

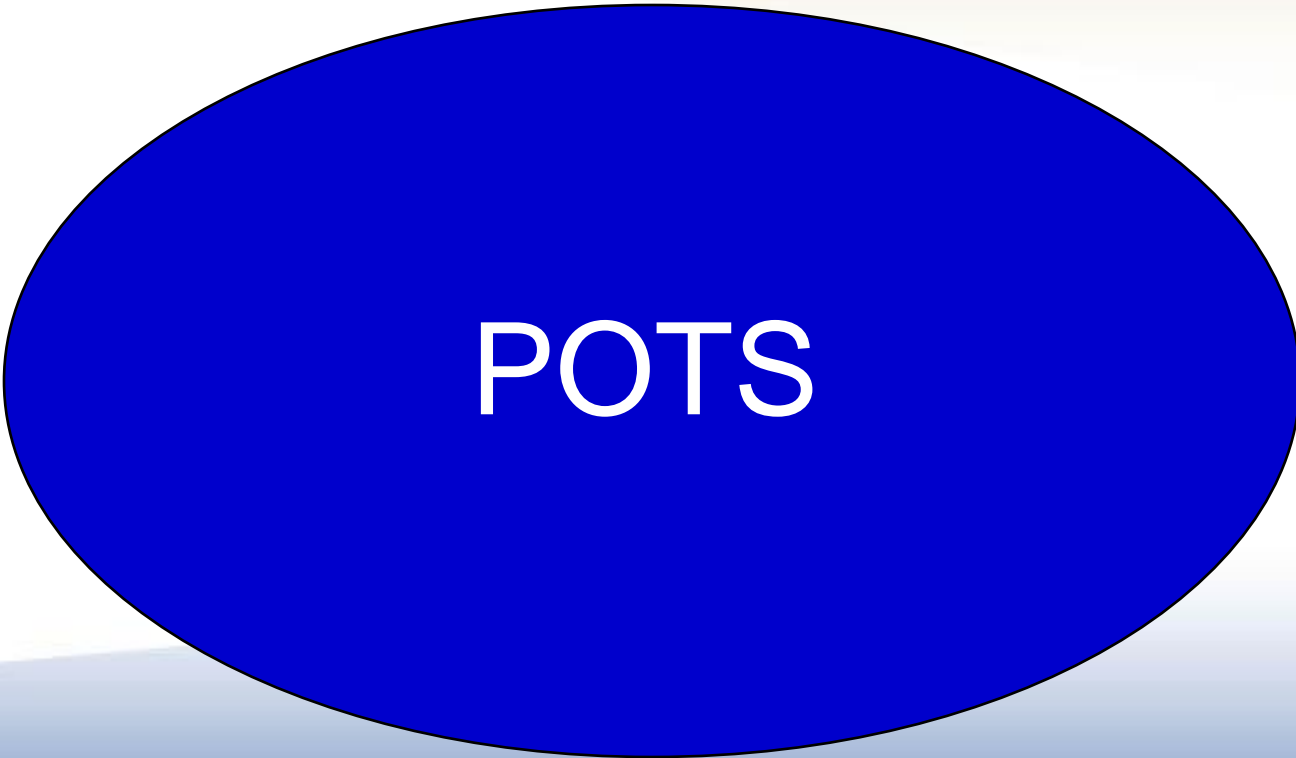
Minnesota: Connecting Broadband to Performance

Bob Isaacson

Ultra High Broadband Task Force

March 20, 2009

Glossary of Terms



POTS

Plain Old Telephone Service



ARPU

Annualized Revenues Per User



WWW

World Wide Wait



SITCOM

Single Income Two Children Oppressive Mortgage



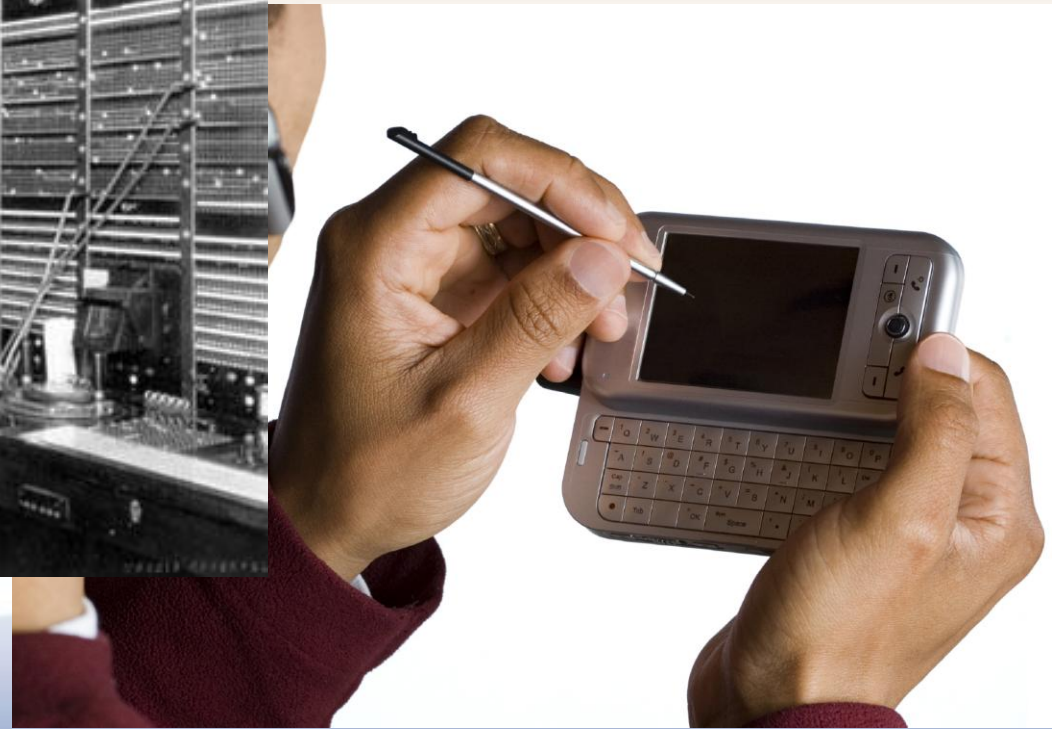
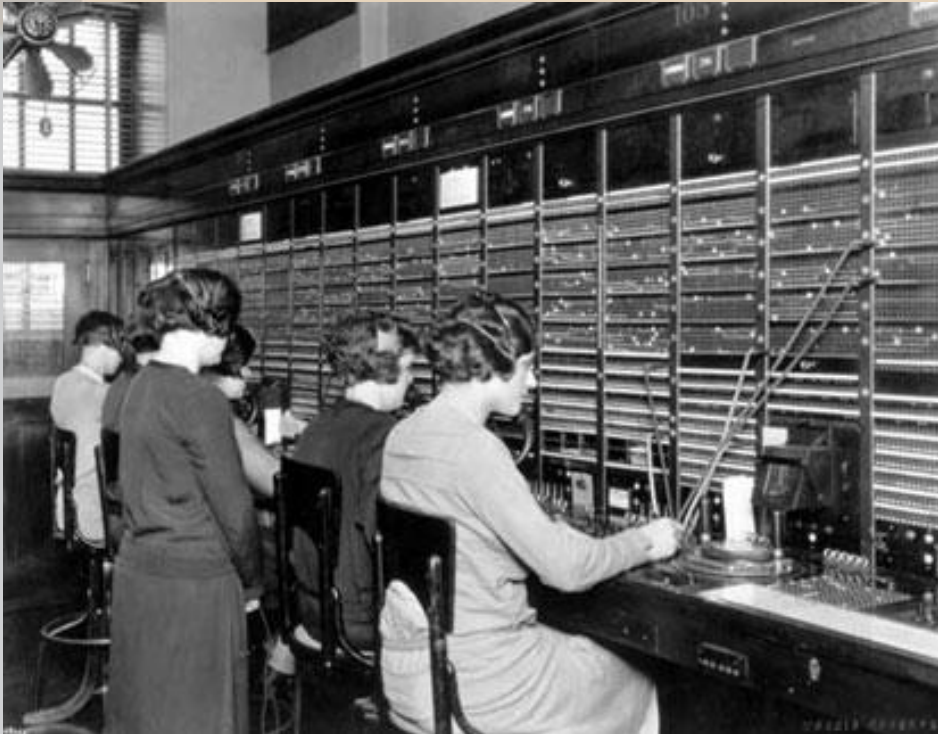
ORCHID

One Recent Child, Heavily in Debt

Broadband and Economic Development

- Past studies suggest that broadband presence gives boost to economic growth
 - MIT study confirmed community growth
 - Brookings found strong impacts in finance, education and health care (along with mfg).
- Business prospects now expect broadband
 - Not a competitive advantage

We've come a long way....

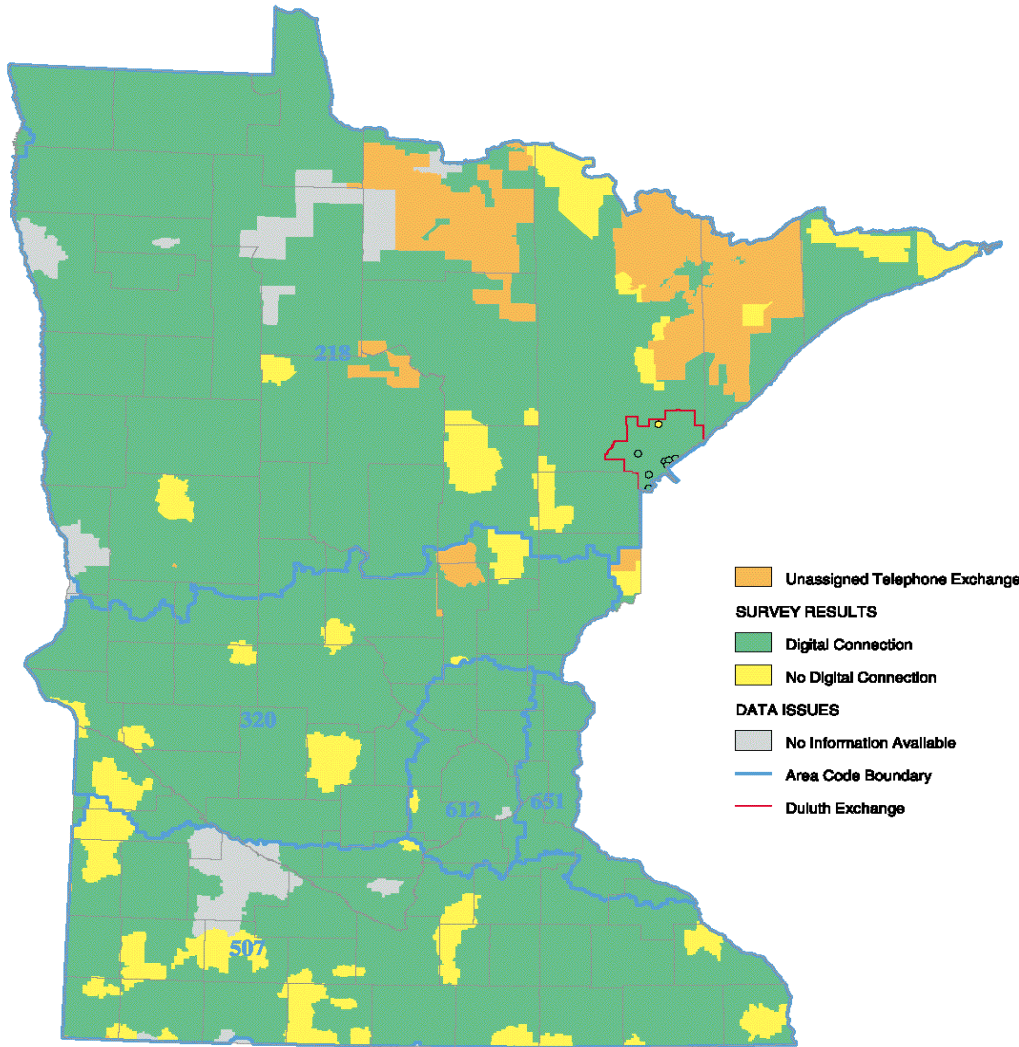


From telecommunications tools and capabilities.....

Telecommunications Infrastructure Profile

Central Office Connected Digitally by Fiber

as of January 1, 2000



Central Offices Connected by Fiber (2000)

...to access and
understanding inventory



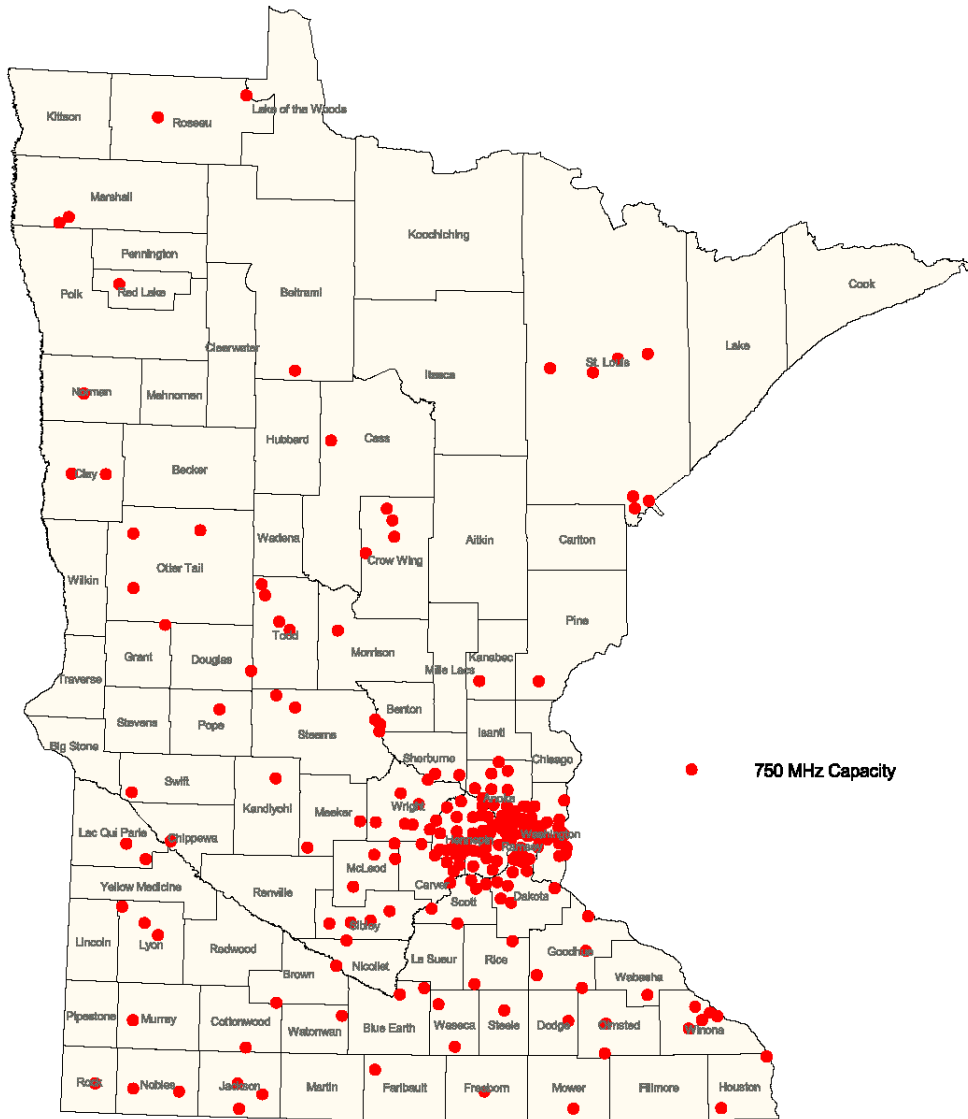
Prepared by the Land Management Information Center at the Minnesota Office of Strategic and Long Range Planning

Source: Departments of Commerce and Administration Survey Conducted September 1999.

Created: January 03, 2000



Telecommunications Infrastructure Profile
 Cities with 750 MHz Capacity or Planning on Upgrading
 as of January 1, 2000



Cities with Cable Offering 750MHz or Plans to Upgrade (2000)



Prepared by the Land Management Information Center at the Minnesota Office of Strategic and Long Range Planning.

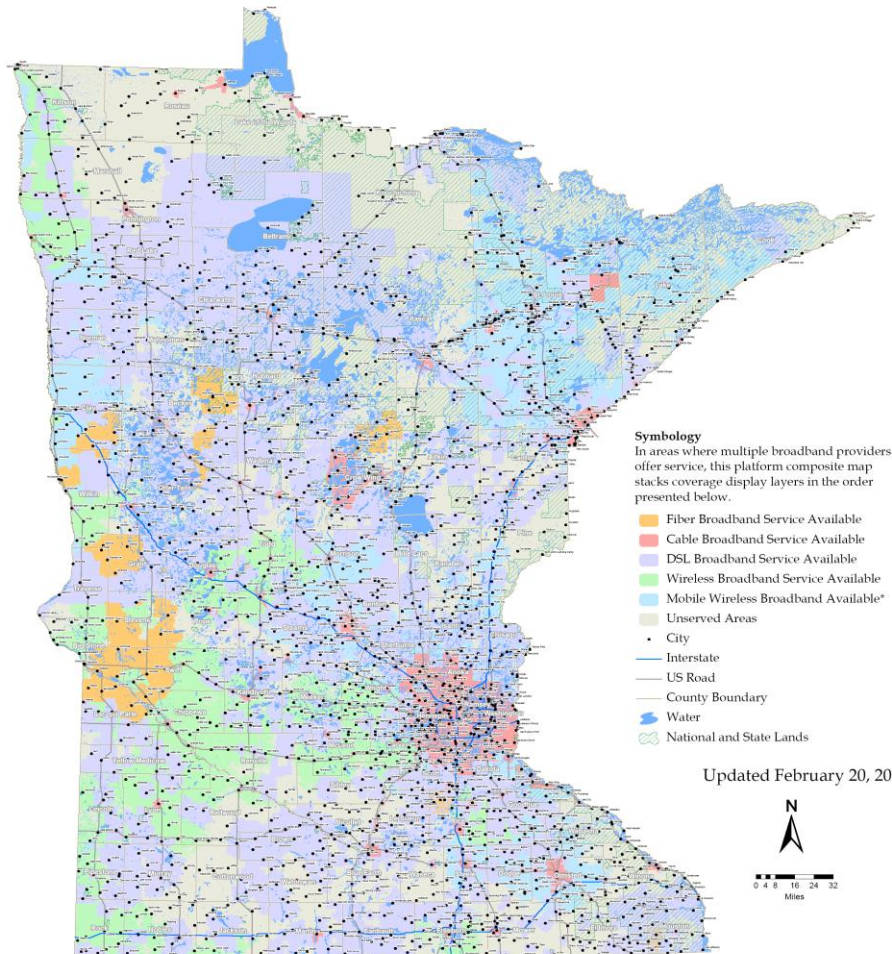
Source: Departments of Commerce and Administration Survey Conducted September 1999.

Created: December 6, 1999



Minnesota Broadband Service Inventory

Submit questions or recommended changes to: maps@connectednation.org



This map does not depict satellite broadband service.

*This map is not a guarantee of coverage, contains areas of no service, and generally predicts where outdoor coverage is available. Equipment, topography, and environment affect service.

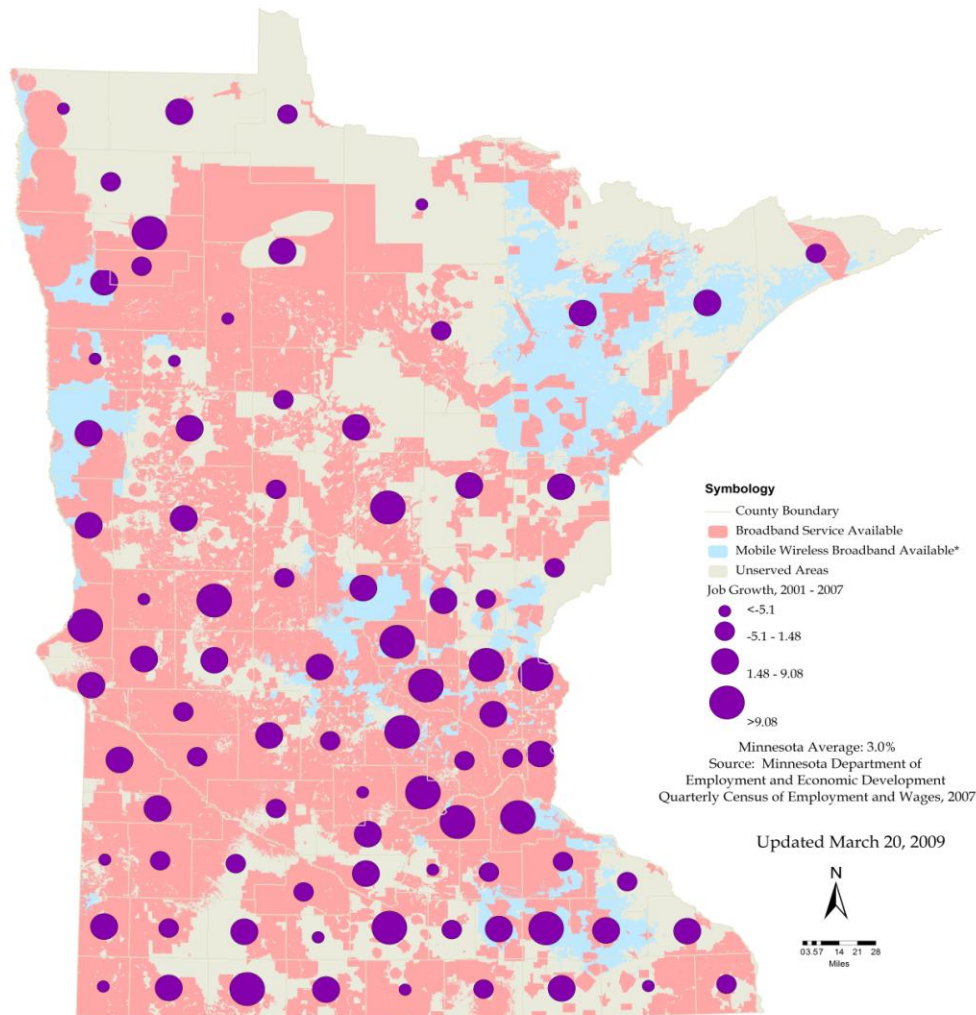
Connect Minnesota has worked with broadband providers throughout the State to identify the gaps in broadband service - the first step in a statewide effort to "fill the gaps" for 100% broadband availability.

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Minnesota Broadband Service Inventory (2009)

Minimum = 750 kilobits per second (kbps) service

Minnesota Broadband Service Inventory and Job Growth



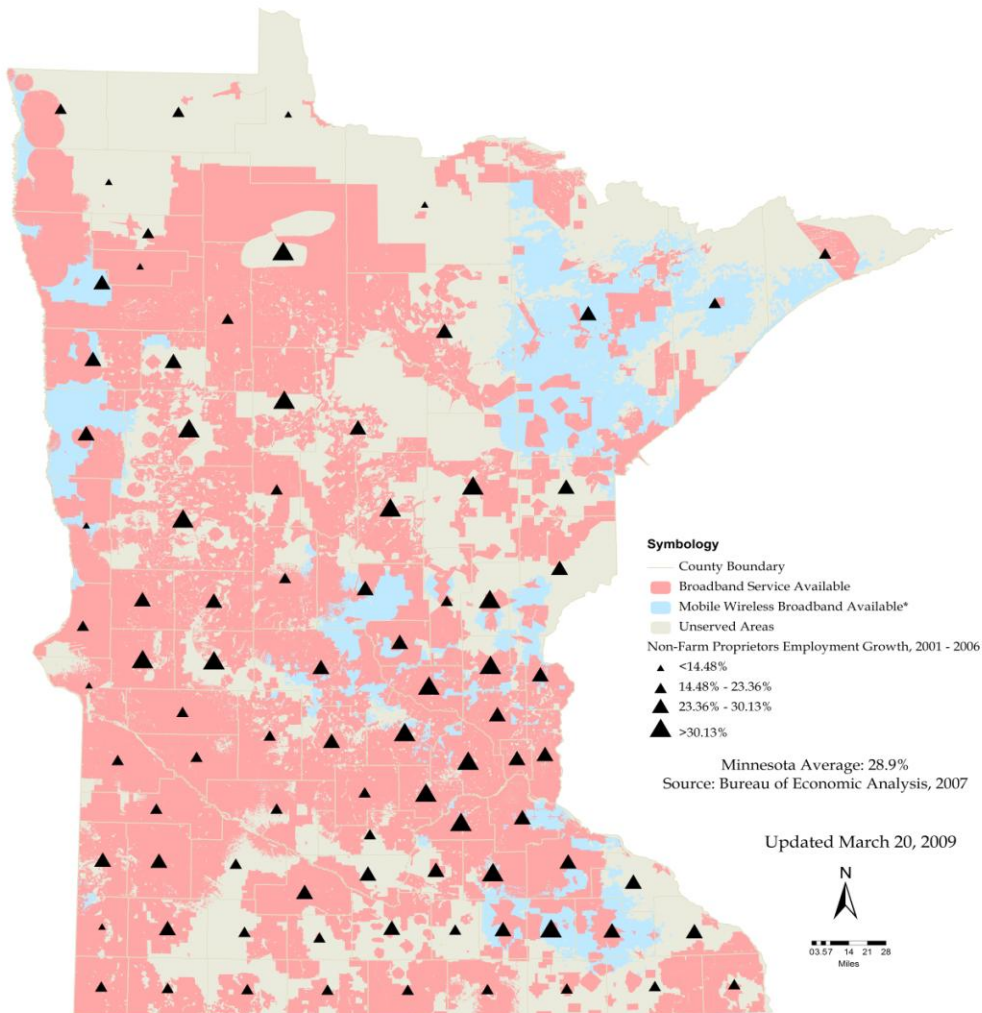
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Broadband Service and 2001 – 2007 Job Growth



Broadband Service and 2001 – 2006 Non-Farm Proprietor Growth

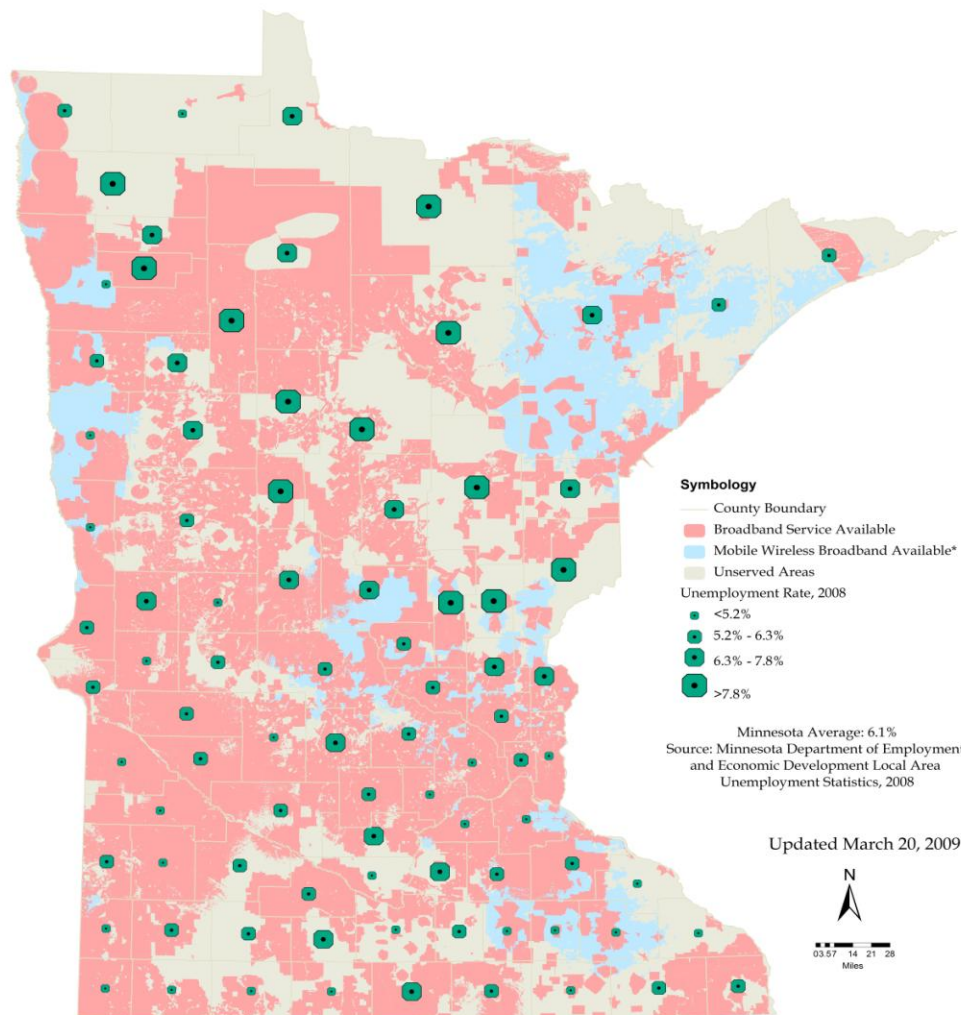
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Minnesota Broadband Service Inventory and Unemployment Rates



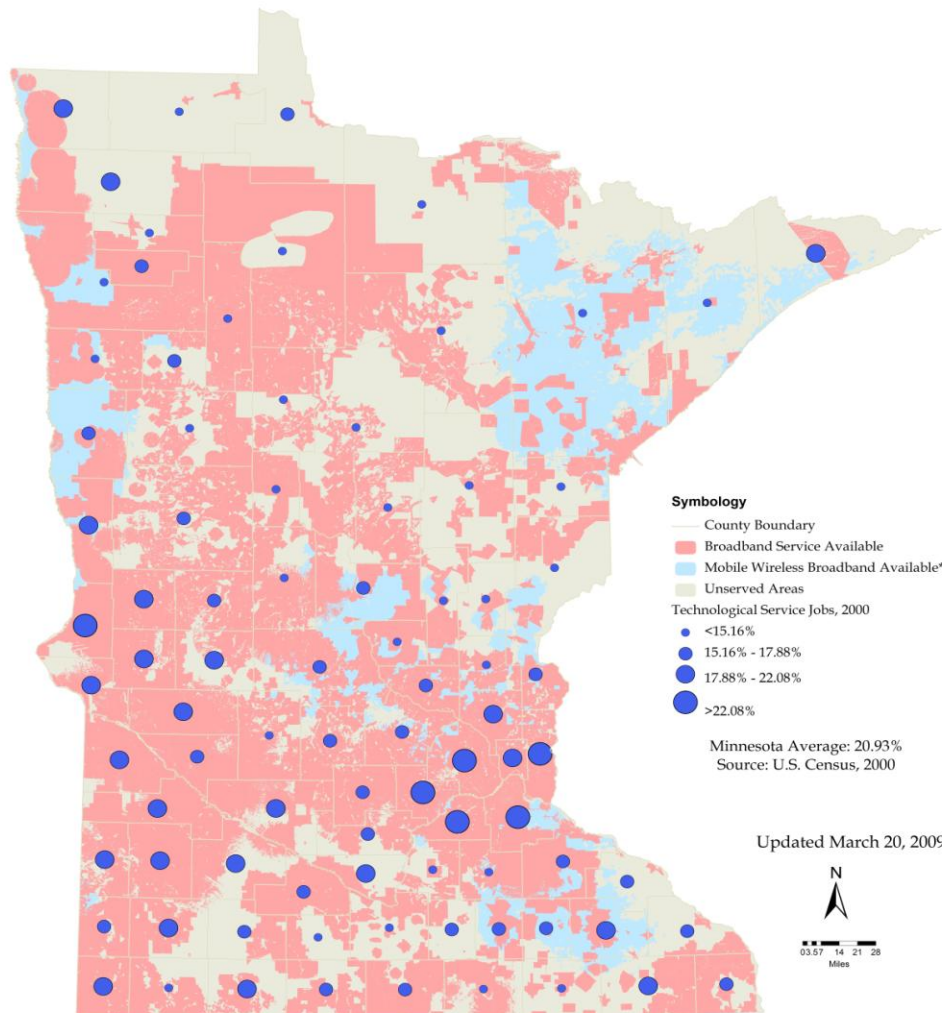
Broadband Service and 2008 Unemployment Rates

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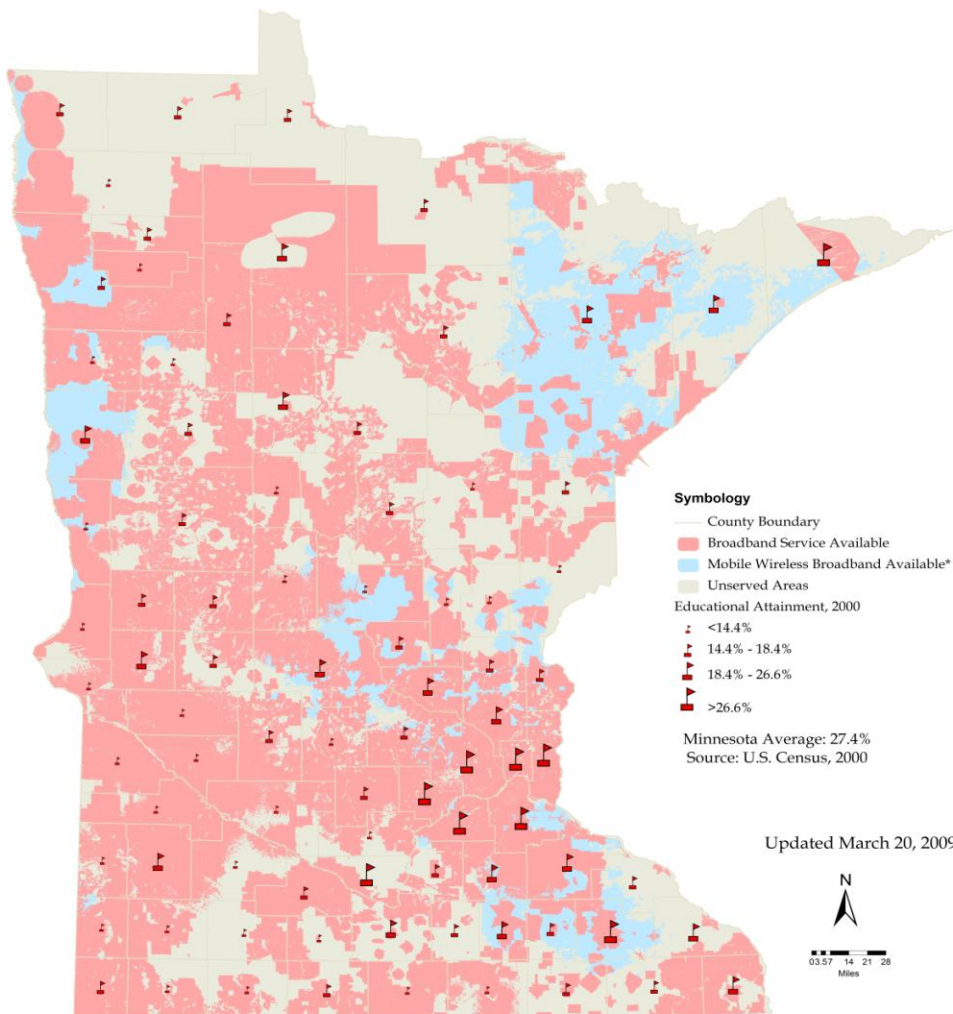
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Broadband Service and Technological Jobs in 2000



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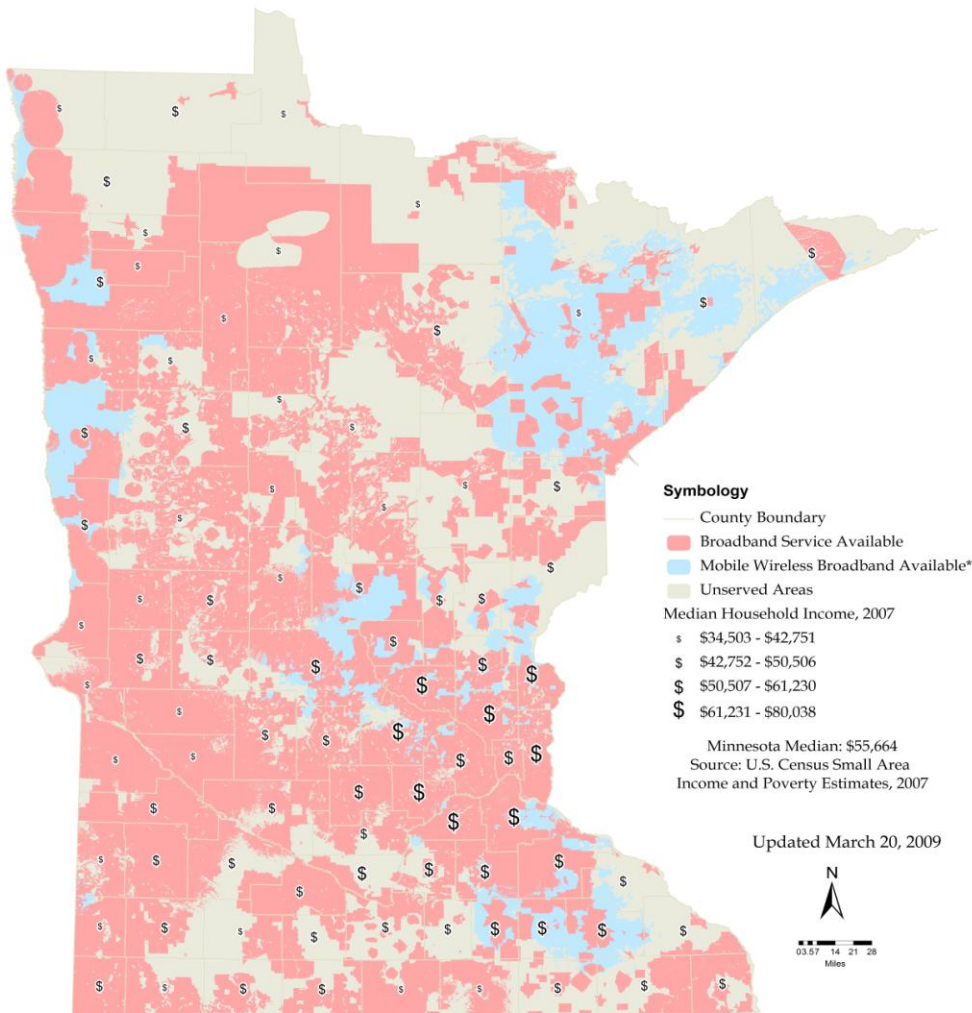
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Broadband Service and Educational Attainment as of 2000

Minnesota Broadband Service Inventory and Median Household Income



Broadband Service and 2007 Median Household Income

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Business Influences and Trends

Worker Skills

Internet-Related
Business

Outsourcing/
Exporting

Senior Living

Global and green
awareness

Demographic changes

Advanced communication
technology

Opportunities

Job Growth Projections – through 2016

- Growth across many sectors
 - Finance and technical business services
 - Administrative and management services
 - Education and health care
 - Hospitality
 - Select wholesale and retail trade
 - Mining and construction
- Manufacturing uneven
 - Wood product, medical devices, misc mfg are stars
 - Other industries growing, but slowly

Next Steps?

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