

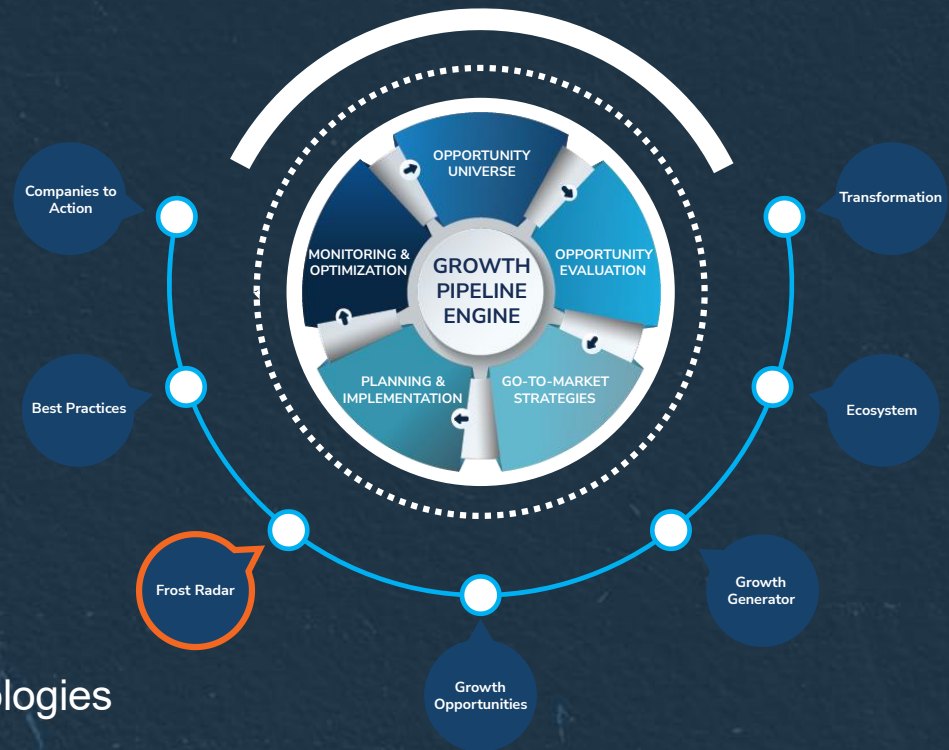
Frost Radar : Dedicated Internet Access in North America, 2026

A Benchmarking System to Spark
Companies to Action - Innovation
That Fuels New Deal Flow and
Growth Pipelines

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KC4D-63

June 2026

Strategic Imperative and Growth Environment



Strategic Imperative

- Dedicated, uninterrupted, high-availability connectivity has become a strategic imperative as enterprises respond to transformative megatrends including artificial intelligence (AI), cloud adoption, data-driven operations, and digital ecosystems. These global forces are reshaping how organizations operate, compete, and scale, significantly increasing dependence on predictable, high-performance network infrastructure.
- Dedicated internet access (DIA) directly addresses these requirements by delivering dedicated, high-bandwidth, symmetrical connectivity supported by rigorous service-level agreements (SLAs). Unlike broadband services, which are typically delivered over oversubscribed networks and lack performance guarantees, DIA is purpose-built to ensure consistent throughput, low latency, packet delivery assurance, and operational continuity. While some “business internet” offerings may provide symmetrical speeds, they do not offer the deterministic performance and contractual assurances required to support mission-critical cloud, AI, and real-time digital workloads. In parallel, leading service providers are positioning multiservice port capabilities, enabling enterprises to provision different connectivity services over a single interface, enhancing flexibility and simplifying network architectures. DIA is becoming foundational to enterprise resilience and long-term digital competitiveness.
- Industry convergence is accelerating collaboration between historically separate domains—networking, cloud, cybersecurity, and wireless—to unlock cross-industry growth opportunities and enable more adaptive digital operating models. In this environment, enterprises require integrated connectivity architectures that combine performance, security, and operational intelligence. SD-WAN has become a critical enabler of this convergence, acting as the orchestration layer that unifies multiple access technologies while embedding security and application awareness into the network fabric.

Strategic Imperative (continued)

- The adoption of SD-WAN has been a primary catalyst for DIA growth. Enterprises typically select DIA as the anchor connection in hybrid architectures that also incorporate broadband, wireless, or legacy MPLS links. SD-WAN's ability to dynamically steer traffic based on real-time performance, security policy, and application requirements elevates the role of the underlying access link. As a result, DIA becomes strategically essential, providing the deterministic performance, reliability, and SLA-backed capacity required to support converged, security-centric, and application-driven networks. In this context, SD-WAN does not replace DIA; rather, it amplifies its value and accelerates adoption as enterprises pursue resilient, converged connectivity models.
- Innovative business models are reshaping how service providers create, deliver, and monetize connectivity, particularly as enterprises demand greater agility, transparency, and scalability from network services. Network as a service (NaaS) is emerging as a transformative model that shifts networking from static, contract-bound offerings to on-demand, programmable, and consumption-based services.
- According to Frost & Sullivan's 2026 Voice of the Customer Survey, DIA is among the services generating the highest interest for delivery through NaaS, with 28% of respondents indicating interest in procuring DIA via this model. By integrating DIA into NaaS portfolios, service providers can preserve deterministic performance while introducing new revenue models, operational efficiencies, and differentiated value propositions aligned with cloud-like consumption and evolving enterprise expectations.

Growth Environment

- The North American DIA services market is mature but has experienced a fresh burst of energy in the past few years as SD-WAN challenges the status quo of traditional WAN services. While some customers have chosen to create a hybrid SD-WAN network by adding broadband links to MPLS or Ethernet WANs, others have chosen to disconnect private networks and instead utilize a combination of broadband, DIA, and wireless links.
- Frost & Sullivan observes that DIA has become the preferred primary connectivity foundation for enterprises, while fixed broadband and 4G/LTE are commonly deployed as secondary or backup links. This hybrid connectivity model reflects a strategic shift away from legacy MPLS architectures as organizations seek to balance performance, resilience, and cost efficiency. DIA enables enterprises to optimize operational costs and network performance, making the migration from high-cost MPLS connections a strategic decision.
- AI is creating a structural inflection point in network traffic patterns and performance requirements. AI-driven workloads, ranging from model training to real-time inference and data-intensive analytics, are significantly increasing bandwidth consumption and placing stringent demands on latency, reliability, and network consistency. Frost & Sullivan believes this shift is compelling service providers to prioritize investments in next-generation network infrastructure that is more automated, higher capacity, and optimized for ultralow-latency performance. Frost & Sullivan anticipates sustained growth in demand for DIA as organizations modernize their connectivity strategies to support AI-centric and data-driven business models.
- The reliance on cloud-based applications is increasing enterprise demand for consistently high-performance network connectivity. Many cloud-based business applications are inherently latency-sensitive, and DIA's SLA-backed connectivity enables these applications to operate efficiently, supporting real-time collaboration, voice quality, and seamless user experience.

Growth Environment (continued)

- The expansion of work-from-home models, combined with the widespread use of over-the-top (OTT) services and social media, continues to drive growth in internet bandwidth consumption in the retail broadband segment. The surge in usage generates exponential traffic growth, increasing demand for network capacity across the ecosystem. While residential users are not direct adopters of DIA, the traffic growth acts as a catalyst for wholesale DIA adoption. Cloud service providers, content delivery networks (CDNs), and large content platforms, such as Netflix and YouTube, rely on DIA to interconnect data centers, manage traffic flows, and ensure consistent performance at scale.
- North America will continue to see rapid deployment of DIA services across the retail and wholesale segments as leading service providers strengthen their offerings. The wholesale segment includes IP transit and wholesale DIA, wherein the local loop and transit are sold to carriers, system integrators, and resellers of DIA services to enterprises.
- Cable multisystem operators (MSOs) have emerged as key competitors to incumbent local exchange carriers (ILECs) and competitive local exchange carriers (CLECs) in the DIA services market. MSOs' investment in Ethernet delivered over fiber and hybrid fiber-coaxial cable networks has paid off, with MSOs moving upmarket in terms of offerings. Network service providers (NSPs) and MSOs promote their DIA services based on the SLAs they offer, which include service availability, data availability, latency, and jitter.
- Despite strong long-term growth fundamentals, several challenges continue to temper demand for DIA services. High installation costs can limit adoption, especially among price-sensitive small and medium-size business (SMB) and mid-market customers, as can intense competition from broadband providers offering bundled connectivity packages with attractive pricing. While these alternatives typically lack the performance guarantees and SLAs of DIA, their lower total cost of ownership appeals to cost-conscious enterprises, creating short-term substitution risks in price-sensitive market segments.

Frost Radar™: Dedicated Internet Access in North America



Frost Radar™: Dedicated Internet Access in North America



In a mature market with 20 qualified participants meeting national coverage, Frost & Sullivan independently evaluated the landscape and selected just 8 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market, demonstrating not only strong growth but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts, Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Companies that have achieved significant market growth through strong execution
- Compete by leveraging proven technologies, scalable business models, and operational efficiency
- Included for their ability to consistently capture demand and deliver results at scale
- Must increase investment in innovation to sustain long-term leadership

CONTENDERS

- Companies with focused strength in specific segments, use cases, or regions
- Compete through deep specialization and targeted customer relevance
- Included to demonstrate credible capabilities, though limited in scale or breadth of innovation
- Must expand both market reach and innovation capabilities to compete at scale

VISIONARY LEADERS

- Companies that demonstrate leadership across both growth and innovation at scale
- Compete by combining transformative innovation with disciplined execution
- Included for their ability to shape market direction while delivering sustained growth
- Must continue to scale innovation while defending leadership in an increasingly competitive market

INNOVATORS

- Companies that lead in technology, product innovation, and market disruption
- Compete by introducing differentiated solutions and shaping future use cases
- Included for their strong innovation capabilities, despite more limited commercial scale
- Must strengthen go-to-market execution to translate innovation into sustained growth

Frost Radar™ Competitive Environment (continued)

- This Frost Radar™ includes service providers that offer DIA services with the following features:
 - Business-grade, dedicated internet connections that provide symmetrical upload and download speeds
 - SLAs that include availability and performance guarantees
 - Proactive monitoring of networks and 24x7x365 customer support
- DIA services are typically delivered using one of the following access technologies:
 - Ethernet-based (using fiber and copper) speeds that can range from 2 Mbps to 100 Gbps
 - SONET-based speeds, including OC-3, OC-12, OC-48, and OC-192
 - TDM-based private line services (DS1 and DS3 circuits)
- To distinguish their offerings, providers have supplemented DIA with additional services, including wireless backup, a service portal to view and manage bandwidth usage, and 24x7 customer support.
- The market consists of a mix of longtime NSPs with an extensive network footprint and cable companies leveraging their coax and fiber footprint to offer DIA services. The eight companies featured in this Frost Radar™ analysis were selected primarily because of their comprehensive DIA offerings and presence in retail and wholesale segments.
- On a more granular level, the Frost Radar™ scores each company based on its network footprint, overall product and services portfolio, competitive pricing, ease of doing business, and approach to business tiers. On the Innovation Index, companies compete mainly on how they market their products, including bundled services; ability to offer services integration; and, most importantly, provision of a range of services through the customer portal.

Frost Radar™ Competitive Environment (continued)

- A company's position on the Growth Index is based on its network footprint and how it approaches small, mid-market, and large businesses (e.g., distributed enterprises and cloud service providers).
- AT&T is the Frost Radar™ Growth and Innovation Index leader because of the completeness of its offering, a large customer base, and its reliable nationwide network in the United States. It has the most comprehensive offering in the market, with maximum symmetrical speeds of up to 1 terabit per second (Tbps). AT&T recently launched Dynamic Defense, an add-on solution for DIA customers that enables a network with built-in security controls.

Frost Radar™: Companies to Action



AT&T Business

VISIONARY LEADER

INNOVATION SCORE **4.20**

GROWTH SCORE **4.25**

INNOVATION

- AT&T Business's fiber-based DIA service is a comprehensive offering with maximum symmetrical speeds of 1 Tbps. It includes a managed router, wireless backup, and diversity options, a personalized portal with 24/7 network management, proactive monitoring and maintenance with automatic ticketing, a flexible billing option, traffic prioritization, and attractive SLAs.
- AT&T Dynamic Defense illustrates its innovation-driven approach and reflects a broader network strategy shift to embedded security models that push threat mitigation upstream. By leveraging AI-driven, real-time detection and automated response directly at the network layer, the approach reduces enterprise reliance on on-premises hardware and accelerates security activation. Its integration with DIA services underscores the convergence of networking and cybersecurity, positioning security as a native network capability rather than a stand-alone add-on, with implications for scalability, cost efficiency, and operational resilience.
- AT&T Business has evolved its enterprise connectivity portfolio to a more integrated, security-centric service model that supports DIA bundling strategies. In addition to multivendor managed and co-managed SD-WAN, SSE, and SASE offerings, AT&T recently expanded into single-vendor SASE architectures, most notably through its AT&T SASE with Cisco launch, positioning security and networking under a unified operational framework.

AT&T Business (continued)

VISIONARY LEADER

INNOVATION SCORE **4.20**

GROWTH SCORE **4.25**

GROWTH

- AT&T maintains one of the most extensive fiber footprints in the United States, anchored by 800,000 fiber-lit business buildings and more than 10 million business customer locations in the United States that are within 1,000 feet of AT&T's fiber. The dense access network underpins AT&T's leadership in DIA services. On a global scale, AT&T operates approximately 1.4 million fiber route miles, supporting multinational enterprises, cloud connectivity, and latency-sensitive workloads.
- AT&T's planned \$250 billion investment over five years signals a structural push to modernize US telecom infrastructure amid demand for resilient, always-on connectivity. Beyond capacity expansion, the initiative addresses systemic enablers for AI adoption, cloud-scale services, and data-intensive applications while prioritizing network security, AI-driven threat intelligence, and infrastructure resilience.
- AT&T is the leader in the North American DIA market, with above-market growth reflecting sustained enterprise demand for high-capacity, reliable connectivity. Performance is underpinned by an extensive fiber footprint, strong penetration across large enterprises and distributed mid-market customers, and ability to bundle DIA with adjacent services, such as Ethernet, SD-WAN, and managed security.
- AT&T is a major NSP for Fortune 1000 companies, and its customer base continues to increase.

AT&T Business (continued)

VISIONARY LEADER

INNOVATION SCORE **4.20**

GROWTH SCORE **4.25**

FROST PERSPECTIVE

- Based on Frost & Sullivan's analysis, AT&T is the leading provider in the North American DIA market, supported by its strong enterprise brand recognition, extensive installed customer base, and established competitive positioning. The company is strategically aligned to benefit from the migration from MPLS to DIA- and SD-WAN-based architectures, particularly across mid-market and large enterprises. This is reinforced by AT&T's sizable legacy MPLS footprint and its ability to offer integrated SD-WAN solutions as part of a broader, scalable network services portfolio.
- AT&T has assembled a broad and increasingly integrated services portfolio that positions it as a one-stop shop for ICT solutions for enterprise customers. The company's continued investment in an as-a-service delivery model reflects a strategic emphasis on simplifying service consumption and broadening ecosystem participation. Strengthening onboarding processes and partner integration capabilities will be essential to maximizing the effectiveness and scalability of the marketplace-driven approach.
- As enterprise service portfolios shift to dynamic, on-demand, and self-service consumption models, the ability to enable end-to-end digital onboarding is a critical enabler of scale. A seamless progression from service discovery to onboarding and provisioning can materially reduce friction in the sales cycle, improve conversion rates, and shorten time to revenue. Continuing to standardize onboarding workflows, enhance API-driven integrations, and align partner participation models would allow AT&T to further operationalize this digital transition and capture greater value from its self-service portfolio.

Best Practices & Growth Opportunities



Best Practices

1

While DIA is a mature service, sustained competitiveness requires continuous enhancement of the customer experience. Service providers must differentiate through proactive monitoring, network automation, self-healing capabilities, flexible billing models, faster installation timelines, and intuitive customer portals. Complementary wireless (5G and LEO) backup for automatic failover strengthens service resilience and enterprise value.

2

APIs are poised to become a foundational enabler of future network architectures, but only a limited number of service providers support API-driven service design and business process automation. Mplfy LSO Sonata APIs represent a critical step toward standardizing interprovider automation, enabling scalable, ecosystem-wide interoperability and accelerating digital transformation.

3

Customer portals and marketplaces are becoming a strategic component of connectivity services, enabling end-to-end visibility from quote to service activation. On-demand, self-service portals allow customers to select, configure, and manage services dynamically, streamlining quote-to-cash processes while enhancing agility, transparency, and overall customer experience.

Growth Opportunities

1

DIA remains a growing market as AI, cloud computing, and enterprise decentralization drive demand for reliable, high-performance connectivity. Expanding into broader ICT portfolios, including SD-WAN, SASE, security, LAN, UCaaS, and voice, enables providers to further monetize DIA, diversify revenue, and create higher-value offerings beyond connectivity services.

2

The MPLS market continues to structurally decline as enterprises migrate to more agile networking models. By proactively supporting customer transitions from private MPLS connections to SD-WAN combined with DIA, NSPs can preserve revenue and differentiate from non-telco competitors by leveraging their network ownership, service reliability, and trusted brand positioning.

3

Growing traffic from cloud providers, hyperscalers, CDNs, and AI platforms continues to drive demand for high-capacity, wholesale DIA. Providers that position DIA as a foundational interconnection service can capture growth across the broader digital ecosystem, beyond direct enterprise customers.

Frost Radar™ Analytics



Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1**MARKET SHARE (PREVIOUS 3 YEARS)**

This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2**REVENUE GROWTH (PREVIOUS 3 YEARS)**

This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3**GROWTH PIPELINE**

This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4**VISION AND STRATEGY**

This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5**SALES AND MARKETING**

This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

III

INNOVATION SCALABILITY

This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO

This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE

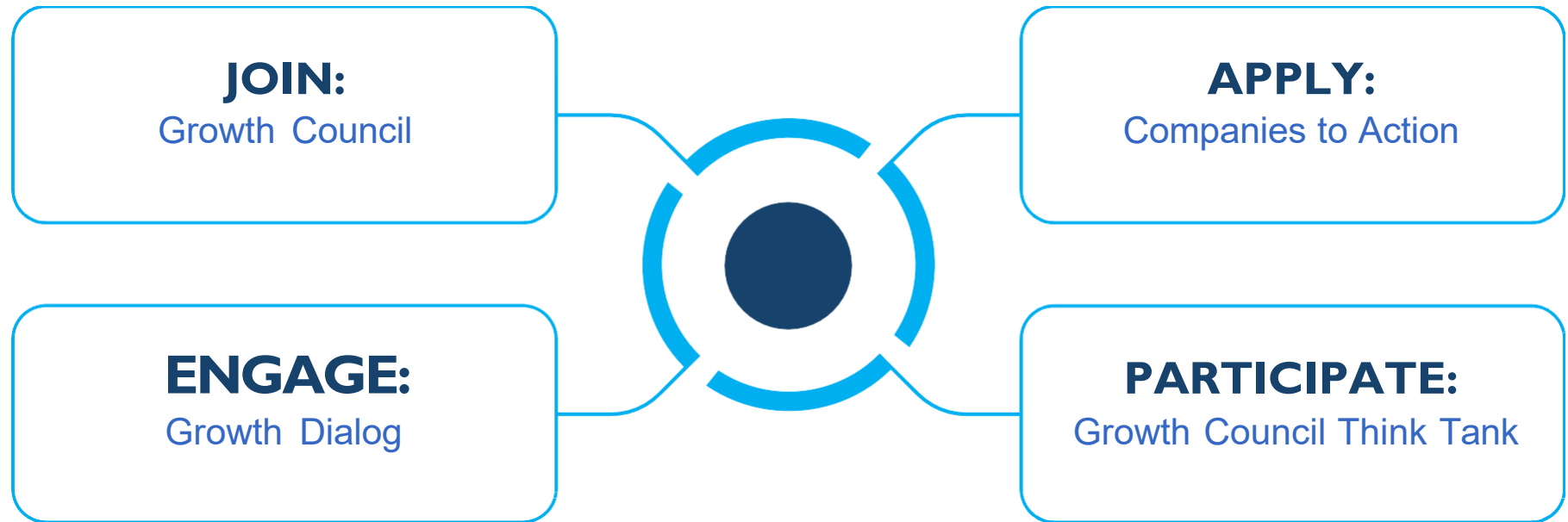
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found [here](#).

II5

CUSTOMER ALIGNMENT

This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Next Steps



Does your current system support rapid adaptation to emerging opportunities?

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