

State Connections

The broadband working group for state legislators

Memo: State BEAD Results and Key Upcoming Issues

BEAD Results: Nationally and Per State

All states except for California have completed their draft BEAD Final Proposals. Pending NTIA approval, these proposals show which ISPs will win funding, which locations will receive what type of service, how much BEAD funding will be used for infrastructure deployment, and how much BEAD funding will be left over for “non-deployment” activities. Table 1 shows national results; Table 2 shows results per state.

Table 1: National BEAD Results

Results*	Locations	Fiber	Satellite	Wireless	Cable	Deployment	Non-Deployment
National	3,599,598	66%	21%	11%	2%	\$18.3 billion	\$20.8 billion

SpaceX’s Starlink and Amazon’s Project Kuiper (the upcoming satellite competitor) have won the most locations (375k and 308k, respectively). Comcast and Strategic Management (a multi-state consortium of internet service providers) have won the most funding (\$1.356 billion and \$787 million, respectively).

Issue 1: NTIA Putting Price Cap on Projects

Before approving Final Proposals, NTIA is requiring states to negotiate down any project with costs above a certain threshold. If ISPs cannot bring project costs below the threshold, the state must re-award that project to a lower bidder or designate the locations ineligible for BEAD.

Impact: The cost thresholds will force states to shift locations from fiber to satellite. When rebidding, states cannot consider bidders’ suitability for the location, so winning projects may provide unreliable service (e.g., satellite service in mountainous areas). Locations that do not receive any bids below the cost threshold may not receive service. The arbitrary cost cutting creates risks for the long-term viability of winning projects.

Issue 2: NTIA May Claw Back Remaining “Non-Deployment” Funds

Every state will have BEAD funds remaining after completing rural broadband deployment. By law, these remaining funds may be used for a wide range of “non-deployment” activities, such as:

- Broadband adoption programs
- Permitting and pole attachments
- Mapping and data collection
- Telehealth and education programs
- Workforce development
- Middle mile and cellular infrastructure
- Apartment building wiring and Wi-Fi
- Affordability programs

The “non-deployment” categories were created by Congress to expedite construction and maximize the positive impact of BEAD networks. However, earlier this year, NTIA cancelled all non-deployment activities and now appears poised to claw back non-deployment funds or limit their uses.

Impact: Clawbacks would deny states billions of dollars (see Table 2 for per-state amounts) and limit their ability to comprehensively address the digital divide with BEAD, as intended by Congress.

** “Locations” refers to homes, businesses, and institutions that will receive service through BEAD-funded projects. “Fiber,” “Satellite,” “Wireless,” and “Cable” refer to the type of service locations will receive. “Deployment” refers to amounts awarded to build rural broadband networks. “Non-Deployment” refers to the amount of BEAD allocations remaining after deployment.*

Table 2: State BEAD Results

State	Locations	Fiber	Satellite	Wireless	Cable	Deployment	Non-Deployment
<i>National</i>	3,599,598	66%	21%	11%	2%	\$18,179,835,122	\$20,819,422,919
Alabama	101,751	75%	21%	0%	4%	\$530,743,198	\$870,478,704
Alaska	44,764	53%	33%	13%	0%	\$776,848,805	\$240,290,867
Arizona	164,264	74%	7%	19%	0%	\$511,973,677	\$481,138,554
Arkansas	79,266	74%	16%	7%	3%	\$308,328,089	\$715,975,905
California*	-	-	-	-	-	-	-
Colorado	96,065	48%	50%	3%	0%	\$409,140,940	\$417,381,710
Connecticut	1,790	78%	0%	0%	22%	\$7,216,501	\$136,964,292
Delaware	4,739	80%	0%	0%	20%	\$13,374,777	\$94,373,608
Florida	102,143	48%	25%	14%	13%	\$291,117,627	\$878,829,766
Georgia	119,545	76%	11%	0%	12%	\$309,602,817	\$997,611,554
Hawaii	7,124	81%	18%	0%	0%	\$95,659,050	\$53,825,444
Idaho	91,423	49%	26%	25%	0%	\$436,151,356	\$147,104,894
Illinois	159,838	76%	15%	9%	0%	\$990,645,134	\$49,775,618
Indiana	131,953	79%	14%	6%	0%	\$486,309,855	\$381,800,075
Iowa	43,001	51%	9%	41%	0%	\$221,282,630	\$194,048,683
Kansas	26,679	46%	3%	51%	0%	\$252,942,108	\$198,783,890
Kentucky	86,406	68%	25%	6%	0%	\$376,926,543	\$709,245,994
Louisiana	127,842	80%	9%	6%	5%	\$498,296,587	\$857,257,966
Maine	25,880	85%	15%	0%	0%	\$48,369,286	\$223,608,437
Maryland	9,785	37%	23%	0%	40%	\$78,106,623	\$189,631,778
Massachusetts	4,937	22%	25%	0%	53%	\$18,654,558	\$128,767,906
Michigan	221,779	85%	13%	1%	1%	\$919,106,714	\$640,255,765
Minnesota	74,653	56%	27%	17%	0%	\$380,681,114	\$271,158,254
Mississippi	97,609	86%	13%	0%	1%	\$567,165,372	\$636,396,191
Missouri	213,803	81%	14%	5%	0%	\$792,326,180	\$943,976,528

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**California has not released its BEAD Final Proposal as of 10/21/2025*

Source: Data from state final proposals. Analysis by Benton Institute for Broadband & Society, BroadbandBreakfast, and Connected Nation.

Table 2: BEAD Results Per State

State	Locations	Fiber	Satellite	Wireless	Cable	Deployment	Non-Deployment
Montana	72,209	20%	65%	15%	0%	\$308,194,874	\$320,778,925
Nebraska	14,086	9%	33%	58%	0%	\$43,844,548	\$361,436,522
Nevada	26,869	64%	29%	4%	3%	\$169,749,806	\$246,916,424
New Hampshire	5,136	68%	22%	0%	11%	\$19,305,223	\$177,255,056
New Jersey	11,472	45%	0%	20%	35%	\$63,551,464	\$200,138,085
New Mexico	43,364	44%	16%	40%	0%	\$432,974,698	\$242,397,614
New York	53,918	31%	25%	44%	0%	\$391,097,992	\$273,520,259
North Carolina	93,482	68%	30%	1%	1%	\$408,511,175	\$1,124,488,306
North Dakota	301	93%	0%	0%	7%	\$6,770,073	\$123,392,742
Ohio	74,112	46%	46%	8%	1%	\$242,397,568	\$551,290,540
Oklahoma	44,568	49%	12%	16%	0%	\$493,318,564	\$304,117,127
Oregon	105,644	53%	46%	1%	0%	\$620,728,287	\$68,186,645
Pennsylvania	129,926	65%	18%	14%	4%	\$793,169,689	\$368,608,583
Rhode Island	2,688	79%	4%	15%	0%	\$16,137,983	\$92,580,838
South Carolina	20,480	48%	49%	0%	3%	\$41,358,389	\$510,177,594
South Dakota	6,993	60%	38%	3%	0%	\$72,816,060	\$134,411,464
Tennessee	44,345	75%	13%	0%	12%	\$203,311,189	\$610,008,491
Texas	242,979	51%	27%	22%	0%	\$1,271,233,724	\$2,041,382,731
Utah	32,256	55%	25%	20%	0%	\$231,292,922	\$86,106,820
Vermont	14,549	91%	6%	0%	3%	\$118,993,040	\$109,919,979
Virginia	85,264	80%	13%	1%	6%	\$545,170,411	\$936,319,162
Washington	69,801	46%	32%	22%	0%	\$849,894,572	\$377,847,494
West Virginia	73,701	94%	6%	0%	0%	\$624,671,277	\$586,129,693
Wisconsin	175,249	74%	13%	13%	0%	\$691,929,792	\$363,893,782
Wyoming	38,933	33%	40%	26%	0%	\$198,442,261	\$149,435,660
<i>National</i>	<i>3,599,598</i>	<i>66%</i>	<i>21%</i>	<i>11%</i>	<i>2%</i>	<i>\$18,179,835,122</i>	<i>\$20,819,422,919</i>

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