December 31, 2021

Dear FBA Members,

As we exit 2021 and reflect on this past year, I have to say “Wow! What a ride!” We entered 2021 with a tremendous amount of uncertainty and challenges in front of us. During the first quarter of 2021, we focused on restructuring our organization, changed our business model, and rebuilt the FBA team. In addition, we aggressively took on Elon Musk and Starlink and encouraged the FCC to carefully scrutinize RDOF long form applications with a Congressional letter signed by over 60 members of both chambers. We strongly advocated for broadband funding legislation resulting in the $94 billion Accessible, Affordable Internet for All Act being introduced in the House and Senate in March, and we worked with the transition team and new Administration, doubling down our efforts advocating for a broadband infrastructure bill. Furthermore, we moved our annual conference from Dallas to Nashville, changing our dates to the end of July to maximize our timing and potential for drive-in attendees. We also recognized that workforce development was going to be critical to the success of our industry.

The second quarter of 2021 began with the Administration’s announcement of the American Jobs Plan which included a significant investment in broadband infrastructure. We immediately went to work on the Hill to ensure that this investment in broadband infrastructure gained bipartisan support. Our workforce development efforts gained momentum and we worked closely with the US Department of Labor to gain a national registered apprenticeship for our Fiber Optic Technician (FBA OpTIC) course. Interest in our organization also started to gain significant momentum as we added 30 new members, registration for our July annual conference began to rapidly accelerate, and our LATAM chapter’s June virtual event had over 2,000 attendees. We saw a significant increase in member engagement and strong output from the Association’s committees while working groups, such as our Public Officials Roundtable saw participation take off, adding a significant number of new members and new States at each meeting.

Our Association’s strong momentum continued to accelerate in the third quarter as we saw record attendance at our annual conference in Nashville in July. The enthusiasm and excitement from our conference carried well into the fall. With the Infrastructure bill passing in the Senate, our members rallied as we put a focus on gaining bipartisan support in the House. FBA also played an instrumental role in ensuring that guidance from the U.S. Department of the Treasury issued with the $10 billion Coronavirus Capital Projects Fund encourages recipients...
to invest in fiber projects. Our state advocacy was successful in California where $6 billion of their state surplus will be invested in fiber broadband.

During the fourth quarter of 2021, our heavy advocacy efforts paid off with the Infrastructure Investment and Jobs Act (IIJA), which was signed into law, delivering $65 billion for broadband investment. The Fiber Broadband Association immediately shifted its focus toward the development of a Federal Funding Playbook that will highlight State Broadband Program best practices and outline a path to help ensure every State and Territory can efficiently deploy the $42.45 billion of the NTIA BEAD program to maximize their investment in critical broadband infrastructure. We have also completed the development of our Fiber Optic Technician training program and moving it into the pilot phase early in the new year. We are currently engaged with workforce development and broadband offices across multiple states in preparation for a nationwide rollout to community colleges and veteran training organizations. Additionally, our LATAM Chapter executed on its second successful virtual event in 2021.

Execution against our 4Q goals:

✓ Finalized the strategy to help accelerate and maximize the benefits of the Broadband Infrastructure subsidies for communities across the nation
  o Issued press release announcing Federal Funding Playbook
  o Scheduled key initiatives and events for 1Q22

✓ Kicked off the content development and planning for Fiber Connect 2022
  o A Call for Speakers was issued
  o Introduced a new Proof of Concept program
  o Finalized our event budget
  o A detailed agenda is now complete, and we have already received commitments from a number of the keynote speakers

✓ Prepared a program to pilot our accredited Fiber Optic Technician (OpTIC) training and will continue to work with State broadband and workforce development offices across the country
  o Course development is complete
  o Pilot is scheduled for 1Q22
  o Demand and engagement are extremely strong from community colleges, veteran training organizations and other training institutes across the country
√ Executed FBA’s LATAM virtual conference scheduled for October 26-27
  o Strong attendance and execution
√ Published FBA’s annual Fiber Study
  o Presented study at the December Premier Members meeting in DC and on the 12/29/21 Fiber for Breakfast
√ Completed FBA’s strategic planning process for 2022
  o Completed and in execution for 2022
√ Prepared and executed our Premier Members meeting in December
  o Doug Kinkoph, NTIA, provided an extensive 90-minute detailed Q&A session on the $42.45B BEAD program

2021 Key Results
2021 was an amazing year for the Fiber Broadband Association and for our industry. As an organization, we achieved the following key results:
√ 26% Growth in Membership (year-over-year)
√ Record Revenue for the Association, 21% growth over FBA’s previous record
√ Record Conference – 21% Growth over previous record
√ LATAM – Is back to profitability
√ Workforce Development – Readying for Nationwide Launch
√ 70% greater attendance (y/y) for Fiber for Breakfast and FBA webinars
√ Strong FBA committee engagement
√ Record Research Year
  o Whitepapers published in 2021 include:
    ▪ Future of Work
    ▪ The Market has Spoken
    ▪ Digital Divide
    ▪ FWA vs Fiber
    ▪ LEOS vs Fiber
√ Research Published:
  o Low Earth Orbit Modeling was filed with the FCC
  o Consumer Study
From the Office of the President & CEO

- Fiber Deployment Survey
- Broadband Experience Index
- Published the Fiber Broadband Association’s first ever magazine, “Fiber Forward”
- Record Advocacy Year
  - $100B+ in Broadband Subsidies

Looking Forward to 2022

While 2021 was a banner year for the Association, 2022 promises to be even better. Broadband service providers deploying fiber passed 6.9 million homes this past year, bringing the Fiber-To-The-Home (FTTH) total deployment to over 60 million homes passed. As we move into 2022, our latest forecasts project that more fiber is going to be deployed over the next five years than during the past 20 years. The market has spoken. Over the past 20 years, our focus has been to advocate the virtues of fiber optics. This battle has now been largely won and it is clear to all, except for a few hold outs that have vested interests in legacy or interim technologies.

Our industry is at the beginning of a special moment in history where we have the opportunity and CapEx backing to realize our vision to create a world where communications are limitless, advancing quality of life and digital equity for generations to come. We have the opportunity to fully realize those limitless possibilities by connecting everyone, everywhere, with fiber broadband. Federal, State and Local government broadband subsidies are set to grow at 5-6x their historical run rates. Experienced network operators and community leaders are coming together with flexible public-private partnership models. Utilities and rural electric coops are stepping up to deliver fiber broadband to the communities they serve. Traditional network operators have announced plans to deliver FTTH to over 47 million more households. This is an extremely exciting time for our industry, and I feel that the Fiber Broadband Association is at the epicenter of this movement.

Next Steps

Our key focus areas for 2022 are the following:

- Launch our Federal Funding Playbook and promote this key asset in every State in the nation
- Complete a successful pilot and launch our OptIC Fiber Optic Technician training program nationwide
- Continue to diversify the Association’s revenue
- Deliver regional Fiber Tool Kit workshops to key underserved areas of the country
- Surpass our record-setting annual conference with an even better event in 2022
• Execute FBA’s LATAM regional conferences, with training
• Automate key organizational processes with the introduction of a new AMS platform

As we head into the first quarter of 2022, the Fiber Broadband Association is hitting its stride in leading our industry. Our nation will be investing a tremendous amount of public and private capital into fiber broadband. To ensure that states are putting in place best practices and processes for their State Broadband Offices, FBA will work to ensure this investment is being focused on fiber broadband projects that will yield the maximum results, as we will not have this opportunity again.

I would like to recognize our 2020 and 2021 Chair, Katie Espeseth (EPB) for her outstanding leadership. I would also like to recognize retiring board member and our secretary for the past six years, Gregg Logan (Telapex) for his guidance and contributions. As Gregg leaves the board, he has been appointed to serve on the Fiber Broadband Association’s Senior Council. I also want to thank our outstanding committee leaders, members, and all of you that contribute your time and efforts in moving our industry forward. In addition, I want to thank our exceptional FBA staff and strategic partners for all your heavy lifting throughout the past year as the Fiber Broadband Association continues to gain national mindshare and global visibility as the voice of fiber broadband. In 2022, we will maintain our focus, working with the Administration, Congress, NTIA, the FCC, ISPs, and communities across the nation to accelerate the deployment of fiber broadband networks to ensure digital equity and enable every community to leverage economic and societal benefits that only fiber can deliver.

Sincerely,

Gary Bolton
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