

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

2024 COMPANY OF THE YEAR

*IN THE GLOBAL
MANAGED SASE SERVICE
INDUSTRY*

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

2024
BEST
PRACTICES
AWARD

AT&T Cybersecurity

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 Cybersecurity excels in many of the criteria in the managed SASE service space.

AWARD CRITERIA	
Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Organizations Face Challenges in SASE Implementation

In Frost & Sullivan’s 2023 ICT network services survey, 83.2% of organizations worldwide have embraced a flexible work arrangement, with remote employees working from home offices at least once a week.

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- Vivien Pua
Senior Industry Analyst

The shift to remote work and increased use of cloud applications have fundamentally changed how businesses consume technologies. As more businesses move their workloads to the cloud, including private, public, and multi-cloud, their physical data center is no longer the focal point of access for remote users and applications.

To facilitate the acceleration of digital initiatives, organizations are looking to transform their networking and security architecture to support the work-from-home requirement better and secure the

highly distributed environment. This trend drives a stronger demand to shift from traditional WAN connectivity, such as multiprotocol label switching (MPLS), to secure software-defined wide area network (SD-WAN) or to embrace secure access service edge (SASE).

Many organizations, however, face challenges in moving to a new SASE architecture. SASE solutions can

be complex to deploy, especially among larger organizations, because of legacy infrastructure and disjointed networking and security functions. Organizations' internal IT or security teams may not have enough knowledge to create the strategy and roadmap for SASE implementation that can address their business needs.

As a result, organizations increasingly turn to service providers, such as managed security service providers (MSSPs), for managed SASE service or consulting services. In addition, these organizations are looking for third-party experts to support their SASE projects, in terms of planning, architecture design, vendor selection, roadmap, implementation, fine-tuning, and ongoing management and monitoring.

Long-standing Experience and Expertise Extend the Leadership Focus and Drive Best Practices Implementation

AT&T is one of the largest telecommunications companies, and its cybersecurity division, AT&T Cybersecurity, is one of the largest MSSPs worldwide. The company has been delivering cybersecurity services for over 25 years and network services for over 100 years, providing it with the unique position to deliver managed SASE services. With AT&T Cybersecurity integrating its comprehensive security capabilities with networking solutions, the managed SASE service can secure workloads for physical datacenters, cloud environments, edge computing, and users across multiple branches and remote sites. The extensive experience in delivering both networking and security services differentiates AT&T Cybersecurity from other close competitors, making it a trusted partner to support organizations' transition to SASE.

AT&T Cybersecurity was among the first service providers to launch managed SASE service to the market in 2021. The company offers complete SASE service, including SD-WAN, cloud access security broker (CASB), secure web gateway (SWG), zero trust network access (ZTNA), and firewall as a service (FWaaS). AT&T Cybersecurity collaborates with leading SASE vendors, such as Palo Alto Networks, Cisco, VMware, and Fortinet, to offer a managed SASE service that suits organizations of all sizes. Recognizing that many organizations will need assistance for a smooth transition to SASE, AT&T Cybersecurity has skilled and experienced network and security professionals who provide managed SASE service and consulting services, including assessment, design, and implementation.

In addition, AT&T Cybersecurity has been continually expanding its engineering team and has introduced an expert engineer role to go deep into detailed design and configuration to achieve the best outcome from the managed SASE service. The company has rolled out mini labs into these engineering teams so that they can be trained continually with new SASE capabilities as the technology continues to evolve. With investments in innovation and an effort to establish SASE expert teams, coupled with long-standing experience in providing managed network and security services, AT&T Cybersecurity has gained a competitive edge over its close competitors in the global managed SASE service market.

Addressing Industry Demand with a Comprehensive Cybersecurity Services Offering

AT&T Cybersecurity understands that customers will increasingly look for integration between SASE and

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other security service areas, including managed detection and response (MDR), incident response, endpoint security, and vulnerability management. As a result, the company is developing an overlay service management platform that is built on top of AT&T Cybersecurity's USM Anywhere platform, a software-as-a-service (SaaS) security monitoring solution that centralizes threat detection, incident response, and compliance management across all types of environments. In 2024, the management platform will provide enhanced data sharing and platform

integration across all security services, a unified dashboard, and a centralized customer portal for an improved customer experience and flexibility in adding services based on their needs.

Leveraging the comprehensive managed security services (MSS) offering and extensive expertise in cybersecurity, AT&T Cybersecurity can expand the integration beyond SASE service into other MSS and security operation center (SOC) services through this centralized platform. The company, therefore, distinguishes itself from other competitors that only focus on providing standalone SASE or MDR services and may have limitations in addressing evolving customer expectations with a comprehensive cybersecurity service offering.

Building Trust through a Positive Customer Purchase and Service Experience

AT&T Cybersecurity structures the enterprise business into the following four groups: manufacturing and transportation, retail, finance, and industry solutions that cover all other verticals. This approach provides dedicated support to meet customer needs, such as tailored marketing, operations, and specialized indirect partners. Each of these vertical groups is supported by specialized sub-vertical teams, including case-driven marketing, product management, and sales teams. Similarly, the company applies a vertical-focused sales and marketing strategy for mid-market segments, primarily focusing on healthcare, manufacturing, transportation, retail, professional services, tech, and media.

Most of AT&T Cybersecurity's customers are still dealing with legacy technology stacks, making it more challenging to shift to the new SASE architecture that cuts across networking and security stakeholders. AT&T Cybersecurity specializes in helping these types of customers embrace SASE with cybersecurity consulting services that focus on SASE strategy planning, roadmap, engineering and design, and implementation. The consulting team works closely with the MSS team to execute the transition to SASE, helping customers achieve the best outcomes from the SASE implementation.

In addition, AT&T Cybersecurity offers a 'try before you buy' SASE service that includes a zero-cost proof-of-concept (POC) environment to support network, security, cloud, and connectivity platforms; agile deployment that showcases how the solutions are designed to address customers' business challenges; dedicated SASE workshops to address customers' specific use cases; and a structured engagement and delivery process to provide customers with a mini-managed service experience.

Frost & Sullivan commends AT&T Cybersecurity for differentiating from competitors by building a strong vertical sales and marketing strategy and dedicated support to deliver an effective SASE implementation that is aligned with customers' business needs.

Strong Business Track Record Led to High Brand Loyalty

Following the acceleration of digital technology adoption to meet changing customer expectations, financial institutions have a stronger need to modernize the network and security architecture by converging networking and security functions for better network performance, workforce productivity, and customer experience. With its strong business track record of supporting leading financial institutions, AT&T Cybersecurity deployed SASE solutions for a financial company, supporting more than 50 domestic sites and more than 1,000 remote employees. Customers want high-performance networks to process time-sensitive financial transactions, transform the banking experience into a 'Branch of the Future' for improved digital customer and employee experiences, and provide reliable network access and cloud application performance for remote employees.

AT&T Cybersecurity supports customers with an SASE readiness plan, solution design, deployment, integrated Fortinet's security and networking functions into one platform with optimized security policy practices, and 24/7 security monitoring services from AT&T Cybersecurity's SOC. A successful SASE deployment provides customers with improved network performance and resilience; centralized security management; faster access to SaaS and cloud applications with lower operating costs; and a future-proof, scalable SASE platform that can add on additional security features based on customer needs.

In addition to supporting financial companies, AT&T Cybersecurity has a strong track record of supporting leading organizations in the healthcare and retail sectors. These three sectors are the largest vertical segments for AT&T Cybersecurity's managed SASE service. With such a well-established brand name among these key industries, AT&T Cybersecurity continues to strengthen its market leadership position in the global managed SASE service market.

Conclusion

AT&T Cybersecurity's strong global market leadership position is primarily based on its continual investment in innovation, strong commitment to expanding its SASE expert team, vertical-focused approach to address customer needs, dedication to providing high-quality customer service, and strong track record in supporting leading organizations in the financial services, healthcare, and retail industries. This strategic combination enables the company to achieve a competitive edge in the market and remain the top-of-mind choice among enterprises worldwide.

With its strong overall performance, AT&T Cybersecurity earns Frost & Sullivan's 2024 global Company of the Year Award in the managed SASE service industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, 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 by a robust solution development process

Visionary Scenarios Through Mega Trends:

Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

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

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

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

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)**

