies. Another competitive differentiator of AT&T's network is its secured connectivity, whether underlay or overlay, supported by managed security services for network, endpoints, and threat detection and response.

Customer Ownership Experience

Bandwidth reliability, high-speed connectivity, and performance are not limited to business size or industry, and a robust underlay transport is a must have for businesses as they become increasingly digital. AT&T designed its DIA service to meet the needs of a range of businesses. Unlike global competitors that primarily focus on large enterprises, AT&T's DIA operates across business tiers, offering dedicated bandwidth with a variety of speeds. Additional customer-friendly features of AT&T's DIA service include a managed router, an interactive portal, 24/7 network management, automatic ticketing, flexible billing, security, free cyber threat reporting, traffic prioritization and global service level agreements (SLAs).

Leveraging its vast network, AT&T offers to extend its network to customer locations at no cost if customers qualify and are within 1,000 feet of AT&T Fiber. Moreover, the company can use close to 100 third-party access providers to reach customers almost anywhere in the United States where AT&T Fiber is unavailable. AT&T's DIA service offers dedicated speeds ranging from 2 Mbps to 1 Tbps, to accommodate the company's large customer base. AT&T sees higher bandwidth demand from its major customers, including content delivery network (CDN) companies, streaming companies, video conferencing companies, gaming companies, and cloud service providers (hyperscalers).

Customer Service Experience

Businesses evaluate Internet links based on the enterprise applications over which they plan to run, especially those that require dedicated bandwidth and scalability. AT&T's DIA service offers the flexibility and scalability needed to accommodate both current and future applications. In addition, the DIA service

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delivers symmetrical Internet speeds and typically comes with robust SLAs, including latency, jitter, and uptime. AT&T offers the industry's leading SLAs with 100% service availability, 99.95% data availability, less than 37 milliseconds of latency, and less than 1 milliseconds of jitter.

AT&T's wireless backup router delivers uninterrupted Internet connectivity and provides 4G LTE-based wireless backup for automatic failover and failback so that key applications, such as point of

sale, web browsing, and messaging, can run during connectivity failures. AT&T's 4G LTE delivers approximately 70 Mbps of speed, which is adequate to run priority applications; however, this wireless router comes with 24-hour battery backup to overcome any power cuts based on weather events or other natural disasters. AT&T's proactive pinging and alarming service is another key differentiator, where customers' locations are constantly pinged, and if a ping is not returned to the network operation center (NOC) for five continuous minutes, the NOC will proactively open a trouble ticket and start the resolution process. Moreover, AT&T offers complementary services, including SD-WAN and SASE, managed services, managed router, and consulting.

Customer Purchase Experience

AT&T's business center portal is one of the most comprehensive in the industry, making it easy for DIA customers to manage their wireline services. Users can be assigned role-based permissions for tasks, such as ordering new services, managing billing, changing speeds, making network changes in near real time, tracking inbound and outbound traffic, tracking SLA performance, and receiving alerts in the event of traffic congestion. AT&T's portal assists customers in managing a wide array of services, while other DIA vendors' portals offer limited services, such as 24/7 proactive monitoring and technical assistance.

Brand Strength

AT&T is one of the most respected brands worldwide and continues to highlight its brand with technology and services with community investment. In 2021, AT&T committed \$2 billion to help bridge the digital divide by removing connectivity barriers that are holding students and families back from fully participating in virtual learning and benefiting from an increasingly connected world. AT&T has now opened AT&T Connected Learning Centers nationwide to provide underserved students and families with free access to high-speed internet and computers, as well as education and mentoring resources, all under one roof.

Furthermore, AT&T is deploying its DIA service in these centers for dedicated connectivity to ensure underserved students can take classes, do homework, and stay connected with their families and friends. AT&T is inviting its DIA customers to join and be a part of this initiative. Moreover, with every new dedicated Internet ports purchased in 2022, AT&T will donate \$100 on behalf of its customers toward this initiative.

Conclusion

With businesses increasingly adopting cloud-based applications and collaboration tools, obtaining high-speed connectivity, reliability, and scalability has become vital. In addition, a growing distributed workforce has emphasized the need for secure and high-bandwidth connectivity.

AT&T's industry-leading DIA service leverages the company's massive IP backbone to deliver high-speed, robust, and secure Internet connectivity. Frost & Sullivan research shows that AT&T's distinctive DIA service has more features than competing solutions in the market. AT&T's DIA includes dedicated speeds ranging from 2 Mbps to 1 Tbps, a business center portal to monitor and manage bandwidth use and network changes, flexible use-based billing, 4G LTE-based wireless backup for automatic failover and failback, and best-in-class SLA performance parameters. Moreover, AT&T offers complementary services, including SD-WAN and SASE, managed services, managed router, and consulting.

For its strong overall performance, AT&T is recognized with Frost & Sullivan's 2022 United States Market Leadership Award in the DIA industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

Best Practices Award Analysis

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

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

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 are proud to 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 of high quality

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)

