



Broadband in America Report: Fiber Focus

Fiber Technology Deep Dive

September 2026 Edition

By: CostQuest Associates®

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SECTION 1: INTRODUCTION

Broadband in America Report: Fiber Focus

Broadband in the United States is changing faster than ever and understanding these market shifts are essential for strategic decision-making. [The Broadband in America Report](#) series delivers nationwide insights into broadband coverage, cost, competition and funding across all network technologies, published semiannually with data updates each spring and fall. Complementary regular reports offer deeper analysis of emerging technologies and trends shaping the telecommunications ecosystem.

This month's edition explores the latest trends in fiber broadband coverage across the United States, focusing on fiber coverage, economics, competition and its evolving role within the broader broadband market landscape.

The data primarily referenced in this report are:

- [FCC's Broadband Data Collection \(BDC\) Service Availability Data](#)
- [CostQuest's® Location Fabric of Broadband Serviceable Locations \(BSLs\)](#)
- [CostQuest's Network Cost Model data](#)

BDC Version	Fabric Data Vintage	FCC Coverage Available
Version 1	June 30, 2022	November 23, 2022
Version 2	December 31, 2022	October 10, 2023
Version 3	June 30, 2023	November 14, 2023
Version 4	December 31, 2023	May 21, 2024
Version 5	June 30, 2024	November 11, 2024
Version 6	December 31, 2024	May 20, 2025
Version 7	June 30, 2025	December 2, 2025
Version 8	December 31, 2025	May 19, 2026

All maps and data points reference fiber-to-the-premises (FTTP) technologies. Service definitions follow the FCC standard, which requires download speeds of at least 100 Mbps and upload speeds of at least 20 Mbps for a BSL to be considered served.

SECTION 2: CURRENT MARKET LANDSCAPE

Fiber broadband's continued rise

Fiber broadband is serving 58.7% more U.S. homes and businesses than it did four years ago. Between Version 1 and Version 8 of the Fabric, more than 26.6 million BSLs gained access to fiber broadband service, and in just the past six months, that number has grown more than 6%.

As of FCC BDC Version 8, **1,593 active fiber providers** are operating nationwide, including **44 new provider IDs** and **42 providers** that **doubled their existing footprint**. Fiber now **covers 62% of all BSLs**, with nearly two-thirds of BSLs considered served by the FCC's service definition.

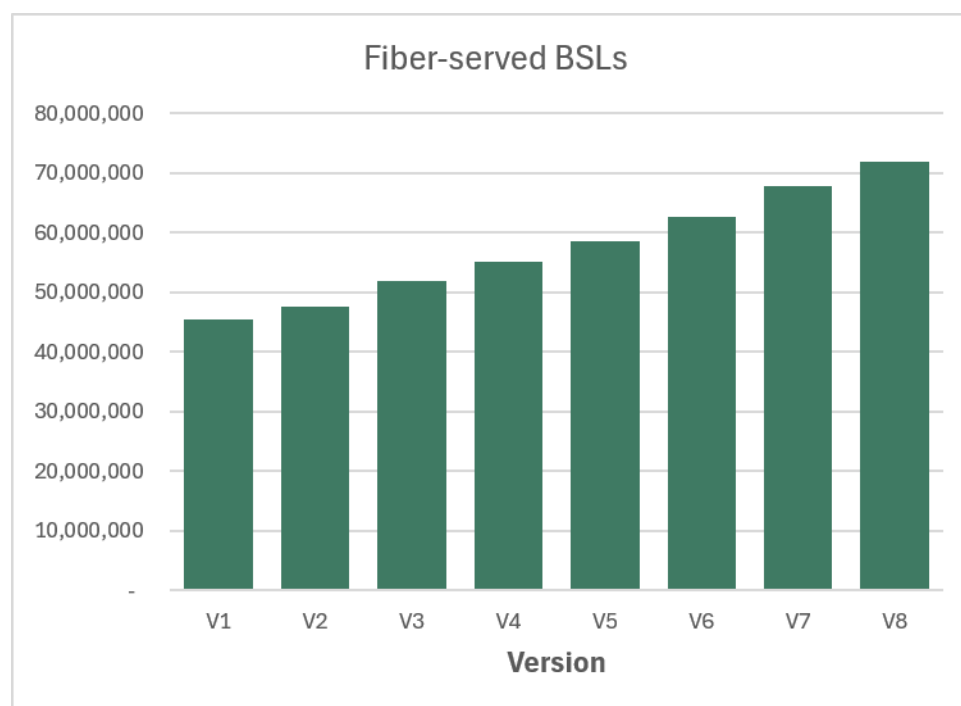


Figure: This chart tracks the number of fiber broadband-served BSLs nationwide across FCC BDC Versions 1 through 8, showing steady growth from roughly 45 million BSLs in Version 1 to more than 72 million in Version 8 — a 58.7% increase overall, including a 6.1% rise in just the past six months.

Beyond simple BSL counts, fiber broadband's role within the broader technology mix tells its own story. The chart below breaks down served BSLs by technology type, showing how fiber broadband's share compares with cable, fixed wireless and telco-only service between FCC BDC Version 7 and Version 8.



Figure: This chart compares served BSLs by technology category between FCC BDC Version 7 and Version 8. BSLs served by multiple technologies, including fiber broadband, make up the largest and fastest-growing share, rising from roughly 61 million to roughly 65 million, while fiber-only BSLs, cable-only BSLs, fixed wireless and telco-only BSLs each account for smaller, comparatively stable shares.

That growth is not evenly distributed: it is concentrated where **dense population corridors meet active provider investment**, with pockets of new expansion emerging even in traditionally underserved rural stretches. The map below illustrates where this fiber broadband footprint stands as of the most recent FCC BDC release, aggregated to H3 8 cells across the country. Areas shaded green represent BSLs already served by fiber broadband, while orange highlights BSLs newly served by fiber broadband in Version 8 of the BDC.

Purple-highlighted areas identify newly served BSLs that also received federal subsidy, offering an early visual signal of **where public funding and private fiber broadband deployment are converging**.

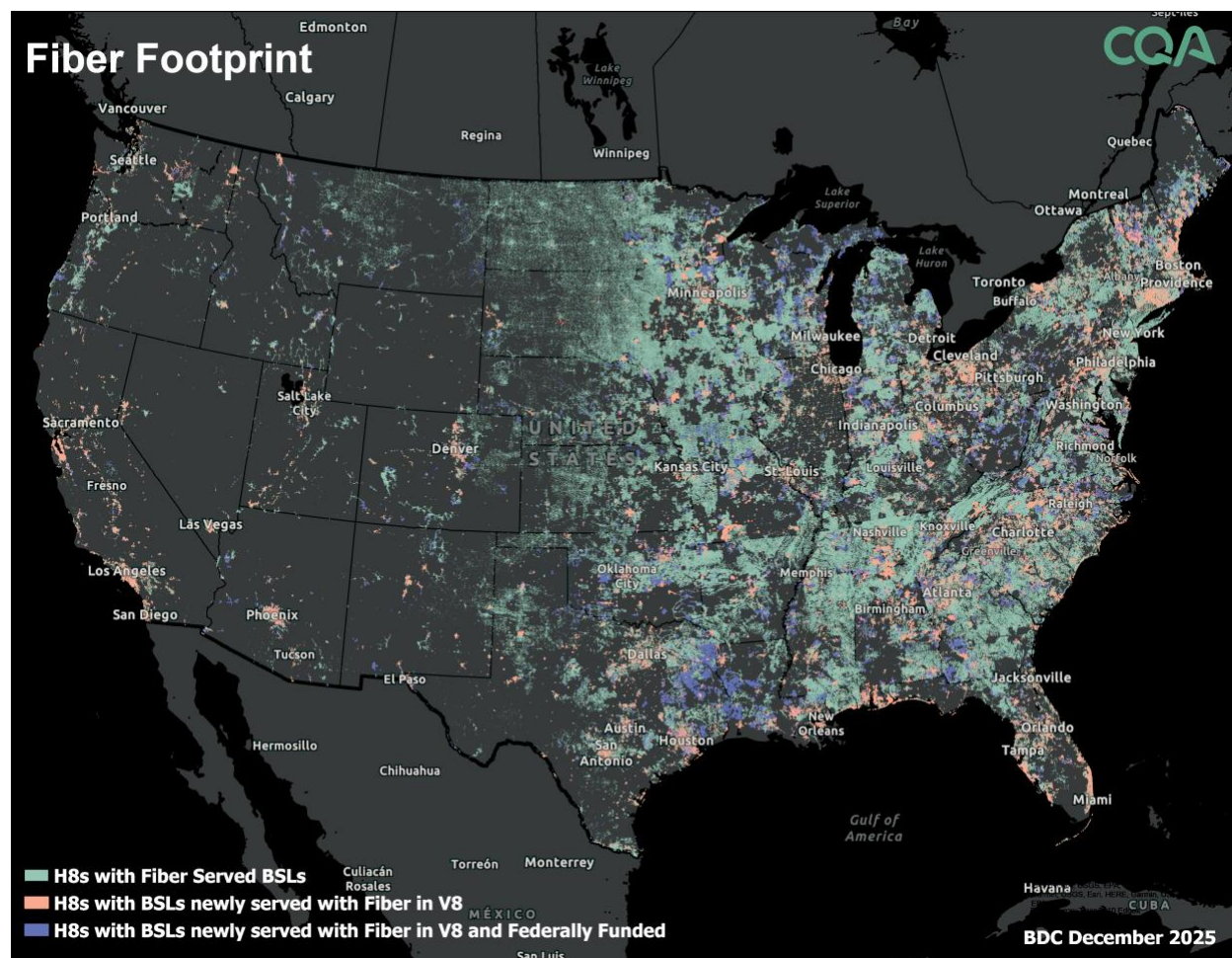


Figure: Fiber Footprint — H8 cells with fiber broadband-served BSLs, newly served BSLs in BDC Version 8 and newly served BSLs receiving federal funding, based on BDC December 2025 data.

Federal funding and fiber deployment

Federal funding programs are a meaningful accelerant of fiber deployment, particularly in rural America. With all states' BEAD programs now approved, the breakdown below illustrates the technologies initially awarded. However, the latest broadband funding map (BFM) does not yet reflect California and Illinois – the figures below exclude those states. Of the BSLs currently represented, 64% of BSLs are slated to receive fiber service, while satellite makes up about 22% and wireless and cable comprise the remaining 14% of BEAD BSLs.

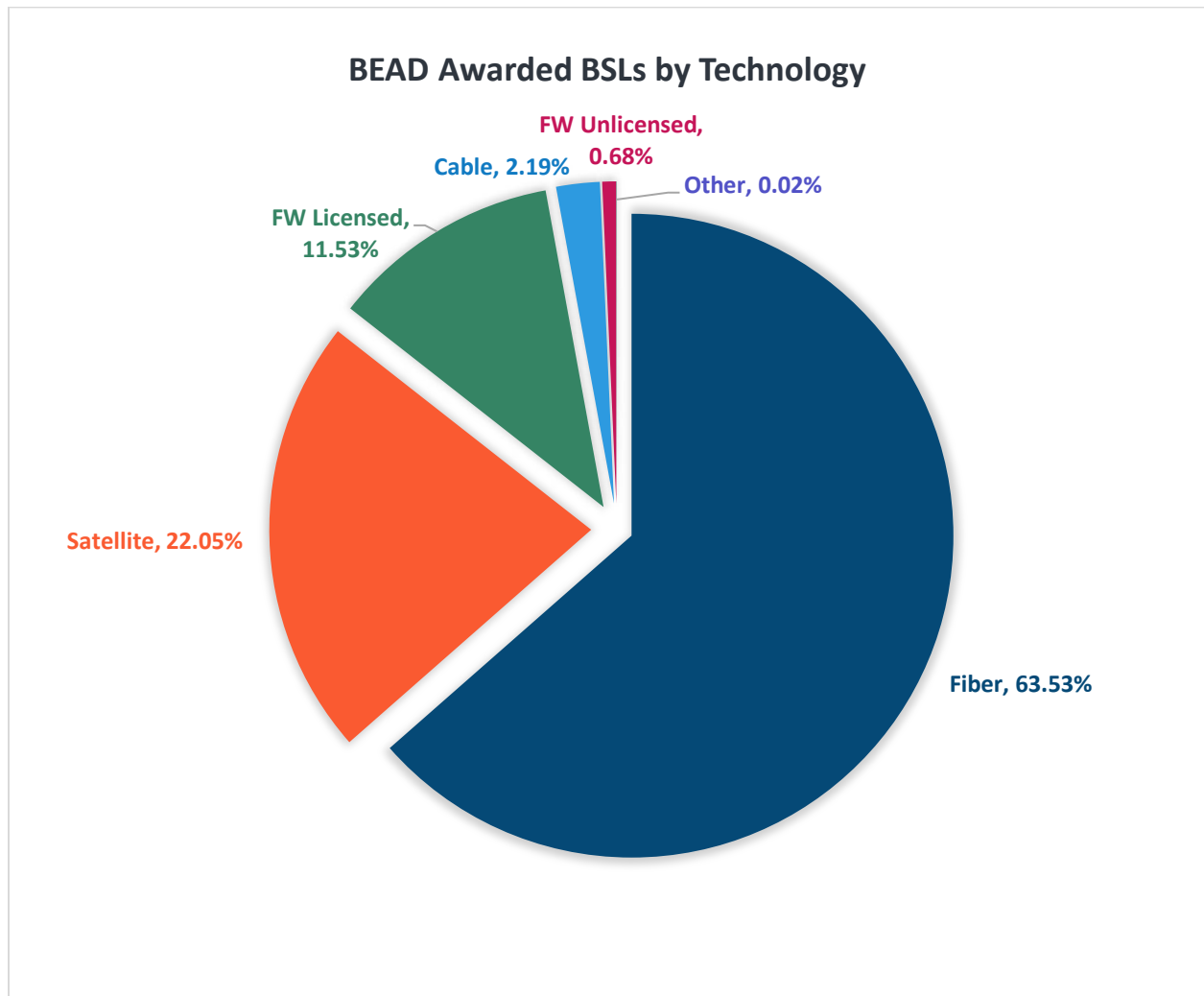


Figure: This chart shows the share of BEAD-awarded BSLs by technology, with fiber broadband capturing the majority at 63.53%, followed by satellite at 22.05%, licensed fixed wireless at 11.53%, cable at 2.19%, unlicensed fixed wireless at 0.68% and other technologies at 0.02%. Source: BFM and BDC, September 5, 2026. This data does not reflect CA or IL as they have not yet made it into the BFM data.

EACAM, RDOF and other programs have been in place for several years and have successfully furthered fiber deployment:

- **EACAM (Enhanced ACAM):** The largest federally funded fiber program by covered locations, updated in 2025, supports 2.4 million locations on fiber.
- **RDOF (Rural Digital Opportunity Fund):** Covering locations from Auction 904 (2020), supports 1.9 million locations on fiber.
- **CAFII:** Covering locations from Auction 903 (2018), supports 198 thousand locations on fiber.
- Fiber serves 2.2 million locations in remaining funded areas.

BEAD covered locations will appear in the BFM data and will grow over time as providers complete network builds and start providing services.¹

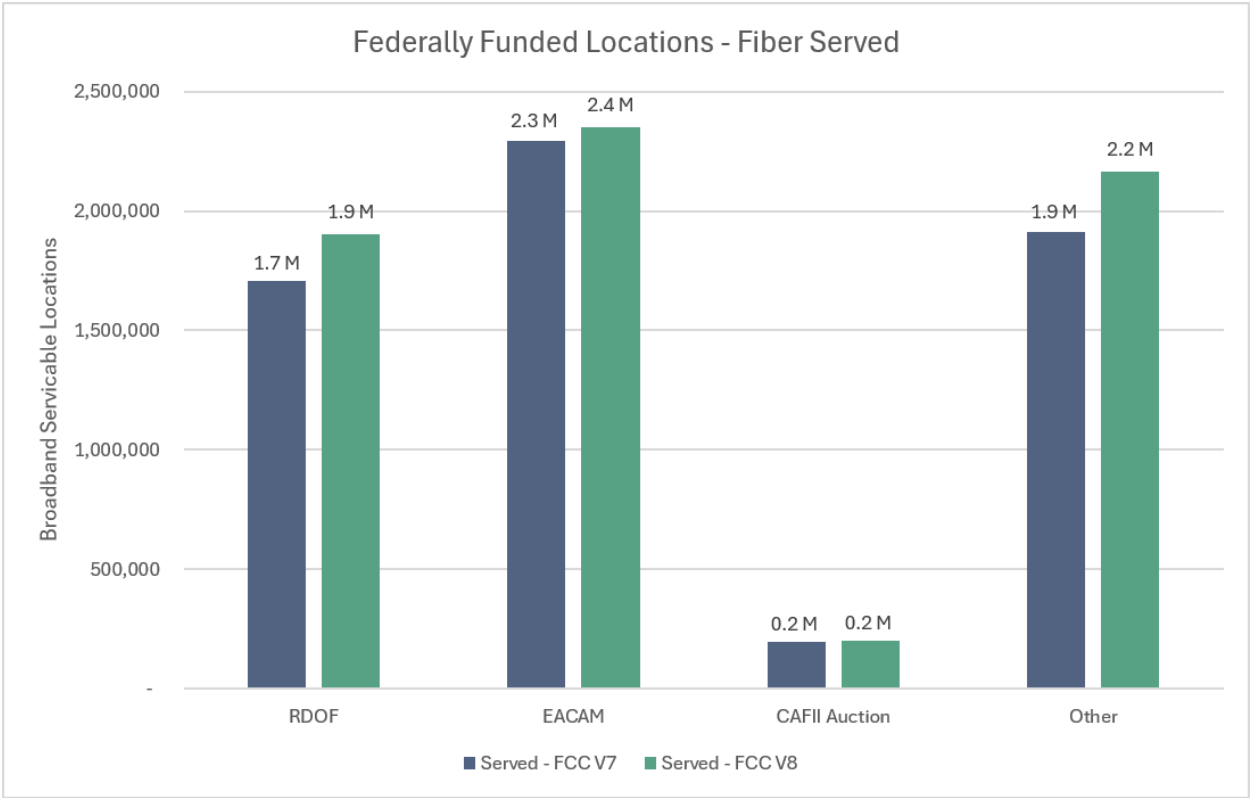


Figure: This chart compares fiber broadband-served BSLs by federal funding program between FCC BDC Version 7 and Version 8, showing growth across RDOF (roughly 1.7 million to 1.9 million), Enhanced A-CAM/EACAM (roughly 2.28 million to 2.35 million), the CAF II Auction (roughly 200,000 to 220,000) and other programs (roughly 1.9 million to 2.15 million) BSLs.

Even after accounting for Benefit of the Bargain Round 1 BEAD BSLs and other federal support programs, some BSLs remain unfunded and unserved. In the coming months, NTIA and state broadband offices will use updated BDC and BFM data to identify these remaining unserved BSLs through the recently announced [BEAD Supplemental Deployment Policy Notice](#) (Benefit of the Bargain Round 2). States then will have the ability to allocate BEAD funding to these locations following an abbreviated challenge process and application round. CostQuest will release additional insights on the characteristics of these locations later this fall.

¹ This analysis doesn't currently delineate whether it was RDOF-awarded providers that were specifically responsible for the increase in coverage of RDOF BSLs.

Competitive dynamics: Cable, ILECs and new entrants

AT&T remains the dominant fiber provider by a significant margin, serving over 19 million BSLs, or 27% of all fiber BSLs nationwide. Cable companies, historically reliant on DOCSIS hybrid fiber-coaxial (HFC) infrastructure, are increasingly deploying FTTP. Four of the largest cable companies – Cox, Charter (Spectrum), Xfinity (Comcast) and Optimum – now collectively serve over 6.8 million BSLs with fiber technology. Cox and Charter recently announced a merger that will cover 41.7 million BSLs with cable and 3.5 million BSLs with fiber.

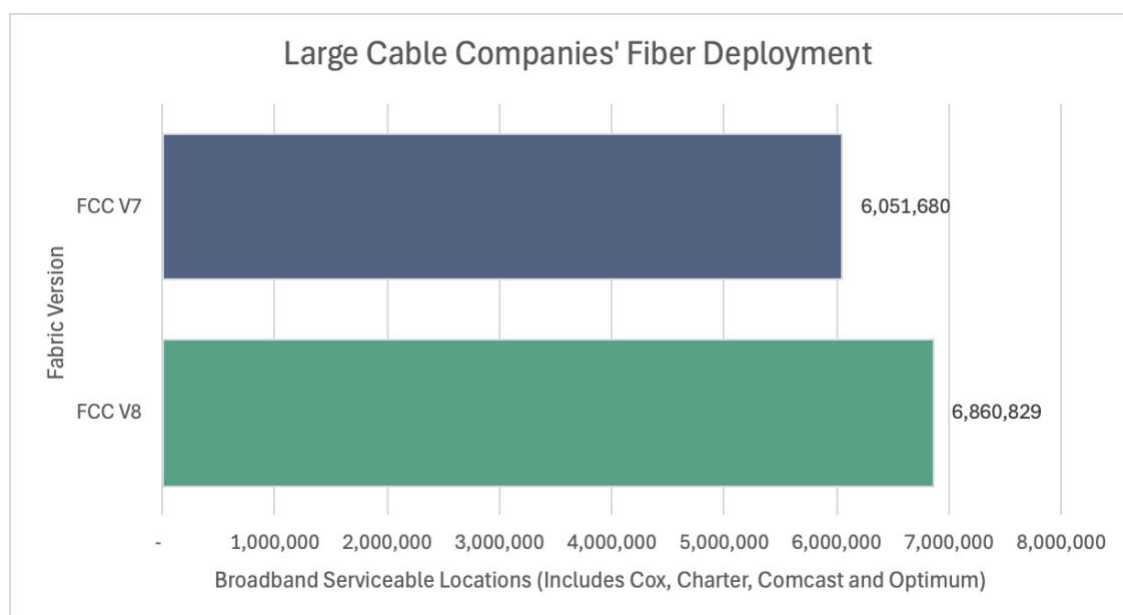


Figure: This chart tracks fiber BSLs among four large cable companies — Cox, Charter (Spectrum), Comcast (Xfinity) and Optimum — comparing FCC BDC Version 7 (6,051,680 BSLs) to Version 8 (6,860,829 BSLs), an increase of over 800,000 fiber broadband-served BSLs in six months as these traditionally HFC providers continue expanding their FTTP footprints.

Largest fiber broadband growth by provider

While AT&T dominates by total footprint, some of the most dramatic percentage growth in fiber broadband is coming from smaller and mid-sized providers, signaling competitive disruption and the impact of targeted funding:

Provider	V7 BSLs	V8 BSLs	Difference	Percent Growth
Cable TV of East Alabama	2,583	40,432	37,849	1465%
Mediacom Xtream	13,360	150,837	137,477	1029%

Wi-Fiber Inc	2,541	13,266	10,725	422%
Lyte Fiber LLC	7,732	27,250	19,518	252%
Wecom Fiber	5,798	19,138	13,340	230%
Tillman Fiber	27,432	86,112	58,680	214%
Crossbeam	17,606	51,408	33,802	192%
Allens Communications	6,018	12,537	6,519	108%
T-Mobile	18,274	36,990	18,716	102%
All Points Broadband	12,591	25,263	12,672	101%

Only providers with more than 10,000 fiber-served BSLs were included in analysis.

SECTION 3: CONCLUSION AND OUTLOOK

What's next for fiber?

Fiber broadband's expansion shows no signs of slowing. **Since Version 1 of the Fabric, the number of fiber-served BSLs has grown 58.7%, with 1,593 active providers now covering 62% of all BSLs with fiber nationwide.**

That growth in Fiber is increasingly layered:

- Cable companies are building fiber alongside their legacy HFC networks
- Smaller and mid-sized providers are posting triple-digit percentage gains
- Federal funding through BEAD and other programs continues pushing fiber broadband to locations that otherwise would remain unserved

As fiber buildout continues, the market is shifting from simply extending coverage to competing for share of internet subscribers in markets that already have service. **CostQuest's Fiber Forecast Model estimates providers will add between 2.1 million and 6.7 million new fiber broadband BSLs nationwide over the next six months**, depending on carrier aggressiveness.

For providers, policymakers and investors, the takeaway is clear: fiber broadband is no longer just a deployment and BSL coverage story – it's a competitive one. Understanding where fiber broadband is expanding, who is building it, and how federal funding is shaping that growth will be essential to navigating the market's next phase.