



Date: May 20, 2026



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GTT Communications – Wholesale

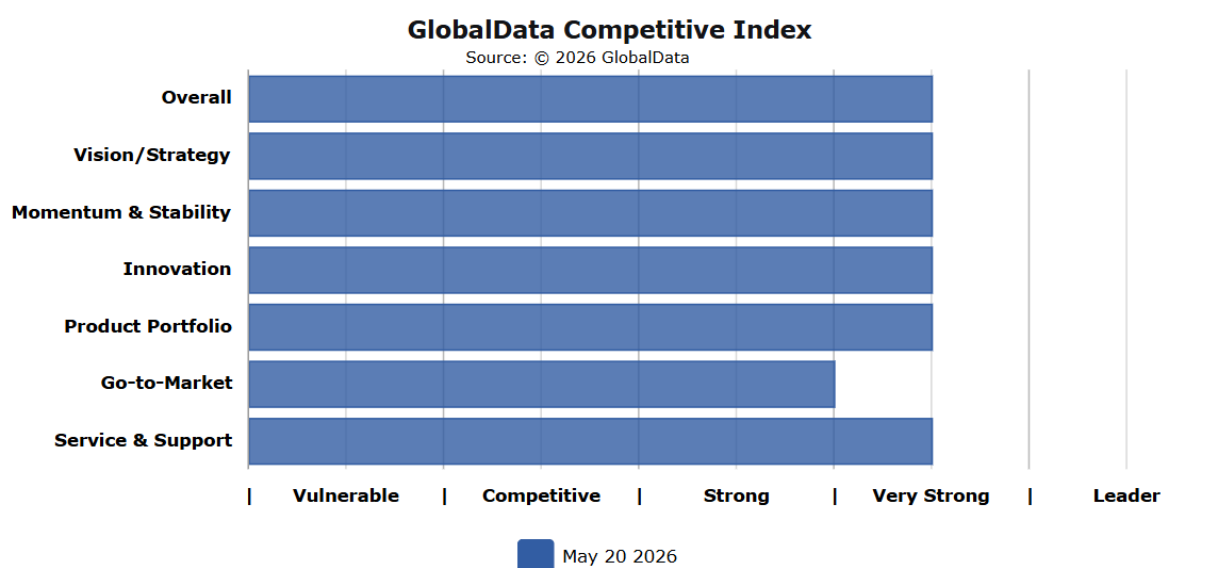
Report Summary

GTT has emerged as a formidable challenger in the wholesale segment. Its continued investment in, and expansion of, its robust global IP backbone positions the company as a credible alternative to traditional large telecom providers.

What's New

- **January 2026:** GTT announced it has expanded its global SIP Trunking availability of its global voice services to include Japan. The global SIP Trunking infrastructure embedded in the GTT Envision platform supports customers by connecting voice infrastructure over SIP and enabling migration to cloud-based telephony with global, secure, scalable, and cost-efficient services.
- **October 2025:** GTT announced it has successfully launched its new AI Factory, developed in collaboration with NVIDIA, Insight, and Dell Technologies. Through this initiative, GTT has established a clear roadmap for embedding AI into every stage of its product innovation cycle and customer experience lifecycle.
- **June 2025:** GTT announced a major expansion of its DDoS Protection and Mitigation Services in partnership with Corero Network Security. GTT has added three new locations in São Paulo, Brazil; Hong Kong, China; and Miami, US, bringing the total number of scrubbing centers integrated with GTT EnvisionCORE to 13 globally.
- **May 2025:** GTT announced it has expanded its global Tier 1 IP backbone to nine countries across Latin America (Argentina, Chile, and Colombia) and Asia-Pacific, including China, India, Malaysia, the Philippines, South Korea, and Thailand.

GlobalData Competitive Index



Rating Update Summary

Very Strong

GTT has emerged as a formidable challenger in the wholesale segment. Its continued investment in, and expansion of, its robust global IP backbone positions the company as a credible alternative to traditional large telecom providers. At the same time, the integration of AI-enabled capabilities has further enhanced both its product portfolio and overall customer experience.

Perspective – Essential Analysis

Strengths	Limitations
• Global Reach: GTT operates a global Tier 1 IP network that connects more than 260 on-net cities on six continents. It is further supported by a broad ecosystem of over 3,000 connectivity partners that interconnect directly with its network. Additionally, it can support highly scalable connectivity with speeds of up to 800 Gbps across its network. • Increased Focus on Professional Services: GTT has enhanced its portfolio to differentiate itself from peers by offering professional services (e.g., project management, technical management, service management, and customer incident management). • Strong IP Transit Offering: GTT IP transit provides extensive reach and high performance with competitive service level agreements, leveraging one of the industry's largest IP transit networks. GTT IP transit can be paired with DDoS mitigation leveraging Corero's technology across its 13 distributed scrubbing centers.	• Brand Awareness: While GTT's brand continues to evolve and become more recognized outside North America, it lacks the brand awareness of rivals such as AT&T, Verizon, Vodafone, Telefónica, and Orange Wholesale. • Changing Wholesale Landscape Pressures: Increased technology changes, increased competition with new emerging entrants, and consolidation in the US market could impact revenue growth.
Source: GlobalData	

Category Ratings and Justification

Vision/Strategy

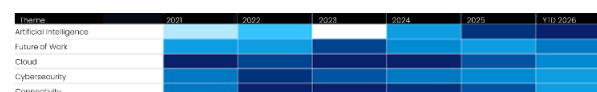
Rating: Very Strong

- GTT will look to further expand its product portfolio focusing on AI-enabled security solutions, giving customers proactive network and security oversight to enable faster threat detection and more effective incident containment. In addition, the company will continue to strengthen its AI Factory to embed advanced AI capabilities across its internal systems, enhancing security performance while enabling real-time prediction and mitigation of network issues.
- GTT will expand its API capabilities through its partner ecosystem, enabling greater automation across its global operations and environment. The company will look to enable the click and order in a single-click functionality to meet customer demand for fast provisioning times. Customers will have the ability to procure services from directly via API integration using an external ITSM system, or the GTT self-service portal.
- GTT will look to further expand its operations and capabilities to new emerging regions, including Latin America, Asia-Pacific and the Middle East, with the company seeing an increase in demand for its wholesale services. In addition, GTT will look to further enhance its managed hybrid cloud capabilities with investments at the edge and in the core along with expanding its professional and managed services capabilities.

Momentum & Stability

Rating: Very Strong

- GTT operates the third-largest global IP backbone across six continents. The carrier has made significant investments to enable its network amid rising demand, increasing its network capacity by 40% and supporting over 400 points of presence (PoPs) with more than 700 Tbps of backbone capacity. Up to 80% of customer traffic remains on-net end-to-end, reinforcing its performance and reliability. In parallel, it has expanded its DDoS scrubbing centers in São Paulo, Brazil; Hong Kong, China; and Miami, US, bringing the total number integrated with its GTT EnvisionCORE platform to 13 globally.
- GTT continues to enhance its self-service platform, GTT EnvisionDX. The unified interface provides customers and partners with end-to-end visibility and control of their services, while ongoing enhancements are expanding its functionality. Recent updates include the addition of 2.5 million on-net addresses to improve quote automation, the integration of AI-driven capabilities, and expanded API integration to support streamlining quoting, provisioning and change management workflows. This is reflected by GlobalData Theme Exposure as shown below. The figure shows GTT's strategic priorities based on over 180 predictive signals in GlobalData's thematic engine. Artificial intelligence and future of work are priorities while other capabilities like cloud, cybersecurity, and connectivity are also important to the carrier.



Innovation

Rating: Very Strong

- GTT, in partnership with NVIDIA, Insight, and Dell, has developed an AI factory built on Dell PowerEdge servers and NVIDIA's advanced computing platform. The company has established infrastructure across three locations globally, including the US, the UK, and Europe to support data sovereignty requirements and comply with regional regulations. This strategic initiative provides the company with a clear roadmap for integrating AI across the organization, including product development to enhance the end-to-end customer experience.
- GTT continues to enhance the security it provides with its internet services and is responding to customer needs for scalable IP connectivity to differentiate itself in the competitive wholesale market. GTT has expanded its scrubbing center presence to include three more scrubbing centers and added a second service tier focused on mid-market customers with less than 1 Gbps of aggregated internet traffic. Alongside GTT's advanced DDoS protection, which targets global enterprise wholesalers, GTT also offers a full suite of cloud-based security features (integrated with SD-WAN under its Secure Connect offering), managed detection and response, and a managed firewall.

Go-to-Market

Rating: Strong

- GTT has a comprehensive solution portfolio built to cater for both wholesale and enterprise segments with a focus on the US and European markets while expanding its focus to include Latin American and Asia-Pacific. GTT's solutions are designed to provide high-capacity, scalable and secure

Product Portfolio

Rating: Very Strong

- GTT has a comprehensive portfolio of wholesale services across networking (IP transit, broadband, IPv4 leasing and management, and DIA), WAN (switched and dedicated Ethernet and MPLS), cloud connect, virtual voice network for SIP Trunking, and network security and operations (managed detection & response, DDoS protection & mitigation) and professional services. GTT's solution portfolio has been carefully tailored to meet evolving needs, delivering digitalized solutions with enhanced visibility and control that extend beyond the capabilities offered by some of its peers.
- GTT's IP Transit services leverage the carrier's global Tier 1 IP network that can connect to 400+ PoPs on six continents, providing service reach to the leading data centers worldwide. GTT has tailored its offering to include a variety of bandwidth speeds as well as diverse billing options including flat rate, tiered and burstable services for maximum flexibility, supporting capacity speeds of up to Nx100GB per port. GTT has deployed RPKI-based route origin validation on all BGP sessions throughout its network, making the IP routes secure from routing leaks or hijacks.
- GTT's Cloud Connect solution enables direct, private peering with all major cloud providers including Microsoft, AWS, Oracle, and Google Cloud. The service supports bandwidth options of up to 10 Gbps, with dedicated high-capacity connections scalable to 400 Gbps, delivering secure high-performance connectivity with end-to-end visibility across both GTT's network and the customer's cloud environment.
- GTT enables customers to lease IPv4 addresses, offering a flexible alternative to upfront capital investment. This approach supports network expansion into new regions

connectivity, catering to the needs of service providers and cloud service providers.

- GTT continues to foster a collaborative relationship with its wholesale customers as it looks to further strengthen its ecosystem. GTT is directly connected to over 3,000 connectivity providers and has over 400 preferred network partners. GTT's value proposition is based on its IP network with integrated local access that is easy to manage.
- GTT has a wholesale partner program designed to provide additional support for its partners as they look to offer solutions to their customers backed with additional support from various departments within GTT.

or data centers , as well as cloud workloads that require publicly routable IP addresses.

Service & Support

Rating: Very Strong

- GTT supports its wholesale customers with self-service capabilities through its GTT EnvisionDX platform. The unified digital gateway allows customers to manage and monitor the network, including the ability to see real-time statistics, raise and manage trouble tickets as well as order management. The platform continues to evolve with new features, including API integration with access to 40 partners, the ability to proceed from quote to order, and additional support with GVO, its virtual assistant chatbot.
- As part of its customer-first strategy, GTT provides its wholesale customers with a dedicated support structure. This includes customer success managers as the first point of contact, alongside a broader account team consisting of carrier account manager, account directors, and solutions architects to support any technical requirements. In addition, the carrier provides dedicated delivery, billing, and service assurance team to support every aspect of the customer lifecycle.
- GTT has strengthened its network operations center, moving from a one-size fits all model to a solution model made up of a team of specialists and engineers forming a pod which will include a dedicated team to support its wholesale customers. This adoption will see fewer handoffs and faster support turnaround times. The carrier offers a follow-the-sun business model with operations available and offers 24/7-day client support providing real-time network management.

Source: GlobalData

Threats and Barriers

- **In Global Wholesale, Might is Right:** GTT lacks the scale of large incumbent operators in Europe and the US such as BT, AT&T, Verizon, and Orange Wholesale – not to mention Asian players such as Tata Communications and NTT Communications. These competitors can highlight deep on-net reach and in-region resources to support wholesale customers.
- **Customer Service is Key:** Other larger wholesale carriers such as Telefónica, Tata Communications, and Orange Wholesale already have in place strong strategic and technological initiatives that enhance the overall customer experience, making it hard for GTT to stand out.

Recommended Actions

Vendor

- **Focus on GTT Brand:** GTT's brand is becoming more recognized outside North America, but it lacks the brand awareness of rivals such as AT&T, Verizon, Vodafone, BT, and Orange Wholesale. GTT should remain vocal about its recent network enhancements, highlighting its GTT EnvisionDX capabilities to further stand out in a competitive wholesale market.
- **Highlight Network Investment:** GTT can emphasize its recent network investments, which have expanded the scale and reach of its global footprint. These upgrades have strengthened its standing and elevated its global ranking, reinforcing its position as a credible provider in the wholesale market. Additionally, the company can leverage its IPv4 assets to support expansion into new regions and unlock additional growth opportunities.
- **Push Security Credentials:** GTT can promote its security credentials including its cloud-based security offering and managed detection and response solution, highlighting its capabilities including its DDoS scrubbing centers in Madrid (Spain) and in Hong Kong (China).

Competitors

- **Global Reach of the Major Players:** International carriers such as AT&T, Lumen, Orange Wholesale, and Verizon can all promote deep global reach, including extensively-owned fiber assets.
- **AT&T Converged Network Capabilities:** AT&T can differentiate itself from GTT by leveraging its converged network strategy, integrating both its fixed and wireless network capabilities to deliver a more unified and resilient offering.

Buyers

- **Global Presence:** GTT's steady stream of acquisitions has resulted in an extensive product set and service reach. Carriers, OTT providers, ISPs, content delivery networks, and system integrators should consider GTT for their global IP connectivity needs.

- **IP Network Global Reach:** GTT should not be dismissed on infrastructure grounds alone. The provider has an extensive global IP backbone, with last mile connectivity delivered through its broad partner ecosystem.
- **Nimble:** GTT might not be as big as some of its peers, however the carrier continues to punch above its weight, providing a high level of support as part of its Customer First strategy that exceeds its rivals.

Company Details

Company Snapshot

Revenue	GTT no longer reports its financial results. Total revenue is estimated to be \$1 billion.
Employees	2,300
HQ	McLean, Virginia (US)
Market strengths/solutions	Managed Services: Managed network services and managed security including managed firewall, Secure Connect (SASE), managed detection and response, DDoS mitigation, and SD-WAN. WAN: SD-WAN, cloud connectivity, MPLS, and VPLS. Internet: IP Transit, Ethernet and DIA, IP Transit, broadband internet, and broadband wireless (5G fixed wireless and satellite). Voice: SIP trunking.
Source: GlobalData	

Key Recent Announcements and Disclosed Strategic Plans

Date	Data
April 2026	GTT Communications announced its strategic priorities for 2026: advance its GTT Envision platform, leverage its AI factory to improve employee, customer and partner experience, and grow its services portfolio.
Source: GlobalData	