



Broadband Wales Update and Progress Report

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Broadband Wales Programme

- As a result of this 5 year programme Wales will benefit from an environment where broadband services are -
 - highly available and affordable for all residents, businesses and the total public sector
 - education will be accessible across the country at all levels using broadband, improving the ability of Wales to build a competitive workforce
 - the economy will be able to accelerate towards a knowledge economy
- and Wales will be able to compete more effectively in the global marketplace as a result of moving to a new level of infrastructure for the 21st century

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Broadband Wales Programme

- Programme based over a 5 year period
 - July 2002 to June 2007
- Based on extensive & authoritative research
- Balanced, strategic, holistic programme
- Target supply intervention
- Demand Stimulation
- Flexible & responsive to match evolving market

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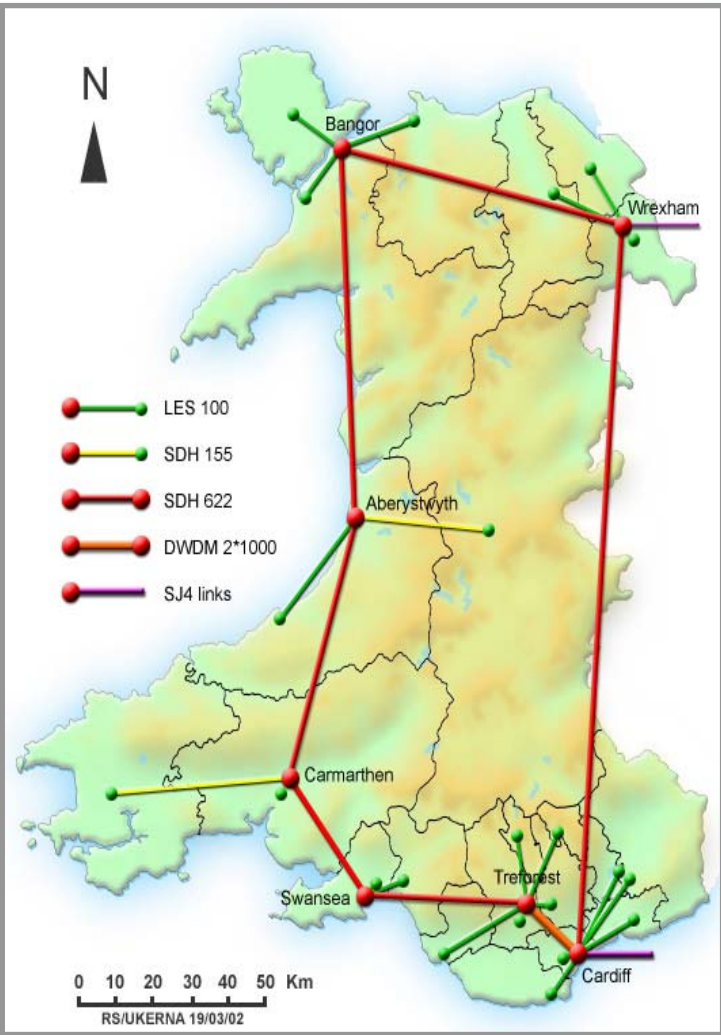
Early Programme success 2002-2003

- Lifelong Learning Network
 - Providing broadband speeds to schools, libraries, ICT learning centres throughout Wales
 - Core network from WAG, Access circuits through UA & LEA with WAG finance
- Satellite Subsidy Scheme for Businesses
 - c. 250 SMEs in Wales have currently used this support scheme
 - Scheme now technology neutral
- Try before you Buy – Business ICT Centres Initiative
 - www.wda.co.uk/broadband

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Public Sector broadband networks

Lifelong Learning Network



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Market status

- In June 2003 Wales had 32 enabled exchanges
- By June 2004 Wales will have around 148 enabled exchanges
- By summer 2005 Wales will have 404 exchanges out of 439 enabled.
- The speed of this development has required us to review the market failure issue and ensure that the support programmes of BISI & RIBS are focused to address the new issues that have arisen.
- Additionally the recent LLU (Local Loop Unbundling) pricing structure changes announced by BT will allow us to engage with infrastructure suppliers in order to offer a competitive environment of both price and bandwidth.

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Marketing Activities

Marketing remains a core asset to the programme

- It will address the areas of education of benefits for business and domestic users
- Encourage potential infrastructure suppliers to invest in Wales
- Identify unique characteristics of the broadband market in Wales and gain an in-depth understanding into their needs and attitudes
- Increase awareness and understanding of the opportunities delivered by broadband
- Increase take-up and effective use of broadband to match UK average penetration figures
- Position Wales as an attractive and dynamic market for competitive growth and sustainable provision of broadband

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Market activities in 2004

- Regional Innovative Broadband Support - RIBS (market review)
- Broadband Infrastructure Support Initiative - BISI (market review)
- Extension to the Lifelong Learning Network (ELLeN)
- Fibre speed services to Business Locations & Parks (WDA)
- Research International Connectivity options (WDA)
- WDA SME Satellite Subsidy becomes the Business Broadband Support Scheme - April 2004 Launch, now covers voluntary sector organisations

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Market activities in 2004

- Demand & Supply Stimulation - Marketing Activities from January 2004
 - Positioning of RIBS, BISI, LLN and programme
 - Partner marketing in areas with broadband availability
- Broadband Wales Taskforce recruitment & deployment
 - geographically dispersed market intelligence & development people
- ICT Try-before-you-buy running in WDA centres
 - All centres now have broadband capability

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Wales objectives - by July 2007

- Increased broadband availability across the country
 - Will require access and network infrastructure build using a range of technologies
- Improved affordability no matter whether in towns or rural areas
 - This may be achieved through new competitive suppliers choosing to enter the Welsh marketplace with new technologies
- Sustainable infrastructure build that provides an asset beyond the intervention period

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Broadband Wales Taskforce Team

- Remote based team
- Spread throughout Wales
- Providing point of presence
- Able to liase on a local and regional level
- Direct contact with public, private and voluntary organisations
- Work with the Economic Forum ICT Group to agree regional priorities
- Support, monitor and evaluate progress of local projects
- Develop local marketing plans to complement local partners
- Identify potential exemplars who can demonstrate the benefits of Broadband
- Liase with other Broadband stakeholders to identify common problems, maximise synergies, emerging themes and possible regional exemplars

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Broadband Wales Programme

www.broadband.wales.gov.uk

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