

Lumen's Private Connectivity Fabric gains momentum with multiple Hyperscale wins with Azure, Meta, AWS and now Google

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IDC'S QUICK TAKE

This announcement by Google to leverage the Lumen network infrastructure is the latest in an impressive string since June 2024, when Lumen announced a new network architecture to facilitate custom private networks. Lumen Private Connectivity Fabric (PCF) allows Service Providers and enterprises to design and configure private networks to meet specific security and performance parameters. Since that announcement, Lumen has racked up several major contracts that shows that Lumen has hit the mark in meeting the critical need for AI driven networking requirements.

PRODUCT ANNOUNCEMENT HIGHLIGHTS

The most recent is the November 5th partnership with Google facilitating the Cloud Service Provider's deployment of Lumen PCF with dedicated fiber to expand the Google network. Google will use Lumen PCF to expand and support growth of its cloud infrastructure and AI driven workloads.

Lumen will leverage Google Cloud to deploy Lumen Digital Twin technology, to enhance its network with proactive insights to detect and quickly resolve network issues before it impacts Lumen customers.

Lumen will also leverage Google's Vertex AI platform to enable new AI powered applications to enhance AIOps with fewer truck rolls, and to improve the efficiency of field, agent, and customer support.

This follows on the heels of the Oct 30th announcement of a partnership between Lumen and Amazon Web Services (AWS) for Lumen to provide fiber connectivity to AWS data centers to facilitate scalable AI applications across AWS regions and local Zones. Lumen will also leverage AWS AI/ML, and security to modernize its network infrastructure and enhance its services portfolio performance.

One week before the AWS announcement, Lumen announced they are partnering with Meta to significantly increase Meta's network capacity and help drive its bold AI ambitions. Lumen's PCF will enable long-term network capacity for Meta's AI capabilities. This

expanded network will provide dedicated interconnection for Meta's infrastructure, with increased flexibility through secure on-demand bandwidth to support its complex computing needs that serve billions of people every day.

IDC'S POINT OF VIEW

These three announcements follow on the heels of the Microsoft strategic partnership announced in July 2024. Microsoft chose Lumen's network infrastructure to provide flexible network capacity in its bid to meet growing demand for its datacenters driven by Azure Open AI and Microsoft Copilot initiatives. In return, Lumen will leverage Microsoft's Cloud and AI technology to modernize and shift workloads to Microsoft Azure cloud, as well as to streamline its portfolio, create and deploy new digital solutions.

By August 2024, Lumen also subsequently announced that it had signed \$5 billion in new business contracts fueled by the demand for connectivity driven from enterprises driven by AI driven workloads across a diverse range of industries. Lumen also stated that it is in ongoing discussions companies for another \$7 billion in opportunities to meet customer demand for custom networks.

The Lumen Private Connectivity Fabric has the potential to be a watershed event for Lumen with an impact that will resonate for years and is the culmination of Lumen's ongoing effort to transform the company into a new digital entity. The company has dramatically redefined its portfolio and mission, shed international assets and is streamlining and focusing on its strength as a leading North American fiber-oriented service provider. Lumen's transformation is timely. It is evolving amid the AI driven revolution which is sweeping the globe and redefining IT infrastructure requirements.

So why is Lumen PCF important? AI driven workloads will have a significant impact in driving up connectivity requirements and spending. Coupled with the continued growth of enterprise data consumption across the board, high speed multi-gigabit networking will be the fastest growing segment of bandwidth requirement.

According to IDC research, 47% of North American enterprises reported that Gen AI is having a significantly larger impact on connectivity strategy and roadmaps in 2024. This is up from 25% in mid-2023. In addition, another 32% stated that Gen AI will have some impact on current connectivity transformation plans for future investment and roadmap decisions. The message is loud and clear, connectivity, and most importantly, the sourcing of dynamic, diverse connectivity options across intercity and metro routes is crucial to enterprise IT infrastructure deployments. (Source: IDC Future Enterprise Resiliency & Spending Survey Wave 6, IDC June 2024, N=366)

However, these partnerships are not just about connectivity. It enables Lumen to continue its dramatic digital transformation, leveraging AI/ML to modernize its network

infrastructure, and to transform how connectivity is consumed. With its vast network assets, and ongoing commitment to a multi-year investment strategy, Lumen is effectively partnering with enterprises for cloud like on-demand connectivity assets to meet current and future demand with predictable reliability and performance. The fact that the leading hyperscale cloud providers have demonstrated their trust in Lumen is a testament to its visionary transformation.

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