



**Year-End 2019  
U.S. Carrier Ethernet  
LEADERBOARD Report**

## CenturyLink Continues to Lead U.S. Ethernet Market #1 LEADERBOARD Provider

CenturyLink achieved first position on Vertical Systems Group's latest U.S. Ethernet LEADERBOARD based on the company's domestic market share as of year-end 2019. CenturyLink has held the number one rank on the U.S. LEADERBOARD continuously since 2017.

### LEADERBOARD RESULTS

Carrier Ethernet LEADERBOARDS are the industry's foremost benchmarks for measuring market leadership in the delivery of retail Ethernet services.

Seven companies attained a position on the year-end **2019 U.S. Carrier Ethernet LEADERBOARD** based on retail port share. These companies are as follows (*in rank order by share*): CenturyLink, AT&T, Spectrum Enterprise, Verizon, Comcast, Windstream and Cox.

To qualify for this LEADERBOARD, each service provider had a four percent (4%) or higher share of the U.S. retail Ethernet services market based on port installations as of December 31, 2019.

### CHALLENGE TIER

The U.S. Challenge Tier cites the Ethernet service providers with U.S. market share between 1% and 4%.

Six service providers attained a Challenge Tier citation for year-end 2019. These companies are as follows (*in alphabetical order*): Altice USA, Cogent, Frontier, GTT, Sprint and Zayo.

**VERTICAL SYSTEMS GROUP** LEADERBOARD

YEAR-END **2019** U.S. CARRIER ETHERNET SERVICES

RANK	ETHERNET PROVIDERS
1	CenturyLink
2	AT&T
3	Spectrum Enterprise
4	Verizon
5	Comcast
6	Windstream
7	Cox

**CHALLENGE TIER** (in alphabetical order)  
Altice USA, Cogent, Frontier, GTT, Sprint, Zayo

[www.verticalsystems.com](http://www.verticalsystems.com)

## MARKET PLAYER TIER

Providers selling U.S. retail Ethernet services with 2019 port share below 1% are in the Market Player tier. Companies in this tier are as follows (*in alphabetical order*): Alaska Communications, American Telesis, Atlantic Broadband, BT Global, Cincinnati Bell, Consolidated Communications, Crown Castle, DQE Communications, Expedient, FiberLight, FirstLight, Fusion, Global Cloud Xchange, Great Plains Communications, Logix Fiber Networks, LS Networks, Masergy, MetTel, Midco, NTT, Orange Business, RCN Business, Segra, Tata, TDS Telecom, Telstra, TPx, Unite Private Networks, US Signal, WOW!Business and others.

## CENTURYLINK RANKS IN THE U.S. AND GLOBAL PROVIDER SEGMENTS

- In 2019, CenturyLink expanded its domestic Ethernet customer base to retain first position on the U.S. Carrier Ethernet LEADERBOARD. The company's growth was driven by its focus on Ethernet service quality, footprint expansion and simplification of the customer experience.

VERTICAL SYSTEMS GROUP YEAR-END 2019

**U.S. CARRIER ETHERNET SERVICES LEADERBOARD**

RANK 1 CenturyLink

*"CenturyLink's growth in 2019 was driven by its focus on Ethernet service quality, footprint expansion and simplification of the customer experience."*

RICK MALONE, PRINCIPAL  
VERTICAL SYSTEMS GROUP  
WWW.VERTICALSYSTEMS.COM

- Additionally, CenturyLink attained third position on Vertical Systems Group's 2019 Global Provider Ethernet Services LEADERBOARD, which is the benchmark for market leadership in the delivery of multinational Ethernet networks. Market shares for this segment are based on Ethernet ports installed outside of each provider's home country. The top Global Providers for 2019 are as follows (*in rank order based on share*): AT&T (U.S.), Colt (U.K.), CenturyLink (U.S.), Orange Business (France), BT Global Services (U.K.), Verizon (U.S.) and NTT (Japan).

## U.S. ETHERNET MARKET TRENDS

Ethernet installations in the U.S. increased 8.9% in 2019 to more than 1.25 million customer ports. Market demand is being driven by the need for higher speed access to Cloud, Internet and VPN services.



Ethernet is the WAN underlay of choice for enterprises purchasing Carrier Managed SD-WAN solutions that require secure, high speed, dedicated connectivity.



Cloud connectivity utilizing Ethernet access enables the benefits of bandwidth scalability and Quality of Service (QoS) for business applications.

Pricing for Ethernet services continues to decline, particularly for high bandwidth connections. Average prices vary based on Ethernet service type, port speed, length of term and geographic location.



Revenue growth for Ethernet services is increasing at a slower rate than port growth as a result of ongoing price compression.

Service providers are actively enhancing their Ethernet solutions to support more flexible configurations, improved network performance and quicker site installations.



New streamlined Ethernet offerings are targeting the requirements of small and medium size businesses.



Fiber buildouts by network providers are expanding the scope of Ethernet service footprints to serve a broader base of business customers across the U.S.

Each of the 2019 U.S. Ethernet LEADERBOARD providers has received MEF ([www.mef.net](http://www.mef.net)) CE 2.0 certification, which signifies compliance with industry-recognized specifications for Ethernet services.

## YEAR-END 2019 ETHERNET MARKET SHARE CALCULATIONS

Market share calculations for the year-end 2019 U.S. Carrier Ethernet LEADERBOARD analysis are based on the total number of billable retail Ethernet customer ports per service provider as tracked by Vertical Systems Group.

Calculations for market share utilize the U.S. Ethernet installed base as of December 31, 2019. Share figures include retail ports only (*i.e.*, no wholesale services).

All ports are counted equally for share calculations, regardless of the access rate of the port. The five speed segments tracked for market analysis are 10+ Gbps, 1 Gbps, 100 Mbps, 10 Mbps, and Sub-10 Mbps.

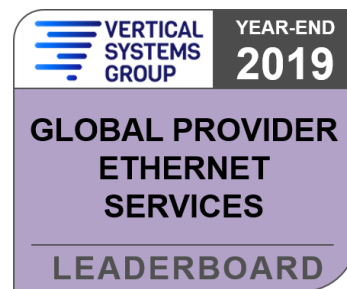
Vertical Systems Group defines six Carrier Ethernet service types from a market perspective based on what network service providers are offering and enterprise customers are purchasing.

The Ethernet service segments included in this analysis are Dedicated Internet Access (DIA), Ethernet Access to MPLS VPNs, Ethernet Private Lines (EPL), Ethernet Virtual Private Lines (EVPL), Metro LAN, and WAN VPLS (Virtual Private LAN Service).

## U.S. AND GLOBAL PROVIDER LEADERBOARD RELEASES



[DETAILS](#)



[DETAILS](#)

## ABOUT VERTICAL SYSTEMS GROUP

Vertical Systems Group is recognized worldwide as a leading market research and strategic consulting firm specializing in defensible quantification of the networking industry.

Detailed Ethernet statistics and port share results that power the year-end 2019 U.S. Carrier Ethernet LEADERBOARD are available exclusively by subscription to Vertical Systems Group's **ENS** (Emerging Networks Service) Research Programs.

CONTACT US FOR MORE INFORMATION  
[www.verticalsystems.com](http://www.verticalsystems.com)