

# Monterey County Broadband Strategic Plan

## Final Project Presentation

Prepared for Monterey County

January 9, 2024



# Monterey County Broadband Strategic Plan

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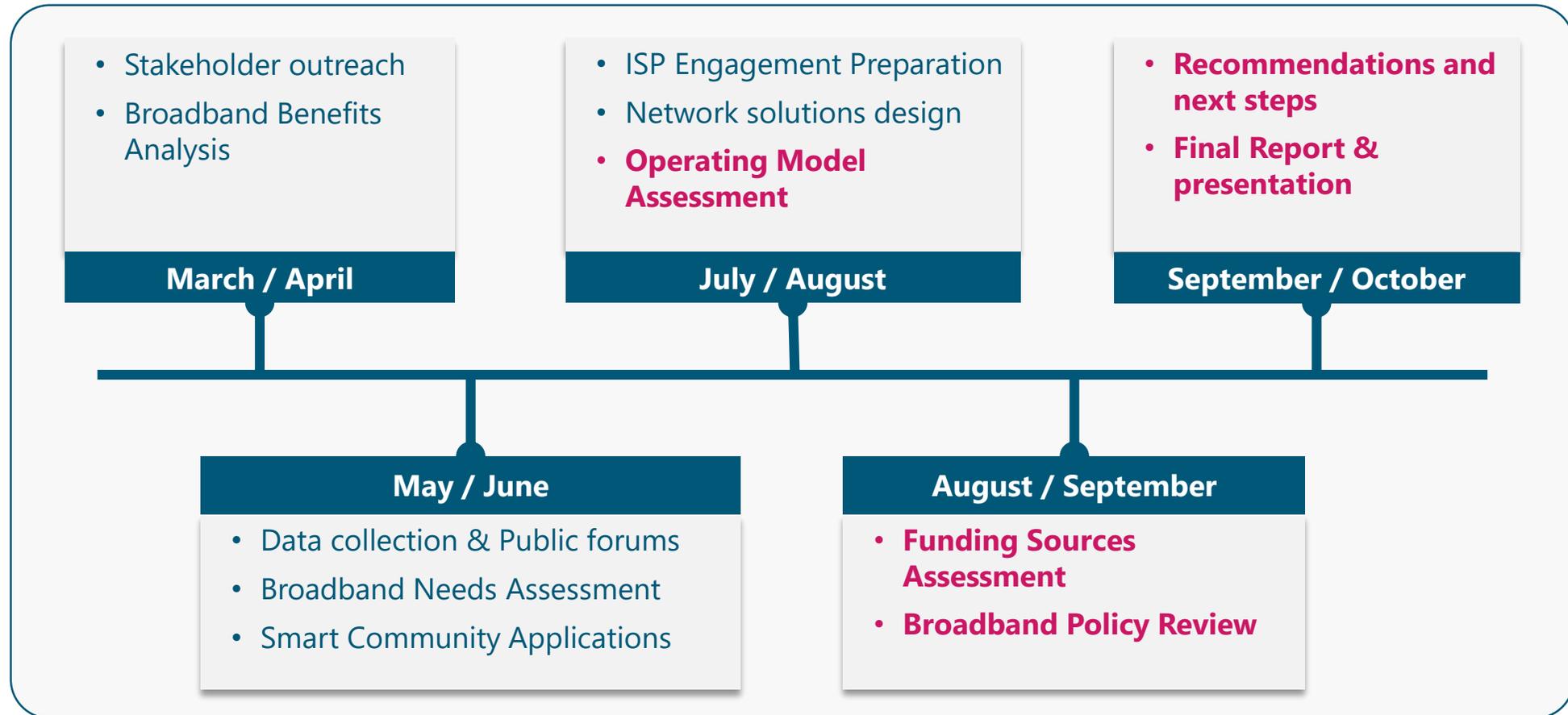
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# Project Scope & Timeline

- This RCRC-funded project seeks to prepare the County for a broadband future via **a countywide strategy and plan.**
- Data collected will support the County and other jurisdictions to continue to plan and apply for broadband funding

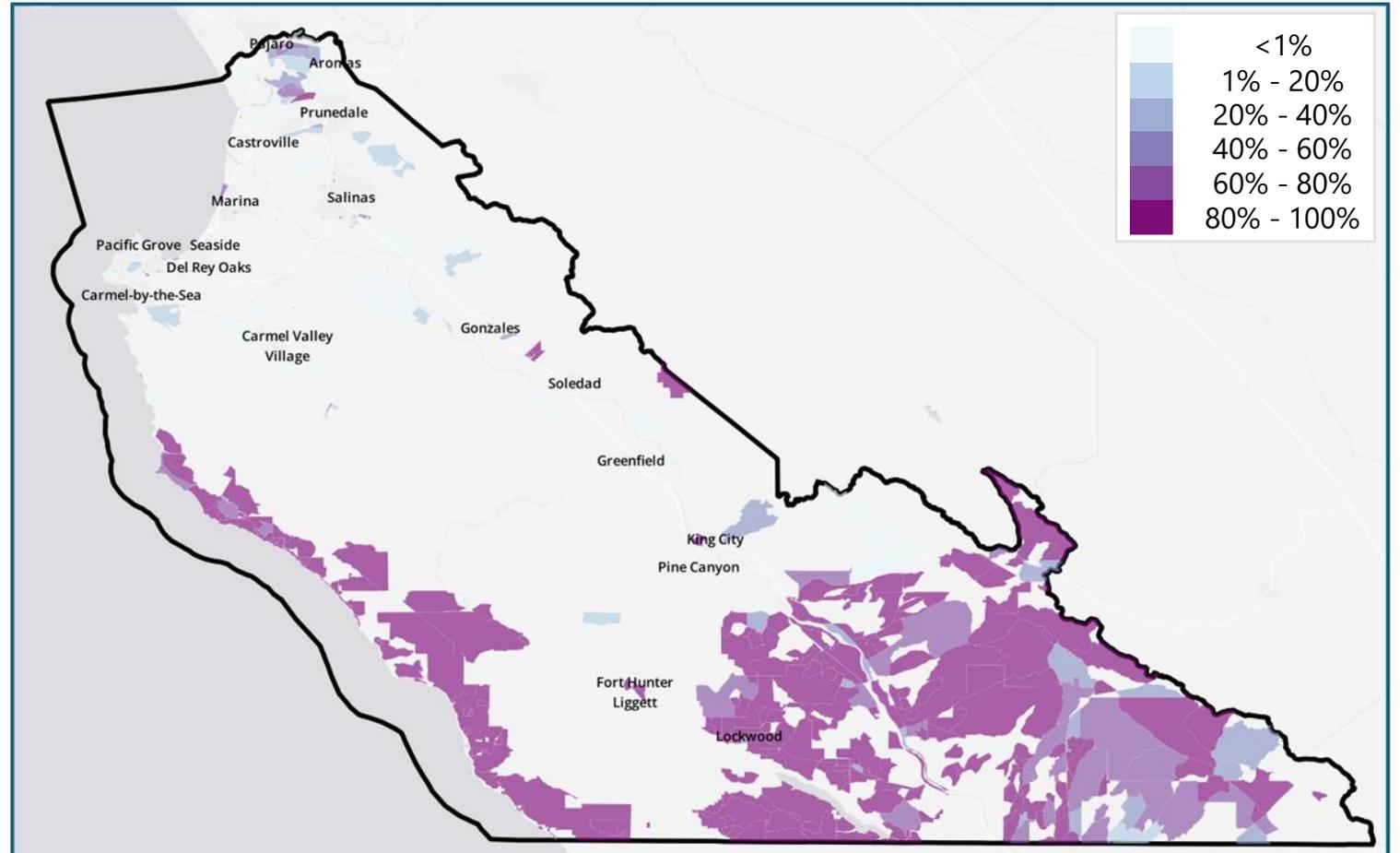


# Broadband Service Status: FCC Data

## Serviceable Location Status in Monterey

## Unserved Locations of Monterey exist mainly in the unincorporated areas (Census Block Level)

1G Served Locations* (> 1000/500)	<b>25,873   (23.3%)</b>
Served Locations (100/20 to 1000/500)	<b>81,054   (72.9%)</b>
Underserved Locations (25/3 to 100/20)	<b>812   (0.7%)</b>
Unserved Locations (< 25/3)	<b>3,436   (3.1%)</b>
<b>111,175</b>	



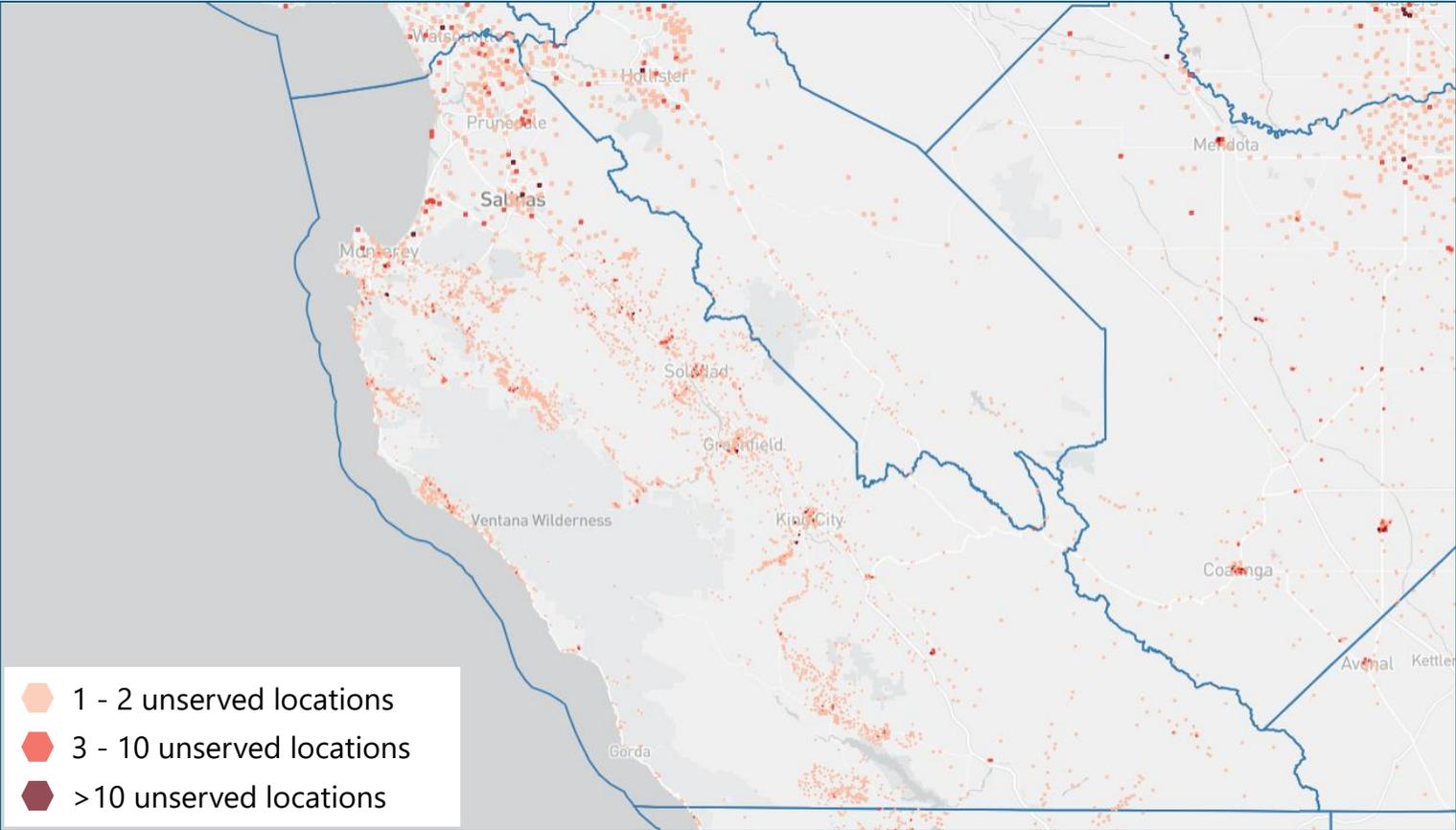
\*On July 15, 2022 the FCC launched a "Notice of Inquiry" that proposes to set a separate national goal of 1 Gigabit per second (Gbps)/500 Mbps for the future

# Broadband Service Status: CPUC Data

Unserved locations according to the CPUC FFA Public Map are captured below

Served Locations **97,380 | (87.6%)**

Unserved Locations **13,795 | (12.4%)**



*\*For Monterey County, the CPUC FFA public map has significant variations with the FCC Broadband Map Dataset*

# Monterey Service Availability: Key Takeaways



- ~**97%** of Monterey locations are considered **served according to FCC (88% according to CPUC)**
- Of those served, **99%** have access to speeds higher than **100/20 Mbps** (FCC data)



- **79%** of unserved locations are in unincorporated areas
- **51%** of the unincorporated unserved locations are in **remote areas of Monterey County (South County)**



- **76.7%** of Monterey County locations **lack access to 1G/500 Mbps service**, leaving much work to be done
- **Marina, Salinas, Carmel by the Sea, Monterey, Sand City, Seaside, Gonzales, Soledad, Greenfield, and King City** are "well served" (>100/20) but lack 1G/500 Mbps service.

# Digital Equity Insights

Digital Equity key learnings and insights are summarized below

	Digital Equity Barriers	Digital Equity Programs
<b>Affordability</b>	<ul style="list-style-type: none"> <li>47% of households (61,142) are eligible for the ACP.</li> <li>Only <b>30.2% of those eligible (18,481) are enrolled.</b> <ul style="list-style-type: none"> <li>October 30, 2023, data</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>County and partners continue to promote ACP enrollment.</li> </ul>
<b>Availability</b>	<ul style="list-style-type: none"> <li>Largest need for broadband infrastructure in <b>South County.</b></li> <li>Satellite service is ineffective and unstable</li> </ul>	<ul style="list-style-type: none"> <li>The Loaves, Fishes and Computers Program                             <ul style="list-style-type: none"> <li><b>Distributes computers, hotspots</b> and holds computer literacy workshops and <b>digital navigator programs.</b></li> </ul> </li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>Aging population is <b>digitally isolated</b> <ul style="list-style-type: none"> <li>Senior centers require digital navigators.</li> </ul> </li> <li>North Star Online Services (NSOS) provides digital tools and training; <b>limited staff</b> impedes new user onboarding</li> </ul>	<ul style="list-style-type: none"> <li><b>Alliance on Aging as a partner</b> to distribute digital literacy and ACP information.</li> <li>Workforce development program is reaching important populations.</li> </ul>
<b>Devices and Applications</b>	<ul style="list-style-type: none"> <li>Have <b>limited access to facilities and public computers</b></li> <li><b>Preference for in-person services</b> (health, governmental, retail) among aging population</li> </ul>	<ul style="list-style-type: none"> <li>Library network could use more staff to provide <b>digital literacy training</b>; needs <b>multi-lingual resources.</b></li> </ul>

# Network Solutions & Scenario Analysis

## Towards a Countywide Broadband Strategy

### Identify Broadband Opportunity Zones

- Identify areas of need matched with revenue opportunities for ISP investment or PPP
- Establish the potential solution (Fiber or FWA) for each area based on size, density and existing competition

### Develop Conceptual Designs

- Fiber and FWA conceptual design
- Leverage GSN and existing municipal infrastructure
- Cost estimate

### Assess Operating Models

- Identify ongoing initiatives
- Assess Funding Sources
- High level business case
- Identify potential partners
- Match broadband projects with Operating Models

# Recommended Scenarios: Key Takeaways

- The proposed scenarios for the 64 broadband opportunity zones reduce unserved locations and increase 1G service from 23% to 84%
- Satellite is required for ~ 790 unserved locations

	Current	Target
1G Served	25,873 (23.3%)	93,688 (84.3%)
Served	81,054 (72.9%)	16,633 (14.9%)
Underserved	812 (0.7%)	854 (0.76%)
Unserved	3,436 (3.1%)	0 (0%)
	<b>111,175</b>	

**Total Grants amount**

- **\$100M+** total grants to enable **52 Fiber and 12 FWA projects.**

**Existing Infra**

- 13 Projects to use the **California MMBI (GSN)**
- 3 Projects to leverage the existing **County Fiber Infra**

**Middle Mile**

- Additional **investment in middle mile** is required to enable projects located in Salinas Valley, Cachagua Valley and Carmel Valley.

**Satellite**

- Satellite as the solution for **790 unserved locations**
- Service > 25/3 Mbps @ **\$50 to \$125 (ACP eligible)**

# Broadband Policies

Broadband readiness for the County and the Cities that responded to the Data Collection request was performed based on the California Local Permitting Playbook and NTIA best practices

## Readiness Assessment

	Monterey County	Salinas City	King City
<p>Construction standards</p>			
<p>Permitting process Documentation</p>			
<p>Differentiation between major and minor broadband projects</p>			

## Recommendations

- Ensure construction standards are updated and accessible online, including method for underground and overhead fiber deployment
- Document permitting process and make it available online
- Establish guidelines to classify and handle minor and major broadband permits

Not Broadband Ready

Broadband Ready



# Broadband Policies

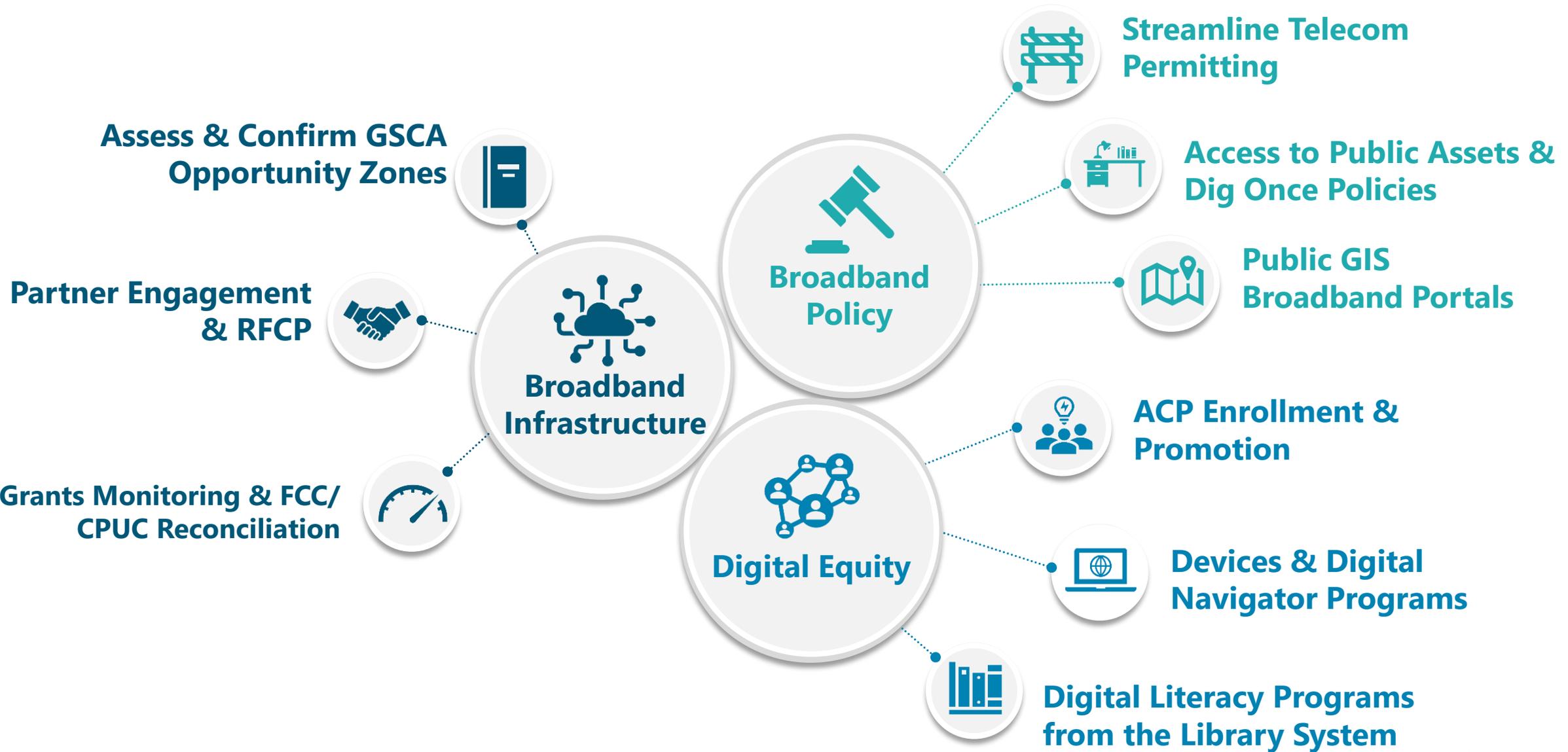
## Readiness Assessment

	Monterey County	Salinas City	King City
 <b>Batch permitting process</b>			
 <b>Leasing of public assets</b>			
 <b>New Assets Policies</b>			
 <b>Public GIS datasets</b>			

## Recommendations

- ▶ Implement batch permitting process for broadband projects (King City)
- ▶
  - Inventory of public assets
  - Develop leasing rules, processes, and fees
- ▶
  - Dig Once / Open Trench Policies (County and King City)
  - Enforce conduit deployment for major construction projects
- ▶ Improve and complement GIS Portals with broadband data
  - Serviceability, ongoing initiatives, existing infra, zoning, etc.

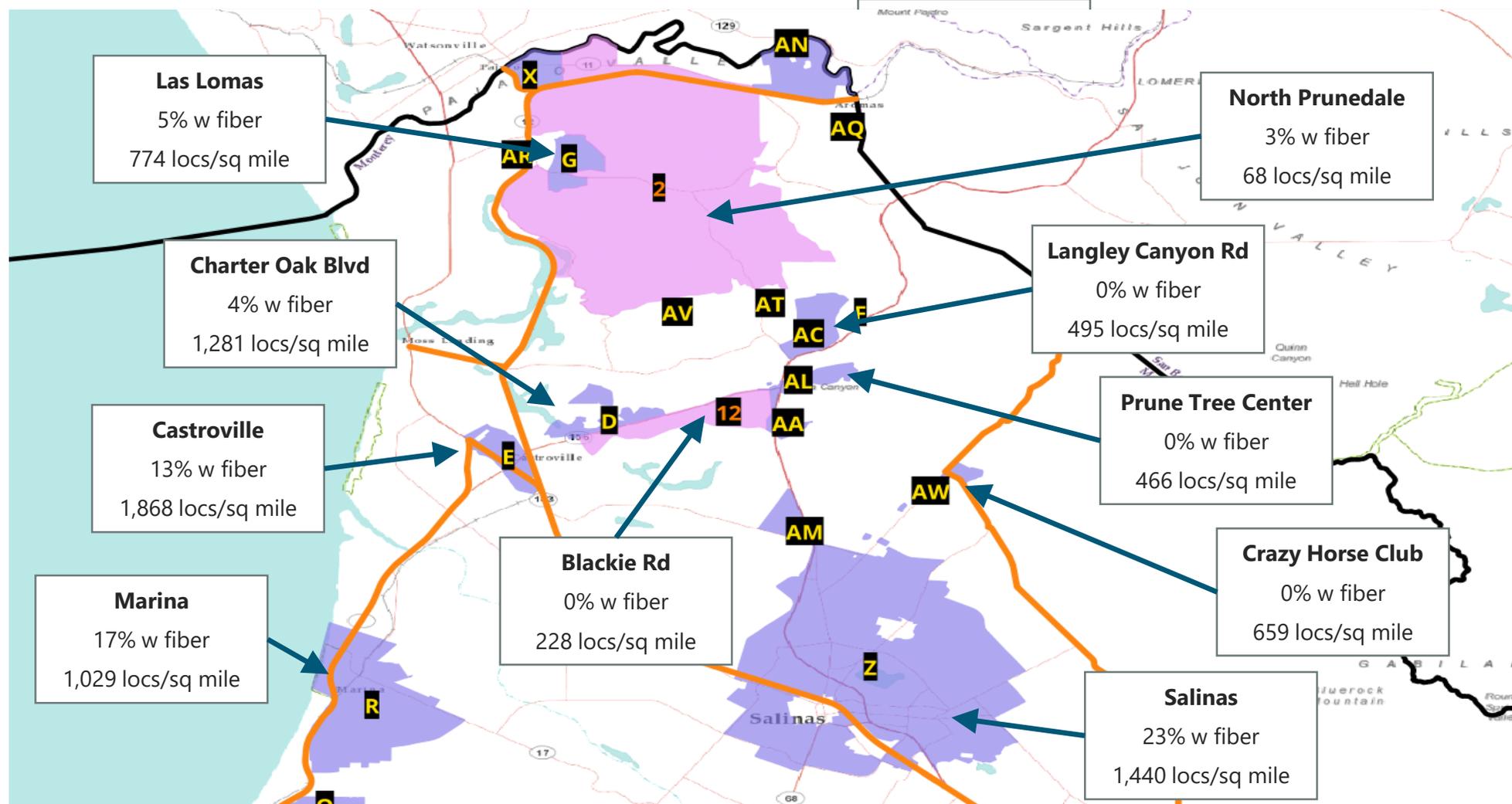
# Action Plan



# Q&A

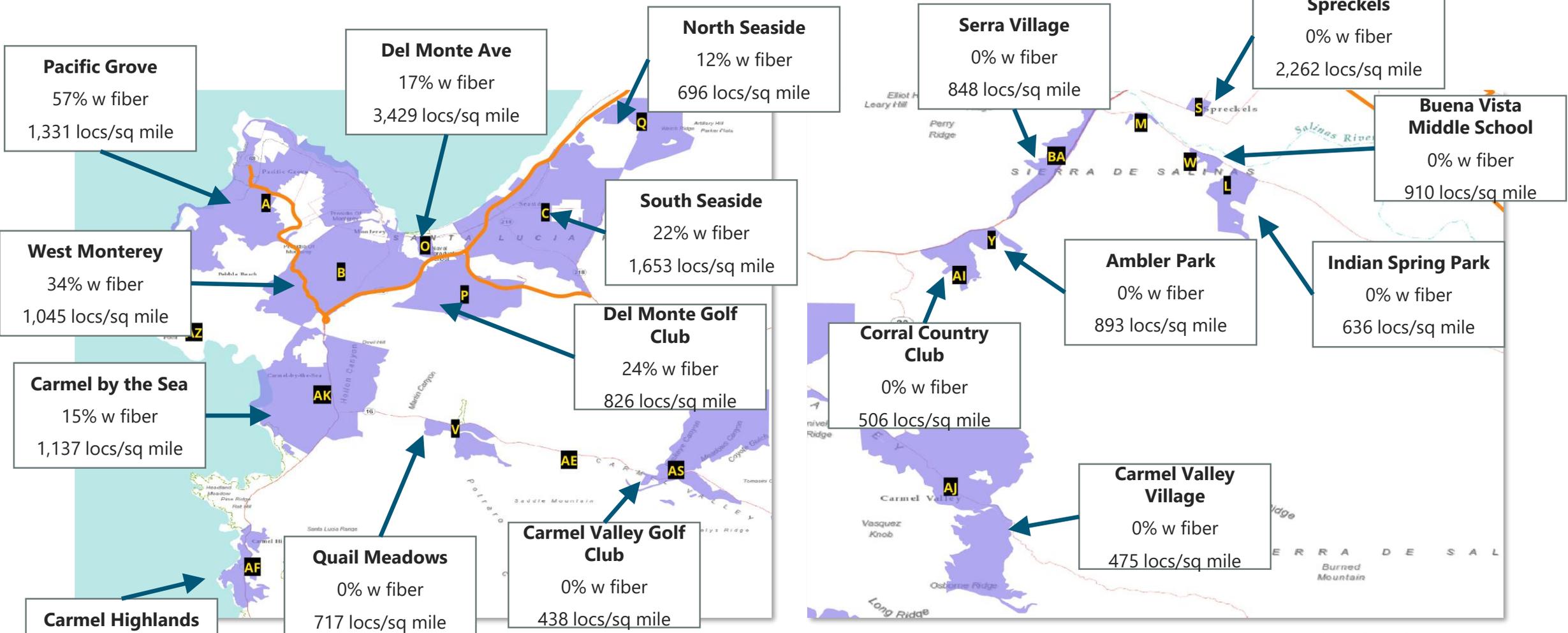
[www.teleworx.com](http://www.teleworx.com)

# Broadband Opportunity Zones: Map View (1/4)



North Zone

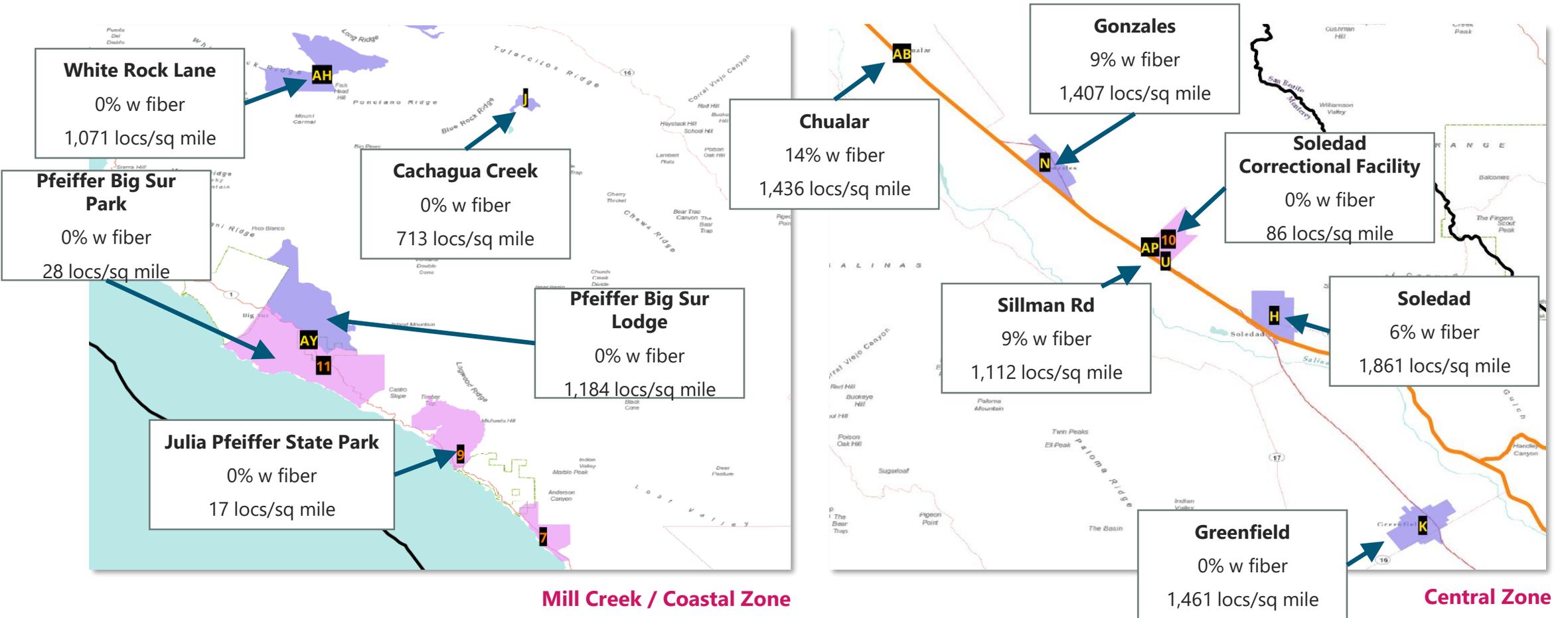
# Broadband Opportunity Zones: Map View (2/4)



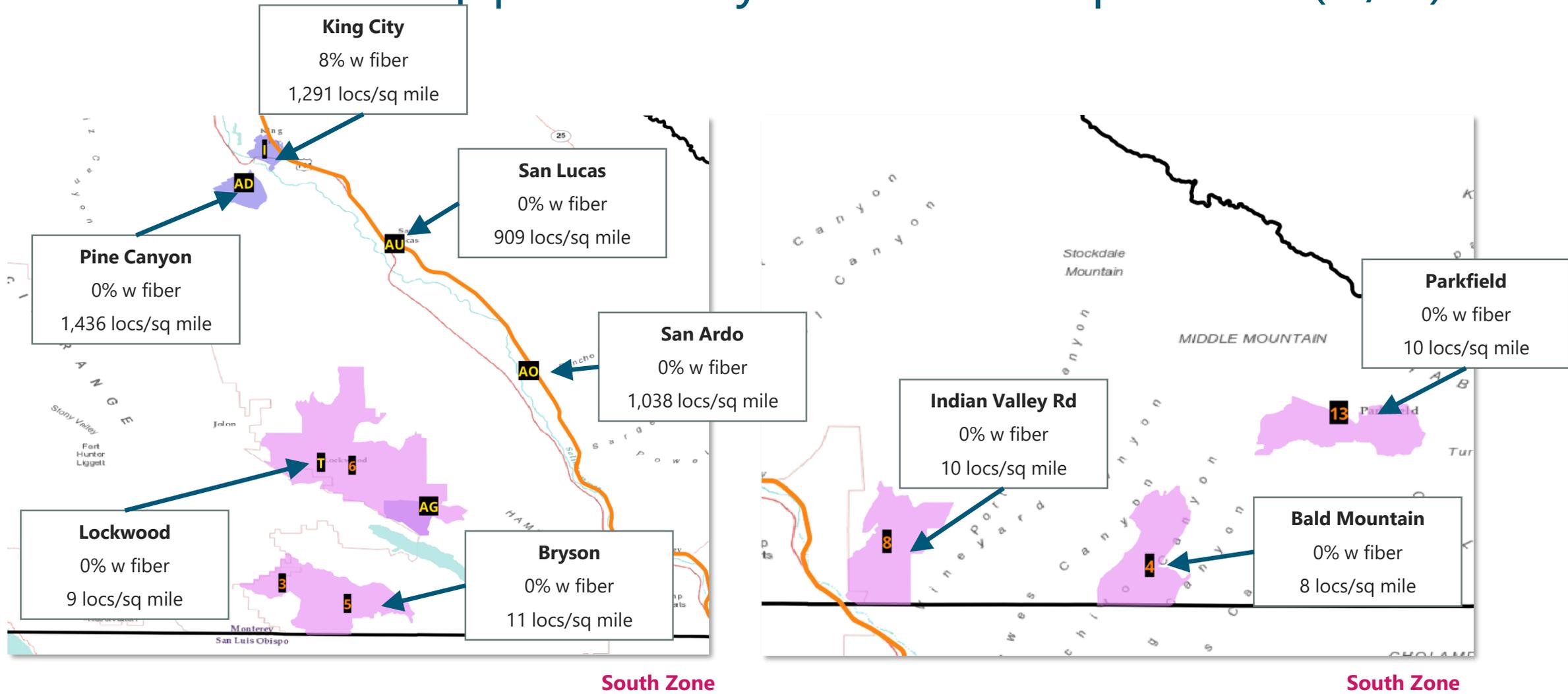
Coastal Zone

Regional Park Zone

# Broadband Opportunity Zones: Map View (3/4)



# Broadband Opportunity Zones: Map View (4/4)



# Fiber Opportunity Zone Prioritization

Low

Feasibility & Timeframe

High

Operating Models

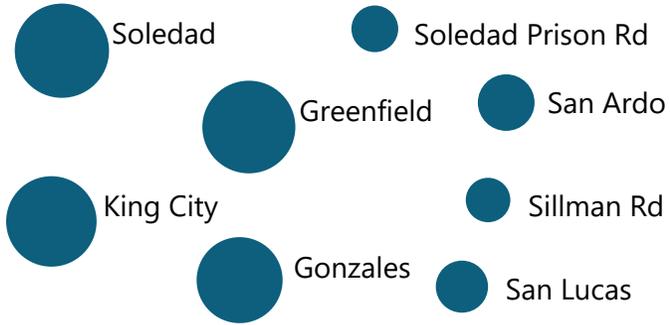
Phase 1  
(2023-2024)

Phase 2  
(2025-2026)

Long Term  
(post-2026)

**GSCA**  
(To be confirmed)

*High density; GSN proximity; SSVBA area*



*High density; low GSN proximity; Grant eligible*



*Within SSVBA Area; Heavy middle mile investment*



*Positive business case (high);*

*Positive business case (medium)*

*Positive business case (low)*

**Fiber ISP Standalone**

Low Locations density Low Location Count

# Fiber Opportunity Zone Prioritization

Low

Feasibility & Timeframe

High

Operating Models

Fiber PPP

Phase 1  
(2023-2024)

Phase 2  
(2025-2026)

Long Term  
(post-2026)

*Negative business case (low subsidy)*

*Negative business case (medium subsidy)*

*Significant middle mile investment required*

- Arrow Transportation Company
- Pajaro River

- Cachagua Creek



# FWA Opportunity Zone Prioritization

