"Speed is everything out here. It opens up everything." -- SW Alaska respondent, concerning impact of broadband in rural communities

"On a scale of 1 to 10, I'd rate it about 10."

-- Tribal administrator in Alaska on the importance of broadband

"Here we have devices. We are device rich, and bandwidth poor." -- Village store owner

"Our clients sometimes don't understand ... they just stare at us when we tell them about how big uploads and downloads make our lives difficult."

-- Fishing lodge owner



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Canadian Communities Dependent on Satellite Service







Community aggregator model



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Fixed voice service and Internet access

Fixed voice service

Arctic Communities

- Generally small, isolated communities
 - Small markets
 - Expensive to serve
- Primarily indigenous populations
 - Young, fast growing populations
 - Large households
 - Low/seasonal incomes
- Institutions:
 - businesses, government, social services, public safety

Broadband Requirements

- Households: education, cloud-based services, government and commercial online services
- Public services: education, health care, public safety
- Business and organizations: logistics, payroll, funding, marketing, training, meetings
- Mobile as well as fixed

Implications for Arctic Connectivity

- Capital Investment: necessary but not sufficient
 - Capex subsidies may be required
- Opex subsidies also required
 - High cost provider subsidies
 - Anchor tenant subsidies: schools/libraries, health care
 - User subsidies: e.g. broadband Lifeline
 - Alaska received almost \$3 billion since 1998 in US USF funding
- Broadband as a moving target
 - Applications are likely to become more bandwidth-intensive and cloudbased
- Affordability is key
 - Users in Alaska and N Canada unable to take full advantage of broadband
 - Low incomes, multiple-user households,
- Indigenous providers as well as users need to be involved
 - Infrastructure funding and subsidies open to all providers
 - Local jobs: installation, maintenance, training , tech support

For more information:

hehudson@uaa.alaska.edu

www.iser.uaa.alaska.edu



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