BUSINESS

‘The race is on:’ Why Frontier is bullish on fiber, and Dallas, after Verizon’s $20B bid

The company sees Dallas-Fort Worth as ground zero for fiber technology as the U.S. eases away from cable.

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Aug. 4, 2025 | Updated 52 minutes ago | 4 min. read



Frontier Communication's Dallas headquarters.

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With digital devices powering every aspect of life and business, telecommunications providers are going neck and neck to provide faster internet speeds at scale — using fiber technology as a linchpin.

That includes AT&T Fiber and Frontier Communications, which sit at the upper echelon of fiber internet providers serving greater Dallas-Fort Worth, and the rest of the nation.

Recently, Verizon — the Dallas-based telecom giant's biggest competitor — decided it wanted to get in on the action by making a splashy fiber deal.

Its $20 billion acquisition of Frontier, which is also based in Dallas, recently cleared a big regulatory hurdle by winning Federal Communications Commission approval. And while a few more steps remain before the deal becomes official, Frontier and Verizon are on the cusp of consolidating their power — right at the doorstep of AT&T, the nation's top fiber provider.

"With Verizon's arrival, that means you've got the two 800 pound gorillas of the U.S. fiber market all in one location here in Dallas," Nick Jeffery, Frontier's CEO, told *The Dallas Morning News* in an interview following the company's second-quarter earnings.

Citing North Texas' historic role in developing fiber technology — and calling Dallas the "epicenter" in the competition to build out faster connectivity, Jeffery added: "The race is on."



FILE - A Verizon retail location is shown in Willow Grove, Pa., Thursday, Feb. 22, 2024. Verizon is buying Frontier Communications in a $20 billion deal that helps bolster its fiber network. (AP Photo/Matt Rourke, File)

MATT ROURKE / AP

Fiber vs. ‘yesterday’s technology’

As Elon Musk’s Starlink orbits outer space to deliver high-speed internet, it sends a (wireless) signal that people are becoming more aware of who provides their internet service — and why that matters as everyday life takes on an increasingly high-tech veneer.

In the U.S., fiber adoption rates are finally catching up with the rest of the world — a trend Frontier capitalized on in Q2 by adding a record number of subscribers. Via Fios, Verizon currently has over 7 million fiber subscribers across several states, including Washington, D.C.

Jeffery said that while fiber broadband penetration in most global markets falls between 60% to 98%, fiber penetration in the U.S. caps out “around 35%” — likely the result of a decadeslong reliance on cable.

“Cable is kind of yesterday’s technology, and fiber is tomorrow’s technology,” Jeffery said.

Unlike cable, which transmits data through copper wires and only holds a fixed amount of data, fiber is made of glass that can move data at close to the speed of light.

The sector’s advancement is analogous to how smartphones gradually turned science fiction lore into science fact, combining intuitive consumer electronics with more sophisticated tech.

“There is nothing that will ever go any faster,” Jeffery said, speaking about fiber. “It’s the best broadband product for connecting homes and businesses that there’ll ever be.”

While cable plans often require upgrades every few years to reflect advances in tech, fiber is infinitely upgradable. The only thing that might reduce fiber internet speed is an aged device. Otherwise, the newer the device, the faster the internet speed.

“It’s completely future proof,” Jeffery said.

But Frontier isn’t interested in boring consumers with a physics lesson on copper cable and glass fiber. The value proposition is much more user-friendly — namely, solving problems consumers actually care about.

Can a remote or hybrid worker have a Zoom call from home without the wi-fi cutting out? Can someone call their mom from the elevator? Can you post to Instagram from the top of a mountain?

With fiber internet service gradually building out, the answer is yes, yes — and yes.

“Fiber just does what cable can’t,” Jeffery said.

Not only is fiber improving digital for the average user, but it’s also laying the foundation for a globalized artificial intelligence future. Jeffery said infrastructure “needs three things” for AI to “take off.”

First, Jeffery said “you need a lot of compute power.” This means data centers, and Texas has close to 400 of them, and growing, as AI explodes.

Second, Jeffery said, “you need energy to run them.”

Although grid reliability is an ongoing concern, Texas offers an abundance of natural and renewable resources, plus its energy generation outpaces that of any other state.

Thirdly, Jeffery told *The News*, “you need infrastructure to connect that compute power to the people who use it.”

Fiber is the infrastructure in a digital age — the tech equivalent of the 1950s interstate highway, connecting people and places. Altogether, Frontier is “really providing one of the critical legs of the whole AI revolution,” the CEO said.

Government backs fiber

While fiber internet service is more common in urban cities, its footprint is expanding to include the rural and remote.

As the largest recipient of federal funds through the Broadband Equity, Access and Deployment program, Texas has $3.3 billion to spend on planning and infrastructure that expands high-speed internet access to rural and underserved locations across the Lone Star state.

BEAD funding doesn’t exclusively focus on fiber support. But Jeffery said “it’s really nice when the federal government then comes in behind you and says, “actually, yeah, building fiber is a really smart thing.”

Frontier’s headquarters on 1919 McKinney Avenue is designed more like a tech start up than a telecom office — more communal lounging spaces and fewer cubicles. It has more splashes of color and less fluorescent lighting.

“When you walk in here it doesn’t feel like a boring old telephone company,” Jeffery said. “That’s by design. We created this building in the image we wanted to project ourselves.”

It’s a powerful rebrand for telecom — and a timely one.

“What telecoms have built is the world’s biggest, most complicated machine with probably the most profound impact on society, economics, culture, and our future,” Jeffery said.