



So, BEAD Happened – Now What?

Staying Compliant and Competitive After BEAD Awards
2:00-3:00PM

04/13/2026

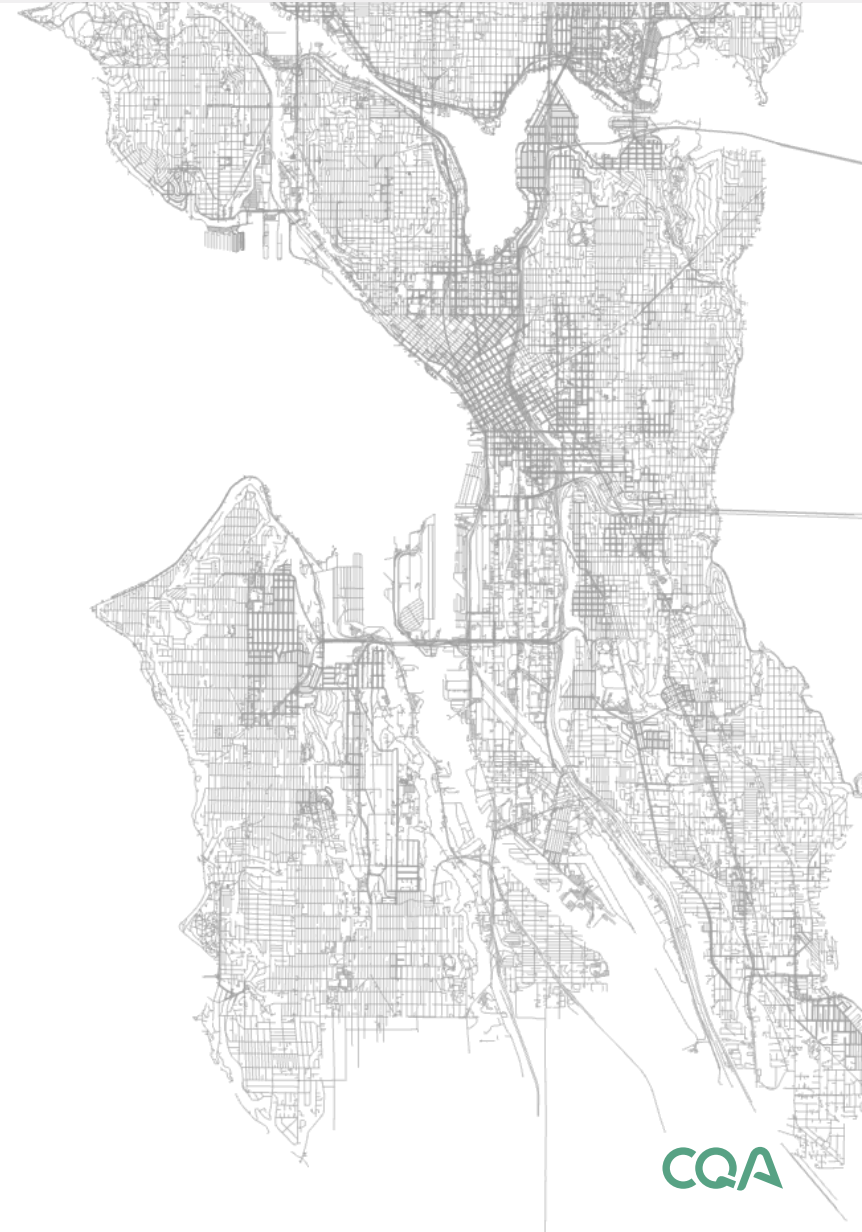
BUILT ON DATA

Overview and Key Takeaways

Market Realities

Preparing for your next move

Your BEAD Operating System



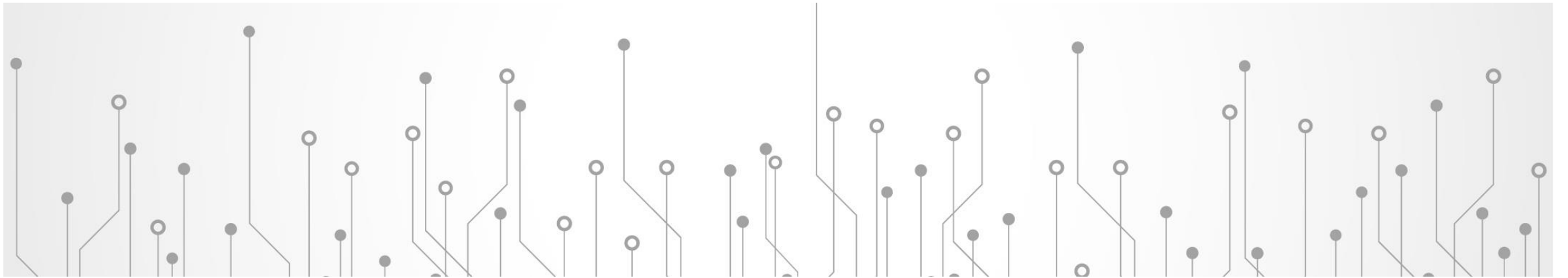


Market Overview

1. Competition is intensifying—and BEAD builds are happening inside that competitive environment, not apart from it.
2. The old math is breaking. Overbuild is real—and it's not just the big guys.
3. Your competitive intelligence should drive your capital decisions.

Is your business plan built for the competitive environment that exists today and into the future?

Or the one that existed when you wrote it?





Fiber pushing deeper

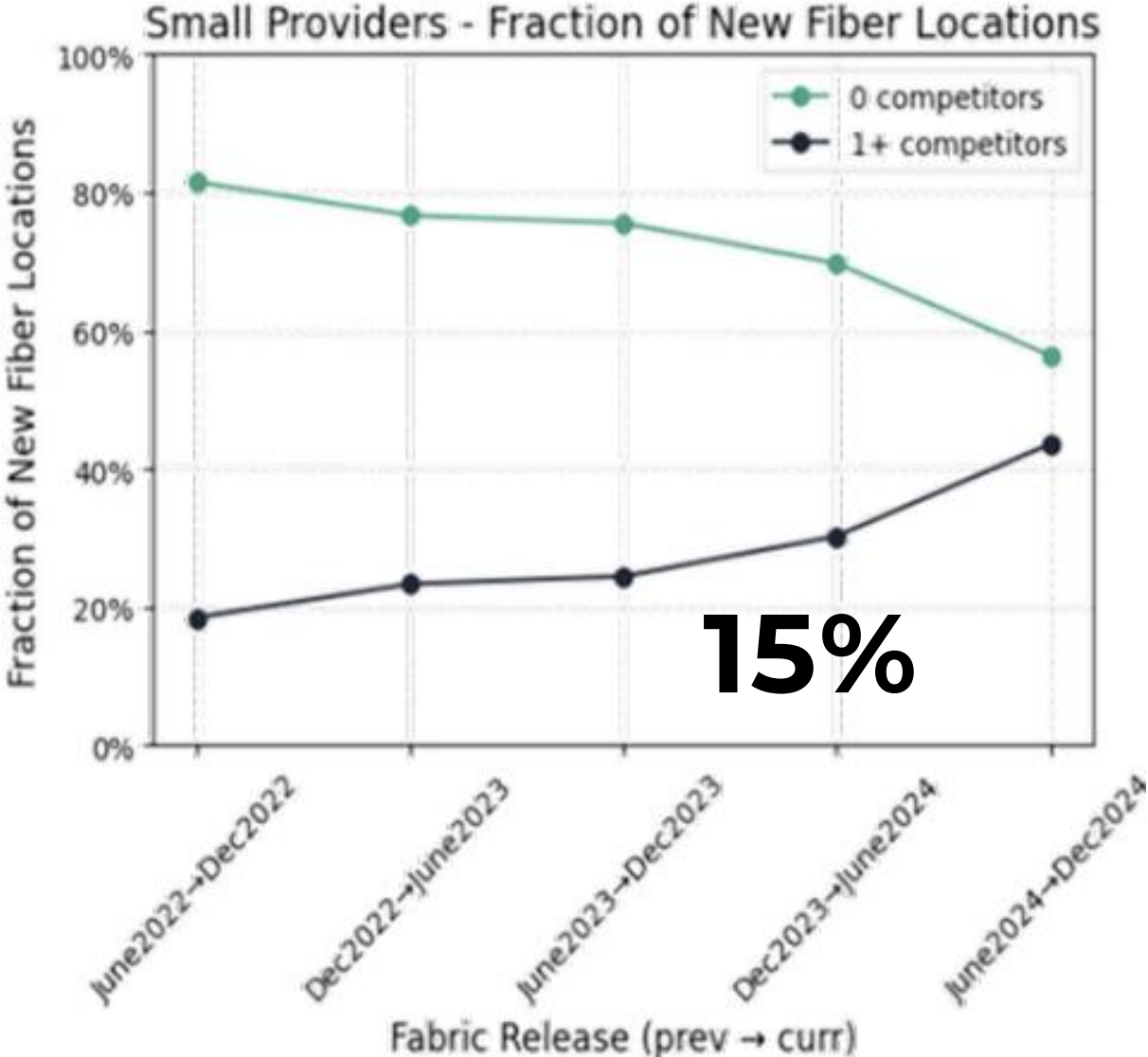


Fixed Wireless and Satellite
scaling



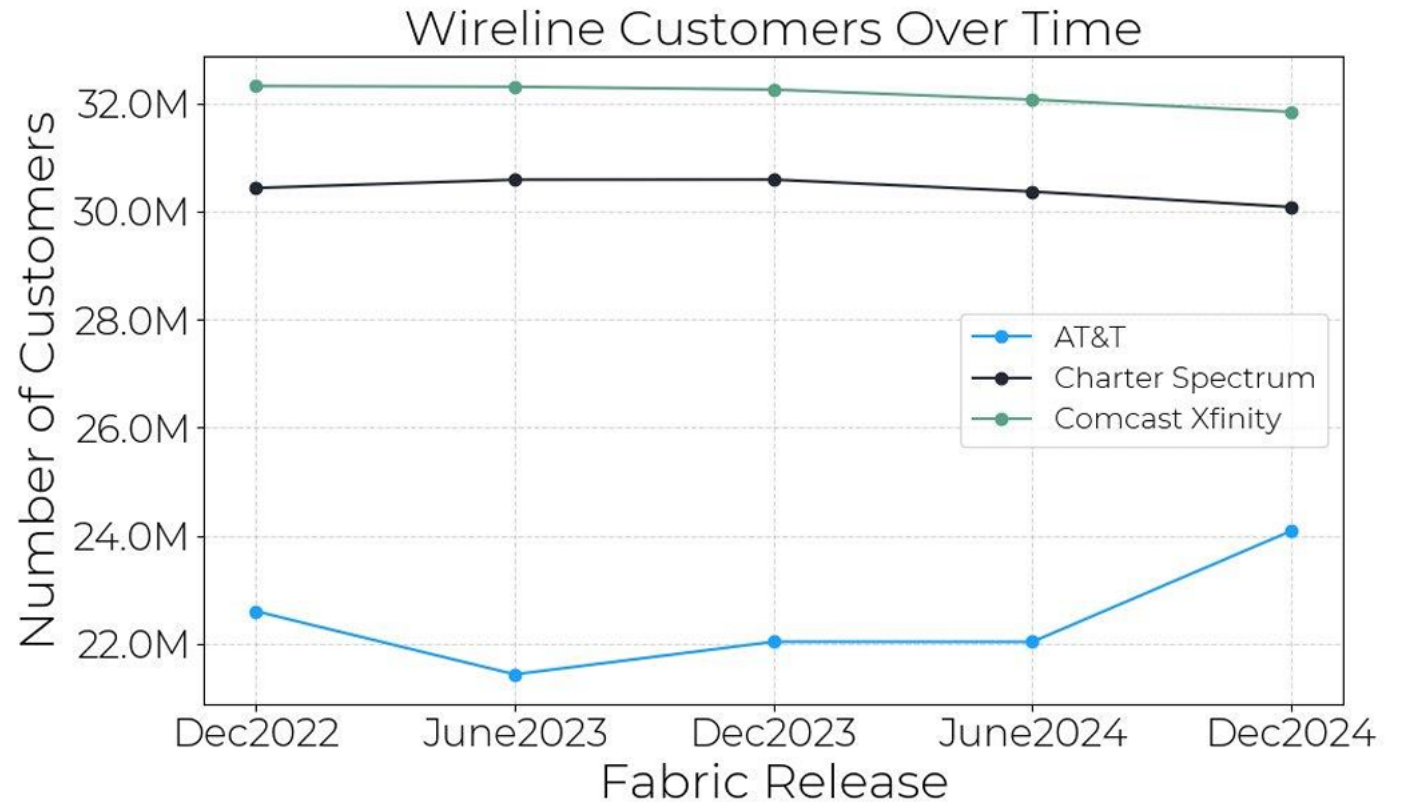
Public funding accelerating
expansion

Fiber Growth & Overbuild



National Provider Playbook

1. Large providers targeting markets with $1 \leq$ fiber provider
2. Convergence play: wireline + wireless = household stickiness
3. Cable operators maintain national penetration rates above 50%—but are experiencing subscriber losses despite continued network expansion



Pricing Race to the Bottom

Reliable high-speed internet starting at

\$39/MO ~~\$50/MO~~

Offer ends 3/31



ENGINEERED BY SPACEX

Availability and price may vary based on location. This offer is valid for Residential service plans and new customers only. Customers who change their plans to a non-Residential plan, cancel their service, or are suspended will lose their promotional pricing. After 6 months, service price will be \$50/month.

Better Value plan

LIMITED-TIME PROMO

\$46.67/mo.





per line for 3 phone lines with AutoPay, plus taxes and fees.


Get some of the best benefits of Experience Beyond at a limited-time price. Switch today with 3+ lines to get our most value-packed plan with our best savings and the best benefits in wireless—including T-Satellite, the freedom to upgrade every 2 years, and our 5-Year Price Guarantee.


[Learn more](#)

Check the math at [T-Mobile.com/offers/family-plan-deal](https://www.t-mobile.com/offers/family-plan-deal). Plan requires 3+ new lines & 2 eligible ports. Limited time; subject to change. Savings vs. comparable plans at AT&T and Verizon, plus the cost of optional benefits; plan

From ATT community on **Reddit**

8:44    5G+  91

Bill details 

 Pricing info

Plan	
Internet 1000	\$2.00/mo. See discounts
Internet 1000	\$90.00/mo.
Discount for Indirect Internet Offer participants	-\$45.00/mo.
\$25 off ongoing	-\$25.00/mo.
20% off ongoing (Wireless+Internet)	-\$18.00/mo.
Subtotal	\$2.00/mo.

The converged bundle is here

☰ xfinity

No contract. Cancel anytime.

The most reliable fiber-powered WiFi. One price. 5 years. Guaranteed.

Lock in one price on 300 Mbps WiFi with WiFi equipment and unlimited data included. **Plus** get one year of Unlimited Mobile on us.

\$45 /mo for 5 years

AT&T
OneConnect

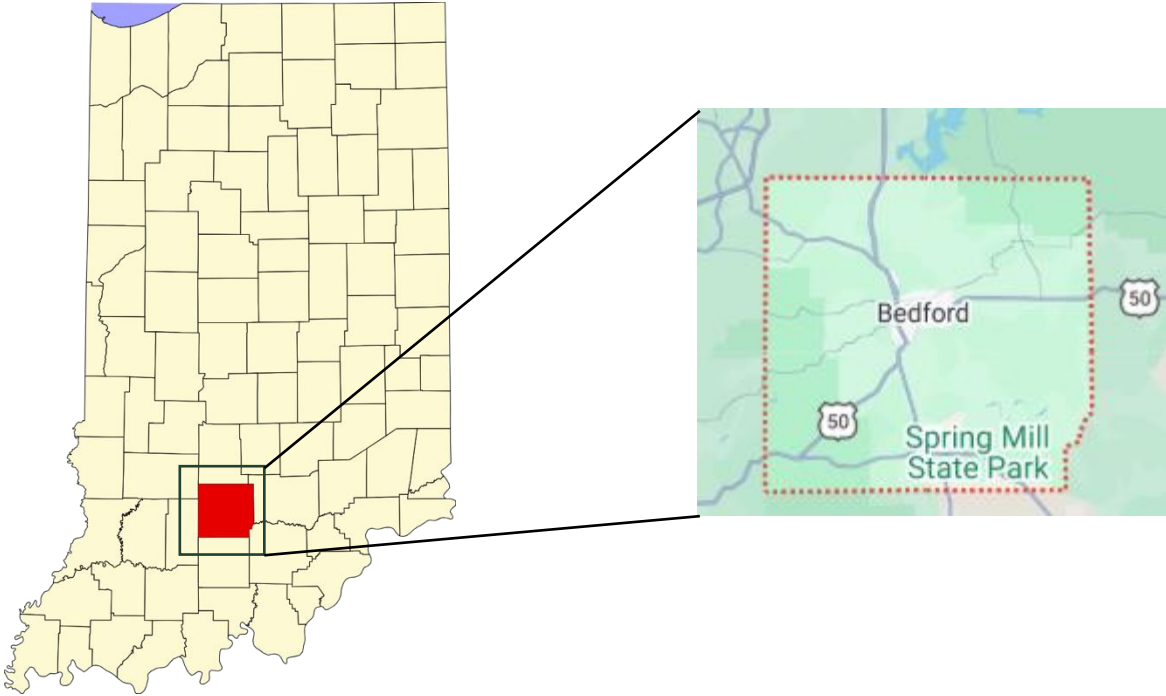
Plan	Price	Members	Voice Lines	Data
Individual	\$90	1 member	4 total	1 household of 1 Gig
Duo	\$120	2 members	8 total	1 household of 1 Gig
Family	\$225	Unlimited members	Up to 10 voice lines	20 total lines, 1 household of 1 Gig

AT&T

How does this play out in rural markets?

Case Study: Lawrence County and Smithville Telecom

“Connecting Hoosiers since 1922”

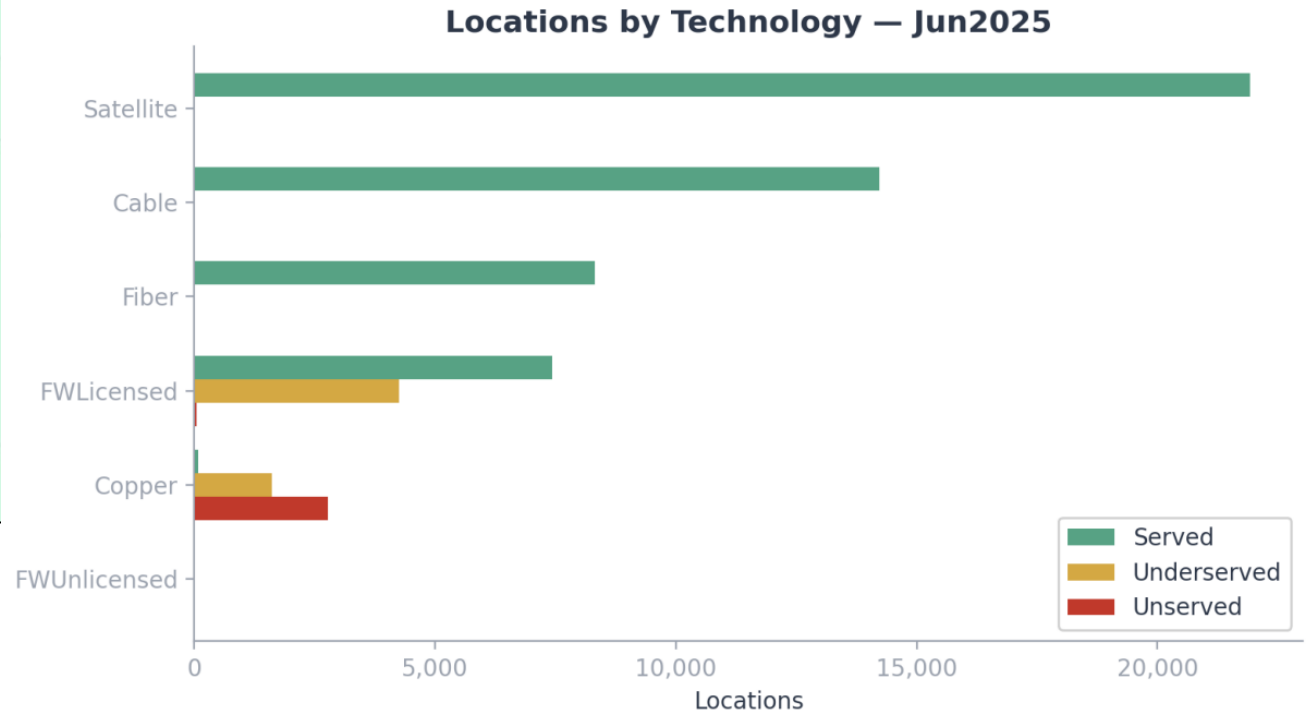


Lawrence County Overview

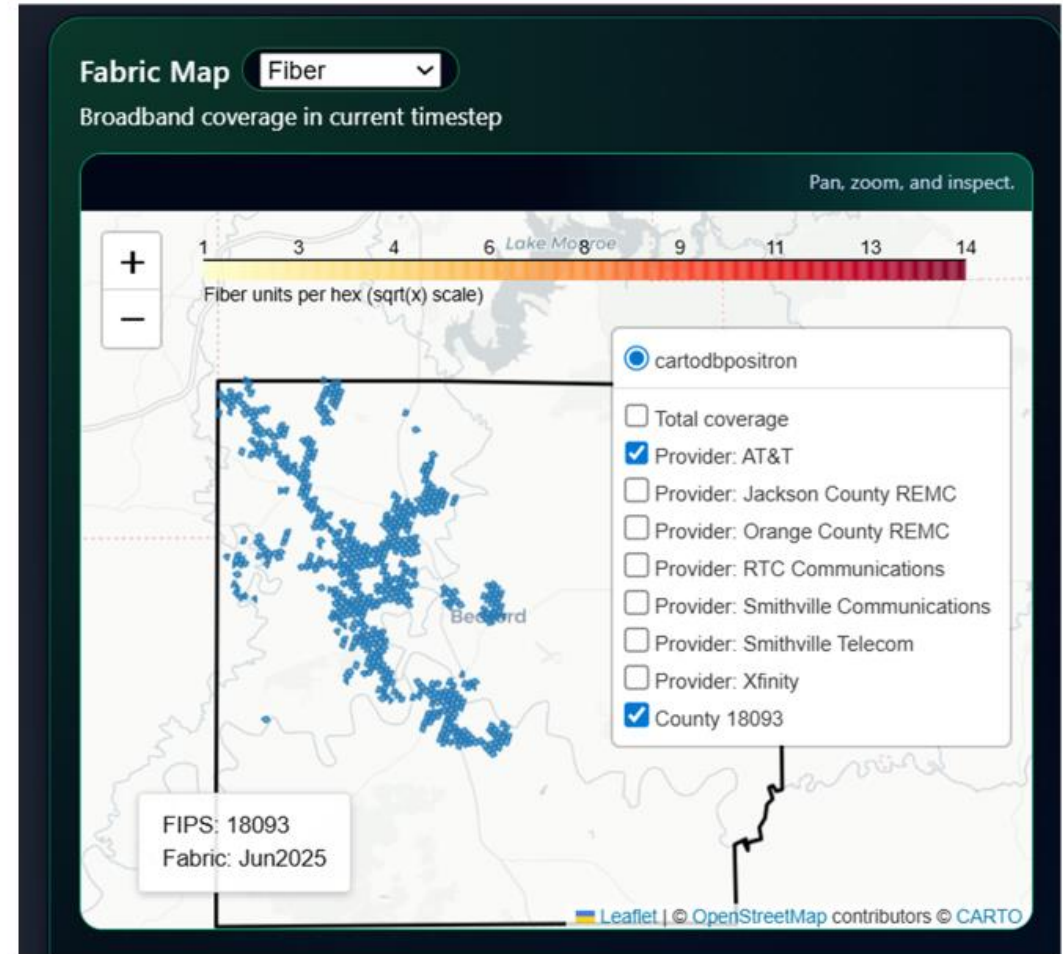
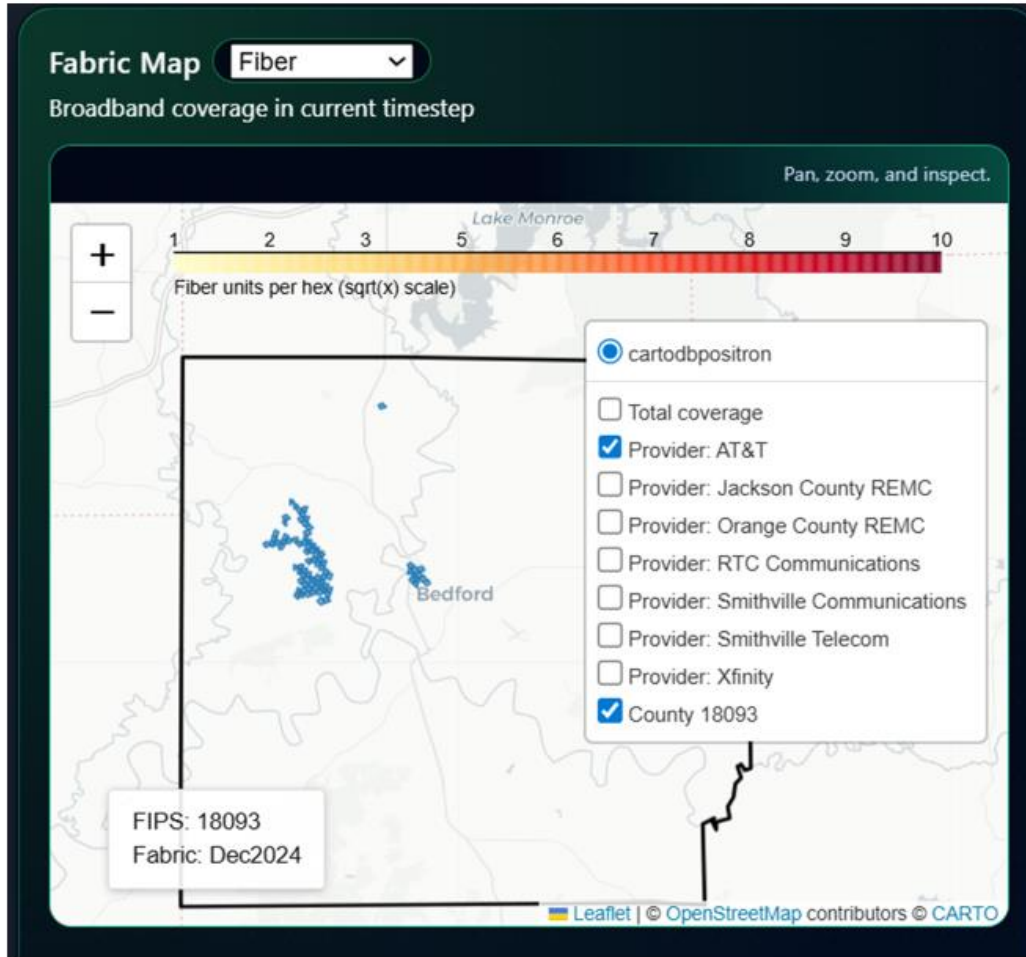


Status	All Tech	All Tech %	Terrestrial	Terrestrial %
Served ($\geq 100/20$)	21,921	99.72%	19,859	90.34%
Underserved ($\geq 25/3$)	0	0.00%	724	3.29%
Unserved	62	0.28%	1,400	6.37%
Total Locations	21,983	100.00%	21,983	100.00%

Table 1: Broadband status summary (All Technologies vs Terrestrial)

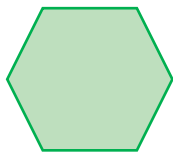
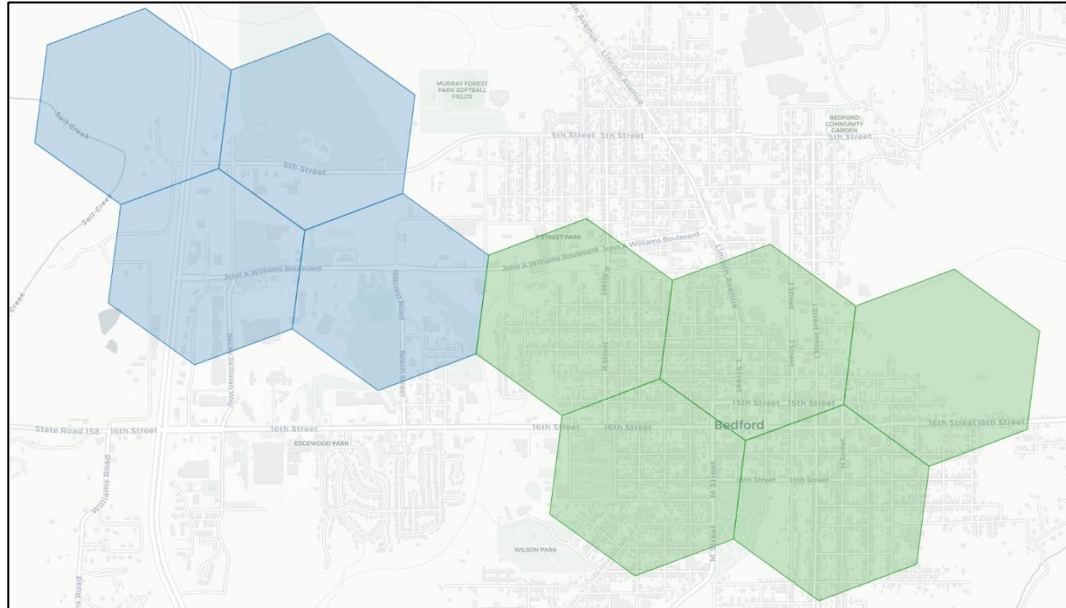


AT&T FootPrint Growth



AT&T's footprint change from Dec2024 to Jun2025

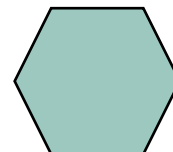
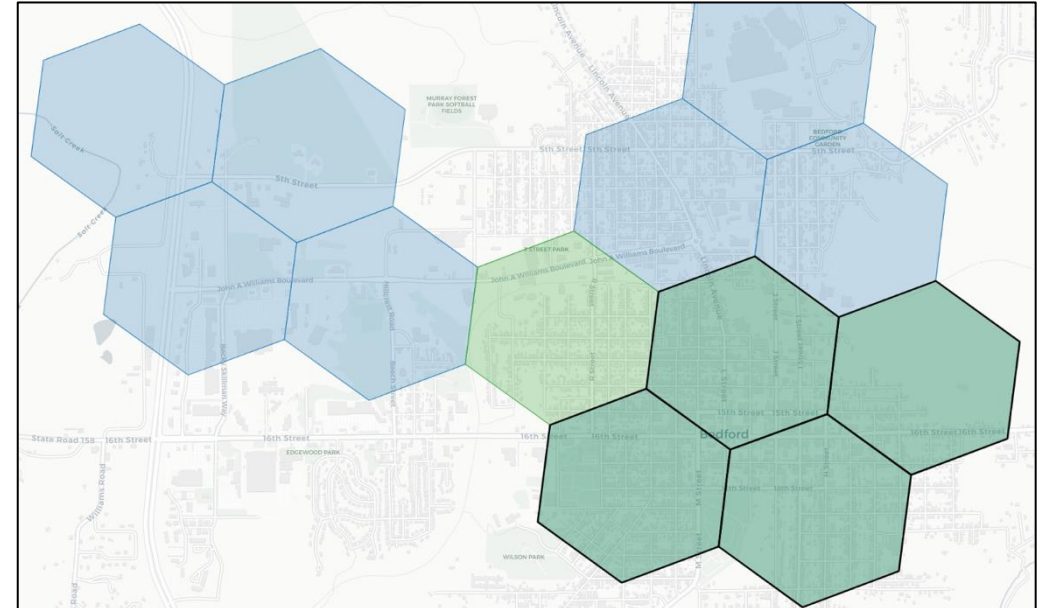
December 2024



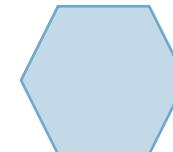
Smithville Telecom



June 2025

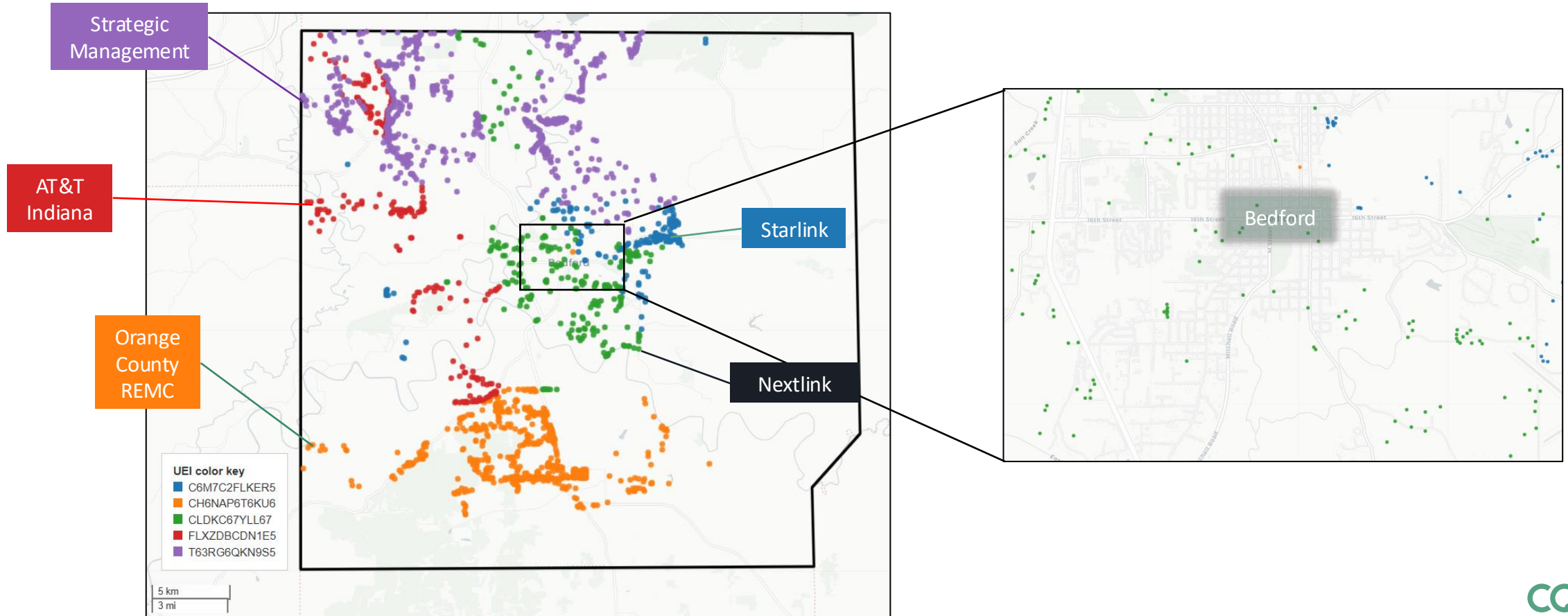


Smithville Telecom
and AT&T

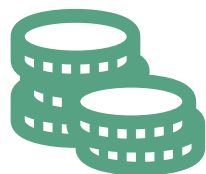


AT&T

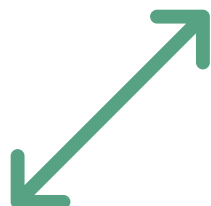
brand_name	UEI	projects	locations	bead_support	match
Starlink	C6M7C2FLKER5	5	211	\$381,000.00	\$348,955.36
Orange County REMC	CH6NAP6T6KU6	6	751	\$1,078,890.24	\$1,168,797.76
AMG Technology, dba Nextlink	CLDKC67YLL67	2	243	\$1,262,357.90	\$420,785.97
Indiana Bell Telephone, dba AT&T Indiana	FLXZBCDN1E5	1	266	\$216,173.00	\$17,419,059.00
Strategic Management	T63RG6QKN9S5	6	730	\$8,423,296.89	\$2,807,765.64



How can you respond?



Reduce prices



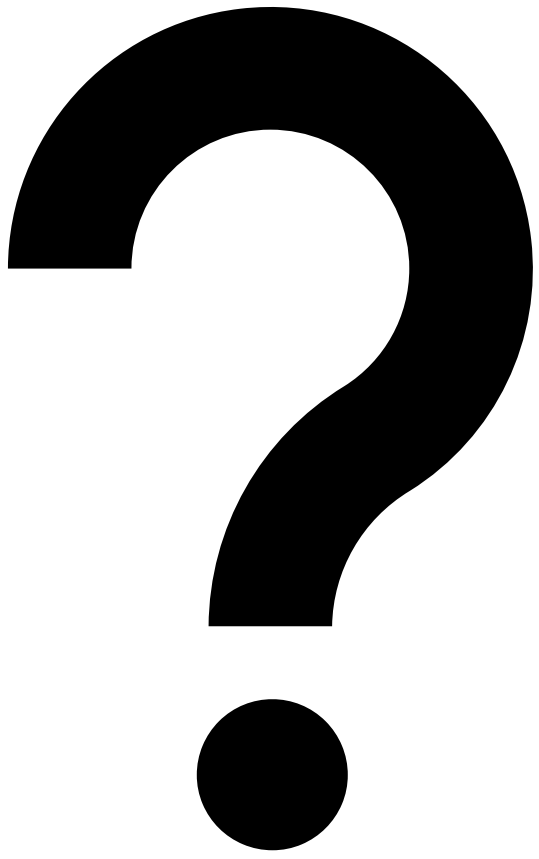
Expand market



Add mobile coverage



Partner



BEAD Program Overview

What's Different, What's Complex &
What's Unknown

How is BEAD Different?

- 🏆 Unprecedented Scale
- 📄 New Federal Requirements
- 💰 More Complex Financial Picture
- 📍 Location-Level Accountability



Bottom Line: Federal and unique state requirements will require the management and submission of far more complex data than any previous federal broadband funding.

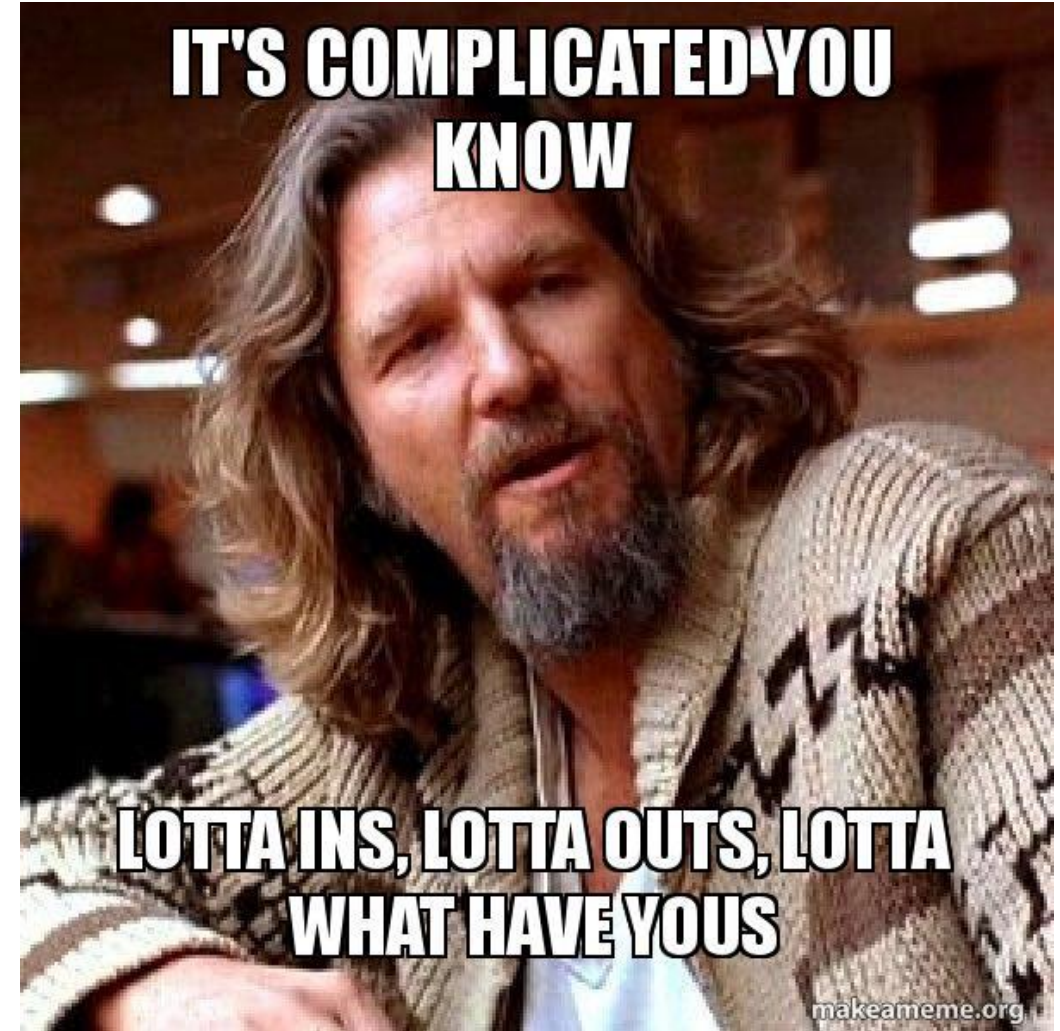
How is BEAD More Complex?

 New Regulatory & Operational Risks

 No Two States Are the Same

 Data & Reporting Demands

Bottom Line: For multi-state subgrantees, these differences directly impact financial performance.



What We Still Don't Know

- 📄 Subgrant Agreement Details
- 💰 Non-Deployment Funding
- 🔄 Amendments & Defaults
- 📊 Long-Term Compliance
- 🏛️ Federal Policy Shifts



Bottom Line: Subgrantees are being asked to make long-term business commitments under conditions that are still being defined. Engaging early and establishing a relationship with your SBO is critical.

So, What Can You Do?

- ✓ Build a single source of truth early
- ✓ Prepare milestone evidence in advance
- ✓ Schedule EHP and permitting as a full workstream
- ✓ Actively manage pole attachments

So, What Can You Do?

- ✓ Set documentation standards for subcontractors
- ✓ Make reporting a steady rhythm
- ✓ Keep financial records audit-ready from day one
- ✓ Maintain one authoritative GIS dataset

1. It's not a matter of *if* you get audited, it's *when*.
2. Create coordinated systems of record. Your future self will thank you.
3. Evidence isn't a formality; it's what gets you paid.
4. A good relationship with your SBO is the key to a strong foundation for program management



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Appendix

