

Broadband Assessment and Connectivity Report Carroll County

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Joanne Hovis, President
www.internetCTC.com



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Project Scope

- **Evaluate and Assess Broadband Market**

- Identify broadband providers

- Residential

- Business including high-capacity transport

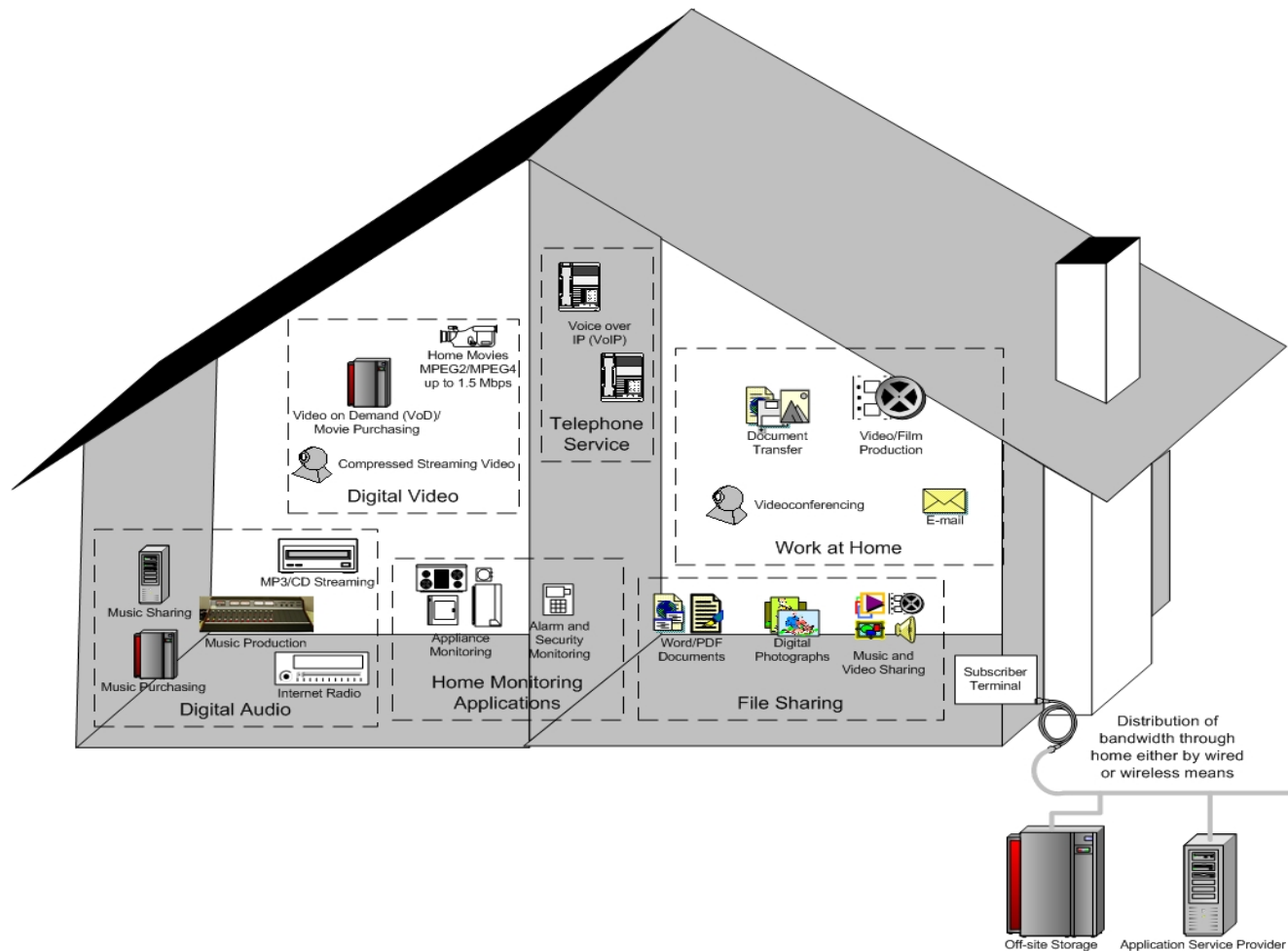
- Identify broadband deployment issues

- **Develop Recommendations for the Future**

- Local goals

- Other community broadband initiatives

Future Connectivity





Carroll County Goals

Statement - insufficient broadband infrastructure and competition

■ Goals

- Innovation
- Job growth
- Economic development
- Education



Carroll County Objectives

- Small business creation and growth
- Support businesses with high bandwidth needs
- Attract and retain businesses
- Promote workforce education
- Support telework and home-based businesses
- Enhance County's image
- Promote major development initiatives such as revitalization zones and technology parks



Carroll County Broadband Issues

- Universal availability
- Affordability
- Symmetrical speeds
- Bandwidth
- Rural exclusion
- Knowledge of service availability



Universal Availability

- Cable
 - Businesses
 - Rural areas
- DSL
 - Businesses
 - Residences
 - Rural areas
- High capacity access
 - Large businesses
- Wireless

Affordability

- Lack of competition
- Affordability of satellite services
- High cost of business-use enhanced circuits

Symmetrical Speeds

- Need for symmetrical speeds
 - Small to medium-size business
 - Home-based businesses



Bandwidth

- Lack of very-high bandwidth offerings for larger businesses



Rural Exclusion

- Significant gap between dense population areas and rural locations



Knowledge of Service Availability

- Provider reliance on the Internet to market products and services
 - Potential customers without Internet access have limited to no access to this information



Recommendations

- Broadband initiatives
- Private-Sector partnerships
- Market research
- Franchising
- Providers and consumers communication
- Communications planning
- Public wireless strategy
- Development zone fiber strategy
- Fiber and conduit infrastructure



Broadband Initiatives

- Government, medical, educational and business data transport services
- Low-cost, introductory level wireless products
- Homeland security and public safety networks
- Dark fiber initiatives
- Any opportunities that optimize the connectivity infrastructure



Initiatives cont.

- Municipal broadband project financing
- Construction, equipment, and integration services pricing
- Service provider interest
- Public and community group interest

Private-Sector Partnerships

- Explore a partnership with service providers
 - Power company
 - Other facilities-based companies with conduit or fiber



Market Research

- Survey market potential
 - Broadband need
 - Features desired
 - Prices market can absorb



Franchising

- Develop a Model Franchise Agreement and Ordinance
- Institute a web-based permit application submission
- Develop an expedited plan and permit review process
- Institute an electronic permitting procedure
- Expedite the inspection process



Provider Communications

- Facilitate distribution of provider information
- Initiate a consumer education campaign
- Form provider partnerships to jointly promote services



Communications Planning

- Seek economic development opportunities by working directly with developers
 - Joint strategy meetings



Public Wireless Strategy

- Initiative private-public partnership study
 - County Network
 - Municipal Network
 - Private Network
- Identify communications needs
- Establish a formal process



Development Zone Fiber Strategy

- Key areas

- Westbranch Trade Center

- MD Route 97/Air Business Center



Fiber and Conduit Infrastructure

- Use every opportunity to maximize fiber and conduit infrastructure
 - Countywide fiber optic policy
 - Municipal collaboration



Summary

- Broadband key driver of future economic development
- Private-sector networks not meeting bandwidth demand in an affordable manner
- Partnerships hold the key to a successful broadband project

Questions?



Columbia Telecommunications Corporation
5550 Sterrett Place, Suite 200
Columbia MD 21044
410-964-5700