

# NaaS

MARKET BRIEF

EDITION

02

OCT 2026

Q3 2026 IN REVIEW

## The access layer is being claimed.

*Lumen closed Alkira, Comcast Business opened its last mile, Zayo put AI agents to work on a production network, and Megaport moved into compute. Five signals from the quarter, and what each one means for operators, GPU and neocloud providers, and data centers.*

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**US\$475M**

Lumen's price for Alkira, closed 7 Jul

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**3,000+**

Lumen NaaS customers, from 1,000 a year earlier

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**~60%**

Megaport revenue from compute by 2030, analyst consensus

FROM THE EDITOR

# The big players moved on the access layer

In August we started tracking the NaaS market every quarter and sharing the read with the operators we work with. This is Edition 02, the first one we are sending wide.

Q3 was the quarter the big players moved on the access layer. Lumen closed its US\$475M purchase of Alkira and now counts more than 3,000 NaaS customers. Comcast Business opened its last mile to Equinix and began automating cross-border orders with Colt on LSO APIs. Zayo put its customers' AI agents to work on a production network, on the platform we build. Equinix announced an inference exchange with NVIDIA and Together AI. Analysts now expect compute to be about 60% of Megaport's revenue by 2030.

They are all reaching for the same position: the place where an enterprise finds intelligence, buys it, and gets a private path to it. I wrote about that position in *Who Owns the On-Ramp to Intelligence?* This edition tracks who moved toward it, with the numbers.

If you read any of it differently, tell me. It sharpens the next edition.

**Eli Karpilovski**

Founder and CEO, insidepacket

[insidepacket.com](https://insidepacket.com)

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**GET EVERY EDITION** The brief comes out once a quarter. Subscribe at [insidepacket.com/naas-market-brief](https://insidepacket.com/naas-market-brief) and Edition 03 reaches you in January.

**Draft marks, removed before send.** An orange dotted underline marks a figure still to verify. A dashed orange box or an orange tag marks a slot that fills after London (13 to 15 Oct) or on approval.

THE QUARTER IN NUMBERS

# Eight numbers that carry Q3

Platform money, adoption, the operator mix, and the move into compute.

**US\$475M**

Lumen's cash price for Alkira; the deal closed 7 Jul<sup>1,2</sup>

**3,000+**

Lumen NaaS customers in Q2, from 1,000 a year earlier<sup>3,4</sup>

**+34%**

Lumen active NaaS ports, Q2 against Q1<sup>3</sup>

**\$0.70**

Advanced solutions Comcast Business sells per \$1 of connectivity, from \$0.20 three years ago<sup>51</sup>

**A\$827.3M**

Megaport's raise to fund GPUs for new AI contracts and a US\$252M GPU pool; completed 2 Jul<sup>36,65</sup>

**~60%**

Share of Megaport revenue expected from compute by 2030, consensus<sup>37</sup>

**17%**

WAN managers who have already bought NaaS; another 25% are researching it<sup>55</sup>

**US\$103.4B**

Active and contracted TCV in Nscale's S-1 for a NYSE listing<sup>14</sup>

DEAL SHEET, Q3 2026

| DATE   | DEAL                                         | DETAIL                                                                                                                      |
|--------|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| 18 Sep | Nscale files for a NYSE listing              | US\$103.4B active and contracted TCV; about 461,000 GPUs <sup>14</sup>                                                      |
| 8 Sep  | Mistral raises a Series D                    | €3B at €21B post-money, partly for compute <sup>13</sup>                                                                    |
| 2 Sep  | CPP Investments and Equinix complete atNorth | US\$4B, Nordic high-density data centers <sup>12</sup>                                                                      |
| 20 Aug | Charter completes Cox                        | Spectrum Business joins Cox Business, Segra and RapidScale <sup>11</sup>                                                    |
| 13 Jul | Zayo names a new CEO                         | Sowmyanarayan Sampath, effective 1 Sep <sup>9</sup>                                                                         |
| 7 Jul  | Lumen completes Alkira                       | US\$475M cash <sup>1,2</sup>                                                                                                |
| 29 Jun | Verizon and BT agree a 50:50 JV              | International enterprise wireline: about US\$4B revenue, 3,000+ customers, 180+ countries; completion in 2027 <sup>10</sup> |

The deal sheet is a standing box: every material deal across NaaS, fiber, data centers and neoclouds in the quarter, newest first.

## SIGNAL 01 • THE PLATFORM LAYER IS BEING BOUGHT, AND IT IS SCALING

# Lumen paid US\$475M for a control plane and tripled its NaaS customers in a year

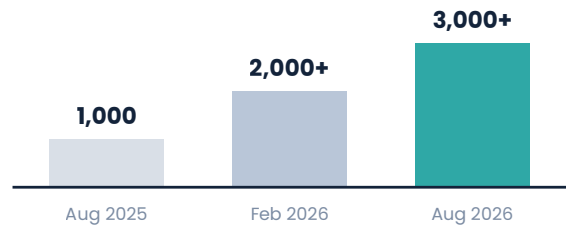
The layer above the fiber is being bought and filled at the same time. Lumen closed Alkira on 7 July, then pushed its cloud networking far past its own footprint.

## US\$475M

CLOSED 7 JUL 2026

Lumen's price for Alkira, a multicloud control plane with no fiber under it. About 4,000 Lumen staff have been trained on it.<sup>1,2,7</sup>

LUMEN NAAS CUSTOMERS



### WHAT HAPPENED

- **Lumen closed Alkira:** the US\$475M cash deal for the multicloud networking platform closed on 7 Jul.<sup>1,2</sup> Lumen plans to merge Alkira and Lumen Connect over 18 months,<sup>5</sup> and its CEO says Alkira will “accelerate our strategic revenue growth curve”.<sup>7</sup>
- **Adoption kept compounding:** Lumen reported more than 3,000 NaaS customers in Q2, against 1,000 a year earlier. New customer adoption rose 22%, active ports 34% and active services 29%, all against Q1.<sup>3,4</sup> More than one in five first-time NaaS buyers was new to Lumen.<sup>5</sup>
- **Reach past the footprint:** on 26 Aug Lumen extended its Multi-Cloud Gateway so more than 10 million US business locations can reach its private cloud networking.<sup>6</sup>
- **Recognition at Zayo:** Zayo's DynamicLink won a 2026 CRN Tech Innovator Award in the Networking Enterprise category.<sup>8</sup>

### WHAT IT MEANS FOR YOU

#### OPERATORS

The layer above the port now has a market price: US\$475M for a control plane with no fiber under it. Lumen's numbers show what it does once installed: more customers, more ports, and new logos.

#### GPU AND NEOCLOUD PROVIDERS

Carrier platforms now reach well past their own fiber, 10 million locations in Lumen's case. That is the reach you need to serve enterprises without building a network.

#### DC AND COLO PROVIDERS

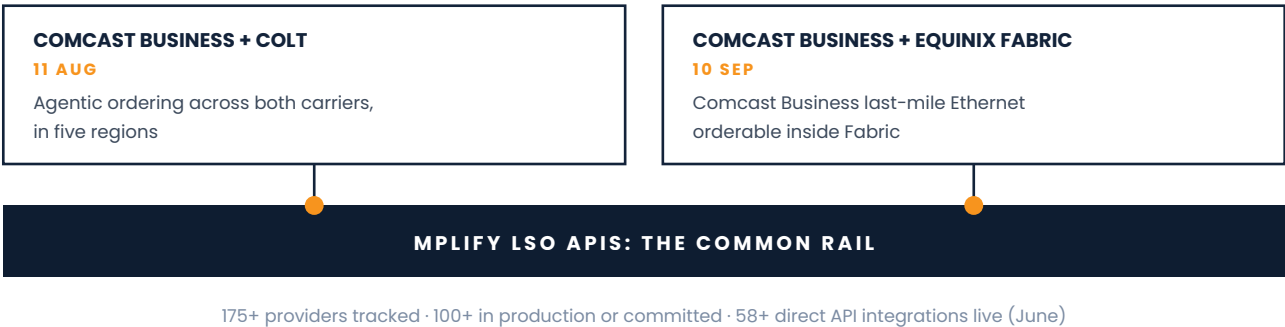
Sites listed on these platforms become destinations an enterprise can order in minutes. Sites off them stay manual.

**WHAT TO WATCH** Lumen's Q3 results, the first quarter with Alkira inside (date not yet set; last year 30 Oct), and whether NaaS customer growth holds.

SIGNAL 02 · NAAS GOES CROSS-CARRIER

# Carriers started selling through each other's platforms

In one quarter Comcast Business opened its last mile to Equinix Fabric customers and began automating cross-border orders with Colt, both on Mplify's LSO APIs. NaaS is moving from one operator's portal to a supply chain of them.



CROSS-CARRIER NAAS Two new links on one standard, Q3 2026.<sup>15,16,17</sup>

WHAT HAPPENED

- **Comcast Business and Colt (11 Aug):** an Innovation Lab program that builds API interoperability on Mplify LSO and uses agentic workflows to discover, order and fulfil connectivity across both carriers, in North America, Europe, Asia, the Middle East and Africa.<sup>15</sup>
- **Comcast Business and Equinix (10 Sep):** Equinix Fabric customers can now order Comcast Business last-mile Ethernet through LSO-aligned APIs, with the goal of cutting delivery “from weeks to days”. Wavelengths, cloud and security come later. Comcast Business connects to 700+ data centers.<sup>16</sup>
- **The standard is in production:** Mplify tracks more than 175 providers on LSO, over 100 with production or committed deployments and 58 with direct LSO API integrations live.<sup>17</sup> Its September awards went to Colt for inter-provider automation and to Lumen for ecosystem collaboration.<sup>19</sup>

*“Advantage depends increasingly on what an organization can access, combine, automate, secure, assure, and deliver across an ecosystem, not simply what it owns.”*

STAN HUBBARD, MPLIFY, 10 SEP 2026<sup>18</sup>

WHAT IT MEANS FOR YOU

OPERATORS

Another platform can now sell your last mile, and you can sell theirs. Decide whether your network is a supplier inside someone else's portal or the platform customers order from.

GPU AND NEOCLOUD PROVIDERS

Standard APIs between carriers mean one integration can reach many last miles. Ask your connectivity partners which LSO partners they already trade with.

DC AND COLO PROVIDERS

Equinix is now a storefront for a cable operator's last mile. A facility platform that can sell partner access becomes part of the carrier's route to market.

**WHAT TO WATCH** Wavelengths, cloud and security on the Comcast Business and Equinix link; whether other US cable and fiber operators open their last mile the same way; Mplify's next AI-ready NaaS research.

SIGNAL 03 · AGENTS BECAME A BUYER

# AI agents got write access to the network

In June the open question was whether a network would answer an AI agent at all. By September Zayo had agents taking authorized actions in production, and Equinix had opened its Fabric MCP server to public preview.

WHAT HAPPENED

- **Zayo Agentic Networking (8 Sep):** Zayo introduced what it calls “the industry’s first production Model Context Protocol (MCP) server built specifically for networking” on DynamicLink. Approved enterprise agents see network state and take authorized actions; “organizations define the information, tools, and actions available to agents”.<sup>20,21</sup>
- **Equinix (31 Aug and 2 Sep):** the Fabric MCP server moved from private beta to public preview, and agents can create and update connections, with deletes kept in the portal.<sup>22,23</sup> Fabric One takes “agent-based requests or natural-language prompts” to set up any-to-any connectivity; beta later this year, general availability in 2027.<sup>24</sup>
- **Digital Realty:** ServiceFabric MCP, launched in June, runs a read-only and a read-write server across 800+ Digital Realty and third-party data centers. Its docs still call it early access.<sup>25,26</sup>
- **Megaport:** its MCP server, launched in June, is still an open beta and read only, with write access promised “soon”.<sup>27,28</sup>
- **Inside the carriers:** NVIDIA puts telco automation at Level 2 to 3 of TM Forum’s autonomy scale and says Level 4 to 5 takes autonomous agents.<sup>29</sup> Lumen, AT&T, Verizon and Colt run agents internally; none offers customers a public agent interface yet.<sup>30,32,33</sup>

“The future of networking is not another portal. It’s making network capabilities available within the AI systems enterprises use to run their business.”

MAX CLAUSON, ZAYO, 8 SEP 2026<sup>20</sup>

Disclosure: insidepacket builds the platform under Zayo’s DynamicLink.

WHAT IT MEANS FOR YOU

OPERATORS

The buyer now includes software. If a customer’s agent cannot see and change your services, the order goes through a platform that can.

GPU AND NEOCLOUD PROVIDERS

Your customers’ agents will provision compute and the path to it in one flow. Choose connectivity partners whose networks agents can operate, not only query.

DC AND COLO PROVIDERS

Two of the largest interconnection platforms now expose agent interfaces. Your facility’s services need the same door, or agents order around them.

**WHAT TO WATCH** Write access at Megaport; general availability of Equinix Fabric MCP; the first published cases of enterprise agents ordering connectivity in production.

THE AGENT-READINESS TABLE · REFRESHED EVERY EDITION

# Which NaaS platforms can AI agents operate?

Six platforms now let a customer’s AI agent in. One runs agent-driven changes in production with general availability.

| PLATFORM                                                           | WHAT A CUSTOMER’S AGENT CAN DO                                                                            | STATUS                                             | SINCE            |
|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------|
| <b>DynamicLink, Agentic Networking</b><br>Zayo                     | Read network context and take authorized actions; the customer sets the tools and actions <sup>20</sup>   | PRODUCTION                                         | 8 Sep 2026       |
| <b>ServiceFabric MCP</b><br>Digital Realty                         | A read-only server plus a read-write server for network changes and bare metal lifecycle <sup>25,26</sup> | EARLY ACCESS <small>release says available</small> | 17 Jun 2026      |
| <b>Fabric MCP</b><br>Equinix                                       | Read, create and update connections and Cloud Routers; deletes stay in the portal <sup>22,23</sup>        | PUBLIC PREVIEW <small>no GA date</small>           | 31 Aug 2026      |
| <b>Alkira MCP</b><br>Lumen, since 7 Jul                            | Read; proposes changes that a person approves <sup>34,2</sup>                                             | LAUNCHED                                           | 30 Sep 2025      |
| <b>Megaport MCP Server</b><br>Megaport                             | Read only; write access promised “soon” <sup>27,28</sup>                                                  | OPEN BETA                                          | 5 Jun 2026       |
| <b>Fabric One</b><br>Equinix                                       | Agent-based and natural-language requests to provision connectivity; MCP not named <sup>24</sup>          | BETA LATE 2026 <small>GA in 2027</small>           | 2 Sep 2026       |
| <b>Lumen Connect</b><br>Lumen                                      | No public agent interface; support assistants only; internal MCP proof of concept <sup>30,31</sup>        | INTERNAL                                           | Nov 2025         |
| <b>Console Connect, PacketFabric, Colt, AT&amp;T, Verizon, GTT</b> | No public agent interface found                                                                           | NONE FOUND                                         | Checked Sep 2026 |

**CHANGED SINCE EDITION 01** Zayo launched publicly on 8 Sep. Equinix moved from private beta to public preview. Digital Realty joins the table. Alkira now sits inside Lumen. Megaport is unchanged.

**HOW WE CHECK** Each row is checked against the provider’s own release or documentation, most recently on 1 Oct 2026. Tell us when a row changes.

insidepacket builds the platform under Zayo’s DynamicLink.

SIGNAL 04 · COMPUTE IS LANDING, THE ROAD TO IT IS NOT BUILT

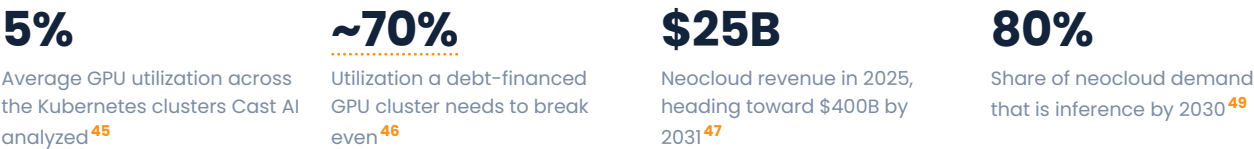
# The compute is landing. The road to it is not built.

Q3 money went to GPU pools and long-haul fiber. The access layer between an enterprise and a GPU is the part still being assembled.



THE THREE SQUARES, Q3 2026 Where the quarter's money landed. <sup>35,36,14,38,39,43,44</sup>

Also in the quarter: GTT launched Defense Halo, network defense on its own AI factory with data held in the US, UK or EU (29 Sep). <sup>40</sup> Mistral plans up to 1 GW by 2030. <sup>41</sup> The EuroHPC call for AI gigafactories closes on 3 Dec. <sup>42</sup> S&P's consensus read puts compute at about 60% of Megaport revenue by 2030. <sup>37</sup>



**OUR READ** Compute and long haul are funded at scale. The access layer, where an enterprise finds GPU capacity, buys it and gets a private path to it, is the open square. Signals 01 to 03 show the first pieces arriving, and by late September vendors were pitching service providers to claim it (page 10).

## WHAT IT MEANS FOR YOU

### OPERATORS

The GPU money is landing on your fiber's doorstep. The revenue line is the connection between enterprises and those GPUs; if you do not sell it, an exchange on top of your fiber will.

### GPU AND NEOCLOUD PROVIDERS

Utilization decides your economics, and enterprise access decides utilization. Each customer you connect in minutes rather than weeks moves you toward break-even.

### DC AND COLO PROVIDERS

Inference pulls compute toward users, so metro and edge sites gain value. Sites with orderable paths to GPU capacity are placed to win those workloads.

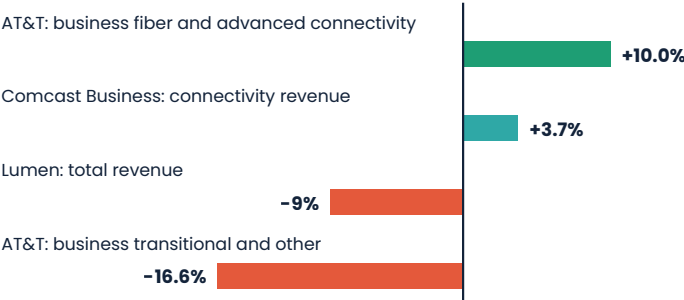
**WHAT TO WATCH** Equinix Inference Exchange (Q1 2027) and the Fabric One beta; Megaport's next AI contracts; Nscale's listing; the EuroHPC gigafactory selections.

SIGNAL 05 · OPERATOR MATH

# Connectivity barely grows. What runs on top of it does.

Q2 results, reported in Q3, drew the same line at every operator: legacy shrinking, connectivity flat, advanced services and platforms growing. Buyers are moving from research to purchase.

Q2 2026, YEAR ON YEAR



WHERE THE GROWTH IS Same quarter, same basis. <sup>52,50,3</sup>

MEGAPORT · FY26

**+37%**

revenue, to A\$312.2M

**114%**

net revenue retention

**+27%**

network ARR, constant currency

Shares touched a record A\$21.96 on results day and fell to A\$17.52 by 26 Aug. <sup>53,54</sup>

WHAT HAPPENED

- **The mix is moving:** Comcast Business connectivity revenue rose 3.7% to US\$2.67B. <sup>50</sup> CFO Jason Armstrong said Comcast now sells about \$0.70 of advanced solutions for every \$1 of connectivity, up from \$0.20 three years ago. <sup>51</sup>
- **Legacy runs down:** AT&T expects legacy service revenue to fall 20%+ in 2026 and to be “immaterial by the end of 2029”. <sup>52</sup> Lumen’s revenue fell 9% in the same quarter its NaaS customers passed 3,000. <sup>3</sup>
- **Buyers are moving:** in TeleGeography’s WAN manager survey, 17% have bought NaaS and 25% are researching it, up from 8% in 2022; 19% decided against. Short NaaS terms carry a 10% to 35% premium, and Europe’s median 10G port costs US\$350 a month, 2.3 times the 1G price. <sup>55</sup>
- **Consolidation:** Charter closed Cox on 20 Aug, <sup>11</sup> and Verizon and BT agreed a JV for international enterprise wireline. <sup>10</sup> Vertical Systems’ mid-2026 US Carrier Ethernet ranking moved Verizon to second and brought Zayo in at sixth. <sup>56</sup>

WHAT IT MEANS FOR YOU

OPERATORS

Growth sits in what you sell on top of the port. That mix is the number to manage, and it moves only when customers can order more than circuits.

GPU AND NEOCLOUD PROVIDERS

Operators are hunting for growth on top of their networks, which makes them willing partners to carry your services to their enterprise customers.

DC AND COLO PROVIDERS

Consolidation means fewer, larger carriers in your buildings. The ones customers can order through your platform matter more.

**WHAT TO WATCH** AT&T (21 Oct) and Comcast (22 Oct) Q3 results; Lumen, Verizon and Equinix dates still to be announced; Megaport’s H1 FY27 results, expected in February.

FIELD NOTES

# What came out of Austin and Boston, and what London will add

Notes from the rooms where operators, data centers and GPU providers met this quarter.

BOSTON · MPLIFY MEMBER SUMMIT · 22 TO 24 SEP

- **The AI gateway became a pitch:** three sessions offered service providers the gateway role between enterprise AI demand and GPU capacity. One startup demoed providers becoming that gateway to distributed GPU clusters. PCCW Global presented AI as a service through Console Connect as an “AI Gateway”. NTT DOCOMO BUSINESS combined GPUaaS and NaaS, with GPUs billed by the minute.<sup>64</sup>
- **Agents moved into the architecture:** Mplify’s agentic LSO blueprint runs on MCP servers. Amartus, NTT DOCOMO and Colt showed agents troubleshooting together across providers, and another demo had AI agents negotiate deals between carriers.<sup>64</sup>
- **Federation is next:** sessions laid out the path to launching NaaS federation, with trusted identity for agents.<sup>64</sup>
- **Operators set the destination:** Comcast Business spoke on “the network that provisions itself”, AT&T on “the AI-grade network”, and Verizon on automating wholesale partners.<sup>64</sup>

**OUR READ** Three months ago the access layer was our thesis. In Boston it was the agenda: gateways, marketplaces, federation and agents, all pitched to service providers. The question has moved from whether this layer exists to who runs it in production.

AUSTIN · METRO CONNECT FALL · 1 TO 3 SEP

- **Mid-size fiber operators are ready:** in three meetings with mid-size regional fiber operators, every team understood the NaaS use cases. Interest in AI agents running the network was growing, and off-net reach was the gap they raised.
- **Three priorities from the floor:** more talent, more resilience, and meaningful redundancy.<sup>57</sup>
- **The program asked the right questions:** whether today’s networks are fit for an inference-led world, and whether the consolidation wave is speeding up.<sup>58</sup> Outside, protesters objected to data center water and power use.

“A second circuit is not meaningful redundancy if it shares the same duct, facility, power dependency or operational bottleneck as the first.”

insidepacket, METRO CONNECT TAKEAWAYS, 11 SEP<sup>57</sup>

LONDON · CAPACITY EUROPE · 13 TO 15 OCT<sup>59</sup>

|                                                                                     |                                                                                        |                                                                        |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| <b>SLOT · 13 OCT</b><br>AI Access Platform launch: one line once the embargo lifts. | <b>SLOT · 14 OCT</b><br>Global Connectivity Awards result: finalist in two categories. | <b>SLOT · 15 OCT</b><br>GrowthX talk: the one line the room took away. |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------|

## WATCH LIST

# The dates that will move the next edition

Earnings, events and launches between send day and Edition 03.

| October                                                                                                                                                                                                                                 | November                                                                                                                               | December                                                             | January                                               | February                                                       |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------|----------------------------------------------------------------|
| <b>20 OCT</b><br>AvidThink AI for Networking report<br><b>21 OCT</b><br>AT&T Q3 results <sup>60</sup><br><b>22 OCT</b><br>Comcast Q3 results <sup>61</sup><br><b>LATE OCT</b><br>Lumen, Verizon and Equinix Q3 results; dates to be set | <b>1 TO 3 NOV</b><br>INCOMPAS Show, Nashville <sup>62</sup><br><b>18 TO 20 NOV</b><br>Broadband Nation Expo, New Orleans <sup>62</sup> | <b>3 DEC</b><br>EuroHPC AI gigafactory call closes <sup>42</sup>     | <b>17 TO 20 JAN</b><br>PTC'27, Honolulu <sup>62</sup> | <b>FEB, EXPECTED</b><br>Megaport H1 FY27 results <sup>63</sup> |
| <b>Q4 2026</b><br>Equinix Fabric One beta <sup>24</sup>                                                                                                                                                                                 | <b>Q4 2026</b><br>Zayo Europe public availability<br><b>ZAYO APPROVAL</b>                                                              | <b>Q1 2027</b><br>Equinix Inference Exchange available <sup>38</sup> |                                                       |                                                                |

## Read it differently? Tell us.

Reply to the email this edition came with. Every answer shapes Edition 03, due in January.

- 1 Which of the five signals matters most to your business in 2027?
- 2 Which platform should the agent-readiness table add next?
- 3 Which market should get its own page next time?

## SUBSCRIBE

## Get Edition 03 in January

One email a quarter: the signals, the numbers and the dates that matter to operators, GPU and neocloud providers, and data centers.



Scan, or go to  
[insidepacket.com/naas-market-brief](https://insidepacket.com/naas-market-brief)

## About insidepacket

**We build it. You sell it.** insidepacket builds the NaaS platform that operators, data centers and GPU providers run under their own brand. Zayo's DynamicLink runs on it in production.

### OPERATOR AGNOSTIC

The platform runs over any operator's network. No single carrier is required.

### NO DIRECT ENTERPRISE SALES

We sell to the providers who serve enterprises, never around them. They keep the customer, the brand and the pricing.

### NEW: THE AI ACCESS PLATFORM

**EMBARGOED TO 13 OCT**

Launched at Capacity Europe on 13 Oct. GPU, neocloud and data center providers use it to give enterprises private, on-demand access to their capacity, over any operator's network.

## SOURCES

## Every figure, where it came from

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