



20 25 | COMPANY OF THE YEAR

Driving impact across the customer value chain

*RECOGNIZED FOR BEST PRACTICES IN THE
GLOBAL ADVANCED METERING
INFRASTRUCTURE INDUSTRY*

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Spectrum Business excels in many of the criteria in the dedicated internet access space.

RECOGNITION 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

The Transformation of the Dedicated Internet Access Industry

Dedicated internet access (DIA) service is designed to meet the increasing demand for dedicated high-bandwidth connectivity. DIA is an unshared internet connection that provides symmetrical upload and

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Industry Director

download speeds backed by service level agreements (SLAs). DIA services inherently provide network reliability, packet delivery, and network throughput at higher levels than broadband links.

Frost & Sullivan notes that SD-WAN has been a key driver for DIA services in the last few years. SD-WAN solutions allow multiple connectivity links, with businesses often choosing a mix of connectivity

options with DIA as the primary link plus broadband, wireless, or even MPLS links from different providers. Frost & Sullivan expects North America to continue seeing a rapid deployment of DIA services across the retail and wholesale segments as leading service providers strengthen their offerings.

Competitive Differentiation

Charter Communications, Spectrum Business’s parent company, is one of the most prominent broadband connectivity companies and cable operators in the United States. The company earned \$55.1 billion in

revenue in 2024, serving 31.5 million customers with broadband, voice, video, and mobile services across 41 states. Spectrum Business's network services portfolio is powered by its extensive network footprint comprising 317,000+ fiber-lit buildings across 245,000+ fiber-route miles nationwide. In addition, Spectrum has 110 carrier partners and 560 interconnects in the United States.

Offering one of the most reliable networks, Spectrum Business's fiber is often the underlying network of the largest U.S. companies, including telecom, carrier, retail, finance, manufacturing, healthcare, hospitality, government and education businesses and services. Spectrum Business leverages its nationwide fiber network to offer DIA service with symmetrical speeds from 30 Mbps to 100 Gbps. The company ensures enhanced network performance with highly competitive SLAs (100% uptime guarantee) and proactive monitoring by a U.S.-based enterprise NOC. Spectrum Business offers an optional 24-hour internet backup service through a 5G/4G LTE-based wireless modem, delivering bandwidth to run critical applications during interruption.

Strategy Effectiveness

Frost & Sullivan's own analysis reveals that multiple factors contribute to Spectrum Business's outstanding performance in the DIA market. First, Spectrum Business is one of the few companies that grew above the market average and gained market share. Second, Spectrum Business is strong in the DIA segment thanks to its ongoing investment in network expansion. Third, the company targets an important market segment. Spectrum Business has expanded its focus in serving small businesses in its traditional hybrid fiber-coaxial (HFC) footprint to midsize and large enterprises, which has increased pricing pressure in the overall market.

Frost & Sullivan recognizes that Spectrum Business executed an impressive strategy by leveraging its extensive footprint combined with a consultative sales approach and competitive pricing to capture growing share of the mid- and large-enterprise market. Spectrum Business's strategy prioritizes simplicity in its product line and packaging, both crucial to contributing to its robust growth in the DIA market. Finally, Spectrum Business presents itself as a one-stop shop provider of a wide range of network services, including managed SD-WAN, managed security services including cloud and Secure Access Service Edge (SASE), Ethernet WAN, DDoS mitigation, cloud connect, unified communications, and TV services, enabling its customers to select from a variety of network solutions.

Price/Performance Value

Spectrum Business is an agile company focused on the B2B segment. It utilizes its 41-state on-net footprint and national out-of-footprint capabilities to offer high performance and reliable connectivity for a competitive price. As its fiber investments have expanded, Spectrum Business has gained traction in the medium business sector, particularly in the retail segment, where it serves large restaurant and grocery chains (for example).

Spectrum Business also captures lucrative markets, including financial services, schools, hospitals, governments, auto dealerships, and sectors that have historically required reliable connectivity and managed overlay IT services.

Customer Purchase Experience

Large companies prefer network service providers that address their varied connectivity, network, and IT infrastructure needs. Spectrum Business simplifies the purchase and deployment of its Dedicated Fiber Internet (DFI), Spectrum's DIA service, by providing symmetrical bandwidth tiers up to 100 Gbps nationwide, allowing for easy upgrades in response to changing needs.

Spectrum Business goes to market with several managed services offerings. The Managed SD-WAN portfolio perfectly complements the DIA offering. The company provides fully managed and co-managed SD-WAN and SD-LAN services, encompassing hardware, design, and support. The managed services portfolio offers other services frequently utilized in a bundle with DIA services, including security, routing, Wi-Fi, and unified communications.

Spectrum Business's sales engineers and solution architects design, deliver, and manage these services for the enterprise and provide them visibility through an online portal. The company is a comprehensive service provider, offering various products and services to ensure customers receive an end-to-end service experience. The company's portfolio includes managed routers, cloud connect, managed security, distributed denial-of-service (DDoS) protection, unified communication, and TV services.

Customer Ownership Experience

The robust pace of enterprise digital transformation, expanding connected ecosystem, and demand for high-performance applications and enhanced user experiences highlight the importance of network service providers that can address their unique connectivity and network infrastructure needs. Uninterrupted high-bandwidth connectivity and low latency are top priorities for large-scale businesses. Spectrum Business's strong network performance and robust SLAs attract enterprises to operate their entire business on its network. Spectrum Business provides some of the industry's most robust SLAs, including 4-hour mean-time to restore targets and 100% service availability (from the customer's premises).

The company also integrates a network interface device (NID) on customers' circuits to provide visibility of end-to-end service-level management and service performance. This is supported by a single point of contact for support and service. Moreover, Spectrum Business offers wireless redundant backup service for uninterrupted connectivity for their day-to-day operations. Moreover, all the services delivered with DFI come with 24-hour, 365-day U.S.-based customer support to resolve issues. Spectrum Business excels in the North American DIA services market, offering industry leading SLA with bandwidth that can be upgraded quickly and remotely or logically.

Brand Equity

Spectrum Business is a national provider of connectivity solutions for small and mid-market businesses and caters to the unique needs of large businesses, communications service providers and government entities. The company serves over 90% of Fortune 500 companies, including telecom, carrier service providers, large cloud service providers, and streaming companies.

Through its parent company, Charter Communications, Spectrum offers several signature philanthropic and engagement programs aimed at improving communities and impacting lives where its customers

and employees live and work, including Spectrum Community Center Assist, Spectrum Digital Education,

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Spectrum Employee Community Grants, Spectrum Scholars, Spectrum Community Investment Loan Fund and Spectrum Smart Devices for Seniors.

The company recognizes that the lack of awareness and training resources hinders underserved communities' opportunities to build digital skills, which can be a severe handicap in today's technology-driven world. Through Spectrum Digital Education, for example, the company has

awarded 327 grants totaling \$11 million to 170 unique organizations that provide digital skills training and access to technology, benefitting over 173,000 community members across Spectrum's service area since the program's 2017 launch.

Conclusion

Spectrum Business is one of the few companies that has grown above the market average and gained market share in the DIA market. The company leverages its nationwide fiber footprint and robust portfolio of value-added services, such as managed SD-WAN, DDoS mitigation, cloud connectivity, managed security services, unified communications, and TV video services. This is particularly significant, as organizations prefer network service providers that can address their varied connectivity, network, and IT infrastructure needs, contributing to Spectrum Business's robust growth and market share trajectory.

With its strong overall performance, Spectrum Business earns the 2025 Frost & Sullivan Competitive Strategy Leadership Recognition in the dedicated internet access industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, 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 offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

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 Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled 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:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

