State of Florida
Public Service Commission
INTERNAL AFFAIRS AGENDA
Monday – July 14, 2025
9:30 AM
Room 105 – Gerald L. Gunter Building

1. Draft Report on the Status of Competition in the Telecommunications Industry (Attachment 1)

2. Legislative Update

3. General Counsel's Report

4. Executive Director's report

5. Other Matters

BB/aml

OUTSIDE PERSONS WISHING TO ADDRESS THE COMMISSION ON ANY OF THE AGENDAED ITEMS SHOULD CONTACT THE OFFICE OF THE EXECUTIVE DIRECTOR AT (850) 413-6463.

Attachment 1

State of Florida

Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD
TALLAHASSEE, FLORIDA 32399-0850

-M-E-M-O-R-A-N-D-U-M-

DATE: June 27, 2025

TO: Braulio L. Baez, Executive Director

FROM: Cayce H. Hinton, Director, Office of Industry Development and Market Analysis CH
Mark Long, Public Utilities Supervisor, Office of Industry Development & Market Analysis
Jeff Bates, Research Associate, Office of Industry Development & Market Analysis
Eric Wooten, Public Utility Analyst IV, Office of Industry Development & Market Analysis
Shelby Nave, Public Utility Analyst III, Office of Industry Development & Market Analysis

RE: Draft of the Report on the Status of Competition in the Telecommunications Industry

CRITICAL INFORMATION: Please place on the July 14, 2025 Internal Affairs. FPSC approval of draft report is sought. Report is due to the Governor and Legislature by August 1, 2025.

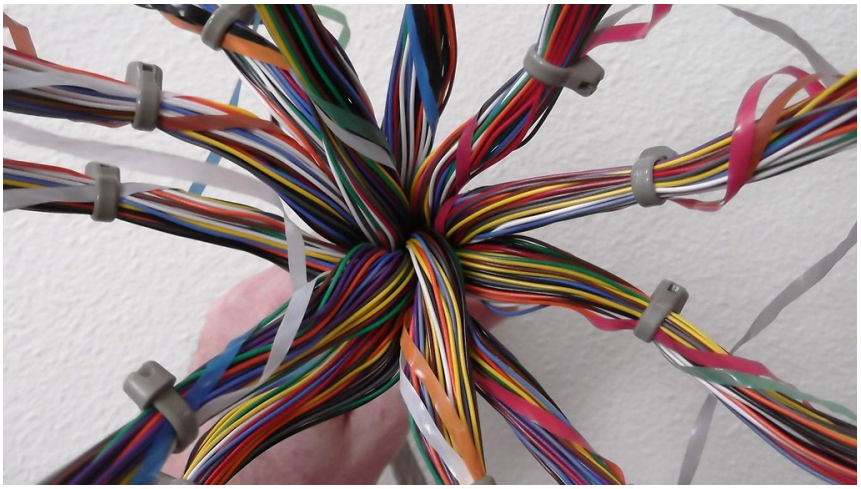
Section 364.386, Florida Statutes, requires that the Commission prepare an annual report on the status of competition in the telecommunications industry. The report is to be submitted to the Governor, the Speaker of the House of Representatives, the President of the Senate, and the majority and minority leaders of the Senate and the House of Representatives by August 1 of each year. The attached draft report on the "Status of Competition in the Telecommunications Industry" has been prepared to fulfill the legislative requirement. Staff is seeking approval of the draft report.

Attachment

cc: Mark Futrell, Deputy Executive Director, Technical
Apryl Lynn, Deputy Executive Director, Administrative
MaryAnne Helton, General Counsel

Report on the

Status of Competition in the Telecommunications Industry



AS OF DECEMBER 31, 2024

Florida Public Service Commission

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List of Acronyms

ACP	Affordable Connectivity Program
CDC	Centers for Disease Control and Prevention
CLEC	Competitive Local Exchange Carrier
ETC	Eligible Telecommunications Carrier
FCC	Federal Communications Commission
FPSC	Florida Public Service Commission
F.S.	Florida Statutes
ICC	Interstate Commerce Commission
ILEC	Incumbent Local Exchange Carrier
IP	Internet Protocol
LTE	Long-Term Evolution
Mbps	Megabits per second
NCHS	National Center for Health Statistics
OTT	Over-the-top
PSTN	Public Switched Telephone Network
TDM	Time Division Multiplexing
UNE	Unbundled Network Element
USF	Universal Service Fund
USAC	Universal Service Administrative Company
VoIP	Voice over Internet Protocol

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, 2024, there were 10 incumbent local exchange carriers (ILECs) and 237 competitive local exchange carriers (CLECs) certificated by the Commission to operate in Florida.

In 2024, 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 2024. Lifeline subscriptions in Florida fell slightly to 212,243 households in 2024.

Consumers in Florida continue to migrate from traditional switched wireline service to wireless and Voice over Internet Protocol (VoIP) services. Carriers reported approximately 587,000 total wireline access lines in Florida for 2024, about 23.1 percent fewer than the previous year. Residential and business wirelines both experienced significant drops in 2024.

Total residential access lines declined 28.9 percent. The transition to VoIP and wireless-only services continues to be responsible for much of this decline. AT&T experienced the largest loss of residential lines with 41.1 percent decline during 2024, while Frontier declined 32.5 percent and CenturyLink declined by 21.9 percent.

For the 14th year in a row, total business access lines exceeded total residential access lines; however, total business access lines declined 19.8 percent in 2024. More than half of AT&T, CenturyLink, and Frontier's wireline subscribers were business lines. While over 97 percent of CLEC access lines were business lines, total CLEC business market share declined to 20.8 percent in 2024.

As reported for the past several years, intermodal competition from wireless and VoIP services continued to drive the telecommunications markets in 2024. According to the most recent data from the Federal Communications Commission (FCC), there are nearly 26 million wireless subscriptions and nearly 4.3 million VoIP connections in Florida, far eclipsing the 587,000 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

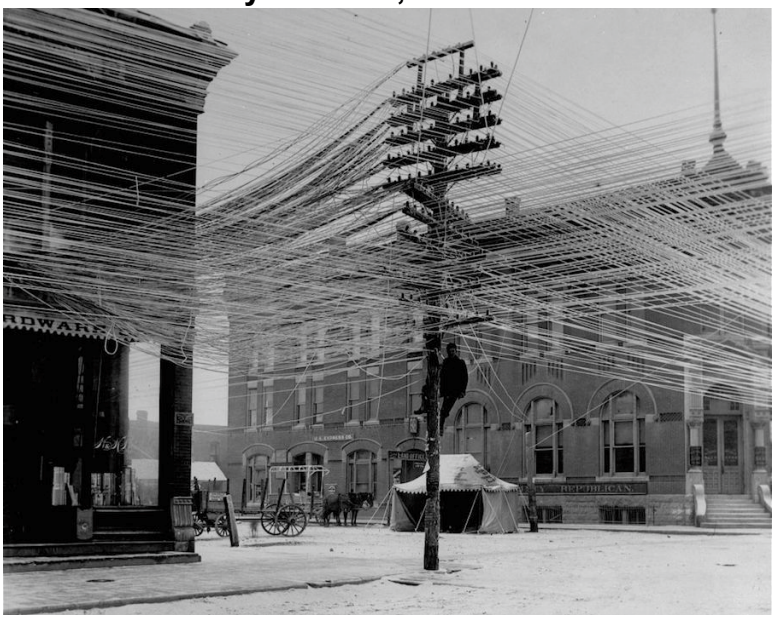
Telephone service has been regulated to some degree since nearly the moment the technology was patented by Alexander Graham Bell (Bell) in 1876.[1] This section summarizes the major historical regulatory events both at the federal and state levels. For the purposes of this report, the history of federal 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 May 28, 2025.
[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 May 28, 2025.
[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 May 28, 2025.

[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 May 28, 2025.

[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 May 28, 2025.

[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 May 28, 2025.

[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 24, 2025, to 10 ILECs and 237 CLECs. Responses were due April 15, 2025. 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 principle 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 2024, 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 85,000 (30.8 percent) in 2024, with residential access lines decreasing by nearly 44,000 (41.1 percent) and business lines by over 41,000 (24.3 percent).[33] Nationwide, AT&T reported losses of approximately 900,000 switched access lines (21.4 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 3.1 percent increase in national wireline operating revenues to over $13.5 billion.[34]

CenturyLink's Florida switched access lines declined nearly 34,000 (17.9 percent), with residential access lines decreasing nearly 21,500 (21.9 percent) and business access lines

[32]Responses to local competition data request 2025.
[33]AT&T's response to the local competition data request 2025.
[34]AT&T Inc., "Form 10-K," December 31, 2024, https://investors.att.com/~/media/Files/A/ATT-IR-V2/financial-reports/annual-reports/2024/complete-annual-report-2024.pdf, p. 12 of 117, accessed May 28, 2025; responses to local competition data request 2025.

decreasing over 12,300 (13.5 percent).[35] Nationwide, CenturyLink reported operating revenues of approximately $13.1 billion in 2024, reflecting a decline of nearly 10.3 percent from 2023.[36]

Frontier's switched access lines in Florida decreased by nearly 6,400 (6.2 percent), with residential access lines decreasing over 6,900 (32.5 percent) while business lines increased by over 500 (0.6 percent).[37] Nationwide, Frontier reported 2024 revenue of $5.9 billion, reflecting an increase of 3.5 percent.[38]

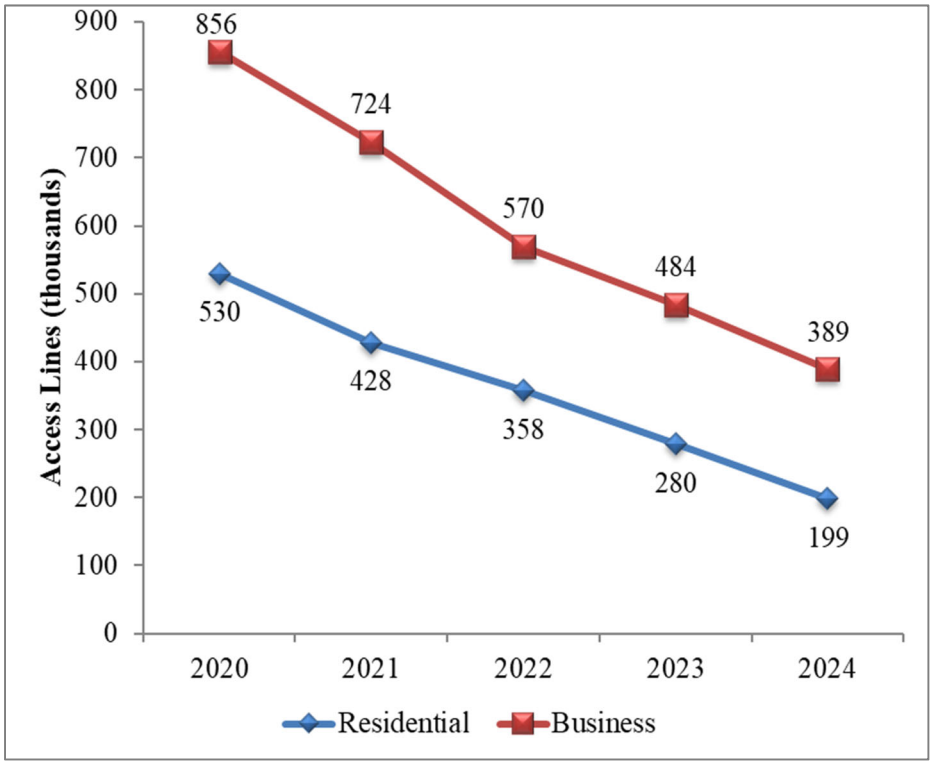
The seven rural Florida ILECs experienced a contraction in the number of switched access lines. In 2024, rural carriers in Florida saw their total access lines decline by approximately 12,700 (17.5 percent). Residential lines decreased nearly 8,700 (17 percent) and business lines decreased by over 4,000 (18.6 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 and business lines accelerated in 2024. Residential access lines totaled nearly 199,000 as of December 2024, representing a decline of 28.9 percent from 2023. Business access lines totaled nearly 389,000, representing a decline of 19.8 percent from the previous year. Total combined access lines for ILECs and CLECs declined 23.1 percent, from nearly 764,000 in December 2023 to approximately 587,000 as of December 2024. Since 2020, the total number of switched access lines decreased by nearly 799,000, or 57.6 percent. Figure 2-1 captures trends over the last five years, but it should be noted that Florida access lines have decreased by over 95 percent since its peak of 12 million access lines in 2001.

[35]CenturyLink/Lumen's response to local competition data request 2025.
[36]Lumen Technologies, Inc., "Form 10-K," December 31, 2024, https://d18rn0p25nwr6d.cloudfront.net/CIK-0000018926/cc0f35c2-7662-4ee9-b17f-da5ca881bec2.pdf, accessed May 28, 2025.
[37]Frontier's response to local competition data request 2025.
[38]Frontier Communications Corporation, "Form 10-K," December 31, 2024, https://d18rn0p25nwr6d.cloudfront.net/CIK-0000020520/9026e8c6-0acd-4a4f-a2c2-1ed3b012b901.pdf, accessed May 28, 2025.
[39]Responses to local competition data request 2024.

Figure 2-1
Florida Wireline Access Line Trends



Source: Responses to local competition data request (2021-2025)

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 wirelines exceeded the percentage of residential wirelines. In 2024, the ILECs' ratio was 61 percent business lines to 39 percent residential lines.

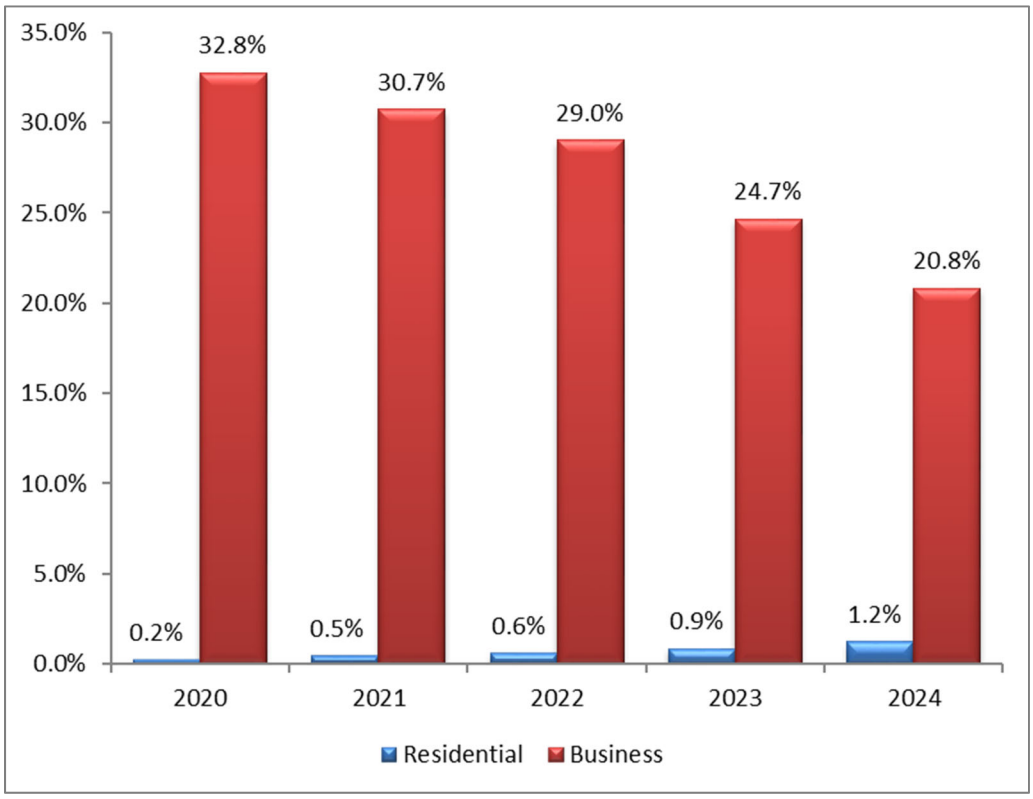
The shift in mix has been even more pronounced in the CLEC market. In 2004, the business-to-residential customer mix for CLECs was about 63 percent business to 37 percent residential. In 2024, the CLEC customer mix was over 97 percent business lines.

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 increased slightly from 0.9 percent in 2023 to 1.2 percent in 2024, while the CLEC business market share decreased from 24.7 percent in 2023 to 20.8 percent in 2024.

Figure 2-2
Florida Residential & Business CLEC Market Share



Source: Responses to local competition data request (2021-2025)

3. Market Composition

The market composition of access lines served by local exchange companies is illustrated in Table 2-1. In 2024, ILEC residential access lines decreased by 29.2 percent, while ILEC business lines decreased by 15.7 percent. CLEC residential lines experienced a slight increase of 1.0 percent, while CLEC business access lines decreased by 32.2 percent.

Table 2-1
Florida Wireline Access Line Comparison

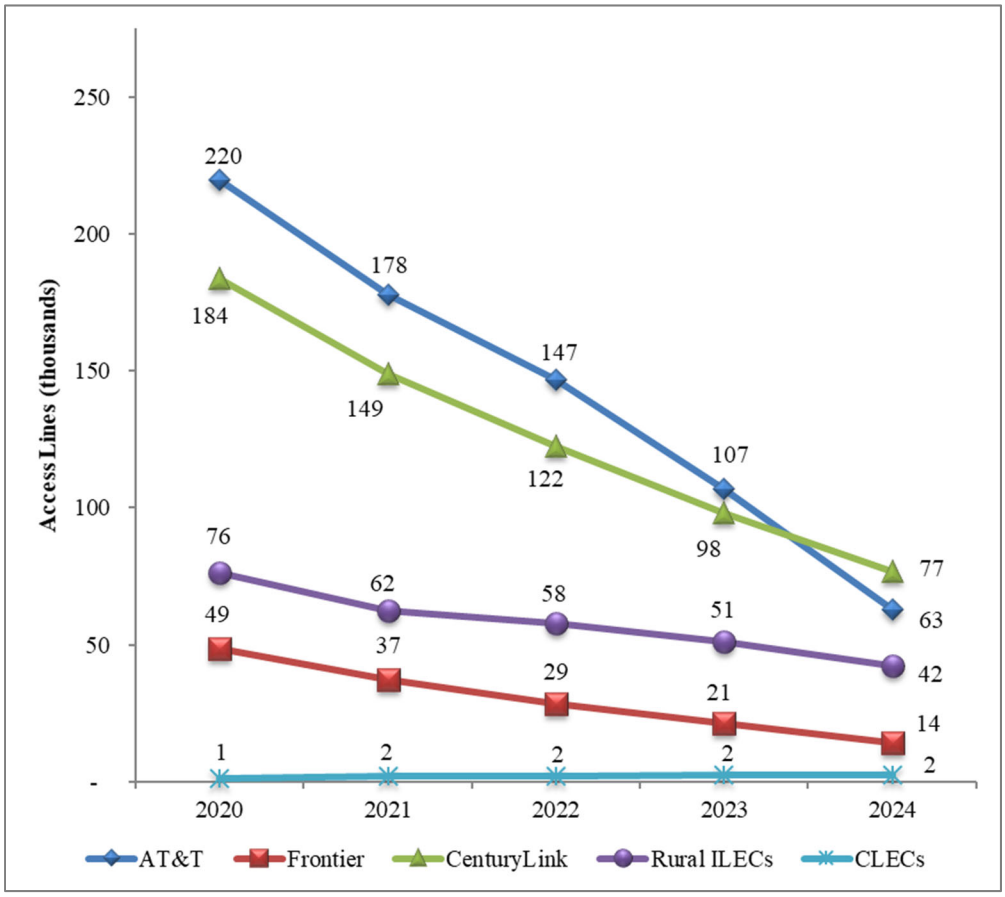
		ILECs	CLECs	Total
2021	Residential	426,460	1,971	428,431
	Business	501,370	222,608	723,978
	Total	927,830	224,579	1,152,409
2022	Residential	355,425	2,153	357,578
	Business	404,564	165,519	570,083
	Total	759,989	167,672	927,661
2023	Residential	277,115	2,406	279,521
	Business	364,881	119,464	484,345
	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
Change 2023-2024	Residential	-29.2%	1.0%	-28.9%
	Business	-15.7%	-32.2%	-19.8%
	Total	-21.5%	-31.6%	-23.1%

Source: Responses to local competition data request (2022-2025)

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 nearly 25 percent per year, AT&T nearly 24 percent per year, and CenturyLink over 19 percent per year. During that period, rural ILEC access lines declined by an average of nearly 11 percent, while CLEC residential lines increased by an annual average of over five percent.

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



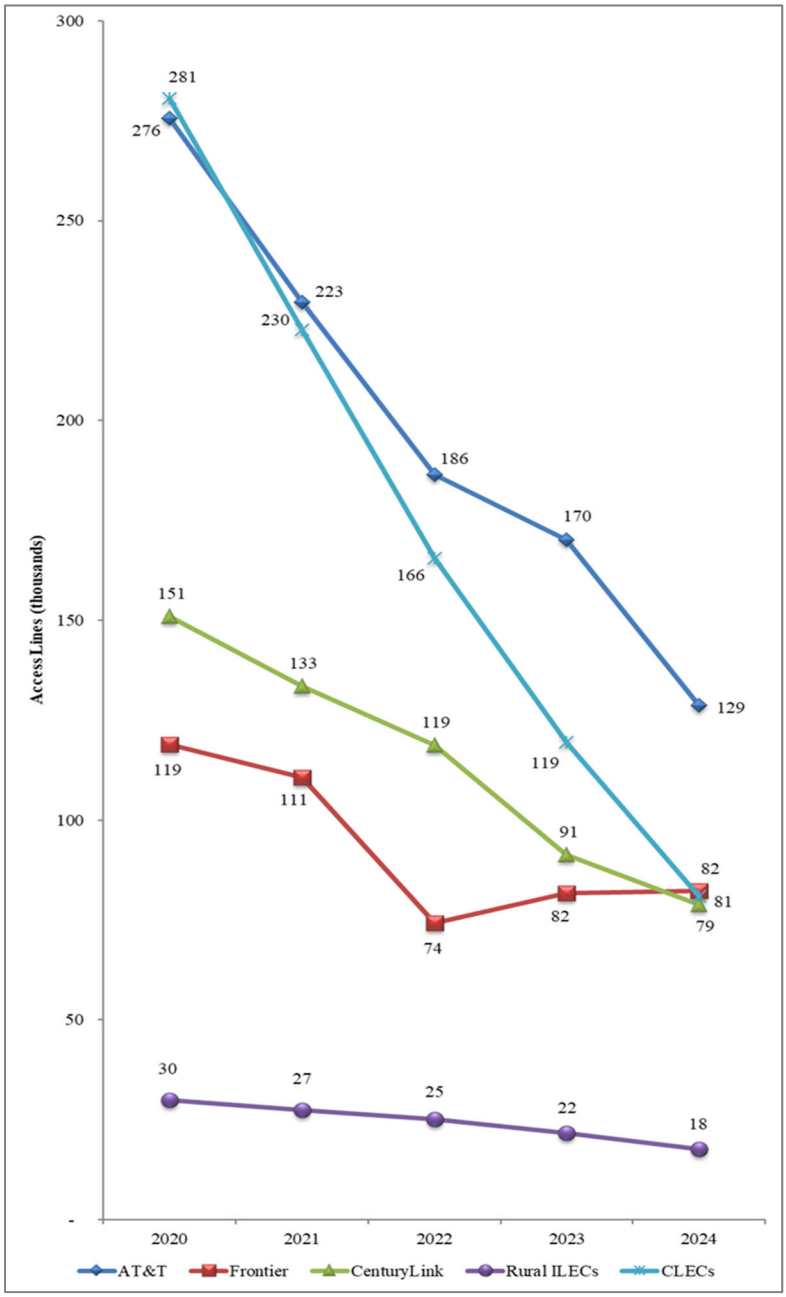
Source: Responses to local competition data request (2021-2025)

More recently, AT&T experienced residential wireline losses of 27.2 percent in 2023 and 41.1 percent in 2024. Frontier lost 25.6 percent of its residential wirelines in 2023 and 32.5 percent in 2024, while CenturyLink lost 19.9 percent of its residential lines in 2023 and 21.9 percent in 2024. The rural ILECs reported line losses of 11.6 percent in 2023 and 17.0 percent in 2024, and the CLECs reported residential wireline gains of 11.8 percent in 2023 and 1.0 percent in 2024. The rate of line loss accelerated in 2024 for all categories, except for CLECs, which reported a moderate increase in residential lines.

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 AT&T has experienced average annual declines of over 17 percent, while CenturyLink has seen average annual declines of nearly 14 percent. Frontier has experienced some years of growth along with years of decline, leading to a more modest average annual reduction of nearly seven percent. The average annual decline in rural ILEC business access lines over the past five years is nearly 11 percent, while CLEC business access lines declined by nearly 25 percent annually over the same period.

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



Source: Responses to local competition data request (2021-2025)

AT&T experienced business wireline losses of 8.7 percent in 2023 and 24.3 percent in 2024. Frontier gained 10.2 percent in business wirelines in 2023 and 0.6 percent in 2024. CenturyLink lost 23.2 percent of its business lines in 2023 and 13.5 percent in 2024. The rural ILECs reported line losses of 13.7 percent in 2023 and 18.6 percent in 2024, while the CLECs reported business wireline declines of 27.8 percent in 2023 and 32.2 percent in 2024. The rate of line loss accelerated for AT&T, the rural ILECs, and the CLECs while CenturyLink experienced a moderation in losses. Frontier experienced moderate growth in business lines in 2024.

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 587,000 by the end of 2024. So where did over 95 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 has 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 May 28, 2025.

[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 May 28, 2025.

[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 May 28, 2025.

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.

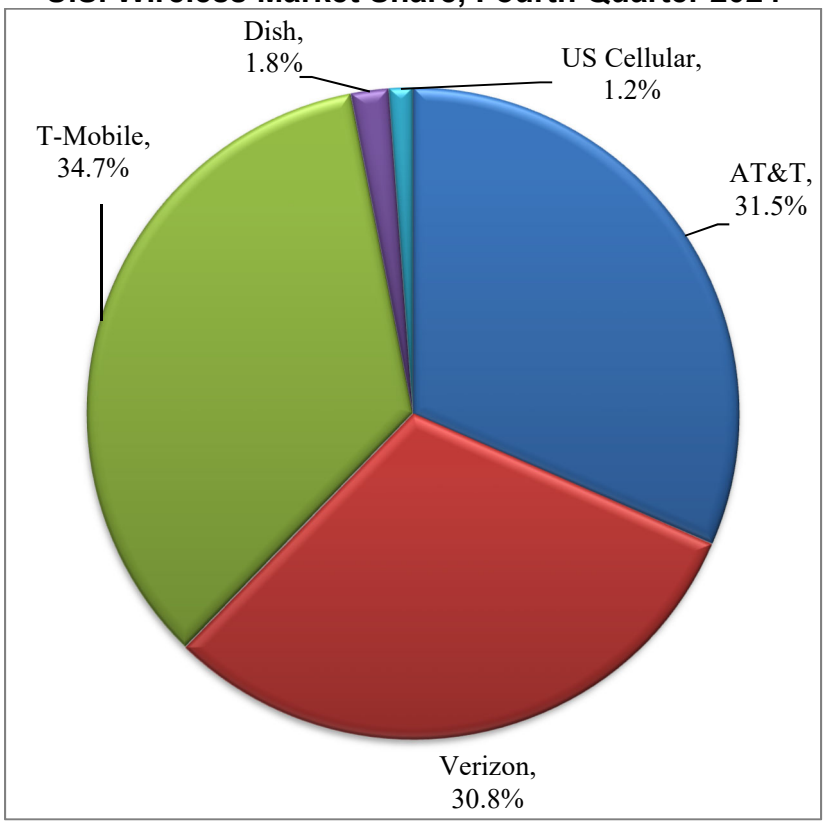
However, as technology became more affordable and easier to upgrade, consumers started to enter the wireless market en masse. Eventually this led to the integration of wireless technology and broadband internet connections. Past reports have consistently shown that adoption of wireless services in the 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 five wireless companies was split with T-Mobile leading at 34.7 percent (129.5 million subscribers), AT&T at 31.5 percent (approximately 117.9 million subscribers), followed by Verizon at 30.8 percent (115 million subscribers), Dish Network at 1.8 percent (approximately 6.9 million subscribers), and UScellular at 1.2 percent (approximately 4.4 million subscribers).[43,44,45,46,47] In May 2024, UScellular entered into an agreement to sell its wireless retail business to T-Mobile. That agreement is currently pending approval by the FCC.[48]

[43]T-Mobile U.S. Inc., "Form 10-K," January 31, 2025, https://d18rn0p25nwr6d.cloudfront.net/CIK-0001283699/5dd13c8f-dc40-4a7a-8277-132c79cbca4d.html, accessed May 28, 2025.
[44]AT&T Inc. "Form 10-K," February 12, 2025, https://otp.tools.investis.com/clients/us/atnt2/sec/sec-outline.aspx?FilingId=18180871&Cik=0000732717&PaperOnly=0&HasOriginal=1, accessed May 28, 2025.
[45]Verizon Communications, Inc., "Form 10-K," February 12, 2025, https://quotes.quotemedia.com/data/downloadFiling?webmasterId=104600&ref=318909556&type=HTML&formType=10-Q&formDescription=General+form+for+quarterly+reports+under+Section+13+or+15%28d%29&dateFiled=2025-04-25&cik=0000732712, accessed May 28, 2025.
[46]EchoStar Corporation, "Form 10-K," February 27, 2025, https://ir.echostar.com/sec-filings/sec-filing/10-k/0001558370-25-001663, accessed May 28, 2025.
[47]United States Cellular Corporation, "Form 10-K," February 21, 2025, https://investors.uscellular.com/financials/sec-filings/sec-filings-details/default.aspx?FilingId=18209227, accessed May 28, 2025.
[48] UScellular News, "UScellular and TDS Announce Sale of Wireless Operations and Select Spectrum Assets to T-Mobile for Approximately $4.4 Billion in Cash and Assumed Debt," May 28, 2024, https://investors.uscellular.com/news/news-details/2024/UScellular-and-TDS-Announce-Sale-of-Wireless-Operations-and-Select-Spectrum-Assets-to-T-Mobile-for-Approximately-4.4-Billion-in-Cash-and-Assumed-Debt/default.aspx, accessed May 28, 2025.

Figure 3-1
U.S. Wireless Market Share, Fourth Quarter 2024



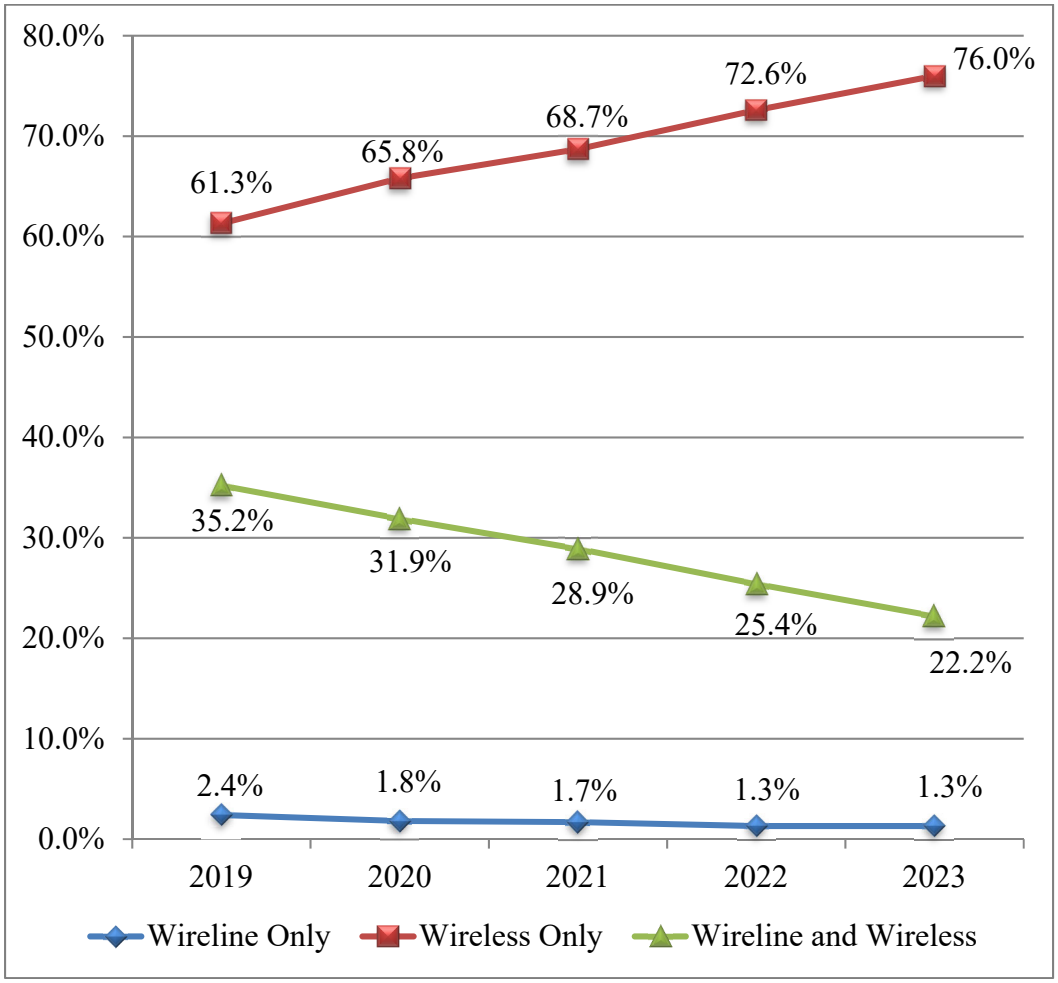
Source: Companies' 2025 10K Earnings Reports

2. Wireless Substitution

According to the most recent data from carriers' financial reports, the five largest wireless service providers in the United States accounted for nearly 374 million subscribers by year-end 2024.[49] Less than 25 percent of U.S. households subscribe to both wireline and wireless service and as shown in Figure 3-2, wireless-only households rose from 72.6 percent in December 2022 to 76.0 percent in 2023.[50] While information for 2024 was not yet available for inclusion in this report, based on previous years' data, this number likely increased in 2024.

[49]Companies' 2025 Annual filings with the SEC.
[50]Blumberg SJ, Luke JV. Wireless substitution: Early release of estimates from the National Health Interview Survey, July-December 2023. National Center for Health Statistics. June 2024. DOI: https://doi.org/10.15620/cdc/156660, accessed May 28, 2025.

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, from May 2025, estimated Florida's wireless subscriptions to be 25,769,000 as of June 30, 2024. This was an increase of approximately 2.89 percent from June 2023 (25,071,000).[51] In the same report, the FCC estimated Florida's population at 21,635,000, and with nearly 26 million wireless subscriptions in 2024, Florida continues to have more connected wireless devices than people.[52]

[51]FCC, "Voice Telephone Services Report," released May 16, 2025, https://www.fcc.gov/document/voice-telephone-services-status-june-30-2024, accessed May 28, 2025.
[52]FCC, "Voice Telephone Services Report," released November 8, 2024, https://www.fcc.gov/voice-telephone-services-report, accessed May 28, 2025.

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 satellite constellations when cellular service is not available. These services will be especially useful in areas where mobile coverage is not present, and will be used for text messaging initially. Services using D2D technology can also include calling, basic data, and IoT (Internet of Things) 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 SMS text messaging to their subscribers.

AT&T's April 2025 agreement with AST SpaceMobile set a goal to create satellite to cellphone service that works with standard devices. The company's goal is to expand service beyond public safety applications. In November 2024, AT&T agreed to purchase select spectrum licenses from UScellular, subject to UScellular's sale of its wireless operations.[53]

In March 2024, Dish Network met its remaining 5G commitment that at least 70 percent of the U.S. population has access to average download speeds equal to 35 Mbps. The company operates the largest commercial deployment of 5G voice covering over 220 million Americans and 5G broadband service covering over 268 million Americans.[54]

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).[55] 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.[56]

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

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[53] AT&T Inc. "Form 10-K," February 12, 2025, https://otp.tools.investis.com/clients/us/atnt2/sec/sec-outline.aspx?FilingId=18180871&Cik=0000732717&PaperOnly=0&HasOriginal=1, accessed May 28, 2025.

[54]EchoStar Corporation, "Form 10-K," February 27, 2025, https://ir.echostar.com/sec-filings/sec-filing/10-k/0001558370-25-001663, accessed May 28, 2025.

[55]47 C.F.R. § 9.3.

[56]47 U.S.C. § 153(36). An example of a non-interconnected VoIP network is a video game console service such as Xbox Live.

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.[57] However, the FCC's currently-published data only includes information through June 2024. FPSC estimates show slightly over 1.2 million residential VoIP subscribers in Florida as of June 2024, while FCC data shows nearly 2.8 million business VoIP subscribers as of June 2024.

U.S. VoIP data from the FCC showed an annual decline of 0.6 percent from June 2019 to June 2024.[58] The FCC also reported over 64.5 million U.S. Interconnected VoIP subscribers.[59] Table 3-1 shows U.S. VoIP subscribership by customer type as of June 30, 2024.

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

Total	Over-the-Top	All Other VoIP	Total
ILEC	20	5,903	5,923
Non-ILEC	25,320	33,280	58,600
Total	25,340	39,183	64,523
Residential			
ILEC	6	4,729	4,735
Non-ILEC	1,381	16,278	17,658
Total	1,387	21,006	22,393
Business			
ILEC	14	1,174	1,188
Non-ILEC	23,939	17,002	40,942
Total	23,953	18,177	42,130

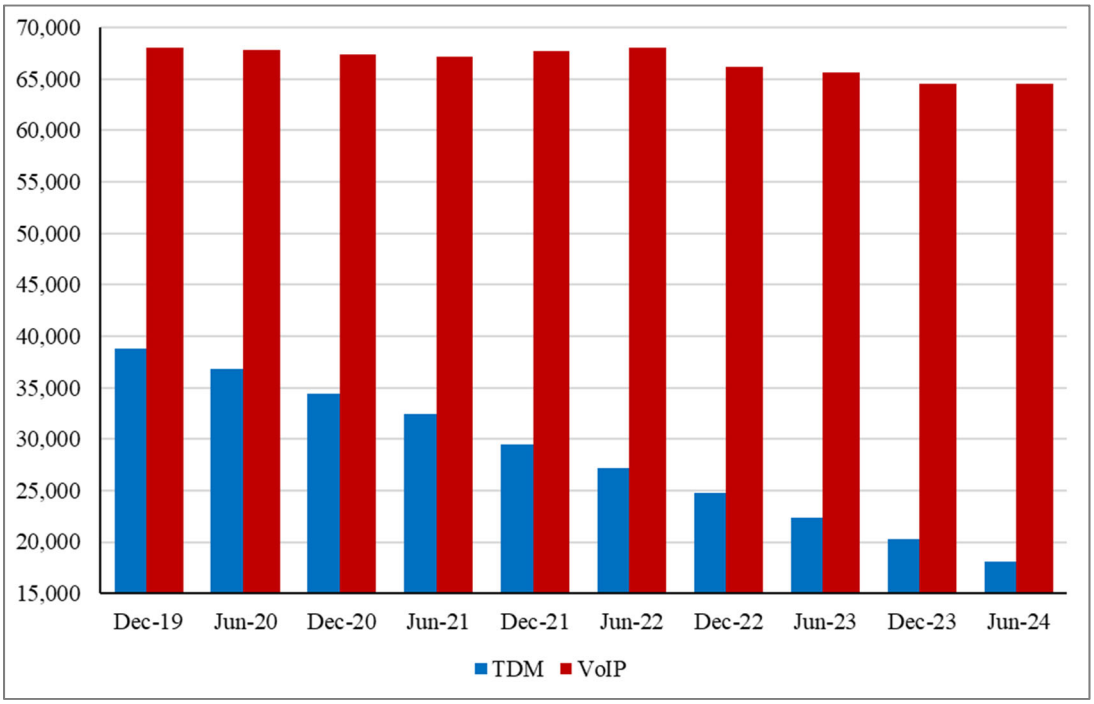
Source: FCC Voice Telephone Services Report, June 30, 2024 (Figure 3)

[57]FiTV represents several of Florida's largest cable-based communications providers.
[58]FCC, "Voice Telephone Services: Status as of June 30, 2024," released May 19, 2025, https://www.fcc.gov/voice-telephone-services-report, accessed May 28, 2025.
[59]Ibid, Figure 3.

1. National Market

VoIP subscriptions have remained steady, both nationally and in Florida, while traditional switched access lines have decreased. As shown in Figure 3-3, the FCC reported approximately 64.5 million VoIP subscriptions and nearly 18 million TDM switched access lines as of June 2024, resulting in approximately 82.6 million total voice telephone subscriptions.[60] Of those connections, 36.4 percent (30 million) were residential and 63.6 percent (52.5 million) were business.[61]

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



Source: FCC Voice Telephone Services Report, June 2024

a. Facilities-Based VoIP Providers

According to the FCC, non-ILEC companies accounted for nearly 17.7 million residential VoIP subscribers as of June 2024, compared to approximately 4.7 million residential ILEC VoIP subscribers. This represents a market share of nearly 79 percent for the non-ILECs in this market.[62] Comcast, the country's largest cable provider, did not report VoIP line numbers for 2023, but it stated that residential revenue declines in 2023 and 2024 were primarily driven by customer losses.[63] The second largest cable provider, Charter Communications, reported

[60]FCC, "Voice Telephone Services: Status as of June 30, 2024," released May 19, 2024, https://www.fcc.gov/voice-telephone-services-report, accessed May 28, 2025.
[61]Ibid.
[62]Ibid.
[63]SEC, Comcast Corporation Form 10-K, released January 31, 2025, https://www.cmcsa.com/static-files/f353e849-8ebe-449c-a6ae-9d769b06eaa9, accessed May 28, 2025.

approximately 5.6 million residential VoIP subscribers at year-end 2024, a 16.4 percent decrease from the previous year.[64] AT&T reported approximately 1.6 million residential VoIP subscribers at the end of 2024, which is nearly a 15.4 percent decrease from the previous year.[65]

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 over-the-top providers to provide lower cost of service than wireline and wireless competition. According to the FCC, there were over 25.3 million OTT VoIP subscribers in the U.S. as of June 30, 2024. This total included nearly 1.4 million residential subscribers and 23.9 million business subscribers nationwide. The FCC's figures showed a decrease of approximately 5.1 percent in residential subscribers, and an increase of 18.1 percent in business subscribers from June 2023 to June 2024.[66]

2. Florida Market

As previously stated, the FPSC does not have jurisdiction over VoIP services, which limits the agency's ability 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 448,000 residential VoIP subscribers for the four member providers in 2024.[67] For the Florida VoIP business market, the FCC reported non-ILECs in Florida served approximately 2.7 million business interconnected VoIP subscribers in June 2024, an increase of over 6.9 percent from June 2023.[68] In total, the FCC reported that Florida had nearly 4.3 million Interconnected VoIP subscriptions in June 2024.[69]

Figure 3-4 shows an estimated 1.2 million residential VoIP subscribers in Florida as of June 2024. This data indicates a decrease of roughly 284,000 residential VoIP subscriptions from June 2023. Over a four-year time frame, the Florida residential VoIP market has declined an average of 14 percent per year. As previously stated, the major VoIP carriers have expressed that increased competition from wireless companies has affected VoIP subscriptions.

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[64]Charter Communications, Inc., "Charter Investors: Results, SEC Filings & Tax Information," News Release, released January 27, 2025, https://ir.charter.com/static-files/adb32597-0631-4198-9c3f-7867cc1599c8, accessed May 28, 2025.

[65]AT&T Inc. "Form 10-K," February 23, 2024, https://otp.tools.investis.com/clients/us/atnt2/sec/sec-outline.aspx?FilingId=17303532&Cik=0000732717&PaperOnly=0&HasOriginal=1, accessed May 28, 2025.

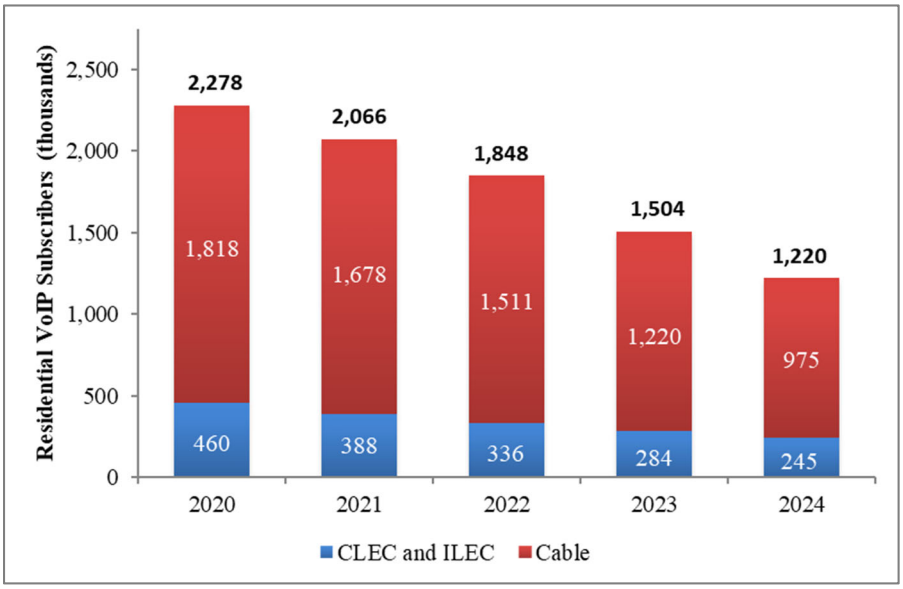
[66]FCC, "Voice Telephone Services: Status as of June 30, 2024," Table 1, released May 19, 2025, https://www.fcc.gov/voice-telephone-services-report, accessed May 28, 2025.

[67]Charter Communications is no longer a member of FiTV.

[68]FCC, "Voice Telephone Services Report, State-Level Subscriptions," Supplemental Table 1, Florida, released May 19, 2025, https://www.fcc.gov/voice-telephone-services-report, accessed May 28, 2025.

[69]Ibid.

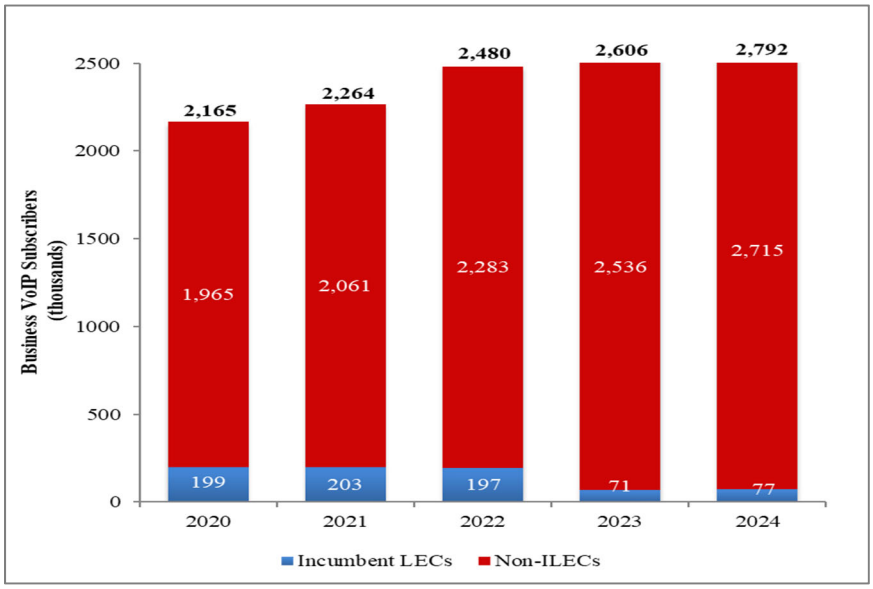
Figure 3-4
Florida Residential Interconnected VoIP Subscribers



Source: Responses to local competition data request (2020-2024)

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 had grown an average of 6.6 percent per year. As the residential VoIP market declines, the business VoIP market continues moderate growth.

Figure 3-5
Florida Business Interconnected VoIP Subscribers



Source: FCC Voice Telephone Services Report, June 2024, 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 May 27, 2025, 213 CLECs responded to the Local Competition Report data request. Several CLECs reported providing a number of services including: local phone service (53), VoIP (107), broadband Internet access (76), video services (13), and bundled services (69).[70]

The vast majority of CLECs reported no barriers to competition or elected not to respond. However, the Commission received nine 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.[71] 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 2024, 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 95 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

[70]Responses to local competition data request 2025 as of May 27, 2025.
[71]Responses to local competition data request 2025.

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

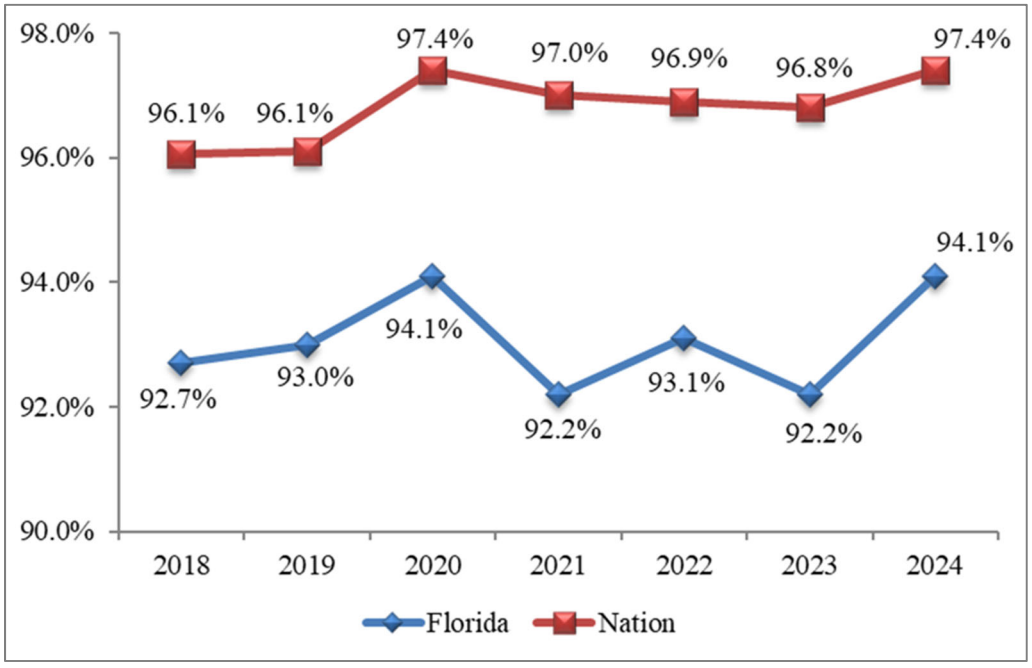
Conclusion: The traditional wireline market continues to decrease despite population growth. Increasing demand for service is being met by wireless subscription growth and VoIP, and the majority of consumers are choosing to obtain wireless and VoIP service from competitors. Given competitors' substantial 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. As shown in Figure 4-1, the average Florida household telephone subscription rate has averaged 93.1 percent over the last seven years.[72] This high telephone subscription rate is not a recent occurrence; the average household telephone subscription rate has been 93.2 percent over the past 40 years.[73]

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



Source: FCC staff interviews

[72]FCC staff, interview, February 21, 2025.
[73]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.[74] 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 2024.

[74]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 2024. 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).[75] In 2023, the Commission granted forbearance to CenturyLink from continuing with its Performance Measurement Plan.[76] 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 59 of its wire centers on August 4, 2024, as a result of Hurricane Debby; the declaration was lifted on August 13, 2024.[77] AT&T declared a similar force majeure event in 196 affected wire centers on August 16, 2024, as a result of a work stoppage; the declaration was lifted on October 22, 2024.[78] Additionally, AT&T declared a force majeure event in 195 affected wire centers on October 7, 2024, as a result of Hurricane Milton; the declaration was lifted on October 29, 2024.[79] AT&T paid $13,288 in remedies in 2024, representing a decrease of 72.6 percent from 2023.[80]

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 2024, Frontier maintained an average monthly compliance rate of 83.4 percent, yielding a 1.5 percent increase from 2023's average monthly compliance rate of 81.9 percent.

The Commission processed a number of other telecommunications-related items in 2024. The items processed include 12 service schedule and tariff filings, 15 interconnection agreements and

[75]FPSC Dockets: Nos. 20000121A-TP (AT&T), 20000121B-TP (CenturyLink), and 20000121C-TP (Frontier FL).
[76]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 May 28, 2025.
[77]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 May 28, 2025.
[78]FPSC Docket No. 20000121A-TP, Document Numbers 08528-2024 and 09646-2024, accessed May 28, 2025.
[79] FPSC Docket No. 20000121A-TP, Document Numbers 09409-2024 and 09721-2024, accessed May 28, 2025.
[80]Remedies are paid two months in arrears; amounts shown are for amounts incurred in 2023 and 2024.

amendments, 14 carrier certifications, 8 certificate cancellations, 7 general inquiries/informal complaints, and 3 name changes.

B. Lifeline

The Lifeline program 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.[81] 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.[82]

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, 2024, there were 212,243 subscribers enrolled in the Lifeline program in Florida which was a 29 percent decrease from the previous year. This significant decline was primarily among two wireless providers, who attributed the reduction to the phase-out of the FCC's Affordable Connectivity Program (ACP). During this period, some customers who had been receiving benefits from both the ACP and Lifeline opted to switch to non-Lifeline providers.

As noted in Chapter 1, the FPSC's authority to designate ETC's was expanded by the Legislature in 2024 to include Wireless carriers for the sole purpose of offering Lifeline service. Since that change, the FPSC has approved 16 new wireless ETCs. We anticipate that the entry of these additional providers will enhance competition in the Lifeline market by increasing consumer

[81]USAC, "National Verifier Application Portal," https://getinternet.gov/apply?id=nv_home&ln=RW5nbGlzaA%3D%3D, accessed May 28, 2025.
[82]USAC, "Companies Near Me Tool," https://data.usac.org/publicreports/CompaniesNearMe/Download/Report, accessed May 28, 2025.

choice, improving service offerings and ultimately resulting in increased participation. Overall, the Lifeline participation rate was 12.78 percent in 2024. Table 5-1 shows the Lifeline eligibility and participation rates in Florida for the last six years.[83]

Table 5-1
Florida Lifeline Eligibility and Participation Rate

Year	Lifeline Enrollment	Eligible Households	Participation Rate
Jun-19	604,693	1,540,682	39.25%
Jun-20	371,180	2,151,503	17.25%
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%

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.[84]

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.[85] 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. During the 2025 Session, the Florida Legislature enacted SB 344 to modernize TASA by allowing the distribution of more advanced equipment and setting certain limits on the surcharge. The Governor signed SB 344 into law on June 19, 2025.

[83]Ibid.

[84]The rate may not exceed $.25 per landline.

[85]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 May 28, 2025.

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. The FCC lists 36 completed telecommunications mergers and acquisitions nationally in 2024.[86] Recent transactions of interest to Florida are described below.

1. T-Mobile & Mint Mobile

On May 1, 2024, T-Mobile completed its acquisition of Mint Mobile, an internationally focused brand providing wireless services, in a $1.35 billion dollar deal consisting of 39 percent cash and 61 percent stock. T-Mobile and Mint Mobile operate in every state providing wireless telephone services and both companies will continue to operate autonomously in every state despite the merger. T-Mobile will keep Mint Mobile's $15 per month plan for both new and existing customers.[87]

2. Smartaira & Lux Speed

On June 12, 2024, Smartaira, a fiber internet provider focused in the multi dwelling unit (MDU) market in 26 states, acquired the assets of Lux Speed Inc., a provider of fiber internet services located in Fort Lauderdale, Florida. This acquisition seeks to strengthen the operations and general footprint of Smartaira in the southeast market. [88]

3. 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.

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.[89]

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

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[86]FCC, 2024 Completed Domestic Section 214 Transfer of Control Transactions, updated January 2, 2024, https://www.fcc.gov/2024-completed-domestic-section-214-transfer-control-transactions, accessed May 28, 2025.
[87]Telecompetitor, "T-Mobile Closes Mint Acquisitions", published May 2, 2024, https://www.telecompetitor.com/t-mobile-closes-mint-acquisition/, accessed May 28, 2025.
[88]Telecompetitor, "Multifamily Broadband Provider M&A: Smartaira Buys Lux Speed", published June 12, 2024, https://www.telecompetitor.com/multifamily-broadband-provider-ma-smartaira-buys-lux-speed/, accessed May 28, 2025.
[89]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 May 28, 2025.

programs, such as the Rural Digital Opportunity Fund and the Enhanced Alternative Connect America Cost Model, discussed in previous reports.[90,91,92]

The FCC's ACP provided a monthly discount for internet service for eligible households, as well as a one-time discount towards purchasing a laptop, desktop computer, or tablet.[93,94] ACP funding was exhausted in April 2024, ending the support to approximately 1.7 million Florida households enrolled through 169 providers.[95,96] The ACP program has yet to be renewed.

On August 29, 2024, the FCC announced it had adopted new rules for the 5G Fund, which aims to bring 5G mobile broadband service to rural areas. The new rules modify the definition of areas eligible for 5G Fund Phase I support and increase the overall budget for Phase I to up to $9 billion. The rules also require recipients to implement cybersecurity and supply chain risk management plans. For Phase I of the 5G Fund, the FCC will use a multi-round reverse auction to distribute up to $9 billion to bring voice and 5G mobile broadband service to rural areas of the country unlikely to otherwise see unsubsidized deployment of 5G-capable networks.[97]

On December 31, 2024, the FCC released its 2024 communications marketplace report. Among other findings, the report states that approximately 66 percent of households had at least two options for services meeting a 100/20 Mbps speed threshold, and approximately seven percent of households had at least two options for services meeting a 940/500 Mbps speed threshold in the fixed broadband market. The report provides a snapshot of prices for internet-only packages, and the data shows generally prices increase as broadband speeds increase regardless of the last-mile technology.[98]

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[90]FCC, Auction 904: Rural Digital Opportunity Fund, January 13, 2023, https://www.fcc.gov/auction/904, accessed May 28, 2025.
[91]USAC, "Enhanced ACAM," https://www.usac.org/high-cost/funds/enhanced-acam/, accessed May 28, 2025.
[92]Florida Public Service Commission Reports/Telecommunication Reports/Competition in Telecommunications Markets in Florida, https://www.psc.state.fl.us/reports, accessed May 28, 2025.
[93]FCC, "FCC Launches Affordable Connectivity Program," December 31, 2021, https://www.fcc.gov/document/fcc-launches-affordable-connectivity-program, accessed May 28, 2025.
[94]FCC, "FCC Adopts Rules To Implement Affordable Connectivity Program," January 14, 2022, https://www.fcc.gov/document/fcc-adopts-rules-implement-affordable-connectivity-program, accessed May 28, 2025.
[95]FCC, Affordable Connectivity Program Providers, March 4, 2024, https://www.fcc.gov/affordable-connectivity-program-providers, accessed May 28, 2025.
[96]USAC, ACP Enrollment and Claims Tracker, February 8, 2024, https://www.usac.org/about/affordable-connectivity-program/acp-enrollment-and-claims-tracker/, accessed May 28, 2025.
[97]FCC, "FCC to Reignite 5G Fund to Target Investments in Rural Communities," August 29, 2024, https://www.fcc.gov/document/fcc-reignite-5g-fund-target-investments-rural-communities, accessed May 28, 2025.
[98]FCC, "FCC Releases 2024 Communications Marketplace Report," December 31, 2024, https://www.fcc.gov/document/fcc-releases-2024-communications-marketplace-report, accessed May 28, 2025.

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.[99,100,101] On May 13, 2022, the NTIA announced the launch of the Internet for All initiative, which will help organize $45 billion in broadband support.[102] On November 29, 2022, the NTIA announced that Florida received an "Internet for All" grant that includes $5 million in Broadband Equity, Access, and Deployment (BEAD) Program planning.[103]

On June 26, 2023, the NTIA announced that it has allocated BEAD Program funding for grants for broadband planning, deployment, mapping, equity, and adoption activities to all 50 states, the District of Columbia, and five territories. Florida's allocation is nearly $1.17 billion.[104] The Office of Broadband at the Florida Department of Commerce manages state and federal broadband support programs in Florida, including the BEAD program.[105] On December 28, 2023, the Florida Department of Commerce announced that Florida's initial proposal to access its BEAD Program allocation has been submitted to the NTIA. The initial proposal includes:

- $971 million for broadband infrastructure to serve Florida's remaining unserved and underserved communities. This includes $200 million set aside for our federally recognized tribal partners, the Seminole Tribe of Florida and the Miccosukee Tribe of Indians of Florida.
- $110 million for workforce education and training programs that support broadband-related infrastructure and maintenance needs.

[99]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 May 28, 2025.
[100]NTIA, Connecting Minority Communities Pilot Program, December 2, 2021, https://broadbandusa.ntia.doc.gov/funding-programs/connecting-minority-communities-program, accessed April 25, 2025.
[101]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 May 28 2025.
[102]NTIA, "Biden-Harris Administration Launches $45 Billion "Internet for All" Initiative to Bring Affordable, Reliable High-Speed Internet to Everyone in America," May 13, 2022, https://www.ntia.doc.gov/press-release/2022/biden-harris-administration-launches-45-billion-internet-all-initiative-bring, accessed May 28, 2025.
[103]NTIA, "Biden-Harris Administration Awards More Than $7.4 Million to Florida in 'Internet for All' Planning Grants," November 29, 2022, https://www.ntia.doc.gov/press-release/2022/biden-harris-administration-awards-more-74-million-florida-internet-all-planning, accessed May 28, 2025.
[104]NTIA, "Biden-Harris Administration Announces State Allocations for $42.45 Billion High-Speed Internet Grant Program as Part of Investing in America Agenda," June 26, 2023, https://www.ntia.doc.gov/press-release/2023/biden-harris-administration-announces-state-allocations-4245-billion-high-speed, accessed May 28, 2025.
[105]Florida Department of Commerce, Office of Broadband, https://www.floridajobs.org/community-planning-and-development/broadband/office-of-broadband, accessed May 28, 2025.

- $30 million for grants to community-based organizations to provide individual Floridians with digital literacy and cybersecurity skills, helping Floridians to safely utilize and benefit from their increased access to broadband.[106]

The BEAD award process follows six stages. Florida has had its Five-Year Action Plan and Initial Proposals, Volumes 1 and 2 approved. The State Challenge Process, which clarifies the eligible entities and locations, is now closed. The final steps are the Subgrantee Selection Process and the Final Proposal.[107]

The Rural Utilities Service of the United States Department of Agriculture (USDA) maintains several programs for broadband deployment. The Consolidated Appropriations Act of 2023 includes $364 million for the ReConnect Program, $65 million for the Distance Learning, Telemedicine, and Broadband Program, $35 million for the Community Connect Grant Program, and $690 million for direct, Treasury-rate, telecommunications loan authorizations.[108] The Broadband Technical Assistance (BTA) Program is designed to help local organizations, cooperatives and Tribes expand affordable, high-speed internet projects in rural communities. On June 21, 2024, USDA also announced the availability of $25 million in additional BTA support.[109] On February 21, 2024, USDA announced that it is providing $42 million in ReConnect Program support for broadband deployment in rural, remote, and underserved communities in Florida, including:

- $17.8 million to the Suwannee Valley Electric Cooperative Inc. for extending broadband access to 19,000 people, 480 businesses, 650 farms and 42 educational facilities in Columbia, Hamilton and Suwannee counties.
- $24.2 million to IBT Group USA LLC for extending broadband access to more than 8,600 people, 230 businesses, 11 farms and 34 educational facilities in DeSoto County.[110]

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

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[106]FloridaCommerce, "FloridaCommerce Submits State of Florida's BEAD Initial Proposal to the National Telecommunications and Information Administration," December 28, 2023, https://www.floridajobs.org/news-center/DEO-Press/2023/12/28/floridacommerce-submits-state-of-florida-s-bead-initial-proposal-to-the-national-telecommunications-and-information-administration, accessed May 28, 2025.

[107]BroadbandUSA, "Public Resources related to BEAD Plans and Milestones," https://broadbandusa.ntia.gov/public-resources-related-bead-plans-and-milestones, accessed May 28, 2025.

[108]Congress.gov, "H.R.2617 - Consolidated Appropriations Act, 2023," https://www.congress.gov/bill/117th-congress/house-bill/2617, accessed May 28, 2025.

[109]Oklahoma Farm Report, "Biden-Harris Administration Announces Availability of $25 Million to Help Expand High-Speed Internet Access in Rural Areas," June 21, 2024, https://www.oklahomafarmreport.com/okfr/2024/06/21/biden-harris-administration-announces-availability-of-25-million-to-help-expand-high-speed-internet-access-in-rural-areas/, accessed May 28, 2025.

[110]USDA, "Biden-Harris Administration Announces Over $770 Million for Rural Infrastructure Projects During Investing in America Tour," February 21, 2024, https://www.usda.gov/about-usda/news/press-releases/2024/02/21/biden-harris-administration-announces-over-770-million-rural-infrastructure-projects-during, accessed May 28, 2025.

broadband infrastructure.[111,112] In Florida, funds from these programs are administered by the Florida Department of Commerce. On February 2, 2024, Governor DeSantis awarded nearly $223 million to expand broadband internet access to Floridians, including $135 million in state funding appropriated from the U.S. Treasury's State and Local Fiscal Recovery Funds through the Broadband Opportunity Program (BOP) and $86 million in the U.S. Treasury's Capital Projects Fund through the Multipurpose Community Facilities Program. The BOP awards will support 54 projects in 33 counties for broadband expansion to over 27,000 unserved residential, educational, agricultural, business and community locations, while Multipurpose Facility Program awards will support 29 projects including health clinics, schools and workforce development internet infrastructure programs across 18 counties.[113] On August 14, 2024, the Florida Department of Commerce awarded 15 Florida local education, workforce and community development partners more than $11 million through ConnectedFlorida's Digital Connectivity Technology Program, which is supported by funds from the U.S. Department of the Treasury's Capital Projects Fund. This support will help communities access broadband internet and assist with digital literacy, education, training, mentorship, and employment opportunities.[114]

The U.S. Department of Housing and Urban Development (HUD) also promotes broadband through its ConnectHomeUSA initiative that helps bring training and technical assistance to help communities access affordable internet access, affordable devices, and digital skills training. On July 11, 2024, HUD announced 97 communities that have been selected to participate in the ConnectHomeUSA initiative. Of the total number of communities accepted, 59 are joining the Tier 1 cohort, which consists of communities that are just beginning to address the digital divide. The program has also accepted 38 communities in the Tier 2 cohort, reserved for returning ConnectHomeUSA communities that have demonstrated a commitment to deepening their work. Florida designated communities include five Tier 1 participants and one Tier 2 participant.[115]

The NTIA maintains a Federal Funding site, which serves as a comprehensive "one-stop shop" of resources for potential applicants seeking federal broadband funding. The site includes broadband funding opportunities and information on more than 80 federal programs across 14 federal agencies.[116]

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[111]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 May 28, 2025.

[112]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 May 28, 2025.

[113]FloridaCommerce, "ICYMI: Governor Ron DeSantis Delivers $223 Million to Expand Rural Broadband Access," February 2, 2024, https://www.floridajobs.org/news-center/DEO-Press/2024/02/02/icymi-governor-ron-desantis-delivers-$223-million-to-expand-rural-broadband-access, accessed May 28, 2025.

[114]FloridaCommerce, "FloridaCommerce Connects 15 Local Education and Workforce Development Partners with $11 Million in Digital Connectivity Support," August 14, 2024, https://floridajobs.org/news-center/DEO-Press/2024/08/14/floridacommerce-connects-15-local-education-and-workforce-development-partners-with--11-million-in-digital-connectivity-support, accessed May 28, 2025.

[115]HUD, "HUD Accepts New Communities to Participate in the ConnectHomeUSA Initiative and Bridge the Digital Divide for HUD-Assisted Families," July 11, 2024, https://archives.hud.gov/news/2024/pr24-178.cfm, accessed May 28, 2025.

[116]BroadbandUSA, NTIA Launches Updated Federal Broadband Funding Guide, https://broadbandusa. ntia.doc.gov/news/latest-news/ntia-launches-updated-federal-broadband-funding-guide-0, accessed May 28, 2025.

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.

In general, Florida consumers pay more into the USF than what is returned to eligible service providers in Florida.[117] For 2023, 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 2023. Table 6-1 shows Florida's estimated contribution and receipts for 2023 and provides a comparison of net contributions for 2021 and 2022. The total estimated consumer contribution for 2023 includes approximately $21 million related to USAC's administrative expense.

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

	2021	2022	2023		
	Estimated Net	Estimated Net	Service Providers Payments	Estimated Contributions	Estimated Net
High-Cost	(250,799)	(215,836)	27,593	251,977	(224,384)
Low Income	(12,309)	(11,123)	44,428	55,354	(10,926)
Schools & Libraries	(40,654)	(36,769)	140,882	142,710	(1,828)
Rural Health Care	(24,346)	(23,725)	9,179	37,614	(28,435)
Admin. Expense	(14,276)	(19,127)		21,227	(21,227)
Total	(342,384)	(306,580)	222,082	508,882	(286,800)

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

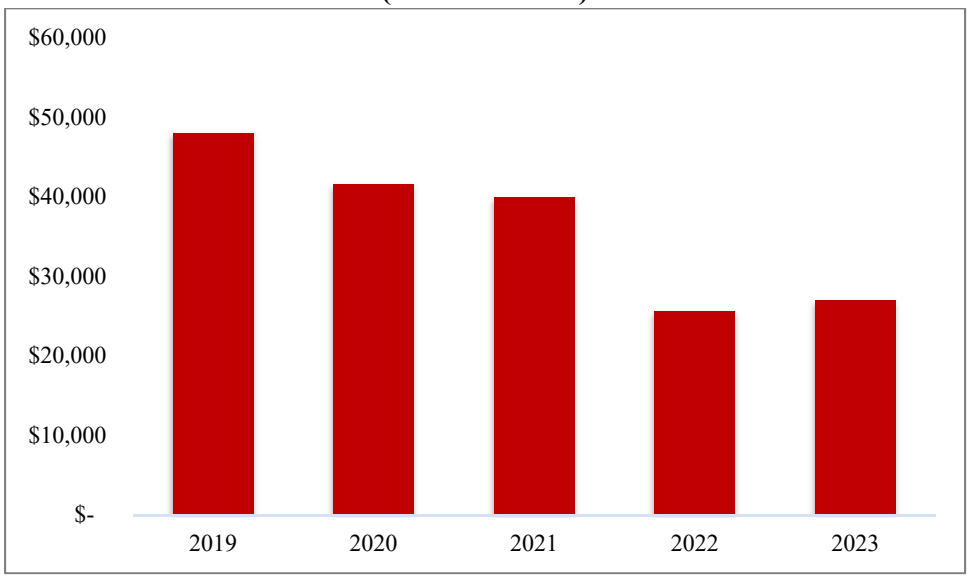
1. High Cost

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.[118] Figure 6-1 identifies the amount of high cost support eligible carriers have claimed in Florida. In 2024, the

[117]FCC, Universal Service Monitoring Report-2024, released January 15, 2025, https://docs.fcc.gov/public/attachments/DOC-408848A1.pdf, accessed May 28, 2025.
[118]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 May 28, 2025.

FCC has also moved to expand support to promote 5G wireless deployment in rural areas.[119] While the final rules to distribute support for 5G networks are still being developed, the FCC has established a budget of $9 billion for the program.

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



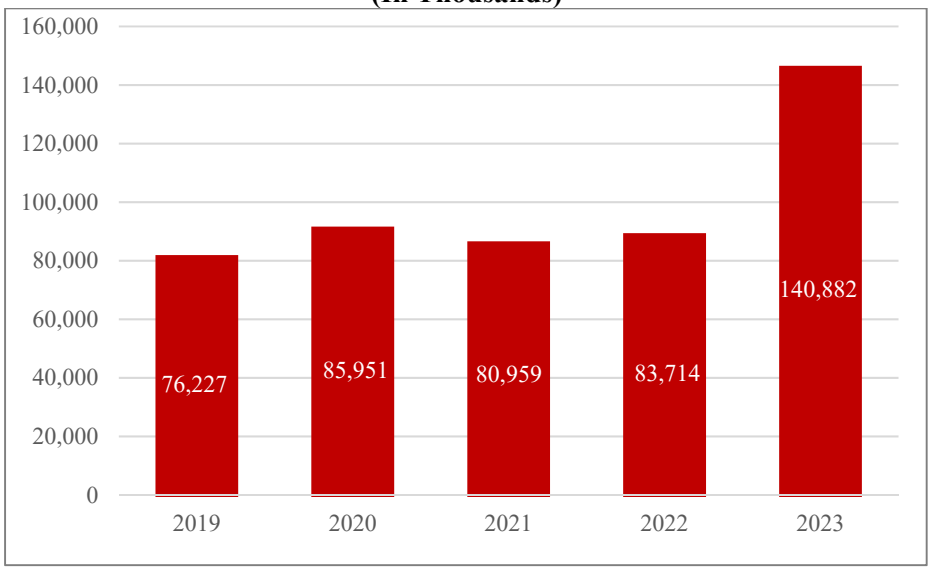
Source: FCC Universal Service Monitoring Report, various years, Table 1.9

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.). In July 2024, the FCC expanded the E-Rate program to enable eligible schools and libraries to implement Wi-Fi hotspot lending programs to loan hotspots and services that can be used outside of school for students, faculty, and library patrons in need. The E-Rate program has a funding cap that is annually adjusted for inflation. For 2025, the adjustment is a 2.4 percent increase, establishing a new cap of $5.05 billion.[120] Figure 6-2 illustrates a comparison of the amounts disbursed in Florida for funding years 2019-2023.

[119]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 May 28, 2025.
[120]FCC, DA 25-199, Public Notice, released March 7, 2025, https://docs.fcc.gov/public/attachments/DA-25-199A1.pdf, accessed May 28, 2025.

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.[121] Broadband services that include a voice component will continue to be eligible to receive Lifeline support after the final voice-only phase-out date of December 1, 2025.[122] As discussed in Chapter V above, 212,243 Floridians participated in the Lifeline program as of June 2024.

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 2025 was established by the FCC at $723.89 million.[123] This represents a 2.4 percent increase from the prior year's cap to adjust for inflation. Funding is distributed through three programs: the Telecommunications Program, the Healthcare Connect Fund Program, and the Connected Care Pilot Program.

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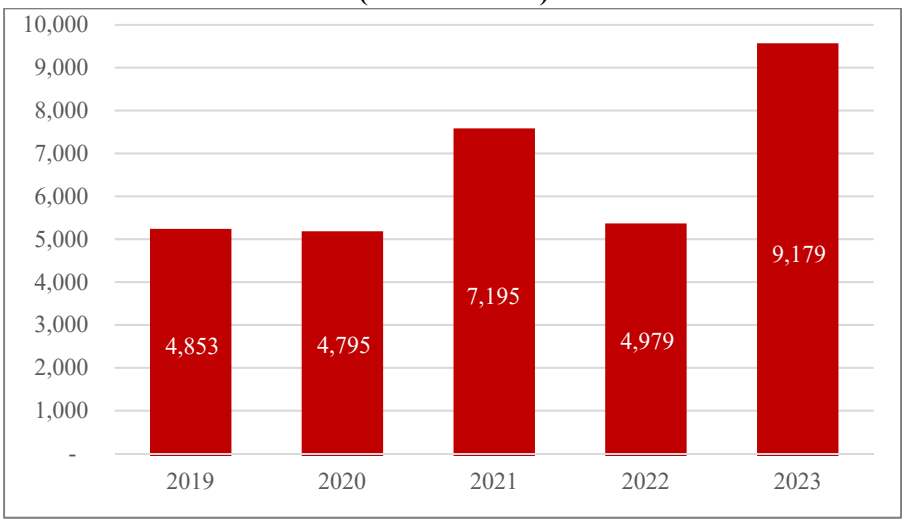
[121]FCC, FCC 16-38, WC Docket No. 11-42, Third Report and Order, Further Report and Order, and Order on Reconsideration, released April 27, 2016, https://docs.fcc.gov/public/attachments/FCC-16-38A1.pdf, accessed May 28, 2025.

[122]FCC, Order, WC Docket No. 11-42, DA 24-642, released on July 3, 2024, https://docs.fcc.gov/public/attachments/da-24-642A1.pdf, accessed on May 28, 2025.

[123]FCC, DA 25-199, Public Notice, released March 7, 2025, https://docs.fcc.gov/public/attachments/DA-25-199A1.pdf, accessed May 28, 2025.

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.[124] The Connected Care Pilot Program provides funding for selected projects to cover 85 percent of the broadband connectivity, equipment, and information services to provide connected care services to patient populations. [125] Two approved applications in Florida that benefit from this pilot program were Banyan Community Health Center, Inc. (approximately $911,833), and the University of Florida – Department of Pediatrics (approximately $612,000).[126] Figure 6-3 illustrates a comparison of the amounts disbursed in Florida for funding years 2019-2023.

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, including hurricanes, in the use of its telecommunications networks. Three hurricanes hit Florida in 2024.

On August 5, 2024, Hurricane Debby made landfall near Steinhatchee, Florida. Along with other infrastructure, the telecommunications network sustained significant damage. The initial FCC communications status report included 44 Florida counties. At the peak level of damage, 10.5 percent of cell sites in the five most affected counties (Baker, Dixie, Jefferson, Taylor, and Wakulla) were rendered nonfunctional, while the peak of cable and wireline service outages

[124]FCC, "Universal Service Monitoring Report - 2024," Issued on January 15, 2025, https://docs.fcc.gov/public/attachments/DOC-408848A1.pdf, p. 61, accessed May 28, 2025.
[125]FCC, "CCPP Selection List," posted March 16, 2022, https://www.fcc.gov/sites/default/files/ccpp-selection-list_03.16.2022.pdf, accessed May 28, 2025
[126]Ibid.

reached nearly 83,000 subscribers. Other impacted communications infrastructure included two FM radio stations and two television stations.[127]

On September 26, 2024, Hurricane Helene made landfall near Perry, Florida. Along with other infrastructure, the telecommunications network sustained significant damage. The initial FCC communications status report included 62 Florida counties. At the peak level of damage, 38.5 percent of cell sites in the five most affected counties (Baker, Hamilton, Jefferson, Taylor, and Madison) were rendered nonfunctional, while the peak of cable and wireline service outages reached nearly 271,000 subscribers. Other impacted communications infrastructure included three FM radio stations, one AM radio station, and four Public Safety Answering Points (PSAP).[128]

On October 9, 2024, Hurricane Milton made landfall near Siesta Key, Florida. Along with other infrastructure, the telecommunications network sustained significant damage. The initial FCC communications status report included 52 Florida counties. At the peak level of damage, 40.8 percent of cell sites in the five most affected counties (Hardee, Highlands, Manatee, Polk, and Sarasota) were rendered nonfunctional, while the peak of cable and wireline service outages reached over 1,273,000 subscribers. Other impacted communications infrastructure included 19 FM radio stations, five AM radio stations, three television stations, and one PSAP.[129]

In preparation and response, the FCC took several steps to promote public safety and connectivity. These steps included updating status and restoration efforts with status reports and granting partial and full waivers of its number aging rule, which requires providers to wait 45 days before reassigning disconnected telephone numbers, as well as some USF and broadband programs rules. The FCC also granted conditional spectrum use waivers to several parties.[130,131,132] In addition to service restoration efforts, providers responded with several steps including: opening up free Wi-Fi hotspots, waiving overage and late charges, deploying additional satellites, and allowing unlimited talk, text, and data. Besides hurricane response, the FCC took several actions to improve the efficacy and efficiency of emergency communications. FCC actions included orders and proposals related to 911 systems and 988 call routing, 911 functionality, emergency alerts, and supplemental coverage from space.

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

[127]FCC, Hurricane Debby: Communications Status Reports, released August 5-7, 2024, https://www.fcc.gov/debby, accessed May 28, 2025.
[128]FCC, Hurricane Helene: Communications Status Reports, released September 26 - October 3, 2024, https://www.fcc.gov/helene, accessed May 28, 2025.
[129]FCC, Hurricane Milton: Communications Status Reports, released October 10-14, 2024, https://www.fcc.gov/milton, accessed May 28, 2025.
[130]FCC, Hurricane Debby: Orders, released August 6, https://www.fcc.gov/debby, accessed May 28, 2025.
[131]FCC, Hurricane Helene: Orders, September 25-October 1, 2024, https://www.fcc.gov/helene, accessed May 28, 2025.
[132]FCC, Hurricane Milton: Orders, October 8-October 11, 2024, https://www.fcc.gov/milton, accessed May 28, 2025.

rules to help ensure that emerging NG911 networks are reliable and interoperable.[133,134] The 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.[135,136]

In addition to overseeing improvements to emergency calling, the FCC established 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.[137, 138,139] Other actions include releasing a report on the October 4, 2023 nationwide test of the Emergency Alert System and Wireless Emergency Alerts. The report stated that 96.3 percent of the 803 test participants in Florida, including radio, television, cable, IPTV providers, and wireline video systems, successfully received the test alert, and 92.4 percent of participants successfully retransmitted the test alert. Florida test participants were thirty first of 56 states and territories in success of reception, and they ranked thirty sixth in transmittal success.[140]

The FCC also continued development of the supplemental coverage from space framework by granting AT&T and AST SpaceMobile permission to test D2D connectivity with its Low Earth Orbit satellites on the First Responder Network Authority, the interoperable public safety broadband network, using spectrum dedicated to public safety and first responders.[141]

[133]FCC, "FCC Takes Action to Expedite the Transition to Next Generation 911", July 19, 2024, https://www.fcc.gov/document/fcc-proposes-action-improve-next-generation-911, accessed May 28, 2025.
[134]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 May 28, 2025.
[135]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 May 28, 2025.
[136]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 May 28, 2025.
[137]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 May 28, 2025.
[138]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 May 28, 2025.
[139]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 May 28, 2025.
[140]FCC, "FCC Releases Report on 2023 Nationwide Alerting Test", June 27, 2024, https://www.fcc.gov/document/fcc-releases-report-2023-nationwide-alerting-test, accessed May 28, 2025.
[141]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 May 28, 2025.

Appendix - List of Certificated ILECs and CLECs as of 12/31/2024

** Indicates the company did not respond to the Commission's data request as of May 27, 2025

Accelecom GA LLC
Access One, Inc.
ACN Communication Services, LLC
Airespring, Inc.
Airus, Inc.
Altaworx LLC
American Dark Fiber, LLC
American Telephone Company LLC
ANEW Broadband, Inc.
ANPI Business, LLC
AT&T Corp.
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.
BeCruising Telecom LLC
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
Cablevision Lightpath LLC
Campus Communications Group, Inc.
CBN-Volusia, Inc. **
CBTS Technology Solutions LLC
CenturyLink
Cincinnati Bell Extended Territories LLC
Cirion Technologies Solutions, LLC
City of Bartow
City of Lakeland

City of Ocala d/b/a Ocala Fiber Network
Clear Rate Communications, LLC
Cloud Computing Concepts
CNS Networks LLC
Cogeco US Enterprise, LLC d/b/a Breezeline
Cogent Communications of Florida
Comcast Business Communications, LLC **
Comcast Digital Phone
COMEXCEL TECHNOLOGIES CORPORATION **
Communications Authority, Inc
Comtech21, LLC **
Consolidated Communications Enterprise Services, Inc.
Consolidated Communications/GTC
Conterra Ultra Broadband, LLC
Convergia, Inc.
Cox Florida Telcom, L.P. **
Crexendo Business Solutions, Inc.
Crosstel Tandem, 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 Systems, LLC
ExteNet Telecom Solutions, Inc.
Ezee Fiber **
Faster.IO, Inc. **

FiberLight, LLC
First Choice Technology, Inc.
First Communications, LLC
FL Network Transport, LLC
Florida Phone Systems, Inc. **
Flying Bull Internet, 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
Gainesville Regional Utilities dba GRU
Gigapower, LLC (f/k/a Infrastructure Endeavors, LLC)
Global Capacity
Global Crossing Local Services, Inc.
Granite Telecommunications, LLC
Great America Networks, Inc.
GRUCom
Harbor Communications, LLC
Hargray of Florida, LLC
Hayes E-Government Resources, Inc.
HD Carrier, LLC
HFA of Florida 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.
ITS Telecommunications Systems, Inc.
JEA
Keys Energy Services
Level 3 Communications, LLC

Level 3 Telecom of Florida, LP
Light Source Communications, LLC
Lightspeed CLEC, Inc.
Lingo Telecom, LLC
LIVEWIRE TELECOM LLC
Luxury Telecommunications LLC d/b/a Luxury Telecommunications
Maryland TeleCommunication Systems, Inc.
MassComm, LLC
MasTec Network Solutions, LLC **
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
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.
Opextel LLC d/b/a Alodiga **
PacOptic Networks, LLC **
PaeTec Communications, 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
RCLEC, Inc.
Reddot Networks Inc.

RingSquared Telecom LLC
SanTel Communications
SBA DAS & Small Cells, LLC
SH Services LLC **
Simwood Inc.
SKYNET360, LLC **
Smart Choice Communications, LLC
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.
T3 Communications, Inc. **
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
Virtu Broadband, LLC **
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

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.