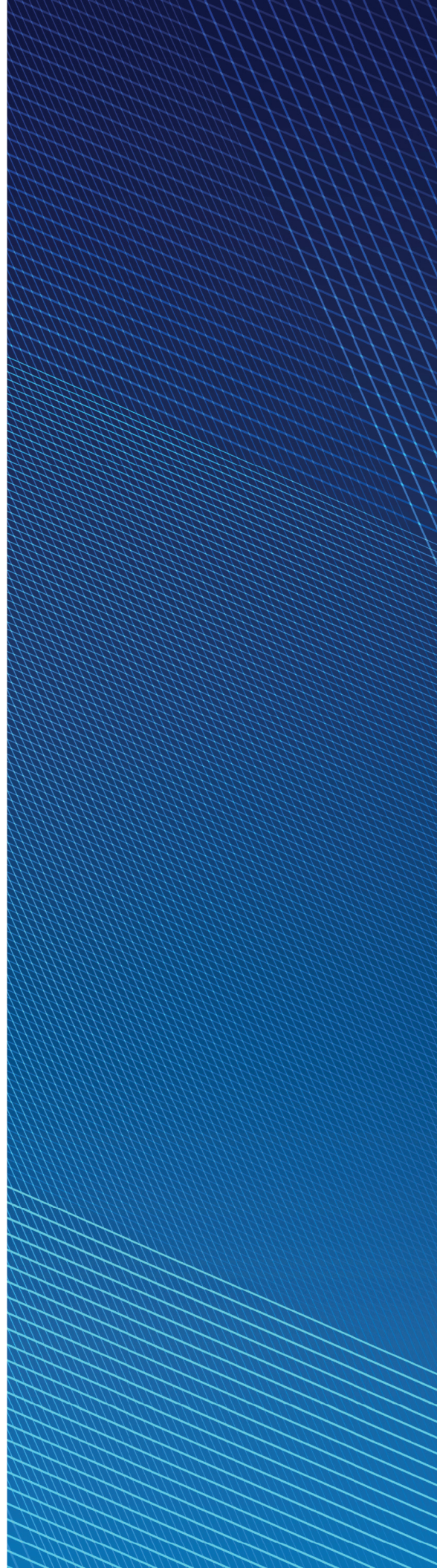


# COLT TECHNOLOGY SERVICES RECEIVES THE 2023 COMPANY OF THE YEAR AWARD

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*Identified as best in class in the European managed  
SD-WAN 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. Colt Technology Services excels in many of the criteria in the managed software-defined wide area network space.

AWARD CRITERIA	
<i>Visionary Innovation &amp; Performance</i>	<i>Customer Impact</i>
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

### Market Snapshot

The managed SD-WAN services market is growing quickly, with European deployments increasing

*“Colt’s corporate culture revolves around using purpose to drive innovation. Its product roadmap (i.e., planning, development, and implementation strategies) incorporates client feedback, ensuring its offerings align with customers’ dynamic needs. Specifically, based on Versa and VMware, Colt’s SD-WAN services portfolio takes the customer experience one step further than any competing solution.”*

**- Riana Barnard**  
**Best Practices Research Analyst**

significantly. Compared to other regions of the global managed SD-WAN services market, Europe ranks second in customer adoption, just behind North America. As more businesses embrace digital transformation, many opt for advisory and managed services that optimize their cloud, information technology, and network infrastructure. The need for simplified network architecture and flexibility in a distributed workforce and application environment leads to a surge of new players in the market, from global systems integrators and consultants to managed services companies and network service providers. With the ever-growing number of vendors and technological advancements, administering them

all is challenging, which is why many businesses choose managed SD-WAN services.

Other key drivers of managed SD-WAN services adoption include cost-effective branch site connectivity, improved application performance, fast deployment times, centralized network management, and improved support for remote working. In particular, Europe's highly integrated SD-WAN managed services market requires transportation services from various service providers located in different countries. Therefore, Frost & Sullivan foresees that managed service providers with the necessary expertise and technology, addressing this complexity by integrating disparate operations and management systems from multiple access providers, will outperform its competitors. Frost & Sullivan analysts also observe that customer adoption of the do-it-yourself model is slowing down in Europe. In contrast, the fully managed and co-managed adoption models for SD-WAN have gained prominence in the region. Most enterprises prefer fully managed SD-WAN services to focus on core business operations, while an external service provider manages all network operations.

Within this context, Frost & Sullivan finds that Colt Technology Services (Colt) uniquely leverages its technology and services to meet its clients' needs. It is well-positioned to capitalize on new growth opportunities, cementing its leadership in the managed SD-WAN market in Europe.

### ***An Established European Leader***

Founded in 1992 and headquartered in London, United Kingdom, Colt is a global digital infrastructure company renowned for its innovation in software-defined networks and network function virtualization (NFV). Its comprehensive solution portfolio, characterized by ease of design and deployment that yield flexibility, helps businesses advance digital transformation. The company has an extensive global presence and delivers services in over 190 countries. Its network connects to 1,000+ data centers, over 250 cloud points of presence, and 31,000+ buildings worldwide, affording customers reliable, high-speed coverage bolstered by supporting staff in 21 countries. With a strong footprint in Belgium, Germany, France, Italy, the Netherlands, Spain, and the United Kingdom, Frost & Sullivan finds Colt's managed SD-WAN service highly appealing for enterprises in the European region.

Moreover, in November 2023, Colt acquired Lumen's Europe, Middle East, and Africa (EMEA) business. To this end, Colt expands its digital infrastructure with 1,630,031 kilometers of fiber connecting 125 European cities in 34 EMEA countries and 11,000 kilometers of metropolitan network in 23 countries while adding twelve cable landing stations and ten subsea cable systems. Colt also extends its talent pool with 1,300 employees across 16 countries. With the transaction, Colt added 2,700 customers (including leading enterprises, blue chip corporations, and public sector clients) to its established customer base. In addition, the company will launch new services (i.e., security technologies, SASE products, managed hosting, and professional services) to its existing portfolio, leveraging even more PoPs (now also in Dubai, Estonia, Greece, Iceland, Israel, Kenya, Serbia, Slovenia, South Africa, and Turkey). Overall, the acquisition, valued at \$1.8 billion, shows Colt's unwavering commitment to providing best-in-class digital infrastructure and pioneering services to help its customers scale and grow.<sup>1</sup>

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<sup>1</sup> <https://www.colt.net/resources/colt-lumen-emea/> (Accessed in November 2023)



### ***Guaranteed Satisfaction through End-to-end Customer Service***

Colt's corporate culture revolves around using purpose to drive innovation. Its product roadmap (i.e., planning, development, and implementation strategies) incorporates client feedback, ensuring its offerings align with customers' dynamic needs. Specifically, based on Versa and VMware, Colt's SD-WAN services portfolio takes the customer experience one step further than any competing solution. The company's services offer features such as multi-cloud access, SD-WAN remote access, and WAN optimization, available through MPLS, internet, or even as bring-your-own-band bandwidth. Furthermore, the flexible offering allows customers to leverage fully managed services (maintaining visibility into network performance characteristics) or co-manage the services (retaining responsibility for real-time security policy changes).

Customer portals are an essential component of managed SD-WAN services. They provide the tools to drive performance and service-level agreements while offering a comprehensive view of critical network

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**- Leandro Argion**  
**Research Director, ICT**

solutions. To this end, Colt enhanced its management interface with role-based access control to elevate the potential of real-time insights, analytics, and dashboard viewing capabilities.

Its visibility on critical network solutions empowers clients to keep track of their journeys from quote to order, while this capability also supports Colt in streamlining its quote-to-cash process. In addition, the company added zero-touch provisioning to its offering. It ships customer premises equipment (CPE) with basic configuration to end sites, which allows clients to enable Colt's service globally without requiring on-site technical resources. This NFV-based CPE approach contributes significantly to an improved customer experience, especially in the small- and medium-sized customer segment.

Frost & Sullivan commends Colt for initiating regular advancements to its solutions and technologies to ensure their optimal performance. With this leadership focus, Frost & Sullivan expects Colt to sustain its leadership in the managed SD-WAN market in Europe.

### ***Needs-based Approach Leads to Innovation***

Colt's approach goes beyond its extensive expertise and best-in-class capabilities, with customer value as a strategic imperative. Through the years, the company has earned a sterling reputation supporting clients' paths toward digital transformation. European enterprises increasingly demand robust security with SD-WAN solutions and favor service providers offering secure access service edge (SASE) solutions. SD-WAN is the first step toward the convergence of networking and security. A product roadmap that includes a clear path to full convergence of networking and security is an attribute enterprises value when choosing a managed SD-WAN provider.

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The company's ability to offer a strong underlay network infrastructure and competitive end-to-end service level agreements in the European market, along with a host of new features such as remote access, VoIP over SD-WAN, and enhanced CPE VNF, creates a competitive advantage. In addition, Colt consistently engages with clients to assess their specific needs and develop tailored solutions with roadmaps for seamless execution. This foundational approach establishes ongoing customer trust for long-lasting relationships throughout the service lifecycle.

Because Colt's services support enhanced efficiency in remote working setups and migrating critical workloads to the cloud, Frost & Sullivan foresees that customer loyalty will increase. Notably, Colt recently expanded its sales channel by launching SD-WAN as a white-label service (i.e., allowing local carriers and resellers to offer customized services from its SD-WAN suite). Frost & Sullivan acknowledges that its seamless approach and close relationships elevate Colt as a partner of choice.

### *A Foot in the Present and an Eye on the Future*

Since its inception, Colt's sterling reputation and customer-centric framework have led to its coveted preferred partner status. Over the years, it added a range of new clients to its established base. The company has a solid footprint across Europe. Currently, it has 60+ active NFV service nodes across Europe, Asia-Pacific, and North America and supports ten virtual functions. In November 2022, Colt announced its intention to acquire Lumen for \$1.8 billion. The deal involves all of Lumen's regional operations in Europe, the Middle East, and Africa, including its terrestrial and subsea networks, data centers, and network infrastructure.

With its customer experience-led approach, Colt disrupts the traditional telecoms industry. Specifically, the company realized customers are more likely to choose suppliers based on data points generated by analytics (rather than human interaction) because the increased use of digital channels results in fewer customer touchpoints and sales interactions. In a drive led by Yasutaka Mizutani, Chief Marketing Officer, Colt started to embed AI capabilities in all its marketing activities. For instance, its team developed a unique recommendation engine to capture customer demand and intent. By gaining more granular insight into customers' needs and preferences, this forward-looking approach allows the company to engage purposefully with clients, strengthening its competitiveness. Furthermore, Colt repositioned its brand to emphasize its role in connecting its customers with the digital universe and to reflect its commitment to creating a fair and equitable organization that contributes to society. Notably, Mizutani was featured on the 2023 Global B2B CMO 100 list (i.e., validating his role as a pioneer and innovator pushing his organization's boundaries to drive growth).

Frost & Sullivan believes the company is well-positioned to drive the managed SD-WAN space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

## Conclusion

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In today's digital landscape, businesses require expert guidance and support to enhance their cloud, information technology, and network infrastructure. With a surge of new players in the market, from global consultants to network service providers, managing them all can be daunting.

Colt Technology Services addresses this unmet need with a strong leadership focus that incorporates customer-centric strategies and exemplifies best practice implementation. It offers strong underlay network infrastructure, competitive end-to-end service level agreements in the global market, and a host of new features to create competitive differentiation. The company continues to invest in expanding its software-defined wide area network (SD-WAN) capabilities and has announced many updates, such as secure access service edge functionalities, to address clients' emerging demands. Moreover, Colt also offers white-labeled SD-WAN services to regional carriers and global resellers. The company remains a trusted partner, earning a reputation for providing the overall best in the managed software-defined wide area network industry.

For its strong overall performance, Colt Technology Services earns Frost & Sullivan's 2023 European Company of the Year Award in the managed software-defined wide area network industry.

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

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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

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## 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)**

