

Model Assumptions	Number of Wire Centers with Negative Net Present Value	% of Wire Centers with Negative Net Present Value
BST Default - No Exclusions	140	78.2%
CLEC Capital Cost @ 15%	142	79.3%
CLEC Capital Cost @ 17%	143	79.9%
Monthly Churn (res) at 5%, Capital Cost at 15%	147	82.1%
Monthly Churn (res) at 6.5%, Capital Cost at 15%	149	83.2%
Monthly Churn (res) at 8.33%, Capital Cost at 15%	159	88.8%
Capital Structure 50/50	141	78.8%
Mkt Share all MM segment 10%, slow penetration	155	86.6%
Mkt Share all MM segment 5%, slow penetration	169	94.4%
Res Sales cost @ \$140	145	81.0%