

BBP TOP 100 in the Fiber Market – 2006

Our staff researched almost 500 companies to find the best of the best for FTTH in 2006

A BBP Staff Report

Vision. Great execution. Courage. Our Top 100 companies have all of that, and more. Nevertheless, many companies with all of the attributes we look for – in fact, successful companies that made the list last year – are missing this year. The reason: The target has moved. Fiber has continued to mature. Today, thanks to many companies, the cost of fiber-optic deployments is little more than half what it was a year ago. Demand for broadband content is greater. The technology risk compared to coax and other competing broadband approaches is nil. In fact, the risk of NOT deploying fiber is very real, and increasing.

Last year, for instance, we honored housing developers such as Pulte and Roseland Property. And why not? Last year, they helped lead the way in their industry. They were among the earliest developers to incorporate fiber to the home into their business plans. They're still great companies. But this year, the rest of the industry has started to catch up. What was uncommon corporate vision and courage last year is becoming, well, common. We'll continue to honor individuals at such companies, of course.

Last year we honored RBOCs SBC (now AT&T) and Verizon, as well as Comcast, Time-Warner Cable and other MSOs. This year, only one of the telecommunications-video-data giants scored a repeat: Verizon Communications. Verizon won our hearts with its FTTH FiOS deployment, of course, but also its Enhanced Communities division – renamed from Verizon Avenue – which has brought broadband to 1 million MDU, condo, coop, dormitory and PUD dwelling units. We continue to honor many bold individuals at the MSOs and other RBOCs as well (most recently, in our May issue). But aside from Verizon, the innovation and vision, execution and courage is taking place at smaller, in-

dependent telcos and cable companies. Some made the Top 100 list this year.

Last year, it took some courage to start a VoIP service. This year? Mainstream.

Last year, there were just a few companies offering to build fiber networks for (or with) developers regionally or nationwide. This year, the best got better and more innovative, and many of them (Connexion Technologies, ZoomyCo and others) made the list.

Does size matter? Not for our Top 100. The smallest, newest company on the list – Tenvera – is just gearing up to start operations this fall. The oldest companies on the list are well past their hundredth anniversary and a few employ around 100,000 people and operate worldwide.

For us, the tiebreaker question was this: Will this company make a difference in the fiber broadband industry in the coming year? To put it another way: Would the industry suffer if this company did not exist?

Judge for yourself. And let us know about organizations – large and small – you think might make a difference a year from now. Your nominations led us to examine almost 50 companies this year, and 11 made the list – companies we might not otherwise have known about.

About the Authors

Our Top 100 list was researched by Robert Calem, Andria Cimino, Rachel Ellner, Cassandra Kania and Chris Stuart, supervised by Contributing Editor Masha Zager and Editor-in-Chief Steve Ross. Suggestions for next year? E-mail steve@broadbandproperties.com.

company is headquartered in Marlborough, Massachusetts, but has more than 600 professional field technicians and project managers around the US, all full-time CTS employees. CTS works with manufacturers and distributors, including AMP, Anixter, Berk-Tek, Chatsworth, Corning, Graybar, Ortronics, Panduit, Proxim, and ShoreTel. One of its biggest wins: Inside wiring for the UTOPIA project.

31. Communications Data Group (CDG)

www.cdg.ws

888-234-4443

Key Products: Billing and provisioning systems

Summary: CDG has been developing and selling communications billing, service provisioning, customer care, and operational support systems for 30 years. The company started in 1970 as a department within the Bank of Illinois, mainly to do the bank's data processing and subscriber bill processing for small telephone companies. It developed one of the first carrier access billing (CAB) systems after the AT&T divestiture more than 20 years ago. Hargray Communications Group acquired the company's billing business in 1990, renaming it Communications Data Group. In 1993, CDG acquired AT&T's Mini-CABS customer base. The company has continued to refine itself, and now serves more than 200 telecommunications companies nationwide, including 21 of the nation's largest independent telephone companies. CDG has 135 employees.

32. Connexion Technologies

www.cnxntech.com

919-674-0036

Key Products: Networks and network services

Summary: Connexion Technologies, formerly Capitol Infrastructure, is one of the nation's largest providers of fiber-to-the-home services. It seeks out greenfield developers and funds FTTH networks for them, providing all content and service through a group of selected partners. By building the most reliable and most affordable fiber optic infrastructure possible, Connexion Technologies delivers unlimited connections to a blazing fast network that can handle current and future technology needs. It currently provides an unprecedented array of communication technologies – from voice and video to Internet and security – to new residential communities nationwide. The company, established in 2003, is based in Cary, North Carolina and has almost 100 employees. While Connexion

Technologies boasts an impressive 75,000 approximate homes under contract, what's more important is the number of communities in which it has deployed FTTH networks. By the end of 2005 Connexion was providing voice, video, data, and security services to 13 different communities. That figure will triple by the end of 2006. FTTH Council member.

33. Corning

www.corning.com

828-901-5880

Key Products: Optical fiber and cable, coaxial interconnect systems, telecommunications hardware and equipment

Summary: Corning is a 150-year-old company that grew from a glass manufacturing plant to one of the leaders in fiber optic cabling. Corning engineers developed the first fiber optic cable for communications in 1970. Today, Corning Optical Fiber is developing new fiber designs at its Sullivan Park Research & Development facility in Corning, New York, and introducing high-performance optical fibers that form the foundation of optical networks worldwide. Corning Optical Fiber is a unit of the telecommunications business segment of Corning, Inc., which had sales of \$4.58 Billion (more than a third in optical fiber). Corning Optical Fiber has deployed more fiber than any other fiber manufacturer. The leadership also extends to patents. The company has been awarded more than 125 U.S. optical fiber patents in the last three years. In addition to optical fiber and cable, the telecommunications segment produces hardware and other equipment for the global telecommunications industry. Corning Gilbert manufactures a comprehensive line of broadband coaxial interconnect systems and microwave connectors. Corning also offers a variety of customer services focused on FTTH, such as training, engineering support and network modeling. The markets and applications served by Corning Optical Fiber include broadband, premises, metro/access, long-haul, submarine, utilities, telephony and CATV. Corning is a member of the FTTH Council.

34. Ditch Witch/The Charles Machine Works

www.ditchwitch.com

800-654-6481

Key Products: Construction tools for laying fiber

Summary: Ditch Witch dates from 1949 when the founder invented a workable compact trencher. The Ditch Witch organization specializes in the design and manufacture of high-quality underground construction equipment. It sells tren-