

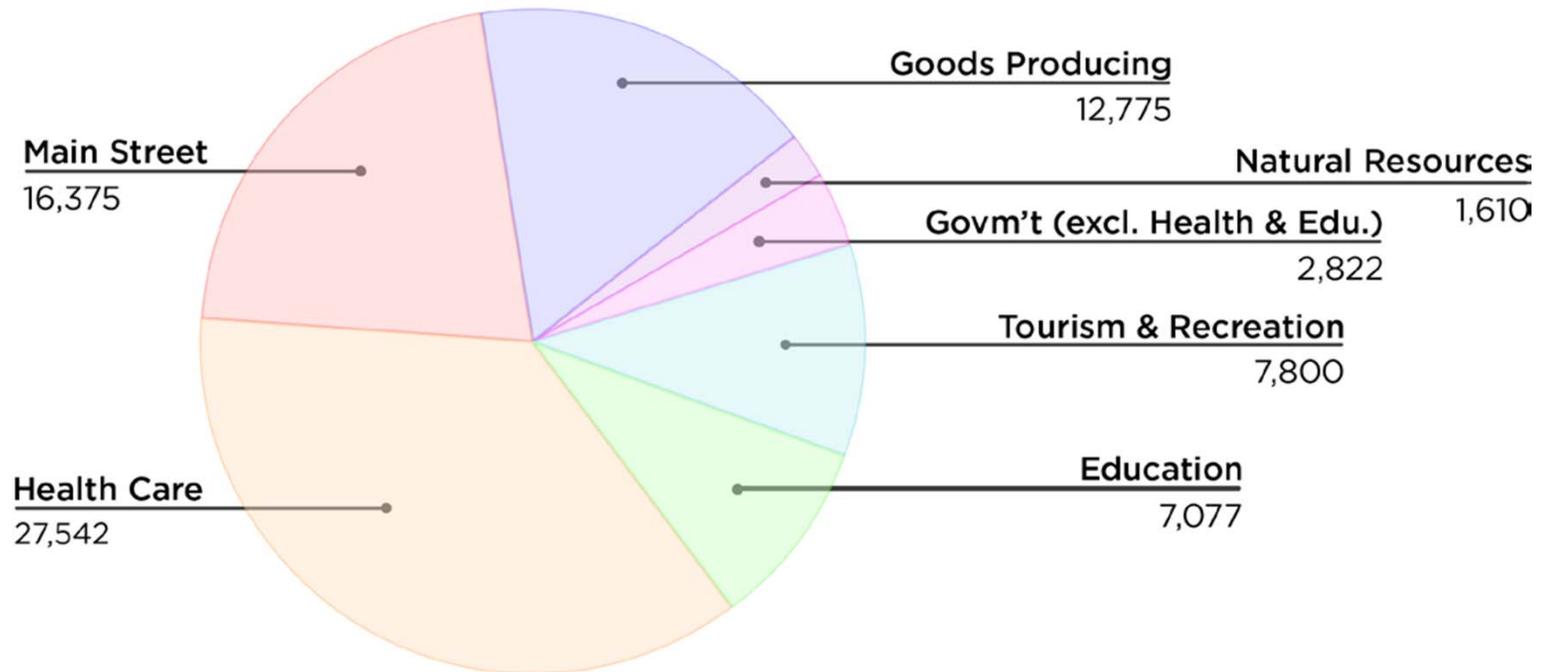


LinkIDAHO

Economic and Social Impact of
Broadband Investment

High Speed Connectivity Is Valuable
Because of the Opportunities Enabled

Approximately 80 % Of Forecasted Job Growth in Idaho (2011 – 2020) Involves Use of Broadband

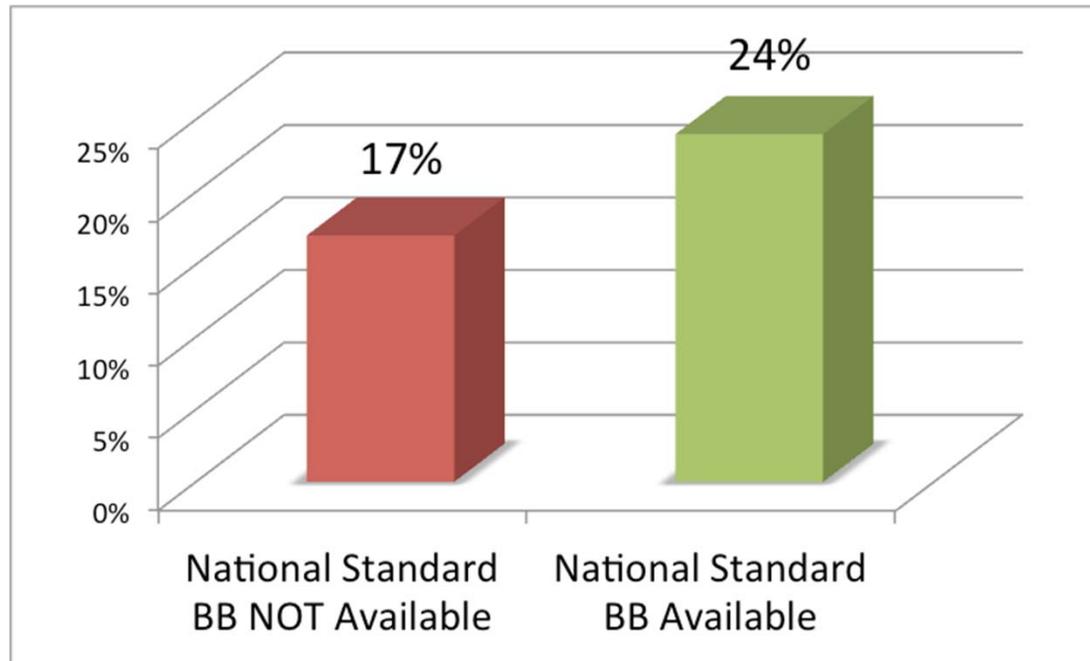


Communities Without Affordable and Quality Broadband Access Are Not Positioned to Grow Jobs

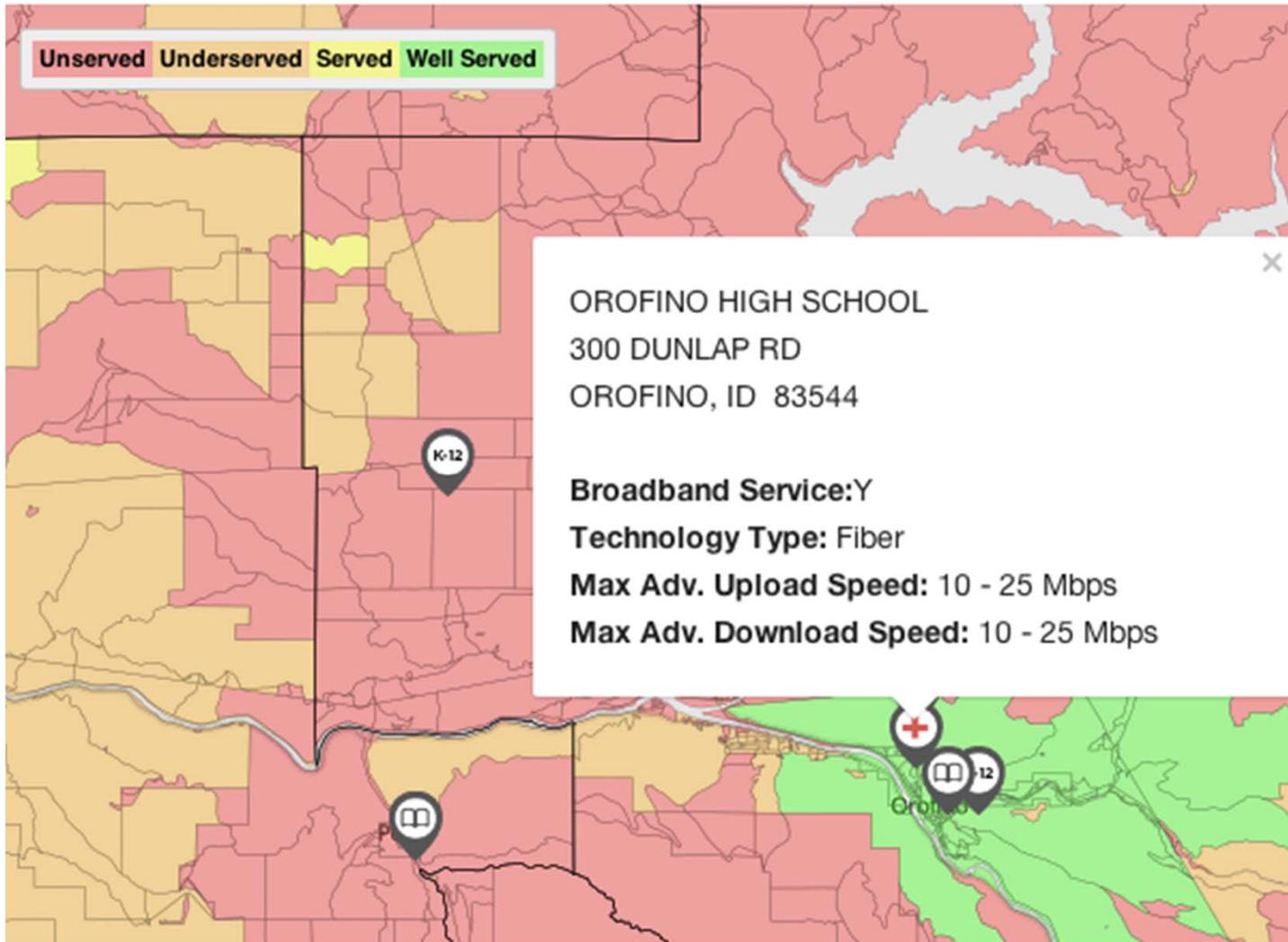
- © About 16% of the state's population can not access a national standard wireline broadband connection from home.
- © About 24% of households are not in an area with a robust LTE standard wireless service.

Based on June 2102 Data

Will Young People Return to Rural Idaho to Raise Families and Start Jobs if Quality Broadband is Not Available?



Can Public Objectives Be Accomplished Without Every Household and Business Having a Quality Connection?



Approximately How Much Would it Cost to Connect:

	Every ID Household To a National Standard Wireline Service	Every ID Household To a Robust LTE Wireless Service
Construction	\$460 M (one time)	\$540 M (one time)
Operations	\$41 M (per year)	\$228 M (per year)

Note: Costs of wireline and wireless builds are not offered here as a comparison of technology cost. Cost structures are based on different engineering standards and for different geographies. It is not correct to conclude from this data that the cost of a wireless build is higher than the cost of a wireline build to the same areas and with the same engineering objective.

Idaho Jobs Impact from Broadband Upgrade Construction and Operation

	Jobs Required to Fill Wireline Service Gaps	Jobs Required to Fill Wireless Service Gaps
Construction	1,500	2,700
Operations	300 (ave annual)	830 (ave. annual)
TOTAL	1,800	3,530

Examples of Five Year Impact on Idaho Communities that Receive Service Upgrades

- ⊙ An estimated 6,,000 jobs retained or created at local businesses as a result of sufficient broadband availability.
- ⊙ Roughly \$225M Main Street sales retained or created.
- ⊙ Approximately 225,000 people with better access to health care, education and government services.
- ⊙ Improved emergency response capabilities to approximately 70 percent of Idaho's land area.
- ⊙ Sustainable economic futures for Idaho's rural communities where connectivity has been improved.

Full Idaho Broadband Economic and
Social Impact Reports Available at:

<http://linkIdaho.org>



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Idaho Broadband

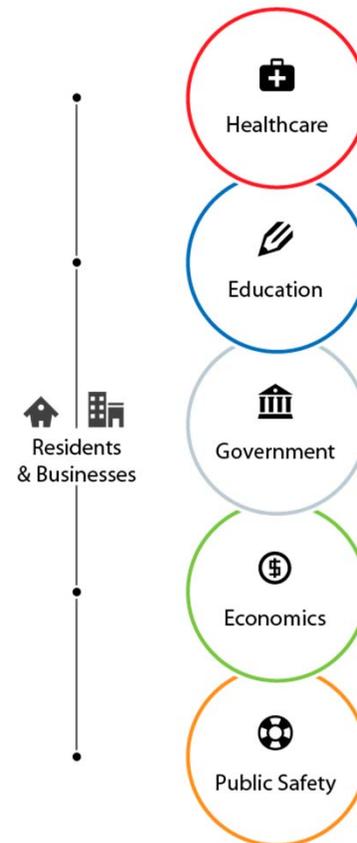
Lessons Learned and Next Steps

Why Alignment Of Broadband Initiatives Is Needed



Benefit of Eliminating Silos

- Reduce duplication saving tax payer's money
- Improve business case for private investment, especially in rural Idaho
- Strengthen economic development and quality of life in all Idaho communities



Funded by a federal grant, the LinkIDAHO initiative was formed in 2009 to:

- © Provide comprehensive trusted data to better understand broadband needs in Idaho.
- © Bring diverse stakeholders together to identify solutions that will improve Idaho broadband availability and use.

Federal funding for LinkIDAHO ends October 31, 2014

28 state and local leaders were interviewed in October 2013.

“Specifically, how Idaho can best align its broadband efforts going forward to achieve its goals”

General Agreement on Several High Level Principles

- © Encouraging private investment is the best approach to meet consumer needs.
- © Sustainable solutions are led from local initiative.
- © Limited role for state government:
 - Source of reliable information and data
 - Encourage beneficial stakeholder partnerships

Options to Encourage Private Investment

- **INCENTIVES**—tax breaks, targeted subsidies, etc.
- **LEVERAGE STATE PURCHASES**—IEN, IDT, Public Safety
- **IMPROVE MARKET INFORMATION**—surveys, assessments and web-based information
- **LOWER PROVIDER COSTS**—dig once, ROW agreements, etc
- **AWARENESS EDUCATION**—outreach and education to promote awareness of the benefits of broadband can improve demand and market profitability for private investment.

Support Local Champions

DATA—web based information on gaps in service, local unmet demand, provider information, etc.

BEST PRACTICES—promote information sharing among communities

TRAINING—digital literacy, working with providers, etc.

FUNDING—targeted resources for local planning and research

LIASON— facilitate connections to state and federal governmental entities that have resources or authority to address local issues

Reduce Silos. Strengthen Collaboration.

LBAT—the LinkIDAHO Advisory Committee provides an important forum to bring together diverse stakeholders around a shared agenda.

STATE SUMMIT—provide an annual forum bringing together diverse stakeholders to share successes and create a vision for the future.

STATE ASSETS—promote collaborative and coordinated use of state network assets such as IEN, public safety and IDT to maximize effectiveness and minimize cost.

LEGISLATIVE AND GOVERNOR'S LEADERSHIP: encourage state agencies to work together in planning for and using broadband.



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