Report on the

Status of Competition in the Telecommunications Industry

AS OF DECEMBER 31, 2025

Florida Public Service Commission

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List of Acronyms

BOP	Broadband Opportunity Program
CDC	Centers for Disease Control and Prevention
CLEC	Competitive Local Exchange Carrier
D2D	Direct-to-device
DIRS	Disaster Information Reporting System
EAS	Emergency Alert System
ETC	Eligible Telecommunications Carrier
FCC	Federal Communications Commission
FPSC	Florida Public Service Commission
F.S.	Florida Statutes
ICC	Interstate Commerce Commission
IIJA	Infrastructure Investment and Jobs Act
ILEC	Incumbent Local Exchange Carrier
IP	Internet Protocol
LEO	Low-Earth Orbit
NCHS	National Center for Health Statistics
NG911	Next Generation 911
NPSBN	Nationwide Public Safety Broadband Network
NTIA	National Telecommunications and Information Administration
OTT	Over-the-top
PSTN	Public Switched Telephone Network
RHC	Rural Health Care (Program)
SCS	Supplemental coverage from space
TDM	Time Division Multiplexing
TRS	Telecommunications Relay Service
TTY	Teletypewriter
UNE	Unbundled Network Element
USF	Universal Service Fund
USAC	Universal Service Administrative Company
USDA	United States Department of Agriculture
VoIP	Voice over Internet Protocol
WEA	Wireless Emergency Alerts

Executive Summary

Section 364.386, Florida Statutes (F.S.), requires the Florida Public Service Commission (FPSC or Commission) to submit a report on the status of competition in the telecommunications industry to the Legislature by August 1 of each year. As of December 31, 2025, there were 10 incumbent local exchange carriers (ILECs) and 237 competitive local exchange carriers (CLECs) certificated by the Commission to operate in Florida.

In 2025, AT&T, CenturyLink, and Frontier experienced overall access line losses in Florida. The local and national markets continued to consolidate with several mergers and acquisitions. Several intrastate issues were resolved or initiated in 2025. Lifeline subscriptions in Florida increased to 332,887 households in 2025.

Consumers in Florida continue to migrate from traditional switched wireline service to wireless and Voice over Internet Protocol (VoIP) services. Carriers reported approximately 445,800 total wireline access lines in Florida for 2025, which is over 24 percent fewer than the previous year. Residential and business wirelines both experienced significant drops in 2025.

Total residential access lines declined 23.4 percent. The transition to VoIP and wireless-only services continues to be responsible for much of this decline. Frontier experienced the largest percent loss of residential lines with a 30.2 percent decline during 2025, while CenturyLink declined 24 percent and AT&T declined 21 percent.

For the 15th year in a row, total business access lines exceeded total residential access lines; however, total business access lines declined 24.4 percent in 2025. More than half of AT&T, CenturyLink, and Frontier's wireline subscribers were business lines. While over 99 percent of CLEC access lines were business lines, total CLEC business market share declined to 19.6 percent in 2025.

As reported for the past several years, intermodal competition from wireless and VoIP services continued to drive the telecommunications markets in 2025. According to the most recent data from the Federal Communications Commission (FCC), there are nearly 26.6 million wireless subscriptions and nearly 4.1 million VoIP connections in Florida, far eclipsing the 445,800 remaining wireline access lines.

Analysis of the telecommunications data obtained by the Commission produced the following conclusions:

- Many CLECs reported offering a variety of services and packages comparable to those offered by ILECs. Subscribers to wireless and business VoIP services continued to increase while residential VoIP and switched access lines decreased. These factors contribute to the conclusion that competitive providers are able to offer functionally equivalent services to both business and residential customers.

- The traditional wireline market continues to decrease; however, the population of Florida and the need for telecommunications services continues to expand. Wireless subscription

growth and VoIP are meeting the increased demand for service. Consumers are choosing to obtain a majority of wireless and VoIP subscriptions from competitors. Given the decline in the traditional wireline market and competitors' substantial wireless and VoIP market shares, consumers are able to obtain functionally equivalent services at comparable rates, terms, and conditions.

- A competitive market requires comparable affordability and reliability of service. The vast majority of Florida households subscribe to telephone service. Consumers are willing and able to choose telecommunications service from competitors using a variety of technologies, and competitors have been maintaining significant market share over an extended period. Based on competitors' substantial market share and market pressures requiring comparable affordability and reliability, competition is having a positive effect on the maintenance of reasonably affordable, reliable telecommunications services.

Chapter I. Introduction and Background

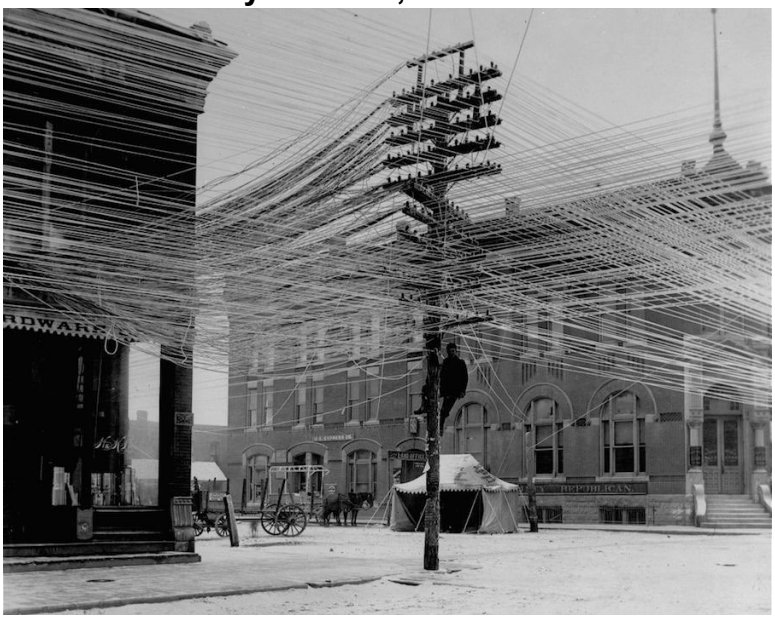
Telephone service has been regulated to some degree since nearly the moment the technology was patented by Alexander Graham Bell (Bell) in 1876.[1] This section summarizes the major historical regulatory events both at the federal and state levels. For the purposes of this report, the history of federal telecommunications regulation is useful because state regulation of these markets has always been intertwined with, and largely a derivative of, federal laws and rules.

A. Federal Regulation

When Bell's patents expired in 1894, competitors were allowed to build their own facilities. This accelerated the development of a nationwide telephone network. In the 18 years Bell held the patents, the average daily calls per 1,000 population peaked at 37. In the first 15 years of competition it increased tenfold.[2] Competitors gained over 50 percent market share by 1907.[3]

Early competition also had its drawbacks. Populated areas saw many lines crisscrossing the streets as competitors raced to build their independent networks. Figure 1-1 shows the lines in Pratt, Kansas circa 1900.

Figure 1-1
Early Network, Circa 1900



Source: America calling: a social history of the telephone to 1940

[1]Diane Katz and Theodore Bolema, "Crossed Lines: Regulatory Missteps in Telecom Policy," Mackinac Center, December 3, 2003, https://www.mackinac.org/6033, accessed June 19, 2026.
[2]Adam D. Thierer, "Unnatural Monopoly: Critical Moments in the Development of the Bell System Monopoly," Washington, D.C.; *The Cato Journal*, Vol. 14, No. 2, (Fall 1994), p. 270, https://www.cato.org/sites/cato.org/files/serials/files/cato-journal/1994/11/cj14n2-6.pdf, accessed June 19, 2026.
[3]Ibid.

Bell's American Telephone and Telegraph Company (AT&T) responded to competition by acquiring its competitors' networks. Once it had acquired enough rivals to control a market, it would refuse to interconnect with any independent providers.[4] AT&T even acquired a controlling interest in its chief rival, The Western Union Telegraph Company (Western Union). These actions eventually got the attention of federal antitrust lawyers and the Interstate Commerce Commission (ICC), which received authority to regulate telephone service in 1910.[5]

In 1913, AT&T reached an antitrust settlement with the Department of Justice. AT&T agreed to divest its Western Union stock, interconnect with other companies, and not acquire any more independent companies without approval from the ICC.[6] This began a decades-long practice by AT&T where, after pressure from potential competitors, courts, or regulators, AT&T would enter into agreements with state and/or federal authorities in order to maintain its control of the national telephone market.[7]

By the 1920s, AT&T had sold the idea of telecommunications as a necessary "universal service" and a "natural monopoly" to state and federal regulators, who in turn discouraged or outright banned competitive telephone services.[8] During this period, AT&T repeatedly agreed to be subject to heavy, rate-restricted regulation in exchange for a guaranteed monopoly in a particular area.[9] AT&T's market share rebounded during this period until it controlled nearly 80 percent of the national market.[10]

Telephone regulation at that time looked a lot like today's electric regulation. The local telephone markets were considered monopolies and were rate-of-return regulated. Companies submitted cost information, regulators established their rate base and a revenue requirement, and the companies' rates were set to recover that amount. This became the de facto regulatory regime at both the federal and state levels.

By enacting the Communications Act of 1934 (1934 Act) as part of President Roosevelt's New Deal, Congress created a new agency, the FCC, and transferred to it the ICC's telecommunications jurisdiction.[11] The new law enabled the FCC to codify its rate-of-return regulation of AT&T while also protecting AT&T's monopoly market position.[12] This regulatory regime continued for several decades, allowing AT&T to grow into the largest corporation in the

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[4]Richard Gabel, "The Early Competitive Era in Telephone Communication, 1893-1920," 34 *Law and Contemporary Problems*, Vol. 34, No. 2, (Spring 1969), p. 350, https://scholarship.law.duke.edu/lcp/vol34/iss2/8, accessed June 19, 2026.

[5]Frank Dixon, "The Mann-Elkins Act, Amending the Act to Regulate Commerce," *The Quarterly Journal of Economics*, Oxford University Press, vol. 24, no. 4, (August 1910), p. 596, https://www.jstor.org/stable/pdf/1883490.pdf, accessed June 19, 2026.

[6]Milton Mueller, "Universal Service: Competition, Interconnection and Monopoly in the Making of the American Telephone System," Syracuse University, 2013, pp. 127-128, https://surface.syr.edu/books/18, accessed June 19, 2026.

[7]Matthew Lasar, "How AT&T Conquered the 20th Century," *Wired*, September 3, 2011, https://www.wired.com/2011/09/att-conquered-20th-century/, accessed June 19, 2026.

[8]Ibid.

[9]Ibid.

[10]Ibid.

[11]Communications Act of 1934, Pub. L. No. 73-416, 48 Stat. 1064.

[12]Ibid.

world. At its peak, AT&T became larger than most countries' economies, and larger than the top five U.S. oil companies combined.[13]

Starting in the 1950s, cracks in the monopoly regime began to develop, and AT&T's ability to negotiate its way out of competition began to erode, first with the courts, and eventually with the FCC itself. Federal proceedings and lawsuits with nicknames such as "Hush-A-Phone," "Carterfone," and "Above 890" forced AT&T to interconnect with competitors' telephone equipment, wireless radio phones, and microwave networks.

Still, AT&T remained the largest corporation in the world when the federal government filed another antitrust suit in 1974. This action led AT&T to enter into one final agreement, this time to break itself up into smaller companies. The long distance and equipment markets had slowly become competitive and would soon be federally deregulated. AT&T offered to divest itself into eight major companies: seven regional Bell Operating Companies were established to continue the local monopolies, and AT&T, while barred from providing local service, remained as a competitor in the long distance and equipment markets.[14] This action, known simply as Divestiture, became final in 1984, and as a result AT&T's size dropped 70 percent.

Between 1984 and the 1990s, technology continued to put pressure on the local and long distance telephone markets. Cable, cellular, and broadband services all showed promise as substitutes for traditional phone service. Divestiture had created the opportunity for Congress to rewrite the 1934 Act to accommodate these technologies and open the local markets to competition.

Congress passed the Telecommunications Act of 1996 (1996 Act), rewriting the majority of the 1934 Act and setting up the ground rules for local competition.[15] The new law encouraged local competition nationwide, and required massive rulemakings from both the FCC and state regulators to ensure wholesale prices, consumer protections, and universal service principles were fair and reasonable.[16] This effectively ended rate-of-return regulation for the vast majority of local telephone services nationwide.

Congress delegated to the FCC and the States the ability to write rules implementing the 1996 Act. Carriers were required to interconnect with one another, and the existing companies, called ILECs, were required to lease elements of their networks to the new competitors, called CLECs. Wholesale rates for these Unbundled Network Elements (UNEs) had to be established at the state level using a specific and complicated cost methodology. Small, rural, independent ILECs could escape the voluminous interconnection rules if they could demonstrate to the state utility commission that they could not implement the rules or if there was no demand by competitors in their area.[17]

Companies were encouraged to negotiate interconnection agreements, adopt another company's agreement, or resell a complete service. A process was also established for the regulator to step

[13]Ray Horak, *Webster's New World Telecom Dictionary*, Wiley Publishing, Indianapolis, Indiana, 2008, p. 42.
[14]*United States v. American Tel. and Tel. Co.*, 552 F. Supp. 131 (D.D.C. 1982).
[15]"Telecommunications Act of 1996, Pub. L. No. 104-104, 110 Stat. 56.
[16]Ibid.
[17]47 U.S.C. § 251(f).

in should disagreements between companies require arbitration. While the FCC was responsible for establishing the national framework for executing the 1996 Act, it took several years for the States and the FCC to complete the initial implementation of the 1996 Act.

While Congress hoped that the 1996 Act would settle the endless litigation in the telecommunications market, the opposite proved true. The FCC's attempts to implement the interconnection and UNE access provisions were struck down, at least in part, no fewer than three times by federal courts. Finally, after four tries and over eight years after the 1996 Act was passed, the FCC's "Triennial Review Remand Order" was issued.[18] The Triennial Review Remand Order, following directives from the courts, limited CLEC access to several UNEs where competitive alternatives existed, as well as local loops combined with local switching, known as the UNE Platform. The UNE Platform was the primary method non-cable CLECs used to provide residential service. Once the courts struck down UNE Platform access, CLECs essentially abandoned the residential market to cable and wireless companies.

B. Florida Regulation

While all this activity was occurring at the federal level, state actions were just as busy. The Florida Legislature added telephone and telegraph regulation to the Florida Railroad Commission's responsibilities in 1911.[19] The agency's name was changed to the Florida Public Service Commission (FPSC or Commission) in 1965.

As previously described, rate-of-return regulation was the norm up through the 1980s in Florida. In 1990, the Florida Legislature recognized the emerging competitive markets for some telecommunications services provided by local carriers and delegated to the FPSC the authority to, in some circumstances, allow price cap regulation for those services.[20] If the FPSC decided that effective competition existed for a particular service or market, it could allow market conditions to control prices and eliminate rate-of-return regulation for that service or market.[21]

Competition for more services developed and, by 1995, the emergence of cable companies made it obvious that competition for all local services was inevitable. In anticipation of a federal law becoming imminent, the Florida Legislature passed a sweeping revision to Chapter 364, F.S., finding that "the competitive provision of telecommunications services, including local exchange service, is in the public interest."[22] Competitive entry into the local market was allowed, and CLECs were able to enter subject to a lesser degree of regulatory oversight than ILECs. Also, ILECs were allowed to elect price caps for all their services, eliminating them from rate-of-

[18]FCC 04-290, WC Docket No. 04-313, CC Docket No. 01-338, Unbundled Access to Network Elements, Review of Section 251 Unbundling Obligations of Incumbent Local Exchange Carriers, Order on Remand, released February 4, 2005.
[19]See 1911 Fla. Laws 6186.
[20]Price caps are a regulatory scheme where, instead of regulators limiting a company's percent return on investment, a company could elect to have its prices capped at a regulator-approved level, allowing the company to keep any profits generated by selling its services at or below the price caps.
[21]See 1990 Fla. Laws 244.
[22]See 1995 Fla. Laws 403.

return regulation altogether.[23] The Legislature also required the FPSC to start publishing this report on the status of competition in Florida.

The Legislature followed up in 1998 by requiring the FPSC to issue a series of five reports on competition, including forward-looking cost estimates of local service, impacts to low-income assistance programs such as Lifeline, the relationships between costs and existing prices, what are fair and reasonable local rates, and impacts on multi-tenant environments.[24]

To further accommodate the growing competitive landscape, in 2003 the Legislature passed another major amendment to Chapter 364, F.S. The changes included less FPSC oversight of long distance companies, and ILECs were allowed to petition the FPSC for lesser regulatory oversight similar to the regulation of their local competitors. It also expanded Lifeline eligibility for low-income Florida consumers, and exempted from FPSC jurisdiction VoIP services, which at that time were largely utilized by cable companies to provide telephone service.[25]

In 2005, the Legislature again amended Chapter 364, F.S., addressing local governments and broadband deployment, FPSC jurisdiction regarding advanced services, Lifeline awareness and participation, and storm damage recovery. The Amendment established rules that governmental entities, such as municipalities, must follow in order to provide communications services (cable, broadband, etc.) in competition with private providers. The 2005 revisions also exempted advanced services from the FPSC's jurisdiction, which included wireless, broadband, and VoIP. The new law also further clarified and expanded Lifeline eligibility and procedures. Finally, as a result of the storm season in 2004, it permitted the recovery of costs and expenses related to damage caused by named tropical storms.[26]

In 2006, carrier of last resort obligations in multitenant environments were amended, and some previously enacted rate requirements were repealed.[27] In 2007, changes included further rate reductions, rebalancing, and repeals. Also, an automated enrollment process for Lifeline was created, and the ILECs' overall carrier of last resort obligations were allowed to sunset.[28]

In 2009, the definition of basic service was narrowed and regulation for non-basic services was decreased. Service quality oversight for non-basic services was eliminated and company tariffs were no longer required to be filed with the Commission. Lifeline eligibility was again expanded. The Florida Department of Management Services was designated as the agency to oversee broadband deployment in Florida. In 2010, the rate-of-return sections in Chapter 364, F.S., were repealed.[29]

In 2011 the deregulation of all retail services by ILECs was finalized. This included the elimination of rate caps, the consumer protection and assistance duties of the FPSC, and all

[23]Ibid.
[24]See 1998 Fla. Laws 277.
[25]See 2003 Fla. Laws 32.
[26]See 2005 Fla. Laws 107 and 132.
[27]See 2006 Fla. Laws 080.
[28]See 2007 Fla. Laws 029.
[29]See 2009 Fla. Laws 226.

service quality oversight. It also repealed the previously-enacted storm damage recovery provisions.[30]

The most recent revision to Chapter 364, F.S. came in 2024, when the FPSC's authority to designate eligible telecommunications carriers (ETCs) was expanded. Wireless carriers may now be designated as ETCs by the FPSC for the purpose of providing Lifeline service.[31]

Although telecommunications is largely deregulated in Florida at this time, the FPSC still retains authority to monitor intercarrier relations and resolve wholesale disputes, oversee the Lifeline and Florida relay programs, and issue certificates of authority to provide telecommunications service. The FPSC has continuing authority over numbering issues, including area code relief, number conservation, and local number portability. The FPSC also resolves complaints relating to Lifeline, relay service, and payphones.

C. Status of Competition Report

Chapter 364, F.S., requires the Commission to prepare and deliver a report on the status of competition in the telecommunications industry to the President of the Senate, the Speaker of the House of Representatives, and the majority and minority leaders of the Senate and the House of Representatives on August 1 of each year. Section 364.386, F.S., requires that the report address the following four elements:

1. The ability of competitive providers to make functionally equivalent local exchange services available to both residential and business customers at competitive rates, terms, and conditions.

2. The ability of customers to obtain functionally equivalent services at comparable rates, terms, and conditions.

3. The overall impact of competition on the maintenance of reasonably affordable and reliable high-quality telecommunications services.

4. A list and short description of any carrier disputes filed under Section 364.16, F.S.

The Commission is required to make requests to local exchange telecommunications providers each year for the data required to complete the report. The data request was mailed on February 25, 2026, to 10 ILECs and 237 CLECs. Responses were due April 15, 2026. The data and analyses that follow accurately reflect the information provided by the ILECs and the reporting CLECs.

This report is divided into chapters that summarize key events and data that may have a short-term or long-term effect on the Florida telecommunications market. Chapter II presents data regarding wireline access line competition in Florida, including access line trends, residential/business access line mix, and market share. Chapter III discusses the continued

[30]Regulatory Reform Act, ch. 36, 2011 Fla. Laws 1231.
[31]See 2024 Fla. Laws 88.

development of the wireline market's principal forms of intermodal competition: broadband, wireless, and VoIP. Chapter IV primarily uses data outlined in the other chapters to address the four statutory issues delineated above. Chapter V provides a summary of state activities affecting local telecommunications competition in 2025, including intercarrier matters, Lifeline, and the Telecommunications Relay Service. Chapter VI details some of the major federal activities that may affect the Florida market.

Chapter II. Wireline Competition Overview

For the past decade, the technologies used to deliver voice telephony have continued to evolve. Analog circuits using copper wires and Time Division Multiplexing (TDM) are traditionally referred to as switched access lines, or more commonly known by consumers today as landlines. This legacy wireline technology is being replaced by wireless cell-based transmission and VoIP, which is provided via a digital broadband connection, either wireless or wired. Wireless, VoIP, and broadband are all exempt from FPSC jurisdiction. The FPSC is therefore limited in what data it can collect regarding these technologies. Trends in these technologies are summarized in Chapter III.

TDM-based wireline service, which is the primary subject of this report, is still used throughout the country and Florida. In fact, the wireless and broadband networks utilize many of the traditional wireline facilities for interoffice and long distance transport.

This chapter discusses the incumbent carriers' corporate trends as disclosed in their federal financial reports. It then discusses the number, market mix, and market share of residential and business wirelines. Knowledge of the number of wirelines and the trends for market participants is essential to understanding the state of the market.

A. Incumbent Carriers

Florida's ILECs have been experiencing switched access line losses for well over a decade. These losses appear consistent with the companies' national trends reflected in their respective annual reports filed with the Securities and Exchange Commission. There are 10 ILECs providing wireline services in Florida, the largest of which are AT&T, CenturyLink, and Frontier.[32] These companies' annual reports showed that, like in Florida, they continue to face access line losses nationally as customers disconnect traditional landline services and migrate to alternative services.

In Florida, AT&T's total switched access lines declined by over 49,900 (26.1 percent) in 2025, with residential access lines decreasing by over 13,200 (21 percent) and business lines decreasing nearly 36,700 (28.5 percent).[33] Nationwide, AT&T reported losses of approximately 600,000 switched access lines (22.2 percent). AT&T is the only major ILEC in Florida that reports access line numbers at the national level in its annual reports. Despite these line losses, AT&T reported a nearly 2.8 percent increase in national operating revenues to over $125 billion.[34]

CenturyLink's Florida switched access lines declined nearly 35,700 (22.9 percent), with residential access lines decreasing nearly 18,400 (24 percent) and business access lines

[32]Responses to local competition data request 2026.
[33]AT&T's response to the local competition data request 2026.
[34]AT&T Inc., "Form 10-K," December 31, 2025, https://investors.att.com/~/media/Files/A/ATT-IR-V2/financialreports/annual-reports/2025/2025-annual-report-complete.pdf, p. 12 of 117, accessed June 19, 2026.

decreasing nearly 17,300 (21.9 percent).[35] Nationwide, CenturyLink reported operating revenues of approximately $12.3 billion in 2025, reflecting a decline of nearly 6.1 percent from 2024.[36]

Frontier's switched access lines in Florida decreased by nearly 19,600 (20.3 percent), with residential access lines decreasing over 4,300 (30.2 percent) while business lines decreased by over 15,200 (18.5 percent).[37] Nationwide, Frontier reported 2025 revenue of $6.1 billion, reflecting an increase of 3.4 percent.[38]

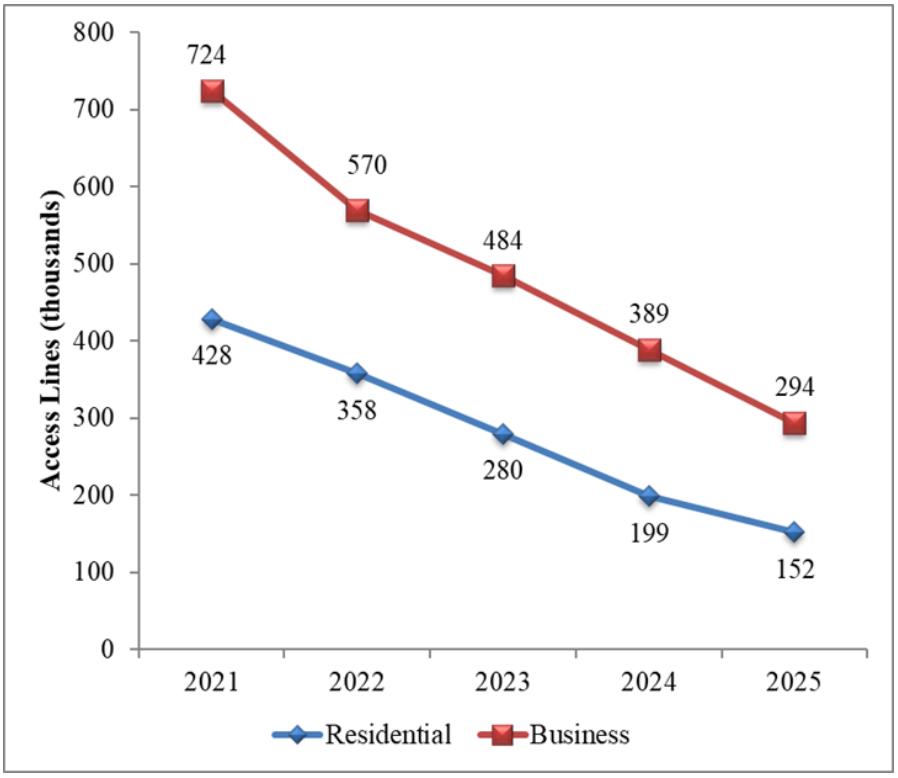
The seven rural Florida ILECs experienced a contraction in the number of switched access lines. In 2025, rural carriers in Florida saw their total access lines decline by approximately 10,900 (18.1 percent). Residential lines decreased nearly 8,600 (20.2 percent) and business lines decreased by nearly 2,300 (12.9 percent).[39]

B. Wireline Trends in Florida

Figure 2-1 illustrates the overall trend in Florida for both residential and business switched access lines. Beginning in 2011, business lines have exceeded residential lines. Based on current data, the rate of decline in residential lines moderated somewhat, while the rate of decline in business lines accelerated in 2025. Residential access lines totaled over 152,000 as of December 2025, representing a decline of 23.4 percent from 2024. Business access lines totaled nearly 294,000, representing a decline of 24.4 percent from the previous year. Total combined access lines for ILECs and CLECs declined 24.1 percent, from approximately 587,000 in December 2024 to nearly 446,000 as of December 2025. Since 2021, the total number of switched access lines decreased by nearly 707,000, or 61.3 percent. Figure 2-1 captures trends over the last five years, but it should be noted that Florida access lines have decreased by over 96 percent since its peak of 12 million access lines in 2001.

[35]CenturyLink/Lumen's response to local competition data request 2026.
[36]Lumen Technologies, Inc., "Form 10-K," December 31, 2025, https://s21.q4cdn.com/756714007/files/doc_earnings/2026/q1/generic/LUMN-Annual-Report-and-Proxy-Statement.pdf, accessed June 19, 2026.
[37]Frontier's response to local competition data request 2026.
[38]Frontier Communications Corporation, "Form 10-K," December 31, 2025, https://d18rn0p25nwr6d.cloudfront.net/CIK-0001670076/31e07f31-862b-430d-8c4a-5ae8d91e6685.pdf, accessed June 19, 2026.
[39]Responses to local competition data request 2025.

Figure 2-1
Florida Wireline Access Line Trends



Source: Responses to local competition data request (2022-2026)

C. Wireline Market Mix, Market Share, and Market Composition

1. Market Mix

The business-to-residential ratio of customers served by ILECs and CLECs has shifted over time. In general, both ILECs and CLECs have seen an increased concentration of traditional wireline business customers as residential customers migrate to other options. The business-to-residential customer mix for ILECs was about 30 percent business and 70 percent residential in 2004. By 2017, the mix for ILECs had shifted so much that the percentage of business lines exceeded the percentage of residential lines. In 2025, the ILECs' ratio was 61 percent business lines to 39 percent residential lines.

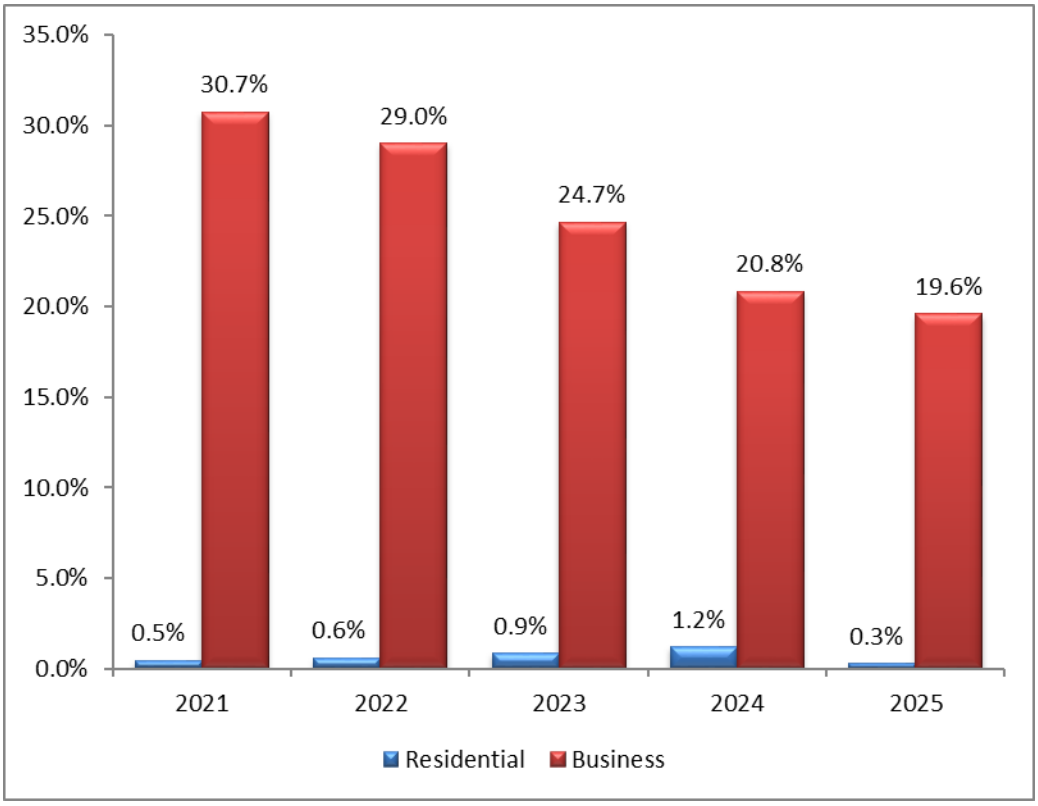
The shift in market mix has been even more pronounced for CLECs. In 2004, the business-to-residential customer mix for CLECs was about 63 percent business to 37 percent residential. In 2025, the CLEC customer mix was over 99 percent business lines.

2. Market Share

CLECs have traditionally focused more on business customers. Figure 2-2 illustrates FPSC data on CLEC market share by business and residential customer classes. The inverse of this percentage would be market share for the ILECs in Florida. According to FPSC data, the CLEC

residential market share decreased from 1.2 percent in 2024 to 0.3 percent in 2025, while the CLEC business market share decreased from 20.8 percent in 2024 to 19.6 percent in 2025.

Figure 2-2
Florida Residential & Business CLEC Market Share



Source: Responses to local competition data request (2022-2026)

3. Market Composition

The market composition of access lines served by local exchange companies is illustrated in Table 2-1. In 2025, ILEC residential access lines decreased by 22.7 percent, while ILEC business lines decreased by 23.2 percent. Given CLECs' diminutive residential segment size, a relatively small change in the number of lines results in a large percentage change. A decrease of fewer than 2000 lines resulted in an 81.1 percent decline in CLEC residential lines, while CLEC business access lines decreased by 28.9 percent.

Table 2-1
Florida Wireline Access Line Comparison

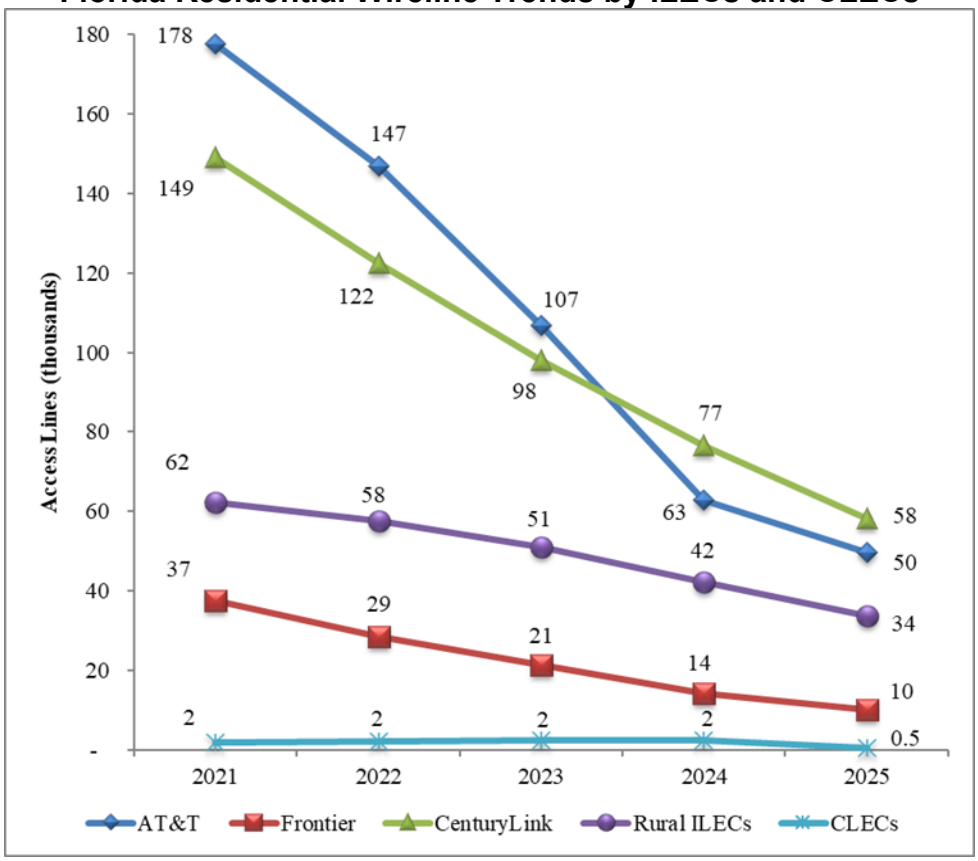
		ILECs	CLECs	Total
2022	Residential	355,425	2,153	357,578
	Business	404,564	165,519	570,083
	Total	759,989	167,672	927,661
2023	Residential	277,115	2,406	279,521
	Business	364,881	119,464	484,345
	Total	641,996	121,870	763,866
2024	Residential	196,197	2,429	198,626
	Business	307,571	80,960	388,531
	Total	503,768	83,389	587,157
2025	Residential	151,662	459	152,121
	Business	236,104	57,591	293,695
	Total	387,766	58,050	445,816
Change 2024-2025	Residential	-22.7%	-81.1%	-23.4%
	Business	-23.2%	-28.9%	-24.4%
	Total	-23.0%	-30.4%	-24.1%

Source: Responses to local competition data request (2023-2026)

4. Residential Wireline Access Line Trends

Figure 2-3 displays the wireline residential access line trends separately for AT&T, Frontier, CenturyLink, aggregate rural ILECs, and aggregate CLECs. Over the past five years, Frontier has averaged losses of 27 percent per year, AT&T over 25 percent per year, and CenturyLink nearly 21 percent per year. During that period, rural ILEC access lines declined by an average of nearly 15 percent, while CLEC residential lines decreased by an annual average of nearly one percent.

Figure 2-3
Florida Residential Wireline Trends by ILECs and CLECs



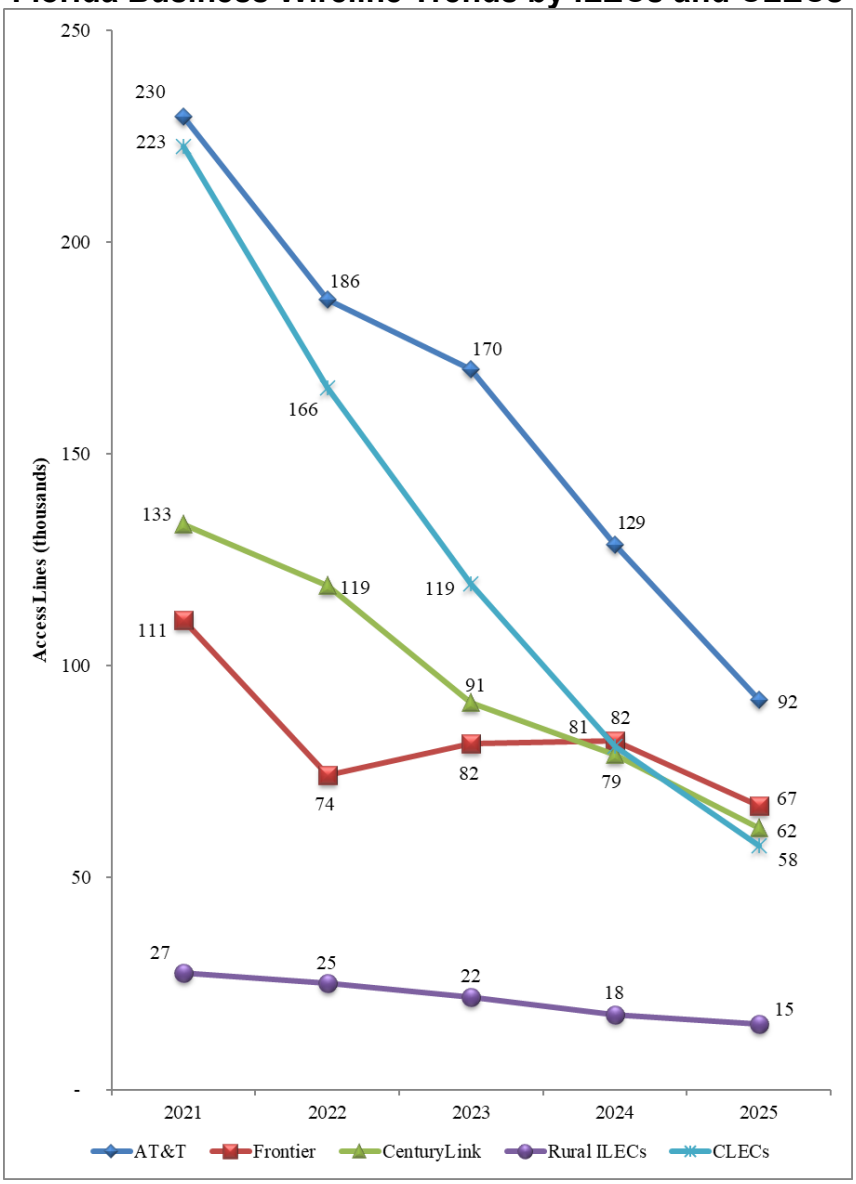
Source: Responses to local competition data request (2022-2026)

More recently, AT&T experienced residential wireline losses of 41.1 percent in 2024 and 21.0 percent in 2025. Frontier lost 32.5 percent of its residential lines in 2024 and 30.2 percent in 2025, while CenturyLink lost 21.9 percent of its residential lines in 2024 and 24.0 percent in 2025. The rural ILECs reported line losses of 17.0 percent in 2024 and 20.2 percent in 2025, and the CLECs reported residential line gains of 1.0 percent in 2024 followed by losses of 81.1 percent in 2025. The rate of line loss moderated in 2025 for AT&T and Frontier, while accelerating in all other categories.

5. Business Wireline Access Line Trends

Figure 2-4 displays the wireline business access line levels separately for AT&T, Frontier, CenturyLink, aggregate rural ILECs, and aggregate CLECs. Over the past five years, the CLECs have experienced average annual declines of 27 percent, while AT&T has seen average annual declines of over 19 percent. CenturyLink has seen average annual declines of over 16 percent, while the average annual decline in rural ILEC business access lines over the past five years exceeds 12 percent. Frontier has experienced some years of growth along with years of decline, leading to a more modest average annual reduction of nearly 10 percent.

Figure 2-4
Florida Business Wireline Trends by ILECs and CLECs



Source: Responses to local competition data request (2022-2026)

AT&T experienced business wireline losses of 24.3 percent in 2024 and 28.5 percent in 2025. Frontier gained 0.6 percent in business lines in 2024 and lost 18.5 percent in 2025. CenturyLink lost 13.5 percent of its business lines in 2024 and 21.9 percent in 2025. The rural ILECs reported line losses of 18.6 percent in 2024 and 12.9 percent in 2025, while the CLECs reported business line declines of 32.2 percent in 2024 and 28.9 percent in 2025. The rate of line loss accelerated for AT&T, Frontier, and CenturyLink, while the rural ILECs and the CLECs experienced a moderation in losses.

Chapter III. Intermodal Competition Overview

Total switched access lines in Florida peaked over 20 years ago at approximately 12 million.[40] Florida's population has increased significantly since that time and communications services have continued to expand, yet as previously shown in Table 2-1, access lines decreased to around 446,000 by the end of 2025. So where did over 96 percent of the access lines go?

Wireless companies began attracting customers in the 1980s, and by 1995 there were over 24 million cellular subscribers in the U.S.[41] Cable companies discovered that they could provide telephone service using VoIP and sought authorization from Congress to do so. These pressures resulted in the 1996 Act, which set up rules for these technologies to directly compete with ILECs, as well as companies that wished to compete using the ILECs' own technology and networks. While the ILECs have continued to dominate the traditional wireline markets, demand and competition have exploded for the wireless and VoIP services. These other modes are simply different technological evolutions of telephone service, much as connecting a call through an operator was replaced by direct dialing many decades ago. The additional capabilities available with these technologies have led the vast majority of residential consumers and businesses to make the transition to these modes.

A major development that has attracted many customers to these technologies is the speed and volume of information that can be transmitted. High-speed Internet and data services, generically known as broadband, allow customers to do much more than talk: they can send and receive audio, video, and other large streams of data to meet many of their business and entertainment needs. Broadband facilities not only serve retail customers, but they have also become the backbone of wired and wireless interoffice data transport.

The benefit of real-time broadband services became evident during the COVID-19 pandemic. Sportscasters and other announcers needed to be able to remotely broadcast events due to travel restrictions. Historically, long distance interviews have been done via satellite with a noticeable delay between transmission and reception. With broadband, however, sports events were broadcast live with announcers thousands of miles apart. John McEnroe announcing the 2020 French Open tennis tournament from his home office in Malibu, California, nine time zones away, could only be accomplished by using terrestrial broadband facilities that carried his voice across the globe nearly instantaneously.[42]

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[40]Florida Public Service Commission, "Competition in Telecommunications Markets in Florida," Tallahassee, FL, December 2002, p. 21, https://www.floridapsc.com/pscfiles/website-files/PDF/Publications/Reports/Telecommunication/TelecommunicationIndustry/2002.pdf, accessed June 19, 2026.

[41]Statement of Anne K. Bingaman Assistant Attorney General Antitrust Division United States Department of Justice, Submitted to the Subcommittee on Oversight and Investigations United States House of Representatives On Competition in the Cellular Telephone Service Industry, p. 3, October 12, 1995, https://www.justice.gov/sites/default/files/atr/legacy/2015/05/06/0460.pdf, accessed June 19, 2026.

[42]Marc Berman, "Mary Carillo will call French Open remotely amid 'shabby' COVID-19 protocols'" New York Post, September 23, 2020, https://nypost.com/2020/09/23/mary-carillo-will-call-french-open-remotely-amid-covid-19-spike/, accessed June 19, 2026.

A. Wireless

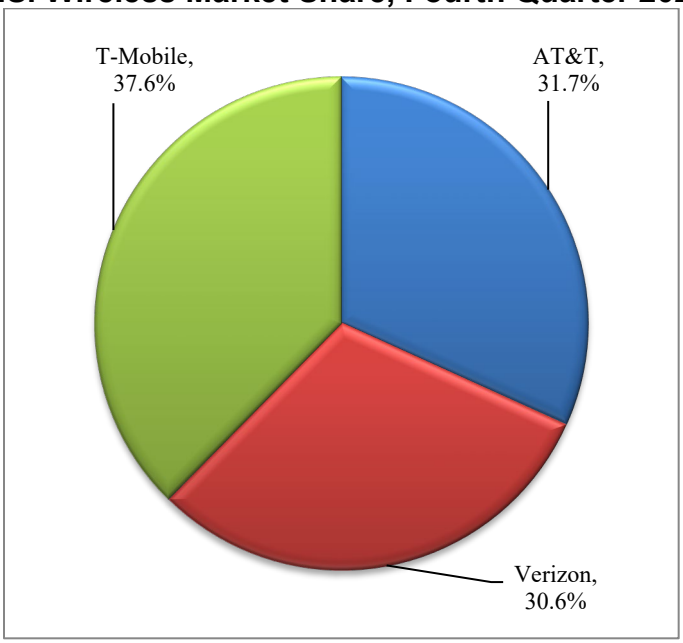
In the early 1990s, wireless service was still new, signal strength and network availability were limited, and the services were marketed primarily to enterprise and other business users. The general population of consumers could not afford the cost of the cellular phone, and the limited availability of network access meant that mass adoption of the platform would take time.

However, as technology became more affordable and easier to upgrade, consumers started to enter the wireless market en masse. Eventually this led to the integration of wireless technology and broadband internet connections. Past reports have consistently shown that adoption of wireless services in the United States, and Florida specifically, far surpasses the adoption of other modes of communications.

1. Market Share

As shown in Figure 3-1, U.S. market share among the top three wireless companies was split with T-Mobile leading at 37.6 percent (approximately 142.4 million subscribers), AT&T at 31.7 percent (approximately 120.1 million subscribers), followed by Verizon at 30.6 percent (approximately 115.9 million subscribers).[43,44,45]

Figure 3-1
U.S. Wireless Market Share, Fourth Quarter 2025



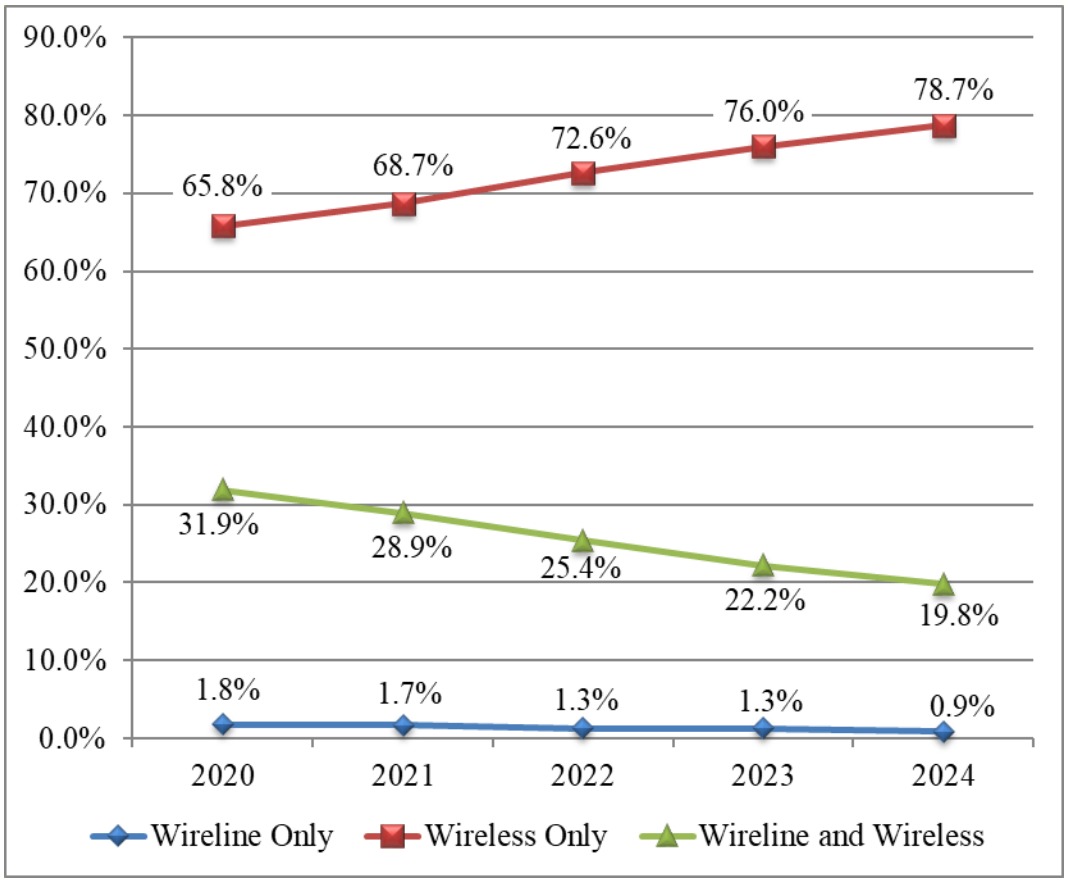
Source: Companies' 2026 10K Earnings Reports

[43]T-Mobile U.S. Inc., "Form 10-K," February 11, 2026, https://d18rn0p25nwr6d.cloudfront.net/CIK-0001283699/fa9762ed-34b1-4599-85cf-0b6e0d80cf17.html, accessed June 19, 2026.
[44]AT&T Inc. "Form 10-K," February 9, 2026, https://otp.tools.investis.com/clients/us/atnt2/sec/sec-show.aspx?FilingId=19129640&Cik=0000732717&Type=PDF&hasPdf=1, accessed June 19, 2026.
[45]Verizon Communications, Inc., "Form 10-K," February 17, 2026, https://quotes.quotemedia.com/data/downloadFiling?webmasterId=104600&ref=319784780&type=PDF&formType=10-K&formDescription=Annual+report+pursuant+to+Section+13+or+15%28d%29&dateFiled=2026-02-17&cik=0000732712, accessed June 19, 2026.

2. Wireless Substitution

According to the most recent data from carriers' financial reports, the three largest wireless service providers in the United States accounted for nearly 379 million subscribers by year-end 2025.[46] Less than 20 percent of U.S. households subscribe to both wireline and wireless service, and as shown in Figure 3-2, wireless-only households rose from 76.0 percent in December 2023 to 78.7 percent in 2024.[47]

Figure 3-2
U.S. Wireless Substitution Rates



Source: CDC/NCHS, National Health Interview Survey

3. Florida Trends

Updated information for Florida's wireless trends is not regularly available, but in the past Florida's wireless subscription distribution has tracked closely with national trends. The most recent data available from the FCC, released May 2026, estimated Florida's wireless subscriptions to be 26,575,000 as of June 30, 2025. This was an increase of approximately three

[46]Companies' 2025 Annual filings with the SEC.
[47]National Center for Health Statistics, "Wireless substitution: Early Release of Estimates from the National Health Interview Survey, July-December 2024," released June 2024., https://www.cdc.gov/nchs/nhis/early-release/wireless-substitution.html, accessed June 19, 2026.

percent from June 2024 (25,796,000).[48] In the same report, the FCC estimated Florida's population at 22,416,000, and with over 26 million wireless subscriptions in 2025, Florida continues to have more connected wireless devices than people.

4. New Technology

The emergence of new technologies may mean that there are fewer areas with limited coverage and that 4G and 5G services may become more accessible. A combined network of cellular, fiber and satellite can fill the gaps in coverage. In areas lacking cellular towers and related infrastructure, direct-to-device (D2D) services bridge the gaps.

D2D technology enables unmodified mobile devices to transmit data over Low-Earth Orbit (LEO) satellite constellations when cellular service is not available. These services will be especially useful in areas where mobile coverage is not present and will initially be used for text messaging. Services using D2D technology can also include calling, basic data, and Internet of Things (IoT) services.

All major wireless carriers are pursuing D2D services. Charter and Comcast currently offer emergency satellite-to-cellular service for certain cellphones and each expects to offer text messaging to their subscribers.

The FCC approved AST SpaceMobile's application to launch and operate its non-geostationary orbit satellite constellation. According to AST SpaceMobile, integrating directly with mobile network operator infrastructure will improve network resiliency and supports critical communications for first responders, government agencies, enterprises and customers, and enables users to access space-based cellular broadband using standard, unmodified smartphones. AST SpaceMobile will be allowed up to 248 satellites to deliver supplemental coverage from space (SCS) to mobile devices across the U.S.[49]

The FCC also authorized SpaceX to expand its fleet of LEO satellites with an additional 7,500 Gen2 Starlink satellites, bringing its total to 15,000 worldwide. This expansion will enable SpaceX to deliver service globally, including SCS and enhanced mobile services.[50] Motorola Solutions and T-Mobile announced their collaboration to bring T-Satellite D2D service, using Starlink. Their goal is to make sure the services they provide will have resiliency across the board, over time.[51]

Between July 2025 and March 2026, the number of D2D connections rose nearly 25 percent, with United States marketplace subscriptions and Starlink Mobile's services showing the greatest

[48]FCC, "Voice Telephone Services: Status as of June 30, 2025," released May 8, 2026, https://www.fcc.gov/voice-telephone-services-report, accessed June 19, 2026.
[49]Phil Britt, "FCC approves AST SpaceMobile for supplemental coverage from space", Telecompetitor.com, https://www.telecompetitor.com/fcc-approves-ast-spacemobile-for-supplemental-coverage-from-space/, accessed June 19, 2026.
[50]FCC, "FCC Approves Next-Gen Satellite Constellation", January 9, 2026, https://www.fcc.gov/document/fcc-approves-next-gen-satellite-constellation, accessed June 19, 2026.
[51]Donny Jackson, "Motorola Solutions, T-Mobile bring satellite D2D to devices", Urgent Communications, https://urgentcomm.com/satellite-direct-to-device/msi-t-mobile-bring-satellite-direct-to-device-service-to-devices, accessed June 19, 2026.

gains. Currently, the U.S. leads the world in D2D connections and accounts for 45.9 percent of all global activity in March 2026.[52]

B. Voice over Internet Protocol (VoIP)

VoIP technology utilizes digital computer protocols in order to complete telephony voice calls over the Internet. Interconnected VoIP allows users to make and receive calls between their VoIP networks and the public switched telephone network (PSTN).[53] These calls can be provided via separate interconnected digital channels or "over-the-top" of existing Internet traffic. Interconnected VoIP is a substitute for traditional TDM-based service, and so is included in this report to the extent information is available. Non-interconnected VoIP services lack the capability of interconnecting with the PSTN and are not considered a substitute for TDM.[54]

VoIP providers include cable companies, ILECs, CLECs, and Over-the-Top (OTT) providers. Customers usually subscribe to a broadband service and lease/purchase telephone equipment from the VoIP provider. Calls are sent through the broadband connection. OTT companies include Magic Jack, Vonage, and Skype. OTT calls can be viewed as interconnected VoIP services because of their ability to connect to internet infrastructure and route calls through the PSTN. These companies require the customer to have a broadband internet connection. Some use plugin converters between the consumer's existing phone and their standard phone jack.

Because VoIP is not regulated in Florida, the FPSC has no direct way to access VoIP access line data. The FPSC therefore estimates residential VoIP from responses to data requests. Florida Internet and Television (FiTV) is able to provide some information on residential VoIP subscriptions, but the FPSC staff relies on FCC data for Florida business VoIP subscriptions.[55] However, the FCC's currently published data only includes information through June 2025. FPSC estimates show nearly 775 thousand residential VoIP subscribers in Florida as of December 2025, while FCC data shows over 2.8 million business VoIP subscribers as of June 2025.

U.S. VoIP data from the FCC showed an average annual decline of 1.2 percent from June 2020 to June 2025.[56] The FCC also reported nearly 63.4 million U.S. Interconnected VoIP subscribers.[57] Table 3-1 shows U.S. VoIP subscribership by customer type as of June 30, 2025.

[52]Dan Robinson, "Phone-to-satellite services jump 25% in 8 months", The Register, https://www.theregister.com/on-prem/2026/04/21/phone-to-satellite-services-jump-25-in-8-months/5229568, accessed June 19, 2026.
[53]47 C.F.R. § 9.3.
[54]47 U.S.C. § 153(36). An example of a non-interconnected VoIP network is a video game console service such as Xbox Live.
[55]FiTV represents several of Florida's largest cable-based communications providers.
[56]FCC, "Voice Telephone Services: Status as of June 30, 2025," released May 8, 2026, https://www.fcc.gov/voice-telephone-services-report, accessed June 19, 2026.
[57]Ibid, Figure 3.

Table 3-1
U.S. Interconnected VoIP Subscribership by Customer Type
(In Thousands)

Total	Over-the-Top	All Other VoIP	Total
ILEC	19	5,449	5,468
Non-ILEC	27,723	30,187	57,910
Total	27,742	35,636	63,378
Residential			
ILEC	5	4,323	4,328
Non-ILEC	1,334	13,744	15,078
Total	1,339	18,066	19,405
Business			
ILEC	14	1,126	1,140
Non-ILEC	26,389	16,443	42,832
Total	26,403	17,569	43,972

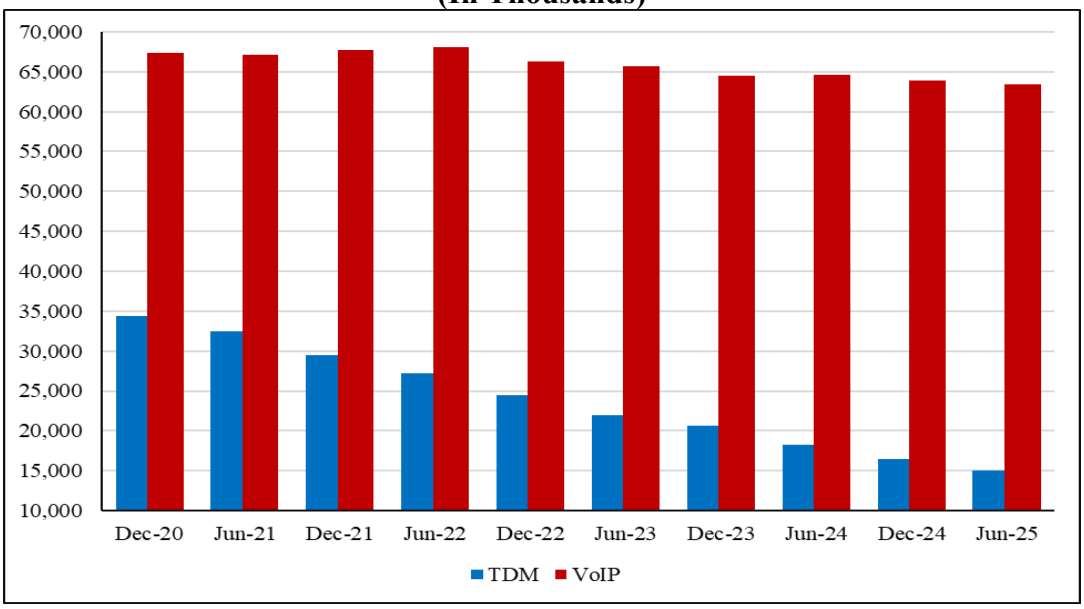
Source: FCC Voice Telephone Services Report, June 30, 2025

1. National Market

VoIP subscriptions have remained steady while traditional switched access lines have decreased. As shown in Figure 3-3, the FCC reported approximately 63.4 million VoIP subscriptions and over 15 million TDM switched access lines as of June 2025, resulting in approximately 78.4 million total voice telephone subscriptions.[58] Of those connections, 33 percent (25.8 million) were residential and 67 percent (52.6 million) were business.[59]

[58]FCC, "Voice Telephone Services: Status as of June 30, 2025," released May 8, 2026, https://www.fcc.gov/voice-telephone-services-report, accessed June 19, 2026.
[59]Ibid.

Figure 3-3
U.S. Retail Voice Telephone Subscriptions
(In Thousands)



Source: FCC Voice Telephone Services Report, Dec 20-June 25

a. Facilities-Based VoIP Providers

According to the FCC, non-ILEC companies accounted for nearly 15 million residential VoIP subscribers as of June 2025, compared to approximately 4.3 million residential ILEC VoIP subscribers. This represents a market share of nearly 78 percent for the non-ILECs in this market.[60] As of 2025, the three largest cable providers are no longer publicly reporting consumer VoIP numbers.

Each of these major facilities-based providers reported that improvements in wireless carriers' broadband infrastructure is a factor in consumer decisions to leave wireline broadband and VoIP services. These providers have developed wireless and video service bundles in an attempt to retain customers.

b. Over the Top VoIP Providers

Routing voice calls over a customer's existing internet connection allows OTT providers to provide lower cost of service than wireline and wireless competition. According to the FCC, there were over 27.7 million OTT VoIP subscribers in the U.S. as of June 30, 2025. This total included over 1.3 million residential subscribers and over 26.4 million business subscribers nationwide. The FCC's figures showed a decrease of approximately 3.5 percent in residential subscribers, and an increase of roughly 10 percent in business subscribers from June 2024 to June 2025.[61]

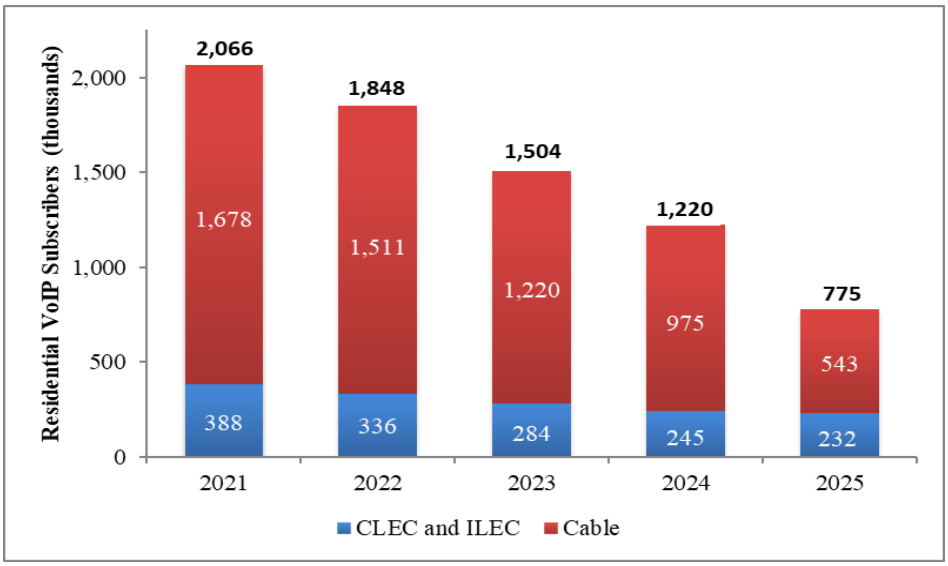
[60]Ibid.
[61]FCC, "Voice Telephone Services: Status as of June 30, 2025," Table 1, released May 8, 2026, https://www.fcc.gov/voice-telephone-services-report, accessed June 19, 2026.

2. Florida Market

As previously stated, the FPSC does not have jurisdiction over VoIP services, which limits the agency's ability to obtain information in order to estimate the total number of VoIP subscribers in Florida. For the Florida VoIP residential market, several ILECs and CLECs voluntarily responded to the Commission's data request and provided information on the number of residential VoIP subscribers. FiTV reported roughly 357,000 residential VoIP subscribers for the four member providers in 2025.[62] For the Florida VoIP business market, the FCC reported non-ILECs in Florida served approximately 2.8 million business interconnected VoIP subscribers in June 2025, an increase of over 2.7 percent from June 2024.[63] In total, the FCC reported that Florida had nearly 4.1 million interconnected VoIP subscriptions in June 2025.[64]

Figure 3-4 shows an estimated 775,000 residential VoIP subscribers in Florida as of December 2025. This data indicates a decrease of roughly 445,000 residential VoIP subscriptions from December 2024. Over a four-year time frame, the Florida residential VoIP market has declined an average of over 21 percent per year. As previously stated, the major VoIP carriers have expressed that increased competition from wireless companies has affected VoIP subscriptions.

Figure 3-4
Florida Residential Interconnected VoIP Subscribers

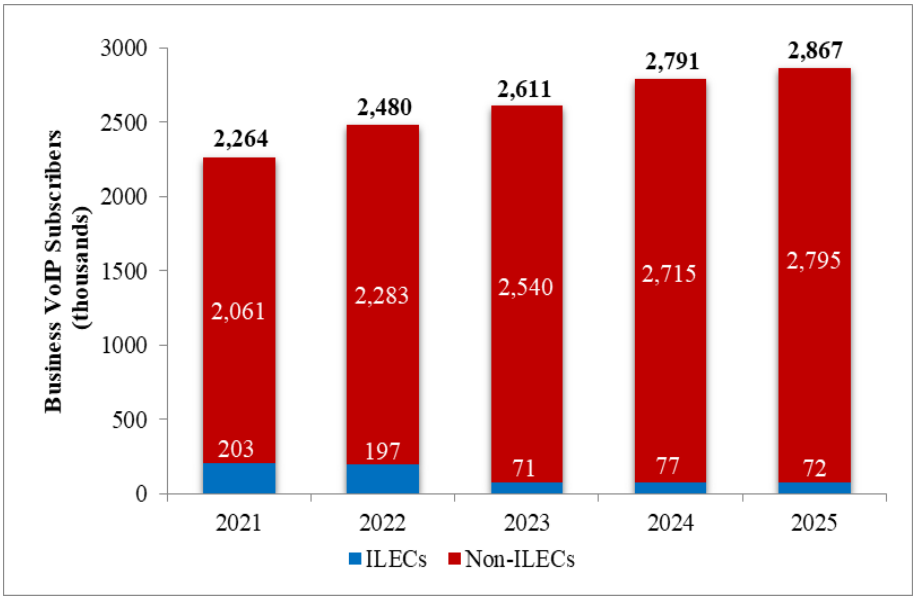


Source: Responses to local competition data request (2022-2026)

While Florida's residential VoIP market contracted over the past five years, its business VoIP market continued to expand. Figure 3-5 displays VoIP business subscribers by ILEC and non-ILEC carriers as reported by the FCC. Over a four-year time frame, the Florida business VoIP market has grown an average of over six percent per year. As the residential VoIP market declines, the business VoIP market continues moderate growth.

[62]Charter Communications is no longer a member of FiTV.
[63]FCC, "Voice Telephone Services Report, State-Level Subscriptions," Supplemental Table 1, Florida, released May 8, 2026, https://www.fcc.gov/voice-telephone-services-report, accessed June 19, 2026.
[64]Ibid.

Figure 3-5
Florida Business Interconnected VoIP Subscribers



Source: FCC Voice Telephone Services Report, June 2025, State Level Subscriptions

Chapter IV. Competitive Market Analysis & Statutory Issues

A. Statutory Issue – Competitive Providers

The ability of competitive providers to make functionally equivalent local exchange services available to both residential and business customers at competitive rates, terms, and conditions.

The data discussed in previous chapters suggests that competitive carriers are able to provide functionally equivalent services to residential and business customers at acceptable rates, terms, and conditions. As of June 12, 2026, 231 CLECs responded to the Local Competition Report data request. Several CLECs reported providing a number of services including local phone service (38), VoIP (110), broadband Internet access (74), video services (15), and bundled services (76).[65]

The vast majority of CLECs reported no barriers to competition or elected not to respond. However, the Commission received six comments reporting a variety of competitive concerns, including complicated and inconsistent permitting requirements, access to infrastructure, restrictive interconnection policies, increasing costs due to pricing deregulation, monopolistic control over transport services, and lack of access to dark fiber.[66] Interconnection agreements specify equipment access, pricing, and other details. CLECs may request that the Commission adjudicate any interconnection agreement disputes. We note that no CLECs have filed petitions with the Commission to address these issues. Some of these issues may be addressed by the FCC.

Conclusion: Dozens of competitors offered multiple combinations of services to attract customers. Also, subscriptions to wireline telephony decreased again in 2025, indicating consumer choice continues to be primarily wireless and VoIP services. Based on the multiple services offered by alternative providers and their significant market share, competitive providers are offering functionally equivalent services to both business and residential customers.

B. Statutory Issue – Consumers

The ability of consumers to obtain functionally equivalent services at comparable rates, terms, and conditions.

If companies are making functionally equivalent services available at comparable rates, terms, and conditions, as concluded in the previous issue, this issue determines whether there are significant impediments to consumers obtaining those services. One of the best determinants of whether consumers can obtain alternative services is the degree to which they are actually subscribing to them in large numbers.

Since reaching a peak in the year 2001, total traditional access lines have declined by over 96 percent in Florida, even as the population has grown significantly. Given the importance of telecommunications service and the large decline in traditional access lines, consumers must be

[65]Responses to local competition data request 2026 as of June 5, 2026.
[66]Responses to local competition data request 2026.

finding service elsewhere. Competitors have been successfully maintaining substantial shares in traditional access lines as well as other technologies, such as wireless and VoIP.

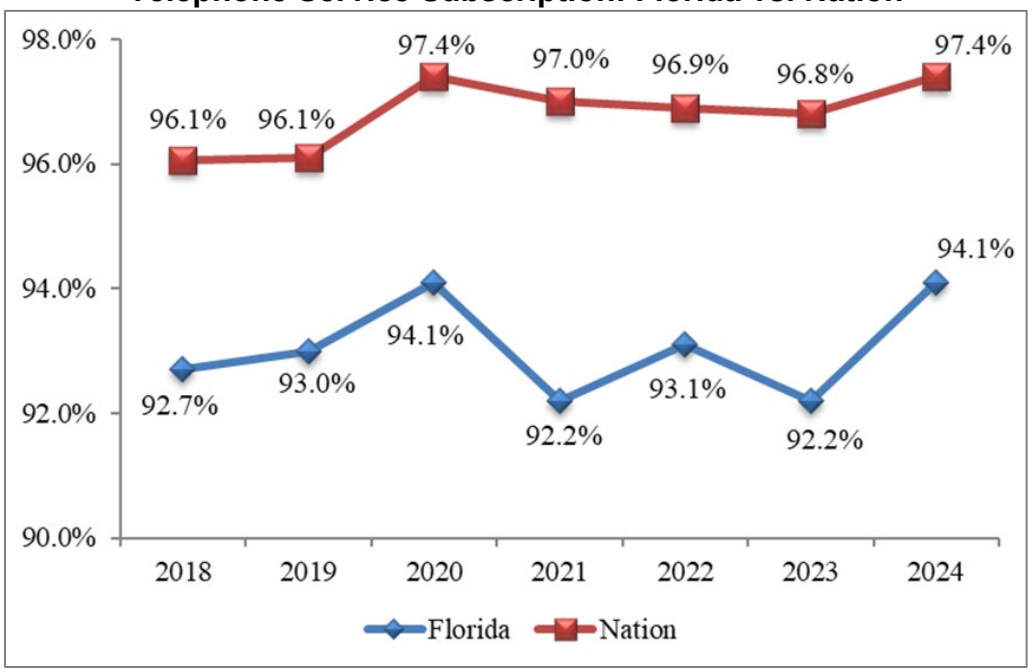
Conclusion: The traditional wireline market continues to decrease despite population growth. Increasing demand for service is being met by wireless and VoIP subscription growth, and the majority of consumers are choosing to obtain wireless and VoIP service from competitors. Given competitors' substantial wireless and VoIP market shares, consumers are able to obtain functionally equivalent services at comparable rates, terms, and conditions.

C. Statutory Issue – Affordability & Reliability

The overall impact of competition on the maintenance of reasonably affordable and reliable high-quality telecommunications services.

In order to compete successfully in a free market, a business needs to provide equivalent or better value to consumers. The value of telecommunications service is most broadly determined by affordability and reliability. Figure 4-1 shows that the Florida household telephone subscription rate has averaged 93.1 percent over the most recent seven years of data.[67] This reflects a 40-year trend of the average telephone subscription rate in Florida (93.2 percent) tracking closely with the national average (94.8 percent).[68]

Figure 4-1
Telephone Service Subscription: Florida vs. Nation



Source: FCC staff interviews

[67]FCC staff, interview, February 21, 2025.
[68]FCC staff, interviews (1986-2025).

Following the passage of the Florida Regulatory Reform Act in 2011, the FPSC no longer retains jurisdiction over telecommunications consumer complaints and holds no data on quality of service.[69] However, consumers freely choosing competitors for telecommunications service suggests that they view competitors' services as having reliability that is sufficiently comparable to ILEC service.

Conclusion: A competitive market requires comparable affordability and reliability of service. The vast majority of Florida households subscribe to telephone service. Consumers are willing and able to choose telecommunications service from competitors using a variety of technologies. Based on competitors' substantial market share and market pressures requiring comparable affordability and reliability, competition is having a positive effect on the maintenance of reasonably affordable, reliable telecommunications services.

D. Statutory Issue – Carrier Disputes

A listing and short description of any carrier disputes filed under Section 364.16, F.S.

Conclusion: There were no carrier disputes filed with the FPSC under Section 364.16, F.S., in 2025.

[69]Regulatory Reform Act, Ch. 36, 2011 Fla. Laws 1231.

Chapter V. State Activities

This chapter provides a summary of state activities affecting local telecommunications competition in 2025. The state activities discussed in this chapter are important in helping to gauge how well the market is functioning for Florida businesses and consumers.

A. Intercarrier Matters

Wholesale performance measurement plans provide a standard against which the Commission can monitor performance over time to detect and correct any degradation in the quality of service ILECs provide to CLECs. The Commission adopted performance measurements for AT&T in August 2001 (revised in 2010), for CenturyLink in January 2003 (revised in 2013 and 2016), and for Verizon in June 2003 (revised in 2007 and later adopted by Frontier).[70] In 2023, the Commission granted forbearance to CenturyLink from continuing with its Performance Measurement Plan.[71] Trending analysis is applied to monthly performance measurement data provided by each ILEC.

AT&T is required to make payments to CLECs when certain performance measures do not comply with established standards and benchmarks. AT&T's current Performance Assessment Plan consists of 47 measurements; financial remedies are applied to 24 of these measures. AT&T declared a force majeure event for Maintenance & Repair, Provisioning, and Trunk Group Performance measures in 20 of its wire centers on January 21, 2025, as a result of Winter Storm Enzo. The declaration was lifted on January 28, 2025.[72] AT&T paid $55,091 in remedies in 2025, representing an increase of 316 percent from 2024.[73]

Frontier Communications completed its purchase of Verizon Florida's wireline operations in April 2016. In its role as a major ILEC, Frontier is responsible for a PMP that includes 29 measures. In 2025, Frontier maintained an average monthly compliance rate of 83.4 percent, yielding the same rate as the previous year.

The Commission processed a number of other telecommunications-related items in 2025. The items processed include 27 service schedule and tariff filings, 7 interconnection agreements and amendments, 12 carrier certifications, 8 certificate cancellations, 13 general inquiries/informal complaints, and 6 name changes.

[70]FPSC Dockets: Nos. 20000121A-TP (AT&T), 20000121B-TP (CenturyLink), and 20000121C-TP (Frontier FL).
[71]FPSC Order No. PSC-2016-0072-PAA-TP, Docket No. 20000121B-TP, Investigation into the establishment of operations support systems permanent performance measures for incumbent local exchange telecommunications companies (CenturyLink Florida Track), issued February 15, 2016, http://www.psc.state.fl.us/library/filings/2016/00858-2016/00858-2016.pdf , accessed June 19, 2026.
[72]FPSC Docket No. 20000121A-TP, Investigation into the establishment of operations support systems permanent performance measures for incumbent local exchange telecommunications companies (AT&T FLORIDA TRACK), Document Numbers 08233-2024 and 08441-2024, issued February 13, 2023, https://www.psc.state.fl.us/clerks-office-dockets-level2?DocketNo=20000121a, accessed June 19, 2026.
[73]Remedies are paid two months in arrears; amounts shown are for amounts incurred in 2024 and 2025.

B. Lifeline

Lifeline is a federal Universal Service Fund (USF) program designed to enable low-income households to obtain and maintain basic telephone and broadband services by offering qualifying households a discount on their monthly bills. The rules affecting the Lifeline program are established by the FCC, which has designated the Universal Service Administrative Company (USAC), an independent not-for-profit corporation, as the program's administrator. USAC is responsible for data collection and maintenance, support calculation, and disbursement for the Lifeline program along with other federal USF programs. The FPSC has oversight over the Lifeline program in Florida pursuant to Section 364.10, F.S.

Customers apply for Lifeline through the National Verifier, which is an electronic system established by the FCC to determine customer eligibility. Customers can complete their application online through the National Verifier portal, and ETCs can assist customers applying by utilizing an interconnected provider portal.[74] Upon completion of an application, and subsequent approval for the Lifeline program, customers are able to find a Lifeline service provider through USAC's "Companies Near Me" tool.[75]

The FPSC has a Lifeline promotion process to encourage participation in the Lifeline program. This process involves a computer interface between the FPSC and the Florida Department of Children and Families identifying clients who are eligible for Lifeline due to their approval for Medicaid and the Supplemental Nutrition Assistance Program. ETCs access this system and contact their customers to determine if they have already been approved for the Lifeline program through the National Verifier. For those customers who have not yet applied for the program, ETCs will either instruct customers on how to apply or assist these customers with their applications in person. If a customer mistakenly identifies an ETC that does not serve the area in which they live, the FPSC sends the customer instructions on how to apply with the National Verifier, along with a list of each ETC's contact information.

As of June 30, 2025, there were 332,887 subscribers enrolled in the Lifeline program in Florida, which was a 57 percent increase from the previous year. This significant increase in subscribership is largely attributed to legislative changes enacted in 2024 that expanded the FPSC's authority to designate wireless carriers as ETCs.

As noted in Chapter I, following the expansion of the FPSC's ETC designation authority, the Commission approved 16 new wireless ETCs in 2024 and 2025. The entry of these additional providers increased the availability of Lifeline service offerings and expanded consumer choice throughout the state. As a result, participation in the Lifeline program increased significantly. Overall, the Lifeline participation rate was 19.90 percent in 2025. Table 5-1 shows the Lifeline eligibility and participation rates in Florida for the last five years.[76]

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[74]USAC, "National Verifier Application Portal," https://getinternet.gov/apply?id=nv_home&ln=RW5nbGlzaA%3D%3D, accessed June 19, 2026.
[75]USAC, "Companies Near Me Tool," https://data.usac.org/publicreports/CompaniesNearMe/Download/Report, accessed June 19, 2026.
[76]Ibid.

Table 5-1
Florida Lifeline Eligibility and Participation Rate

Year	Lifeline Enrollment	Eligible Households	Participation Rate
Jun-21	273,641	1,882,842	14.53%
Jun-22	300,285	1,590,216	18.88%
Jun-23	300,229	1,658,694	18.10%
Jun-24	212,243	1,661,381	12.78%
Jun-25	332,887	1,672,792	19.90%

Source: Florida DCF, ACCESS Florida: Standard Data Reports

C. Telecommunications Relay Service

Chapter 427, F.S., established the Telecommunications Access System Act of 1991 (TASA). Section 427.702, F.S., requires the Florida telecommunications access system to be compliant with regulations adopted by the FCC to implement Title IV of the Americans with Disabilities Act. Section 427.704, F.S., charges the Commission with overseeing the administration of a statewide telecommunications access system that provides Telecommunications Relay Service (TRS). TRS facilitates telephone calls between people with hearing loss or speech disabilities and other individuals by using special equipment and a communications assistance operator to relay information. Funding for TRS in Florida is through a surcharge on telephone landlines. The assessment rate is currently $0.08 per line.[77]

Relay services are provisioned under contract by T-Mobile USA, Inc. (T-Mobile). On March 5, 2024, Commission staff opened a docket to initiate a new Request for Proposals to provide relay service in Florida beginning March 1, 2025.[78] The Commission voted to accept staff's recommendation to select T-Mobile as the new provider at the Commission's November 5, 2024 Agenda Conference. The current contract will expire on February 28, 2028.

On November 21, 2025, the FCC released a Notice of Proposed Rulemaking (NPRM) to initiate a comprehensive proceeding to modernize TRS.[79] In the NPRM, the FCC sought comment on various aspects of the relay services, including terminating the mandatory status of analog Teletypewriter (TTY) relay. The FCC also sought comment on ending the requirement that analog TTY relay services must be offered by state programs. The FCC asserts that this would afford states the flexibility to adapt their programs to local needs and technological realities.

[77]The rate may not exceed $.25 per landline.
[78]Docket No. 20240043-TP, Request for submission of proposals for relay service, beginning in March 2025, for the deaf, hard of hearing, deaf/blind, or speech impaired, and other implementation matters in compliance with the Florida Telecommunications Access System Act of 1991, https://www.floridapsc.com/pscfiles/library/filings/2024/01047-2024/01047-2024.pdf, accessed June 19, 2026.
[79]FCC, Notice of Proposed Rulemaking, FCC 25-79, CG Docket Nos. 08-15 and 03-123, released November 21, 2025, https://docs.fcc.gov/public/attachments/FCC-25-79A1.pdf, accessed June 19, 2026.

On March 24, 2026, the Commission submitted reply comments urging the FCC to adopt a phased, flexible transition framework that will ensure relay users retain access to critical services during the transition. The Commission commented that functionally equivalent solutions should be available before eliminating mandatory analog TTY relay. The Commission also noted that broadband availability and affordability are central issues to consider in determining when to end the analog TTY relay mandate.[80]

[80]FPSC Reply Comments in response to FCC Notice of Proposed Rulemaking, FCC 25-79, CG Docket Nos. 08-15 and 03-123, submitted March 24, 2026, https://www.fcc.gov/ecfs/document/1032496551436/1, accessed June 19, 2026.

Chapter VI. Federal Activities

A. Mergers and Acquisitions

Telecommunications carriers seeking to transfer assets or corporate control in mergers and acquisitions must first receive approval from the FCC, which examines the public interest impact of proposed mergers or acquisitions. Recent transactions of interest to Florida are described below.

1. Verizon & Frontier

On September 5, 2024, Verizon announced its plans to acquire Frontier Communications in a cash transaction valued at $20 billion. Verizon has roughly 7.4 million fiber connections and will acquire the fiber footprint of about 7.2 million fiber locations from Frontier Communications. On May 16, 2025, the FCC approved the acquisition.[81]

2. Cox Communications & Charter Communications

On May 15, 2025, Charter Communications and Cox Communications announced a merger of the two companies. The deal is valued at $34.5 billion. Charter will acquire Cox's commercial fiber and residential cable services, among other business units. The customer facing business unit will bear the Charter brand.[82] On February 27, 2026, the FCC approved the merger.[83]

3. AT&T & Lumen Technologies

On May 21, 2025, AT&T announced an acquisition of Lumen Technologies' consumer fiber operations for $5.75 billion. Lumen's fiber offerings currently serve approximately 1 million customers.[84] On February 2, 2026, the acquisition was completed.[85]

4. T-Mobile & Metronet

On July 24, 2024, T-Mobile announced plans to acquire Metronet's residential fiber operations. Metronet currently services fiber to customers in 17 states, including Florida, with approximately

[81]Telecompetitor, "FCC Approved Verizon Acquisition of Frontier," published May 16, 2025, https://www.telecompetitor.com/verizon-to-acquire-frontier-for-20-billion/, accessed June 19, 2026.
[82]PR Newswire, "Charter Communications and Cox Communications Announce Definitive Agreement to Combine Companies," published May 16, 2025, https://www.prnewswire.com/news-releases/charter-communications-and-cox-communications-announce-definitive-agreement-to-combine-companies-302457690.html, accessed June 19, 2026.
[83]CFX, "FCC Give Charter-Cox Merger Green Light, published February 27, 2026, https://www.cablefax.com/regulation/fcc-gives-charter-cox-merger-green-light, accessed June 19, 2026.
[84]Reuters, "AT&T agrees to buy Lumen's consumer fiber business for $5.75 billion," published May 21, 2025, https://www.reuters.com/business/media-telecom/att-agrees-buy-lumens-consumer-fiber-business-575-billion-cash-2025-05-21/, accessed June 19, 2026.
[85]PR Newswire, "America's Best and Largest Network Just Got Larger: AT&T Completes Acquisition of Lumen's Mass Markets Fiber Business," published February 2, 2026, https://www.prnewswire.com/news-releases/americas-best-and-largest-network-just-got-larger-att-completes-acquisition-of-lumens-mass-markets-fiber-business-302676205.html, accessed June 19, 2026.

2 million customers.[86] On July 11, 2025, the FCC approved the transaction with T-Mobile investing $4.9 billion for a 50% stake in Metronet with the other 50% going to investment firm KRR.[87]

B. Broadband Deployment

The federal government has recognized there is no one-size-fits-all solution to delivering broadband service to rural areas. The 2021 Infrastructure Investment and Jobs Act (IIJA) allocates $65 billion in broadband infrastructure investment, creating multiple programs that envision using many technologies, including fiber, fixed wireless, and satellites.[88]

Multiple federal agencies are responsible for broadband deployment and affordability programs through existing mechanisms as well as the IIJA. The FCC is in charge of several of these programs, such as the Rural Digital Opportunity Fund and the Enhanced Alternative Connect America Cost Model, discussed in previous reports.[89,90,91]

The National Telecommunications and Information Administration (NTIA) has been charged by the IIJA with administering nearly a dozen different broadband deployment programs. These programs will invest over $47 billion in broadband infrastructure.[92,93,94]

[86]T-Mobile, "T-Mobile and KKR Announce Joint Venture to Acquire Metronet and Offer Leading Fiber Solution to More U.S. Customers, published July 24,2025, https://www.t-mobile.com/news/network/t-mobile-kkr-joint-venture-to-acquire-metronet, accessed June 19, 2026.
[87]Broadband Breakfast, "FCC Approves T-Mobile-Metronet Deal," published July 11, 2025, https://broadbandbreakfast.com/fcc-approves-t-mobile-metronet-deal/, accessed June 19, 2026.
[88]117th Congress (2021-2022), "H.R.3684 - Infrastructure Investment and Jobs Act," November 15, 2021, https://www.congress.gov/bill/117th-congress/house-bill/3684, accessed June 19, 2026.
[89]FCC, Auction 904: Rural Digital Opportunity Fund, January 13, 2023, https://www.fcc.gov/auction/904, accessed June 19, 2026.
[90]USAC, "Enhanced ACAM," https://www.usac.org/high-cost/funds/enhanced-acam/, accessed June 3, 2026.
[91]Florida Public Service Commission Reports/Telecommunication Reports/Competition in Telecommunications Markets in Florida, https://www.psc.state.fl.us/reports, accessed June 19, 2026.
[92]NTIA, "Commerce Department's NTIA Announces $288 Million in Funding Available to States to Build Broadband Infrastructure," May 19, 2021, https://www.ntia.doc.gov/press-release/2021/commerce-department-s-ntia-announces-288-million-funding-available-states-build, accessed June 19, 2026.
[93]NTIA, Connecting Minority Communities Pilot Program, December 2, 2021, https://broadbandusa.ntia.doc.gov/funding-programs/connecting-minority-communities-program, accessed June 19, 2026.
[94]NTIA, "NTIA's Role in Implementing the Broadband Provisions of the 2021 Infrastructure Investment and Jobs Act," November 16, 2021, https://broadbandusa.ntia.doc.gov/news/latest-news/ntias-role-implementing-broadband-provisions-2021-infrastructure-investment-and, accessed June 19, 2026.

On June 6, 2025, the NTIA announced changes in requirements for BEAD funding that included the removal of the fiber requirement. The announcement rescinded all previous approvals of BEAD funding and required states to submit their proposals that were "technology-neutral." BEAD funds awarded to Florida are managed by the FloridaCommerce Office of Broadband. As of December 15, 2025, the FloridaCommerce Office of Broadband has provided $229.7 million of BEAD funding to 20 service providers to buildout services to 73,943 locations in Florida.[95,96]

The Rural Utilities Service of the United States Department of Agriculture (USDA) maintains several programs for broadband deployment. The USDA's budget summary of 2025 shows $112.4 million available for loans and grants for broadband improvement projects. This includes $35 million to be used for improving broadband in communities with populations of 20,000 or less and $60 million for Distance Learning and Telemedicine.[97]

The United States Department of the Treasury awards support from its State and Local Fiscal Recovery Funds program and its Capital Projects Fund to support states' response to and recovery from the COVID-19 public health emergency through various projects, including broadband infrastructure.[98,99] In Florida, funds from these programs are administered by the Florida Department of Commerce. In 2024, the state of Florida was awarded $363.9 million from the U.S. Department of Treasury's Broadband Opportunity Program (BOP). BOP funding is to be awarded to projects that will provide broadband service to unserved and underserved residents. BOP has distributed $82 million of its $363.9 million as of the end of 2025. BOP projects are expected to be completed by end of 2026 and will have culminated in the deployment of 18,227 miles of fiber and service provided to 66,804 locations.[100]

C. Universal Service

Universal service is the policy that seeks to ensure all Americans have access to communications services through a series of financial support programs. The Universal Service Fund (USF) supports the budgets of universal service programs. The USF is funded by telecommunications providers based on an assessment of interstate and international revenues. Carriers are allowed by federal rules to pass these costs on to their customers through their bills.

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[95]NTIA, "Trump Administration Announces the Benefit of the Bargain BEAD Program that Removes Regulatory Burdens, Lowers Costs and Expands Use of All Technologies," April 20, 2026, https://broadbandusa.ntia.gov/news/latest-news/trump-administration-announces-benefit-bargain-bead-program-removes-regulatory, accessed June 19, 2026.

[96]FloridaCommerce, "ConnectFlorida BEAD Program," https://broadband.commerce.fl.gov/pages/bead-program#Breakdown, accessed June 19, 2026.

[97]USDA, "United States Department of Agriculture FY 2025 Budget Summary," published March 11, 2024, https://www.usda.gov/sites/default/files/documents/2025-usda-budget-summary.pdf, accessed June 19, 2026.

[98]U.S. Department of the Treasury, "State and Local Fiscal Recovery Funds," https://home.treasury.gov/policy-issues/coronavirus/assistance-for-state-local-and-tribal-governments/state-and-local-fiscal-recovery-funds, accessed June 19, 2026.

[99]U.S. Department of the Treasury, "Capital Projects Fund," https://home.treasury.gov/policy-issues/coronavirus/assistance-for-state-local-and-tribal-governments/capital-projects-fund, accessed June 19, 2026.

[100]FloridaCommerce "Broadband Opportunity Program Annual Report," published December 30, 2025, https://floridajobs.org/docs/default-source/community-planning-development-and-services/broadband/broadband-documents/final-broadband-annual-report-2025.pdf?sfvrsn=654402b0_1, accessed June 19, 2026.

In general, Florida consumers pay more into the USF than what is returned to eligible service providers in Florida.[101] For 2024, only consumers in California and New York were larger net contributors than consumers in Florida. The FCC annually publishes contributions to and disbursements from the fund. The most current data for this report is through December 2024. Table 6-1 shows Florida's estimated contribution and receipts for 2024 and provides a comparison of net contributions for 2022 and 2023. The total estimated consumer contribution for 2023 includes approximately $19 million related to USAC's administrative expense.

Table 6-1
Federal Universal Service Payments and Contributions in Florida
(Thousands of Dollars)

	2022	2023	2024		
	Estimated Net	Estimated Net	Service Providers Payments	Estimated Contributions	Estimated Net
High-Cost	(215,836)	(224,384)	27,196	263,509	(236,313)
Low Income	(11,123)	(10,926)	33,884	54,895	(21,011)
Schools & Libraries	(36,769)	(1,828)	144,685	151,501	(6,816)
Rural Health Care	(23,725)	(28,435)	4,181	30,470	(26,289)
Admin. Expense	(19,127)	(21,227)		18,866	(18,866)
Total	(306,580)	(286,800)	209,946	519,242	(309,296)

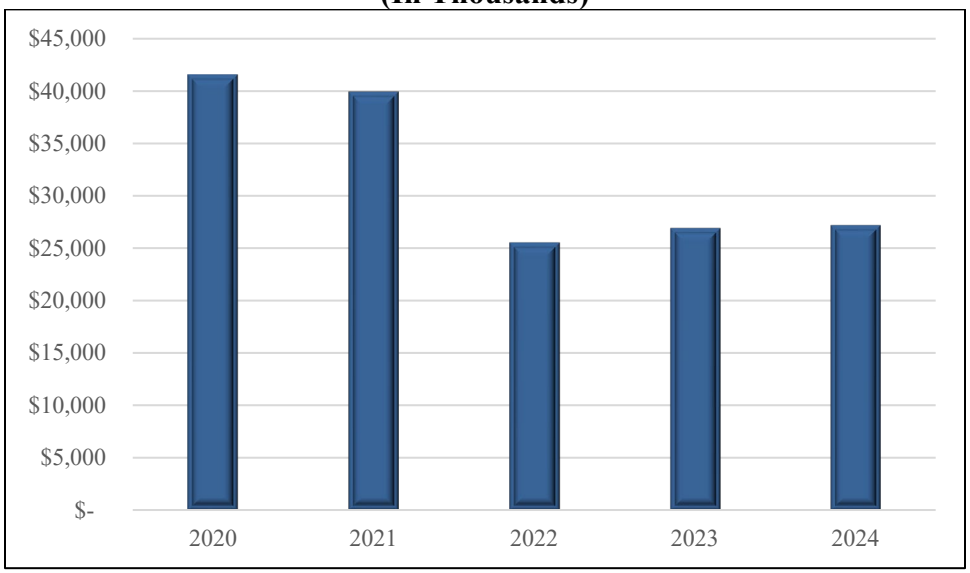
Source: FCC Universal Service Monitoring Report, various years, Table 1.9

1. High Cost

High Cost support allows eligible carriers who serve rural and high-cost areas to recover some of their costs from the USF. Since 2011, the FCC has been modernizing the federal high-cost programs to maintain voice services and extend broadband capable infrastructure.[102] Figure 6-1 identifies the amount of high cost support eligible carriers have claimed in Florida. In 2024, the FCC has also moved to expand support to promote 5G wireless deployment in rural areas.[103] The first phase targets rural homes and businesses that lack mobile coverage with a budget of $8 billion. The second phase focuses on initiatives specifically tailored to facilitate advanced precision agriculture with a budget of $1 billion.

[101]FCC, Universal Service Monitoring Report-2024, released January 15, 2025, https://docs.fcc.gov/public/attachments/DOC-408848A1.pdf, accessed June 19, 2026.
[102]FCC, FCC 11-161, WC Docket No. 10-90, Report and Order and Further Notice of Proposed Rulemaking, released November 18, 2011, https://docs.fcc.gov/public/attachments/FCC-11-161A1.pdf, accessed June 19, 2026.
[103]FCC, FCC 24-89, GN Docket No. 20-32, Second Report and Order, Order on Reconsideration, and Second Further Notice of Proposed Rulemaking, released August 29, 2024, https://docs.fcc.gov/public/attachments/FCC-24-89A1.pdf, accessed June 19, 2026.

Figure 6-1
High Cost Support Claims in Florida
(In Thousands)



Source: FCC Universal Service Monitoring Report, various years, Table 1.9

2. Schools and Libraries

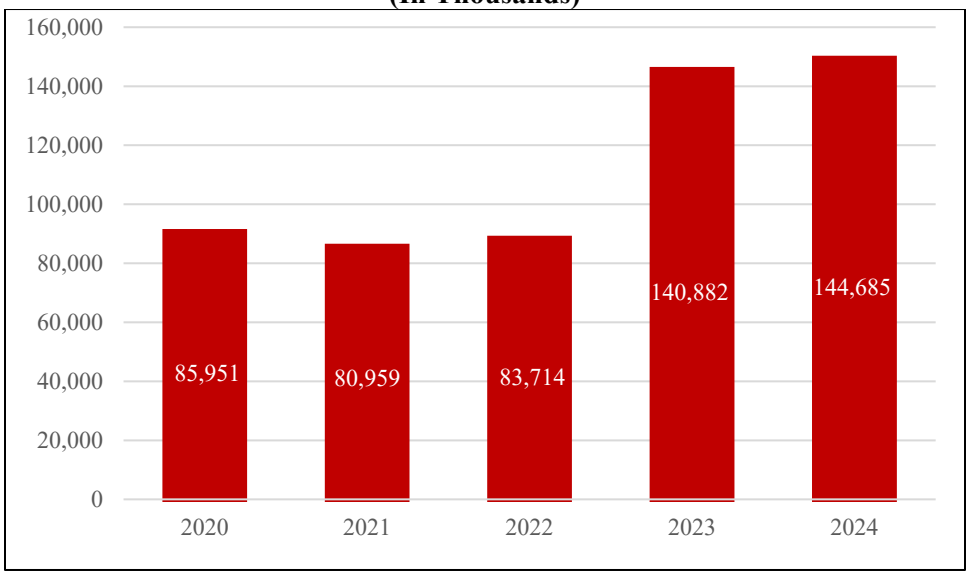
The schools and libraries support program, commonly known as the E-Rate Program, provides financial support to eligible schools and libraries for connectivity. The discounts range from 20 percent to 90 percent of the costs of eligible services, depending on the level of poverty and whether the school or library is located in an urban or rural area. The E-Rate program has two funding categories that support schools and libraries. Category One provides connectivity to schools and libraries (e.g. access lines, broadband connections, etc.) and Category Two provides connectivity for services within schools and libraries (e.g. routers, servers, etc.).

The FCC rescinded the eligibility of school bus Wi-Fi, or other similar access point technologies, including the equipment needed to provide such service on school buses in a Declaratory Ruling adopted September 20, 2025.[104] The FCC also made off-premises use of Wi-Fi hotspots and internet services for those hotspots ineligible for E-Rate support in an Order on Reconsideration issued September 30, 2025.[105] All pending requests for funding will be denied and no funds will be paid for the services beginning Fiscal Year 2025. Due to the two FCC decisions, the WCB also released an amended Fiscal Year 2025 Eligible Services List on September 30, 2025, removing the eligibility of services related to school bus Wi-Fi and Wi-Fi hotspots.[106] The E-

[104]FCC, FCC 25-63, WC Docket No. 13-184, Modernizing the E-Rate Program for Schools and Libraries, Declaratory Ruling, adopted and released September 30, 2025, https://docs.fcc.gov/public/attachments/FCC-25-63A1.pdf, accessed June 19, 2026.
[105]FCC, FCC 25-62, WC Docket No. 21-31, Addressing the Homework Gap through the E-Rate Program, Order on Reconsideration, adopted and released September 30, 2025, https://docs.fcc.gov/public/attachments/FCC-25-62A1.pdf, accessed June 19, 2026.
[106]FCC, DA 25-920, WC Docket No. 13-184, Wireline Competition Bureau Releases Amended Funding Year 2025 Eligible Services List for the E-Rate Program, https://docs.fcc.gov/public/attachments/DA-25-920A1.pdf, accessed June 19, 2026.

Rate program has a funding cap that is annually adjusted for inflation. For 2026, the adjustment is a 2.8 percent increase, establishing a new cap of $5.2 billion.[107] Figure 6-2 illustrates a comparison of the amounts disbursed in Florida for funding years 2020-2024.

Figure 6-2
Schools and Libraries Funding Disbursements in Florida
(In Thousands)



Source: FCC, Universal Service Monitoring Report, various years, Table 1.9

3. Low Income

The Lifeline program provides a monthly discount on phone or broadband service for qualifying low-income consumers. In 2016, the FCC reformed the Lifeline program to transition to a more broadband-focused program, which included a phase-down of federal support for voice-only services.[108] The FCC has delayed the complete phase out of voice-only Lifeline support several times. In its most recent Order, the FCC stated that support for voice-only Lifeline services will continue to be available through December 1, 2026. The FCC noted that this extension is partly due to the ongoing reliance of Lifeline subscribers on voice services.

4. Rural Health Care

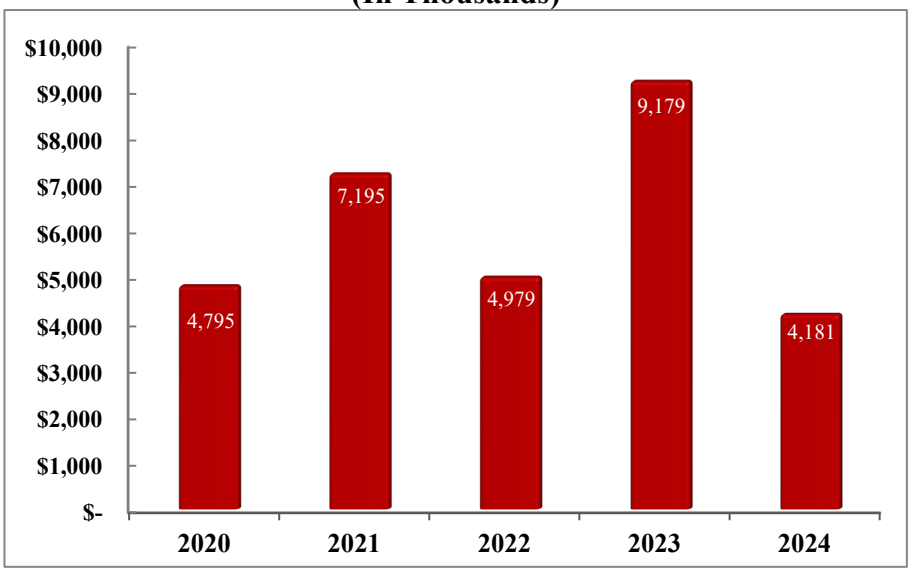
The goal of the Rural Health Care (RHC) Program is to ensure the affordability of telehealth services in rural communities to promote healthcare in underserved and hard to reach geographic areas. To achieve these goals, the RHC Program provides funding to eligible rural healthcare providers for broadband and telecommunications services. The new RHC funding cap for 2026 was established by the FCC at $744.16 million.[109] This represents a 2.8 percent increase from the

[107]FCC, DA 25-199, Public Notice, released March 7, 2025, https://docs.fcc.gov/public/attachments/DA-25-199A1.pdf, accessed June 19, 2026.
[108]FCC, FCC 16-38, WC Docket No. 11-42, Third Report and Order, Further Report and Order, and Order on Reconsideration, released April 27, 2016, https://docs.fcc.gov/public/attachments/FCC-16-38A1.pdf, accessed June 19, 2026.
[109]FCC, DA 25-199, Public Notice, released March 7, 2025, https://docs.fcc.gov/public/attachments/DA-25-199A1.pdf, accessed June 19, 2026.

prior year's cap to adjust for inflation. Funding is distributed through two programs: the Telecommunications Program and the Healthcare Connect Fund Program.

The Telecommunications Program subsidizes the difference between urban and rural rates for telecommunications services, and the Healthcare Connect Fund Program promotes the use of broadband services by providing a flat 65 percent discount on an array of communications services to both individual rural healthcare providers and any related healthcare consortia.[110] A pilot program that covered 85 percent for selected projects of the broadband connectivity, equipment, and information services to provide connected care services to patient populations ended in December 2025. Figure 6-3 illustrates a comparison of the amounts disbursed in Florida for funding years 2020-2024.

Figure 6-3
Rural Health Care Funding Disbursements in Florida
(In Thousands)



Source: FCC, Universal Service Monitoring Report, various years, Table 1.9

D. Public Safety

Florida faces numerous public safety challenges in the use of its telecommunications networks. Federal agencies endeavor to assist states by maintaining programs to prepare and respond to these challenges.

The FCC worked to help the transition from legacy 911 systems to Next Generation 911 (NG911) by defining responsibilities and setting deadlines for the transition, and by proposing rules to help ensure that emerging NG911 networks are reliable and interoperable.[111,112] The

[110]FCC, "Universal Service Monitoring Report - 2024," Issued on January 15, 2025, https://docs.fcc.gov/public/attachments/DOC-408848A1.pdf, p. 61, accessed June 19, 2026.
[111]FCC, "FCC Takes Action to Expedite the Transition to Next Generation 911", July 19, 2024, https://www.fcc.gov/document/fcc-takes-action-expedite-transition-next-generation-911-0, accessed June 19, 2026.
[112]FCC, "FCC Proposes Action to Improve Next Generation 911", March 27, 2025, https://www.fcc.gov/document/fcc-proposes-action-improve-next-generation-911, accessed June 19, 2026.

FCC also acted to improve wireless 911 location accuracy and required wireless providers to implement georouting solutions for suicide prevention Lifeline 988 calls to local crisis centers based on call origin area rather than by area code.[113,114]

Other FCC actions include establishing a new television, radio, and wireless phone alert code for missing and endangered persons, created templates for the 18 most commonly issued and time-sensitive alerts in the 13 most commonly spoken languages in the U.S., and enabled alert originators to send silent Wireless Emergency Alerts (WEA).[115, 116,117] The FCC also proposed to re-examine the national alert and warning systems, including the Emergency Alert System (EAS) and the WEA. This includes seeking comment on the objectives for effective alert and warning systems, exploring which entities need to be able to send alerts and how these needs should be addressed in the design of alerting systems. Other points of considerations include the alert transmission capabilities that a national public alert and warning system must have.[118]

Additionally, in order to maintain its preparedness and responsiveness to emergencies, the FCC proposed to review its Disaster Information Reporting System (DIRS): this includes simplifying reporting requirements, limiting DIRS reporting obligations to facilities-based providers, and promoting federal and state agencies' ability to obtain direct access to the Network Outage Reporting System and DIRS filings by eliminating unnecessary access requirements.[119] The FCC also clarified the situations in which network outage reporting requirements are suspended during DIRS activations, while maintaining requirements to send outage notifications to 911 and 988 officials during DIRS activations.[120]

The FCC continued development of the SCS framework by granting AT&T and AST SpaceMobile permission to test D2D connectivity with its LEO satellites on the First Responder Network Authority (FirstNet), the interoperable public safety broadband network, using spectrum dedicated to public safety and first responders.[121] FirstNet will also benefit from a deal reached by NTIA with AT&T to secure an additional $2 billion in value to benefit public safety under FirstNet's Nationwide Public Safety Broadband Network (NPSBN) contract. As part of the deal AT&T will reduce costs borne by FirstNet by roughly $1 billion, allowing for further

[113]FCC, "FCC Aims to Help First Responders Better Locate Wireless 911 Callers", March 27, 2025, https://www.fcc.gov/document/fcc-aims-help-first-responders-better-locate-wireless-911-callers, accessed June 19, 2026.
[114]FCC, "FCC Adopts Rules Requiring Georouting for All Wireless Calls to 988", October 18, 2024, https://www.fcc.gov/document/fcc-adopts-rules-requiring-georouting-all-wireless-calls-988-0, accessed June 19, 2026.
[115]FCC, "FCC Adopts New Alert Code for Missing & Endangered Persons", August 8, 2024, https://www.fcc.gov/document/fcc-adopts-new-alert-code-missing-endangered-persons-0 accessed June 19, 2026.
[116]FCC, "FCC Paves Way for Multilingual Wireless Emergency Alerts", January 8, 2025, https://www.fcc.gov/document/fcc-paves-way-multilingual-wireless-emergency-alerts, accessed June 19, 2026.
[117]FCC, "FCC Improves Wireless Emergency Alerts by Enabling Silent Alerts", February 27, 2025, https://www.fcc.gov/document/fcc-improves-wireless-emergency-alerts-enabling-silent-alerts, accessed June 19, 2025.
[118]FCC, "FCC to Re-Examine Emergency Alert System", August 7, 2025, https://www.fcc.gov/document/fcc-re-examine-emergency-alert-system, accessed June 19, 2026.
[119]FCC, "FCC Looks to Modernize Disaster Information Reporting System", August 6, 2025, https://www.fcc.gov/document/fcc-looks-modernize-disaster-information-reporting-system-0, accessed June 19, 2026.
[120]Ibid.
[121]AT&T, "With FCC Authorization, FirstNet, Built with AT&T Envisions Satellite Connectivity Trials Later This Year", April 16, 2025, https://about.att.com/story/2025/firstnet-satellite-connectivity.html, accessed June 19, 2026.

investments to the NPSBN. This framework will help promote the accelerated buildout of the Dedicated Public Safety 5G Core. AT&T will also invest approximately $1 billion in new network and coverage enhancements.[122]

[122]NTIA, "Secretary Lutnick and AT&T Agree to $2 Billion Deal Benefitting First Responders, Public Safety under FirstNet Contract", March 31, 2026, https://www.ntia.gov/press-release/2026/secretary-lutnick-and-att-agree-2-billion-deal-benefitting-first-responders-public-safety-under, accessed June 19, 2026.

Appendix - List of Certificated ILECs and CLECs as of 12/31/2025

** Indicates the company did not respond to the Commission's data request as of June 12, 2026.

Accelecom GA LLC
Access One, Inc.
ACN Communication Services, LLC
Airespring, Inc.
Airus, Inc.
altafiber connected services
Altaworx LLC **
Alternative Choice Wireless, LLC **
American Dark Fiber, LLC
American Telephone Company LLC
ANEW Broadband, Inc.
ANPI Business, LLC
AT&T Enterprises, LLC
AT&T Florida
AT&T Florida
ATC Outdoor DAS, LLC
Atlantis Communications LLC
ATN, Inc.
Bandwidth.com CLEC, LLC
Barr Tell USA, Inc.
BCM One, Inc.
BCN Telecom, Inc.
BeCru
BIF IV Intrepid OpCo LLC
Blue Stream Fiber
Blue Stream Fiber
Boldyn Networks US LLC
Bright House Networks Information Services (Florida), LLC
Broadband Dynamics, L.L.C.
Broadview Networks, Inc.
Broadvox-CLEC, LLC
Broadwing Communications, LLC
BT Communications Sales LLC
Business Telecom, LLC
C3
Cablevision Lightpath LLC
Campus Communications Group, Inc.
CBN-Volusia, Inc.
CBTS Technology Solutions LLC
CenturyLink of Florida, Inc.
Cirion Technologies Solutions, LLC

City of Bartow
City of Lakeland
City of Ocala d/b/a Ocala Fiber Network
Clear Rate Communications, LLC
CNS Networks LLC
Cogeco US Enterprise, LLC d/b/a Breezeline
Cogent Communications of Florida
Comcast Digital Phone
COMEXCEL TECHNOLOGIES CORPORATION **
Communications Authority, Inc
Conexon Connect LLC
Consolidated Communications of Florida Company, LLC
Conterra Ultra Broadband, LLC
Convergia, Inc.
Cox Florida Telcom, L.P. **
Crexendo Business Solutions, Inc.
Crosstown Fiber IL LLC
Crown Castle Fiber LLC
CSG-Cloud, LLC d/b/a Citrus Phones **
Custom Network Solutions, Inc.
Dais Communications, LLC
DeltaCom LLC
dishNET Wireline L.L.C.
DSCI, LLC
EarthGrid PBC
Easton Telecom Services, L.L.C.
Easy Telephone Services Company
Embarq Communications
ENA Services, LLC
eNetworks NC, LLC
ENGAGE COMMUNICATIONS
Enhanced Communications Network, Inc.
Entelegent Solutions, Inc.
ExteNet Asset Entity, LLC
ExteNet LVS, LLC
ExteNet Systems, LLC
ExteNet Telecom Solutions, Inc.
Ezee Fiber
Faster.IO, Inc.
Fiber AssetCo LLC

FiberLight, LLC
Fidium
First Choice Technology, Inc.
First Communications, LLC
FL Network Transport, LLC
Florida Phone Systems, Inc.
Forged Fiber 37, LLC
FPL Energy Services, Inc.
FPUAnet Communications
France Telecom Corporate Solutions L.L.C.
Frontier Communications of America, Inc.
Frontier Communications of the South, LLC
Frontier Florida LLC
Frontier Florida LLC
Frontier Tampa Bay FL Fiber 1 LLC
Fusion
Fusion Cloud Services, LLC
Gigapower, LLC (f/k/a Infrastructure Endeavors, LLC)
Global Capacity **
Global Crossing Local Services, Inc.
Granite Telecommunications, LLC
Great America Networks, Inc.
GRU Communication Services/GRUCom/GRU
GRUCom
Harbor Communications, LLC
Hargray of Florida, LLC
Hayes E-Government Resources, Inc.
HD Carrier, LLC
Home Town Telephone, LLC
Hypercube Networks, LLC
HyperFiber, LLC d/b/a HyperFiber of Florida LLC
inContact, Inc.
INdigital
INNOVATIVE TECH PROS **
Integrated Path Communications, LLC **
Intelletrace, Inc.
Intellifiber Networks, LLC
Interactive Services Network, Inc.
InterGlobe Communications, Inc.
InterMetro Fiber, LLC
Intrado Safety Communications, Inc.
IPC Network Services, Inc. **
IQ Fiber (FL), LLC
ITS Fiber, LLC d/b/a Blue Stream Fiber
JEA
Keys Energy Services

L&A Utility Solutions Inc.
Level 3 Communications, LLC
Level 3 Telecom of Florida, LP
Lightspeed CLEC, Inc.
Lingo Telecom, LLC
LIVEWIRE TELECOM LLC **
Lumos Fiber of Florida, LLC
Luxury Telecommunications LLC d/b/a Luxury Telecommunications
Maryland TeleCommunication Systems, Inc.
MCC Telephony of Florida, LLC
McLeodUSA Telecommunications Services, L.L.C.
MetroNet
MetTel
Micro-Comm, Inc.
MIX Networks, Inc.
Motorola Solutions Connectivity, Inc.
Myakka Communications, Inc.
Nebula Telecommunications of Florida LLC
NEFCOM
Neo Network Development, Inc.
Network Innovations, Inc.
Network Telephone, LLC
Neutral Tandem-Florida, LLC
New Horizons Communications Corp.
NextCity Networks, LLC
NGA 911, L.L.C.
NOS Communications, Inc.
Office Management Systems, Inc.
One Voice Communications, Inc.
Onvoy, LLC
Open Infra East Inc. **
PaeTec Communications, LLC
PB Florida Asset Entity, LLC
PBX-Change
PeakNet, LLC
Peering Hub Inc.
Peerless Network of Florida, LLC
Phone Club Corporation
Point Broadband Fiber Holding, LLC
PowerNet Global Communications
Preferred Long Distance, Inc.
Prime Fiber, LLC
QuantumShift Communications, Inc.
Rapid Fiber Internet, LLC
Reddot Networks Inc.
RingSquared Telecom LLC

SanTel Communications
SBA DAS & Small Cells, LLC
SH Services LLC
Simwood Inc.
SKYNET360, LLC
Smart Building US LLC d/b/a Smart Building
Smart City Metro
Smart City Networks, Limited Partnership
Smart City Solutions, LLC
Smart City Telecom
Southeastern Services, Inc.
Southern Light, LLC
Southern Light, LLC
Southern Telecom **
Spectrotel of Florida LLC d/b/a Touch Base Communications
Spectrum Fiberlink Florida, LLC
SQF, LLC
Stanley Utility Contractor, Inc.
Stratus Networks, Inc.
Summit Broadband
Synergem Technologies, Inc.
Talkie Communications, Inc.
TDS Telecom
Telco Experts, LLC
TelCove Operations, LLC
Telepak Networks, Inc.
Teleport Communications America, LLC
TELETECH COMMUNICATIONS INC
Teliax, Inc.
Telrite Corporation
Tel-Star Communications of Florida Inc. **
Terra Nova Telecom, Inc.
TerraNovaNet, Inc.
Tillman FiberCo Florida, LLC
TIME CLOCK SOLUTIONS, LLC **
Time Warner Cable Business LLC
Touchtone Communications Inc. of Delaware
Tristar Communications Corp. **
Triton Networks LLC
Ubiquity Florida, LLC
United Commercial Telecom, LLC
United Data Technologies, Inc. d/b/a UDT
Uniti Fiber GulfCo LLC
Uniti Fiber LLC
Uniti National LLC
US LEC of Florida, LLC
US Signal Company, L.L.C.

USA FIBER
Vanco US, LLC
Velocity, A Managed Services Company, Inc.
Verizon Access Transmission Services
Verizon Select Services Inc.
Vero Networks
VoDa Networks, Inc.
Vodafone US Inc.
Voxbeam Telecommunications Inc.
WANRack, LLC
Wholesale Carrier Services, Inc.
Wide Voice, LLC
WiMacTel, Inc.
Windstream Florida, LLC
Windstream KDL, LLC
Windstream New Edge, LLC
Windstream Norlight, LLC
Windstream NuVox, LLC
Windstream Talk America, LLC
Wire 3 LLC
WonderLink Communications, LLC
WOW! Internet, Cable and Phone
XO Communications
YMax Communications Corp.
Zayo Group, LLC
Zayo Network Services, LLC

Glossary

5G	5G is the short name for fifth-generation wireless broadband technology. 5G provides higher bandwidth, faster speeds and coverage than the current 4G. 5G offers speeds of up to 1 Gb/s for tens of connections or tens of Mb/s for tens of thousands of connections.
Access Line	The circuit or channel between the demarcation point at the customer's premises and the serving end or class 5 central office.
Broadband	A term describing evolving digital technologies offering consumers integrated access to voice, high-speed data, video on demand, and interactive information delivery services.
Circuit	A fully operational two-way communications path.
CLEC	*Competitive Local Exchange Company*. Any company certificated by the Florida Public Service Commission to provide local exchange telecommunications service in Florida on or after July 1, 1995.
Communications Act, 1996 Act or The Act	The federal Communications Act of 1934, as amended by the Telecommunications Act of 1996, established a national framework to enable CLECs to enter the local telecommunications marketplace.
Facilities-based VoIP service	VoIP service provided by the same company that provides the customer's broadband connection. Facilities-based VoIP services are generally provided over private managed networks and are capable of being provided according to most telephone standards. While this service uses Internet Protocol for its transmission, it is not generally provided over the public Internet.
Fixed Wireless Access (FWA)	Wireless broadband Internet service provided through stationary customer premise equipment that connects to a cellular network.
ILEC	*Incumbent Local Exchange Company*. Any company certificated by the FPSC to provide local exchange telecommunications service in Florida on or before June 30, 1995.
Interconnected VoIP service	According to the FCC, it is a VoIP service that (1) enables real-time, two-way voice communications; (2) requires a broadband connection from the user's location; (3) requires Internet protocol-compatible customer premises equipment; and (4) permits users generally to receive calls that originate and terminate on the public switched telephone network.
Intermodal	The use of more than one type of technology or carrier to transport telecommunications services from origination to termination. When referring to local competition, intermodal refers to non-wireline voice communications such as wireless or VoIP.
Internet Protocol (IP)	The standards that keep the Internet functioning. It describes software that tracks the Internet address of nodes, routes outgoing messages, and recognizes incoming messages.

Over-the-Top VoIP service	VoIP service that is provided independently from a particular broadband connection and is transmitted via the public Internet.
Switched Access	Local exchange telecommunications company-provided exchange access services that offer switched interconnections between local telephone subscribers and long distance or other companies.
Time Division Multiplexing (TDM)	A method of transmitting and receiving independent signals over a common signal path. TDM circuit switched lines represent the traditional wireline access line data within this report and do not include VoIP connections.
Universal Service Fund	Provides compensation to communications entities for providing access to telecommunications services at reasonable and affordable rates throughout the country, including rural, insular, high-cost areas, and public institutions.
Universal Service Administrative Company (USAC)	An independent American nonprofit corporation designated as the administrator of the federal Universal Service Fund by the Federal Communications Commission. USAC is a subsidiary of the National Exchange Carrier Association.
Voice over Internet Protocol (VoIP)	The technology used to transmit voice conversations over a data network using Internet Protocol.
Wireline	Synonymous with “landline” or land-based technology for providing telephone service.