

FROST & SULLIVAN

SPECTRUM ENTERPRISE

2022
COMPETITIVE
STRATEGY
LEADER

US DEDICATED
INTERNET ACCESS 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. Spectrum Enterprise excels in many of the criteria in the dedicated internet access space.

AWARD 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

Competitive Differentiation

Enterprises' demand for bandwidth continues to grow because business applications are increasingly latency sensitive and require uninterrupted connectivity to perform efficiently. Dedicated Internet access (DIA) services deliver guaranteed bandwidth, reliable connectivity, symmetrical upload and download speeds, and the flexibility and scalability needed by bandwidth-heavy applications.

Through its Fiber Internet Access (FIA) service, Connecticut-based Spectrum Enterprise leverages its nationwide fiber network to offer symmetrical speeds, ranging from 10 Mbps to 100 Gbps, thus

“Spectrum Enterprise leverages its nationwide fiber network to offer symmetrical speeds, ranging from 10 Mbps to 100 Gbps, thus accommodating its large customer base across business tiers. The company is a national provider of scalable, fiber technology solutions serving many of America's largest businesses and communications service providers.”

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Senior Industry Analyst**

accommodating its large customer base across business tiers. The company is a national provider of scalable, fiber technology solutions serving many of America's largest businesses and communications service providers. Indicative of Spectrum Enterprise's strong network performance and robust service level agreements (SLAs) is its ability to attract enterprises that operate their entire business on Spectrum Enterprise's network.

Spectrum Enterprise offers some of the industry's strongest SLAs, with 99.99% service availability

(from the customer premises), 99.99% data availability, less than 25 milliseconds of latency, and less than 4 milliseconds of jitter. The company's FIA service includes a scalable platform that supports customers' current and future bandwidth requirements and secure traffic routing over its IP network. In addition, the company integrates a network interface device (NID) on customers' circuits to provide end-to-end service-level management and service performance visibility, all-backed by a single point of contact for support and service. Wireless internet can be critical for businesses looking for a redundant backup service for uninterrupted connectivity for their day-to-day operations. Another one of Spectrum Enterprise's key differentiators of its FIA is that it offers an optional wireless internet service which includes a managed appliance at the customer site that monitors the network. If connectivity is lost, the appliance automatically re-routes traffic over the wireless internet. Spectrum Enterprise's 4G LTE-based wireless modem supports automatic failover and failback, delivering up to 10 Mbps of symmetrical bandwidth to run critical applications during interrupted connectivity. Moreover, all the services delivered with FIA come with 24-hour, US-based customer support to resolve any issues.

Customer Purchase Experience

Connectivity becomes critical as businesses increasingly adopt cloud-based applications as part of the digital transformation initiative. A DIA service is a high performing and reliable underlay transport, helping businesses connect to their cloud environments seamlessly.

Spectrum Enterprise makes it easy for customers to purchase and deploy its FIA service by offering flexibility and scale with symmetrical bandwidth tiers ranging from 10 Mbps to 100 Gbps across its IP

"Spectrum Enterprise makes it easy for customers to purchase and deploy its FIA service by offering flexibility and scale with symmetrical bandwidth tiers ranging from 10 Mbps to 100 Gbps across its IP backbone that can be easily upgraded based on changing needs."

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backbone that can be easily upgraded based on changing needs. To enhance the customer experience, the company also offers a range of managed services that are typically used along with internet services, such as security, routing, Wi-Fi, and unified communications. IT experts design, deliver and manage these services for the enterprise and also provide them visibility through an online portal.

and services so that customers can receive everything under one umbrella. The company's portfolio includes managed SD-WAN, Ethernet WAN, Distributed Denial-of-Service (DDoS) protection and video solutions.

In addition to offering FIA service, the company acts as a single provider by offering a range of products

Strategy Effectiveness

The COVID-19 pandemic has disrupted the global supply chain, thus affecting service providers' ability to deliver appliances based on increased supply chain intervals. The US DIA services market, therefore, has been affected by this disrupted supply chain, resulting in a shortage of routers.

Spectrum Enterprise has gained a competitive edge by addressing this supply chain constraint. For example, the company has proactively stocked appliances to accommodate the increasing demand from both new and existing customers, compared to other vendors.

Brand Equity

Spectrum Enterprise is a subset of the commercial business segment of Charter Communications and has a countrywide network presence across 41 states. The company serves more than 271,500 fiber-lit buildings across 230,000+ fiber route miles and offers the FIA service at the same price for on-net and a large number of near-net buildings without charging any construction costs to enterprises.

Spectrum Enterprise holds a competitive position among network service providers in the United States by offering several network services and leveraging its vast network infrastructure. The company has built strong brand equity in network transport services, and its fiber is often the underlying network for some of the largest companies in the United States.

Conclusion

Businesses increasingly demand DIA services because of the growing adoption of cloud-based applications as part of the digital transformation initiative. These cloud-based applications are latency sensitive and require uninterrupted high-bandwidth connectivity to operate efficiently. Furthermore, the COVID-19 pandemic has forced businesses to adopt a hybrid working model, thus increasing the need for dedicated high-speed connectivity.

Spectrum Enterprise offers FIA service by leveraging its hundreds of thousands of fiber-lit buildings and fiber route miles in the United States. In addition to FIA, the company offers a highly competitive feature of 4G LTE-based wireless backup for automatic failover and failback, ensuring uninterrupted connectivity during disruptions. Other features include a network interface device to monitor and manage the network, dedicated speeds ranging from 10 Mbps to 100 Gbps, and robust SLA performance parameters. Spectrum Enterprise's FIA service is often the underlying network for enterprises, indicating the company's network reliability and scalability.

For its strong overall performance, Spectrum Enterprise earns Frost & Sullivan's 2022 US Competitive Strategy Leadership Award in the dedicated internet access industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, 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 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)**

