

FROST & SULLIVAN
BEST PRACTICES



2026

NORTH AMERICAN

DEDICATED INTERNET ACCESS

**COMPETITIVE STRATEGY
LEADERSHIP**

Spectrum
BUSINESS®

Table of Contents

Best Practices Criteria for World-Class Performance	3
The Transformation of the Dedicated Internet Access (DIA) Industry	3
Beyond retail, Spectrum Business continues to capture high-value opportunities in sectors with mission-critical connectivity needs, including financial services, education, healthcare, government, and franchised enterprises. These customers increasingly demand not only reliable access but integrated managed and overlay IT services to support cloud adoption, security frameworks, and application performance. Frost & Sullivan analysis highlights Spectrum Business’s ability to balance scale, flexibility, and pricing discipline as a key driver of its expanding relevance in the U.S. B2B connectivity landscape.	5
Brand Equity	7
Conclusion	7
What You Need to Know about the Competitive Strategy Leadership Recognition	8
Best Practices Recognition Analysis	8
Strategy Innovation	8
Customer Impact	8
Best Practices Recognition Analytics Methodology	9
Inspire the World to Support True Leaders	9
About Frost & Sullivan	10
The Growth Pipeline Generator™	10
The Innovation Generator™	10

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 DIA space.

RECOGNITION CRITERIA	
<i>Strategy Innovation</i>	<i>Customer Impact</i>
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 (DIA) Industry

DIA addresses the growing enterprise need for deterministic, high-capacity connectivity driven by cloud migration, real-time applications, and data-intensive workloads. Unlike shared broadband, DIA delivers a dedicated, symmetrical connection supported by stringent service level agreements (SLAs), ensuring superior network availability, consistent throughput, and predictable latency. This makes DIA a foundational element for mission-critical operations and digital transformation initiatives.

Frost & Sullivan analysis indicates that the accelerated adoption of SD-WAN and the evolution toward SASE architectures have been key catalysts for DIA demand. Enterprises increasingly deploy hybrid connectivity models, positioning DIA as the primary access link, complemented by broadband, wireless, and, in some cases, MPLS to enhance resilience, performance optimization, and cost efficiency.

Looking ahead, Frost & Sullivan expects sustained growth of DIA services in North America across both retail and wholesale segments. Service providers are differentiating through higher access speeds, enhanced SLA frameworks, and tighter integration with cloud and security services, reinforcing DIA's strategic role in next-generation enterprise networks.

Competitive Differentiation Through Network Depth and Strategic M&A

Spectrum Business, whose parent company is Charter Communications, is part of one of the largest broadband connectivity providers and cable operators in the United States, leveraging scale, network

density, and disciplined capital allocation. For full-year 2025, Charter Communications reported revenues of approximately \$54.8 billion. Moreover, by year-end 2025, the company supported approximately 31 million total customer relationships, including continued growth in mobile lines, across 41 states. Spectrum Business’s enterprise portfolio is underpinned by a nationwide infrastructure footprint comprising 330,000+ fiber lit buildings and 350,000+ fiber route miles, supported by 70 carrier partners and more than 560 interconnection points, reinforcing Charter’s position among the top-tier providers in the U.S. business fiber ecosystem.

In May 2025, Charter Communications announced a transformative \$34.5 billion acquisition of Cox Communications, including debt, which is expected to expand its subscriber base by more than 20% and significantly enhance its broadband, enterprise fiber, and mobile convergence capabilities. The transaction is strategically aligned with Charter Communications’s concurrent acquisition of Liberty Broadband, simplifying ownership structure and reinforcing balance-sheet flexibility. Post-merger, Frost & Sullivan analysis suggests Spectrum will emerge as a dominant, converged connectivity platform with

“A key competitive differentiator is Spectrum Business’s 100 Gbps metro and regional interconnection architecture, which allows the company to extend 100 Gbps capabilities consistently across its footprint. This high-capacity backbone enhances network resiliency, supports advanced SD-WAN and SASE deployments, and positions Spectrum Business to meet rising enterprise demand for high capacity, low latency, and highly reliable connectivity at scale.”

**- Leandro Agion
Industry Director**

enhanced scale efficiencies and a strengthened competitive position across residential, wholesale, and enterprise segments.

Leveraging its nationwide fiber footprint, Spectrum Business delivers Dedicated Internet Access (DIA) with symmetrical bandwidth ranging from 30 megabits per second (Mbps) to 100 gigabits per second (Gbps), enabling enterprises to scale capacity in line with digital growth requirements. A key competitive differentiator is Spectrum Business’s 100 Gbps metro and regional interconnection architecture, which allows the company to extend 100 Gbps capabilities consistently across its footprint. This high-capacity backbone enhances network resiliency, supports advanced SD-WAN and SASE

deployments, and positions Spectrum Business to meet rising enterprise demand for high capacity, low latency, and highly reliable connectivity at scale.

Operational Efficiency and Price Advantage in Enterprise Connectivity

Spectrum Business is an agile, growth-oriented provider with a deliberate focus on the B2B segment, leveraging its extensive 41-state on-net footprint alongside national out-of-footprint capabilities to deliver high-performance, reliable connectivity at competitive price points. This hybrid reach enables Spectrum Business to address both regional and multi-location enterprise requirements while maintaining cost efficiency and operational simplicity.

As its fiber investments have scaled, Spectrum Business has significantly strengthened its position in the medium and large business segments, gaining notable traction in verticals with distributed footprints, particularly retail. The company has become a preferred connectivity partner for large restaurant groups,

“Spectrum Business executed a highly effective strategy by aligning network scale, product simplicity, and customer-centric execution to gain measurable momentum in the mid- and large enterprise segments.”

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grocery chains, and franchise-based models that require consistent performance, rapid provisioning, and centralized network management across hundreds of locations.

Beyond retail, Spectrum Business continues to capture high-value opportunities in sectors with mission-critical connectivity needs, including financial services, education, healthcare, government, and franchised enterprises. These customers increasingly

demand not only reliable access but integrated managed and overlay IT services to support cloud adoption, security frameworks, and application performance. Frost & Sullivan analysis highlights Spectrum Business’s ability to balance scale, flexibility, and pricing discipline as a key driver of its expanding relevance in the U.S. B2B connectivity landscape.

Simplifying Enterprise Networking Through Integrated Service Portfolios

Enterprises increasingly favor network service providers that can address a broad and evolving set of connectivity, networking, and IT infrastructure requirements through a simplified and predictable engagement model. Spectrum Business positions its Dedicated Fiber Internet (DFI), and Secure Dedicated Fiber Internet (SDFI), the company’s DIA offering, as a scalable and flexible foundation for enterprise networks, providing symmetrical bandwidth tiers up to 100 Gbps nationwide and enabling seamless upgrades aligned with changing business demands.

Beyond core connectivity, Spectrum Business differentiates through a robust portfolio of managed services that complements its DIA offering. Its managed and co-managed SD-WAN and SD-LAN services integrate hardware, solution design, deployment, and ongoing support, while adjacent capabilities, including managed security, routing, Wi-Fi, unified communications, cloud connectivity, and DDoS protection, are frequently bundled to deliver an end to end enterprise solution.

Frost & Sullivan analysis highlights Spectrum Business’s structured customer experience lifecycle as a key strength. During the consultative engagement stage, the company emphasizes prompt professional interactions, customized discovery, and early transparency into delivery approaches and timelines, supported by a dedicated cross-functional account team spanning sales, sales engineering, service delivery, and customer care, with identified leadership contacts. Technical workshops align on business outcomes and map existing network environments, with written findings and total cost of ownership (TCO) insights delivered within five business days. In the solution design and readiness stage, Spectrum Business conducts detailed site surveys, defines clear success metrics and acceptance criteria, and establishes predictable installation timelines, typically 30 to 45 days depending on building and construction complexity. Execution discipline remains central during implementation and activation, where a dedicated project manager engages within one business day of order verification and a single accountable service delivery lead oversees execution. Spectrum-led vendor coordination, structured

milestones, and defined change control and escalation ownership ensure alignment and accountability. Following activation, ongoing service management is supported by industry-leading SLAs, including 100% U.S.-based 24x7 support with rapid dispatch capabilities, and customer portal access for ticketing, service visibility, and change management. End-to-end ticket management, a four-hour mean time to repair, and a 100% uptime SLA backed by service credits reinforce service reliability. Finally, through continuous governance and innovation, Spectrum Business maintains regular business reviews focused on service health, business alignment, and feedback integration, reinforcing a partnership-driven model that evolves alongside enterprise requirements. This lifecycle-driven approach reinforces predictability, transparency, and long-term partnership across enterprise engagements

Network Performance and SLA as a Core Competitive Differentiator

The accelerated pace of enterprise digital transformation, expanding connected ecosystems, and rising demand for latency sensitive applications underscore the importance of network service providers capable of delivering deterministic performance at scale. For distributed enterprises, uninterrupted high bandwidth connectivity, low latency, and rapid service restoration are critical operational requirements. Spectrum Business addresses these needs through strong network performance and some of the most robust SLAs.

Spectrum Business offers industry leading SLAs that include four hour mean time to restore (MTTR), stringent packet handling performance metrics, and a 100% uptime guarantee with applicable service credits. Unlike many competitors whose SLAs terminate at the minimum point of entry (MPOE), Spectrum Business extends SLA coverage all the way into the customer's suite, including the network interface device or modem. For Secure Dedicated Fiber Internet (SDFI), SLA coverage extends to the managed security edge. These SLAs are applied consistently nationwide and are supported by 24x7, 365 day U.S. based customer support. Frost & Sullivan analysis highlights this depth of SLA coverage in its Dedicated Fiber Access service as a key differentiator, enabling enterprises to confidently operate mission critical workloads on Spectrum Business's network.

Effective Strategy Execution and Market Momentum

Frost & Sullivan analysis indicates that Spectrum Business executed a highly effective strategy by aligning network scale, product simplicity, and customer-centric execution to gain measurable momentum in the mid- and large-enterprise segments. By leveraging its extensive nationwide footprint and a consultative sales model, Spectrum Business strengthened its competitive position in the DIA market, outperforming overall market growth and gaining share despite a challenging macroeconomic environment.

A core component of this success has been the company's emphasis on simplifying product design and packaging, enabling faster decision-making, predictable deployments, and scalable upgrades, key requirements for distributed enterprises.

In parallel, Spectrum Business expanded and integrated its managed services portfolio in 2025, including managed SD-WAN, SASE, Ethernet WAN, DDoS mitigation, Cloud Connect, and unified communications. This one-stop-shop approach positions Spectrum Business to address converging connectivity and security requirements, reinforcing its relevance as enterprises increasingly seek consolidated, performance-driven network partners in North America.

Brand Equity

Spectrum has emerged as one of the most recognizable and trusted connectivity brands in the North American market, supported by nationwide scale, consistent service execution, and sustained infrastructure investment. Anchored in Charter Communications' extensive network assets, the Spectrum brand is strongly associated with high network availability, broad geographic reach, and competitive pricing, key attributes that appeal to both residential and enterprise customers across diverse industries.

Frost & Sullivan analysis indicates that Spectrum Business's growing brand relevance is closely aligned with macro trends such as digital transformation, cloud adoption, and increasingly distributed enterprise operating models. The company's ability to support complex connectivity requirements at scale is reflected in its relationships with more than 90% of Fortune 500 companies, including telecom operators, carrier service providers, hyperscale cloud platforms, and streaming companies.

Brand equity is further reinforced by external recognition and strategic partnerships. Spectrum Business was named Service Provider Partner of the Year for the Americas at Cisco Partner Summit 2025, underscoring the value of its collaboration with Cisco in delivering advanced connectivity solutions, including DIA and managed network services. By integrating Cisco's technology portfolio with Spectrum Business's engineering and operational expertise, the company delivers best in class performance and reliability.

Beyond commercial performance, Spectrum's brand strength is also shaped by community engagement. Through Charter Communications, the company supports multiple philanthropic initiatives focused on digital inclusion, education, workforce development, and community investment, strengthening stakeholder trust and reinforcing long-term brand sustainability.

Conclusion

Spectrum Business has established a strong leadership position in the North American Dedicated Internet Access market by combining network scale, performance assurance, and disciplined strategic execution. Its expansive fiber footprint, supported by advanced 100 Gbps backbone architecture, enables deterministic connectivity aligned with the evolving demands of cloud-driven, mission-critical enterprise environments. Spectrum Business further differentiates through industry-leading SLAs, deep service demarcation, and a lifecycle-driven engagement model that delivers predictability and operational confidence. Complemented by a simplified, integrated services portfolio and strong price-value economics, Spectrum Business is well positioned to sustain market momentum as enterprises increasingly seek consolidated, performance-led connectivity partners to support long-term digital transformation initiatives.

With its strong overall performance, Spectrum Business earns the 2026 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 identifies the company with a standout approach to achieving top-line growth and a superior customer experience.

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®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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™.

[Learn more.](#)

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)**

