



# A Broadband Development & Investment Framework for the Province of Saskatchewan (2023-2027)

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# COMMITTEE REPRESENTATION

The Saskatchewan Broadband Action Committee is comprised of the following:



# EXECUTIVE SUMMARY

## Background

The Saskatchewan Broadband Action Committee (SBAC) is a cross-sector and community-based group of provincial, local, and Indigenous organizations, networks, and service providers. The committee was established in February 2021 in response to the exacerbated broadband issues experienced across the province due to COVID-19.

Formed through a shared and collective concern over the issues and lost opportunities for all citizens related to broadband connectivity across the province, SBAC is committed to achieving broadband infrastructure parity by 2025, and exceed the CRTC standard by 2030, for all Saskatchewan residents, regardless of location. Our key focus is to assist with addressing long-standing issues affecting broadband connectivity; and advise and direct actions leading to a shared strategy, investment, and vision.

## Provincial Shortfalls and Root Causes

SBAC’s concerns regarding a widening gap over this essential infrastructure is further highlighted below:

<p>Lowest Investment Per Capita</p>	<p>Saskatchewan continues to receive the lowest per capita investment from the Federal Government.</p>
<p>Persistent Digital Divide</p>	<p>The recent Federal Auditor’s Report further highlighted Saskatchewan’s lagging position in terms of services for ‘rural and remote communities and First Nations’.</p>
<p>Below National Standards</p>	<p>At the local provincial level, SBAC’s 2022 Saskatchewan Broadband Survey, 53% of respondents indicated they ARE NOT or DO NOT have access to broadband 50/10 high-speed internet.</p>
<p>No Provincial Plan</p>	<p>To the best of our knowledge, Saskatchewan is currently the only province without a formal provincial plan or strategy related to improving broadband infrastructure.</p>

### Provincial Government Recommendations:

1. Adopt the attached Broadband Development & Investment Framework as a starting point.
2. Establish a Saskatchewan Broadband 'Collaboration & Priorities' Office, to provide 'point of contact' within Saskatchewan that can guide and work alongside local and regional Leadership.
3. Introduce a \$3.0M to \$4.0M annual broadband 'Inclusive Regional Community Capacity' Grant.
4. Commit to a \$50.0M ISP Market Incentive Co-Funding Infrastructure Grant.

### Building Blocks for Change

The Committee has identified four key building blocks that will help guide achievement of the above noted investment and key actions.

1. Enhanced awareness, local capacity, and digital competency
2. Strengthened industry partnerships and market development.
3. Elevated community access and infrastructure development
4. Improved regional and Indigenous collaboration, and stakeholder partnerships.

# TIME FOR A SASKATCHEWAN SOLUTION

## Provincial Shortfalls Amplify the Digital Divide

The Saskatchewan Broadband Action Committee (SBAC) is a provincial multi-sector and community-based group of provincial, local and Indigenous organizations, networks and service providers, formed through a shared and collective concern over the issues and lost opportunities facing citizens, businesses, and communities due to broadband connectivity shortfalls across the province.

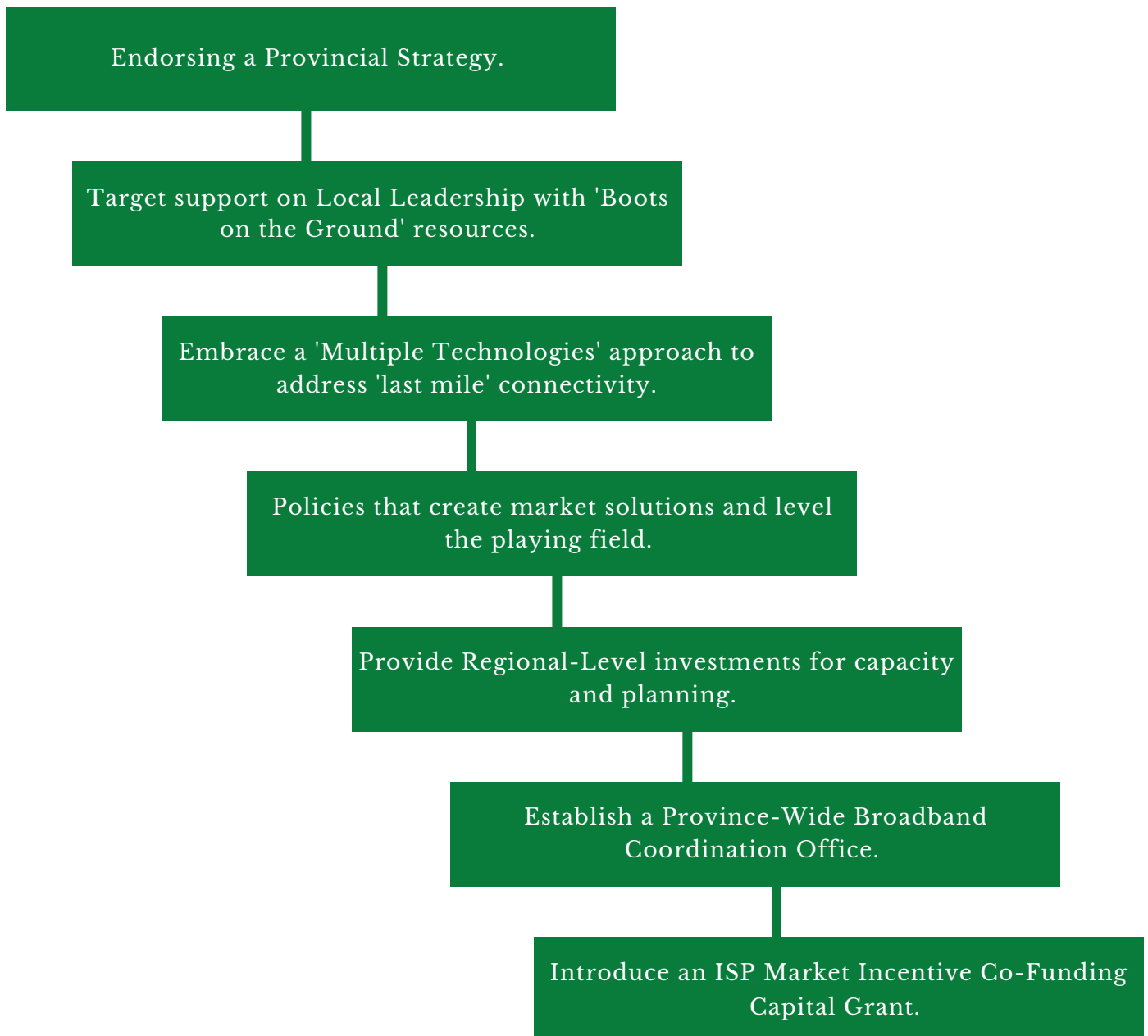
Concerns regarding a widening gap over this major infrastructure is further highlighted below:

<p>Lowest Investment Per Capita</p>	<p>Since 2015, Saskatchewan continues to receive the lowest per capita investment from the Federal Government (2.46% of total federal dollars) when compared with federal broadband investments distributed across Canada.</p>
<p>Persistent Digital Divide</p>	<p>The recent Federal Auditor’s Report further highlighted Saskatchewan’s lagging position in terms of services for ‘rural and remote communities and First Nations’. While nearly 91 per cent of Canadian households had access to high-speed internet in 2021, just 59.5 per cent of those in rural and remote areas enjoyed the same access. That number drops to 42.9 per cent for households on First Nations. The Auditor General’s report further noted “the persistent digital divided for people living on First Nations and in rural and remote communities”.</p>
<p>Below National Standards</p>	<p>At the local provincial level, SBAC’s 2022 Saskatchewan Broadband Survey, 53% of respondents indicated they ARE NOT or DO NOT have access to broadband 50/10 high-speed internet.</p>
<p>No Provincial Plan</p>	<p>To the best of our knowledge, Saskatchewan is currently the only province without a formal provincial plan or strategy related to improving broadband infrastructure.</p>
<p>Continued Loss of Investment</p>	<p>Municipal and First Nations Community leaders have shared their frustrations with the Committee regarding the growing gap in connectivity, its impact on community innovation, and a continued loss of investment and business opportunities to other neighbouring provinces.</p>

## A Truly Saskatchewan Solution

The Saskatchewan Broadband Action Committee has come to the conclusion that a truly 'Made-in-Saskatchewan' solution might be the only and best path forward for our Regional and Community Leadership.

Key next steps for our province include the following:



## Key Recommendations For 2023

In order for our province, its communities, businesses, and citizens to begin to achieve broadband parity and for Saskatchewan as a whole to assume a leadership role regarding digital adoption and supporting a modern broadband infrastructure, SBAC is recommending the following:

### Provincial Government Recommendations

1

Adopt the attached Broadband Development & Investment Framework as a starting point to establishing a province-wide broadband connectivity strategy for Saskatchewan.

2

Establish a Saskatchewan Broadband 'Collaboration & Priorities' Community-Based Office, in order to provide a central provincial resource and 'point of contact' within Saskatchewan that can guide and work alongside local and regional Leadership. This Office will need to be able to provide project management and 'boots on the ground' planning capacity to help Communities and First Nations move forward.

3

Introduce a \$3.0M to \$4.0M annual broadband 'Inclusive Regional Community Capacity' Grant in support of advancing:

- a. Enhanced local/regional awareness, community and business capacity, education, and digital competency; and,
- b. Improved local, regional and Indigenous broadband planning and collaboration.

4

Commit to a \$50.0M ISP Market Incentive Co-Funding Infrastructure Grant:

- a. Incentivizing industry to expand their reach to areas and communities that Internet Services Providers (ISP) would consider non-viable economic areas of the province (e.g., 'the last mile'); and,
- b. Renewal and improvement of existing infrastructure deficits for assets that will be obsolete or limiting in terms of standards 5-10 years from now.

5

Creation of an Industry Collaboration Table, chaired by the Province of Saskatchewan, charged with improving market competition, removing / refining federal and provincial policies that hinder a level playing field, and promoting greater industry collaboration.



## Federal Government Recommendations

1

Work with the SBAC Committee to establish an Industry Table that meets regularly with the Federal Government officials that enables greater dialogue with local ISPs and helps to address Prairie-specific policy issues and market barriers;

2

Establish a Prairies Broadband Capacity Fund that provides matching funding in support of community awareness, community capacity development, and greater regional planning;

3

Recognize the SaskTel Capital Investment as part of the Provincial matching contribution investment and target; and,

4

With respect to Broadband Infrastructure Funding, SBAC strongly recommends the following directives:

- a. That the Federal Government get beyond funding based on a percentage of population, as this approach is outdated and short-sighted as it relates to Saskatchewan, given our specific challenges related to rural, Indigenous, and remote / Northern communities; and,
- b. That the Federal Government immediately begin to release much needed broadband funding from the UBF in order for our local ISPs to continue with vital investment in broadband infrastructure. The inequitable investments made from the federal Government across Canada is disheartening and counterproductive.

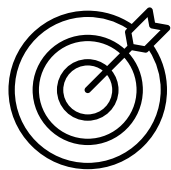


## Our Collective Vision

Committee members have committed to promote the following shared vision statements:



**By 2025:** Saskatchewan's broadband infrastructure would have achieved parity for 100% of Saskatchewan residents (50 Mbps download and 10 Mbps upload), regardless of location and community.



**By 2030:** 100% of Saskatchewan citizens exceed the CRTC standard by accessing 100 Mbps download and 50 Mbps upload, regardless of location and community.



# SASKATCHEWAN'S CURRENT STATE

## Base of Infrastructure to Build From

Comparatively speaking, Saskatchewan fairs quite well on a number of fronts related to broadband connectivity.

As a starting point, Saskatchewan has a fairly good base of infrastructure from which to build and develop. As well, considering Saskatchewan's major crown corporation, along with other competitive and active industry service providers, there are a number of significant assets to support improvement of our broadband connectivity.

For example:

- There is 20+ major cities and towns that have direct access to fibre, reaching over 75% of the population;
- In terms of the CRTC broadband standard (50 megabits per second for downloads and 10 Mbps for uploads), our province is at approximately 90% connectivity;
- There are also 360+ communities that are able to deliver the 50/10 standard, although the majority would be through DSL technology.

Despite our current state, and based on feedback from community and Committee stakeholders, two fundamental truths remain:

“We can't be satisfied with broadband as being just good enough”. A contemporary and reliable communications network and infrastructure is critical for our future economic growth, community development, and social prosperity; and,

From a human wellness and equity perspective, “the inability of several hundred communities and Indigenous Nations to stay connected through a reliable broadband network is simply unacceptable”.

## Definite Room for Improvement

It's no coincidence that the topic of broadband connectivity has received greater attention in recent years. The COVID-19 pandemic has highlighted a number of disparities and weaknesses. Some of the more general issues noted by stakeholders include:

There is definitely “a lack of equal opportunity for some citizens versus others, and the very real prospect and fears that some within our province will fall further behind” related to educational attainment, access to health, and improved social wellness.

From a business perspective, there is also a very real disadvantage for some in participating and succeeding in a modern economy

It was also noted that from an Indigenous perspective, these issues and barriers only serve to compound pre-existing challenges related to employment and work barriers, business interruptions, community safety concerns, accessing health and wellness services, as well as training and educational barriers.

According to the CRTC Communications Monitoring Report 2019, only 41% of rural households and about 25% of Indigenous communities in Canada have access to high-quality, reliable broadband internet services.

## Root Cause Considerations

There appears to be four essential areas of challenge that persist in terms of our ability to advance broadband connectivity within the province of Saskatchewan:

### Lack of Shared Leadership & a Common Provincial Plan

- There definitely needs to be more accomplished in terms of shared leadership and collaboration regarding connectivity.
- Communities, organizations, and stakeholders need definite support to plan collectively around a common outcome.
- Indigenous communities continue to experience a significant gap in broadband connectivity that has impacted health, safety, economic development and Nation building.
- As well, “the lack of a national and provincial strategy is challenging”.

### Technology & Infrastructure re: Population & Cost

- Our low-density population presents certain business case and accessibility challenges.
- There is also a “cost gap” that exists specific to remote “last mile” citizens, communities, Nations and businesses.
- A number of technology options and approaches are available, but will still require testing and significant improvements.

### Limited / Complex Financial Supports & Incentives

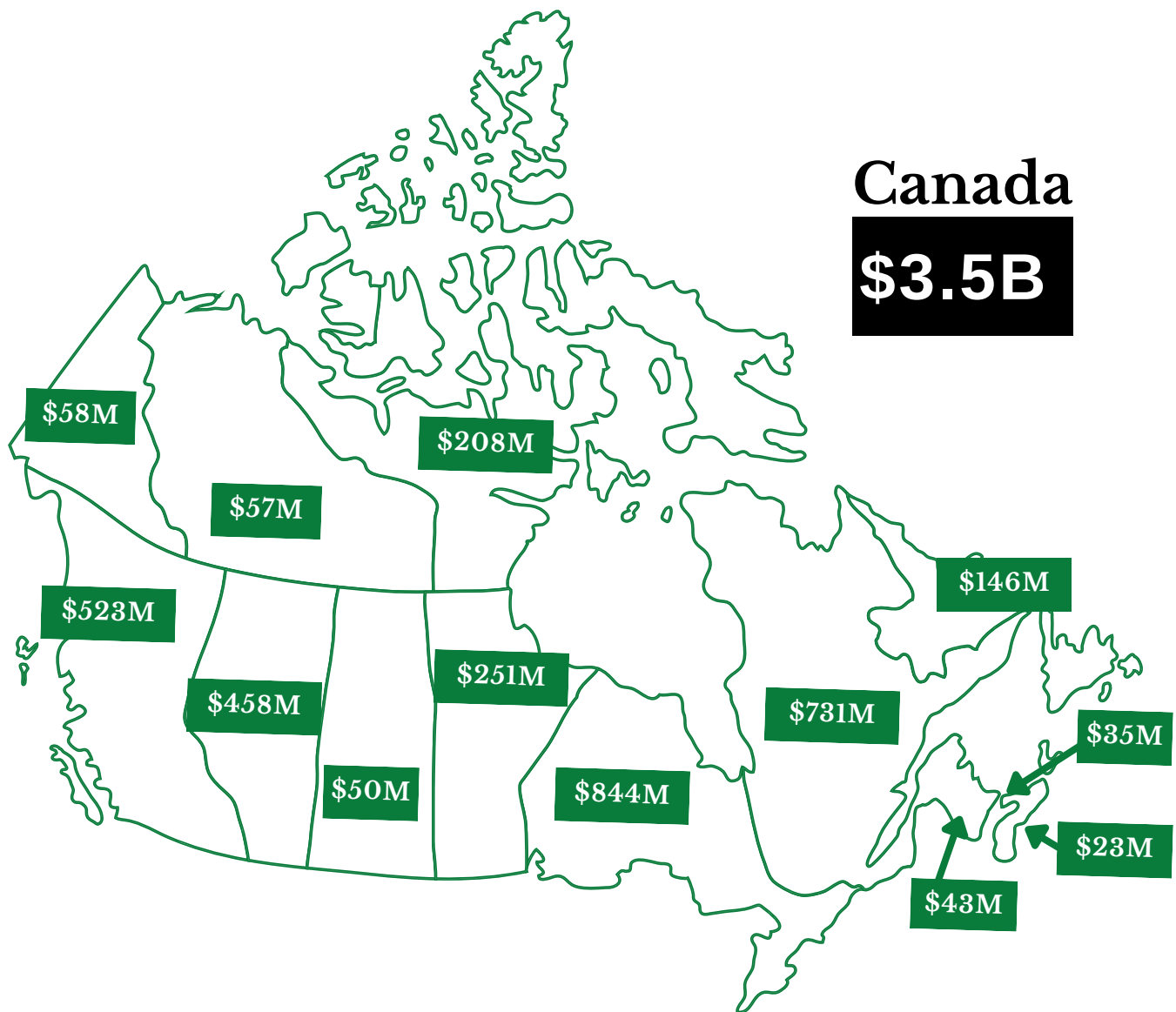
- There are no subsidies or grants provincially and federally to help communities plan and advance fibre and other technology developments.
- Federal dollars will help enhance connectivity, but these dollars are still quite limited, with no ongoing subsidy currently available.
- Accessing Federal funding can also be quite slow, with rigid grant criteria requirements.

### Regional Capacity, Planning & Innovation

- COVID-19 has highlighted the very real disparities and capacity issues between and within communities.
- While there are a few shining examples in our province regarding connectivity, as a whole, there is almost no digital planning going on at the regional level.
- Even in communities where 50/10 is available, many residents select slower plans. Uptake / consumer expectations continue to be problematic.
- There is no clear policy or organization that is driving this as a priority.

## Federal Broadband Investment by Province and Territory

Since 2015, the following federal broadband investments have been distributed across Canada, with Saskatchewan ranking among the lowest. The lack of equitable funding distributed across Canada, further contributes to the problem and challenge to improve long standing issues and access to broadband, across the province.



## Key Findings from the 2022 Provincial Survey

SBAC recently undertook a community needs and priorities survey to better understand and analyse broadband access and connectivity issues from several community perspectives across our province. Key findings include:

53% of respondents indicated they ARE NOT or DO NOT have access to broadband 50/10 high-speed internet or better.

38% of respondents who are able to access high-speed internet said they were dissatisfied with their current service provider.

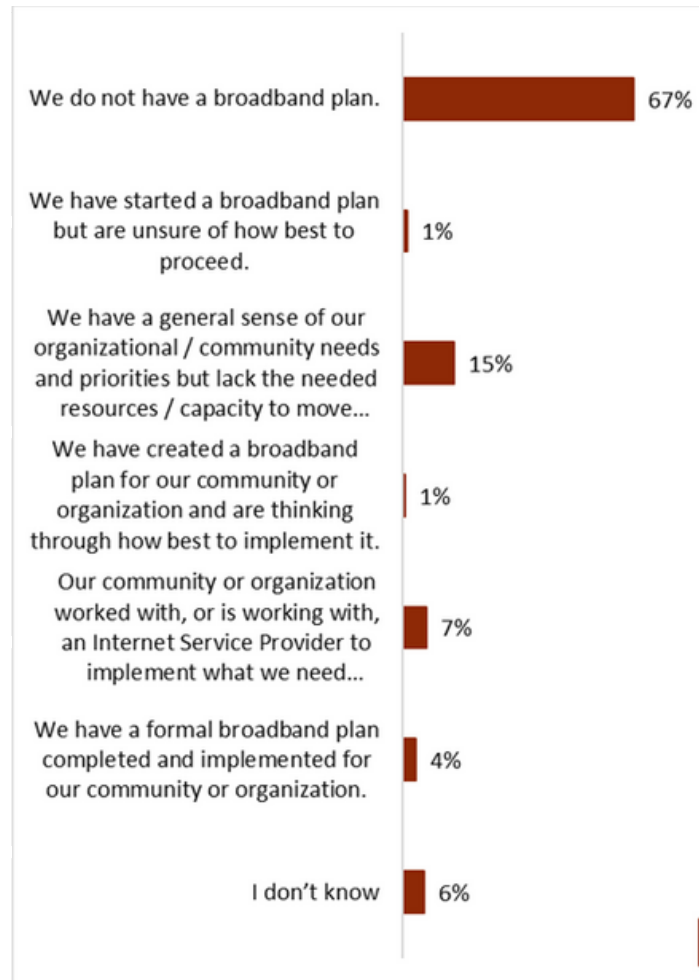
45% of survey respondents who do not have access to high-speed internet said a broadband plan is a priority for their community.

51% of survey respondents who are able to access high speed internet said they are dissatisfied with the advertised speed from their internet provider

38% of survey respondents who are able to access high speed internet said infrastructure is stopping them from upgrading their internet service

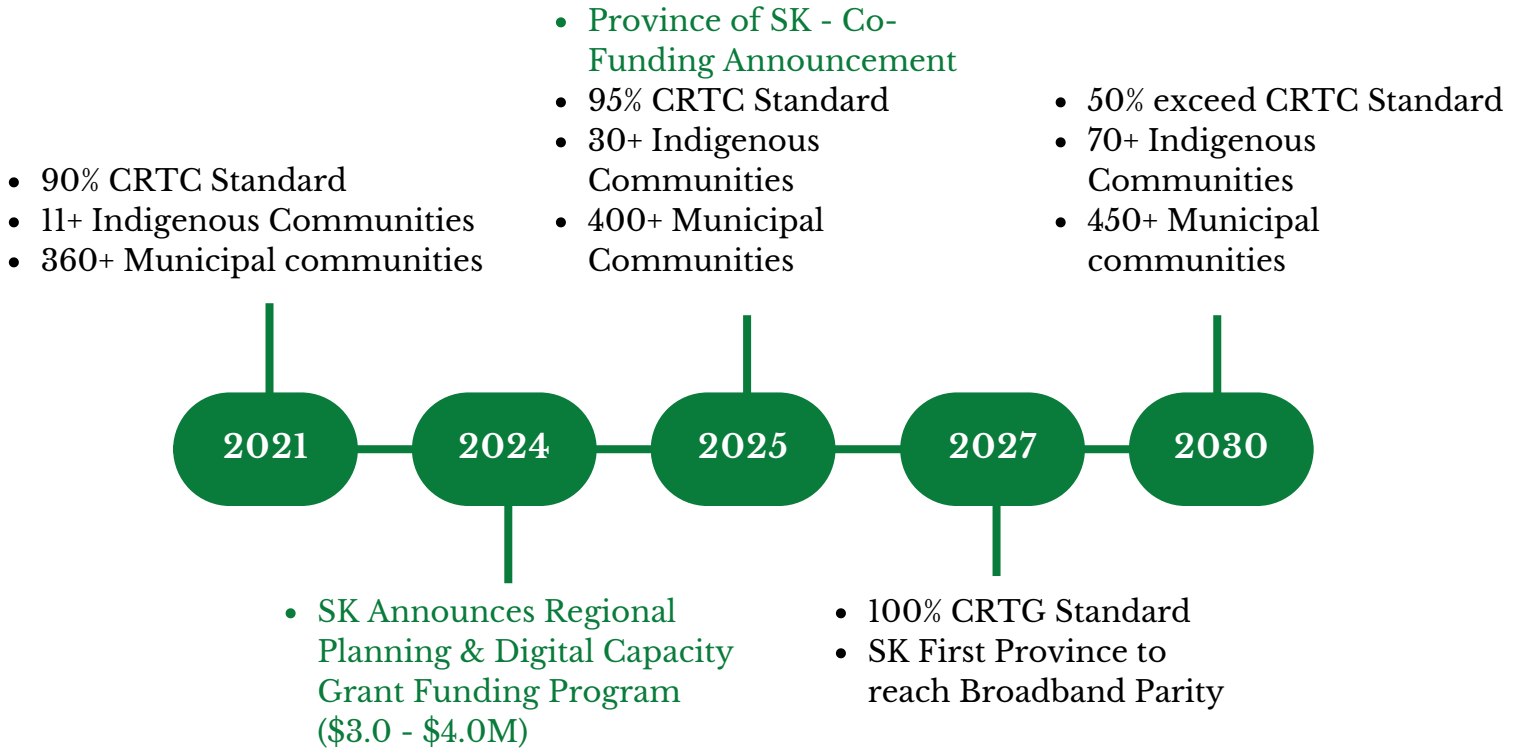
98% of respondents who do not have access to high-speed internet said they do not have a formal broadband connectivity plan in place.

Majority (72%) of survey respondents not able to access high speed internet said they have not consulted internally or with other communities or organizations in their region regarding broadband connectivity



# A VISION FOR SASKATCHEWAN

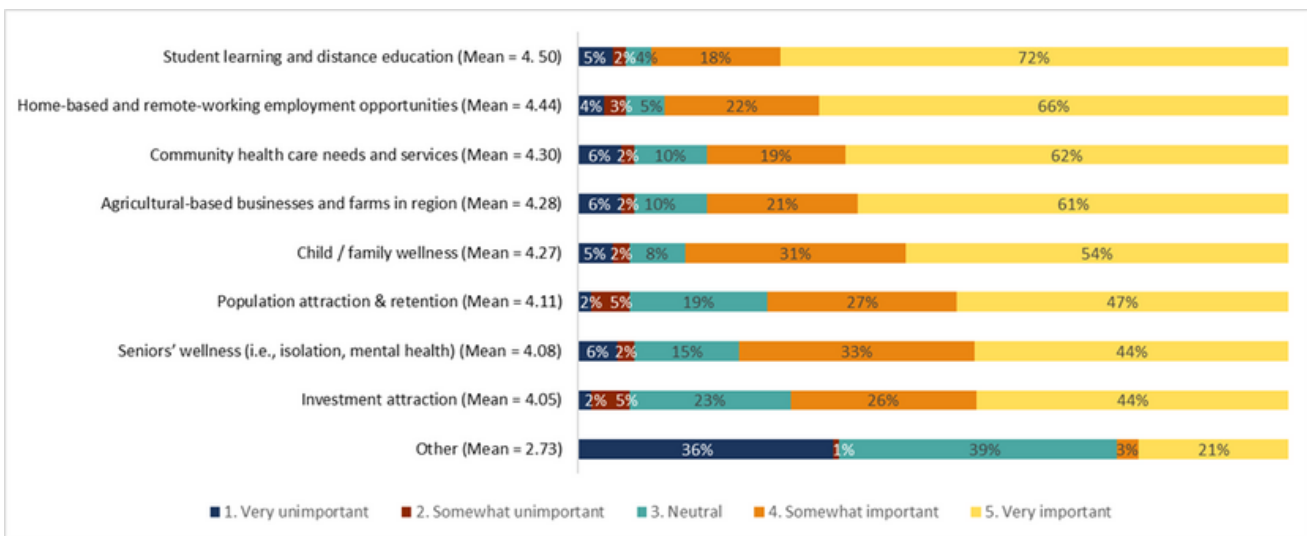
## Funding & Our Desired End State



## Digitally Enabled Community

Additional key findings from the 2022 survey with respect to future priorities for communities included the following:

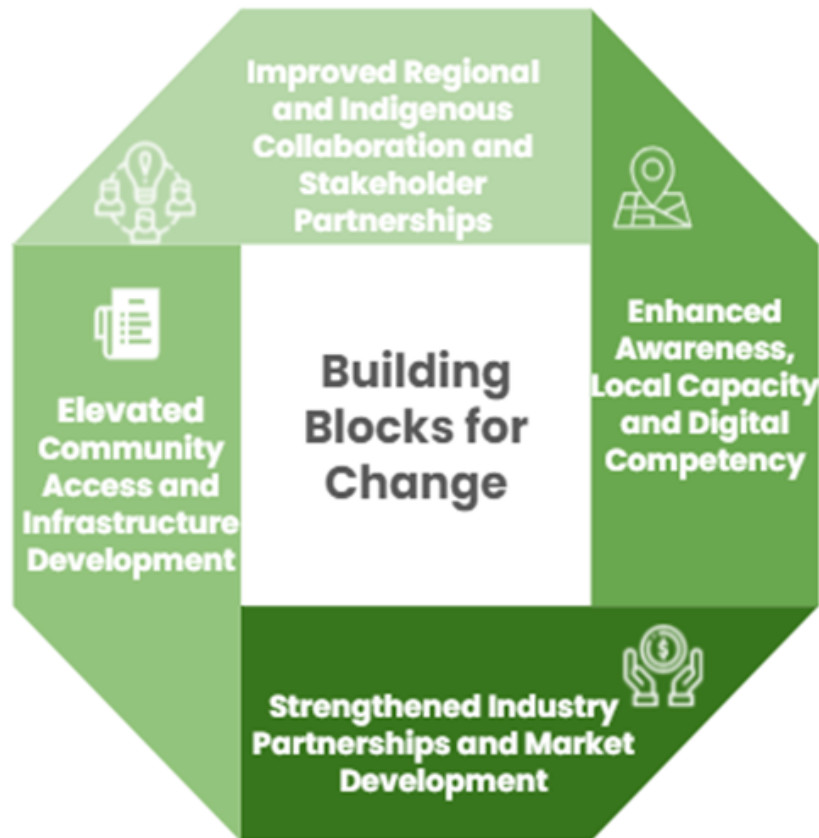
- Student learning and distance education are most important to the majority (72%) of survey respondents when it comes to improved broadband connectivity.
- When it comes to better broadband connectivity, 66% of respondents said home-based and remote-working employment opportunities is very important
- 62% of respondents said community health care needs and services are very important when it comes to greater broadband connectivity





## Building Blocks to Achieve our Vision

The Committee has identified four key building blocks that will help guide achievement of the above noted vision statement.



# BUILDING BLOCKS FOR CHANGE

## Priority #1 - Enhanced Awareness, Local Capacity, and Digital Competency

A critical first step for communities in advancing connectivity for citizens, human service organizations, and businesses will be by ensuring that local planning, mapping, connectivity needs and digital competencies are developed in order to put the broadband issue on the local agenda.

### Proposed Areas of Policy, Planning, and Investment

A. Leadership Awareness & Knowledge	B. Digital Planning at Local Level	C. Enhanced Grant-Funding that Builds Local Supports and Regional Capacity
<ul style="list-style-type: none"> <li>• Enhance avenues and efforts of communication that raise the importance of broadband connectivity across the province (e.g., conferences; webinars; training sessions; etc.).</li> <li>• Encourage / incentivize local communities to revise their current policy frameworks (e.g., revised Official Community Plans, and Capital Asset Management Plans) in order to highlight broadband as a key priority.</li> <li>• Ensure community-based and accessible supports and material are in place that assist communities with technology mapping and digital needs assessments related to their broadband infrastructure (e.g., Connected Saskatchewan program).</li> </ul>	<ul style="list-style-type: none"> <li>• Communities and businesses will need support “on-the-ground” as they begin to revise plans around digital infrastructure.</li> <li>• A community-based program that is inclusive of all communities and Nations should be promoted that supports community leaders, planners, and economic development staff.</li> <li>• Local planners and communities will also require Toolkit resources, community outreach support, and virtual forums in order to assist with ongoing planning and adoption efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Municipalities are encouraged to explore the development of a Municipal-based Broadband Levy at the Local Level targeted for broadband infrastructure efforts and investments.</li> <li>• The Provincial Government needs to introduce of a new stream of grant funding to specifically target broadband, local economic development planning, and regional cooperation. As well, any funding needs to be inclusive of “all” communities.</li> </ul>

## Priority #2 - Improved Regional and Indigenous Collaboration and Stakeholder Partnerships

Regarding current challenges and barriers, there is a clear need for shared leadership and a common plan among municipal and Indigenous partners. Research demonstrates that regional collaboration among communities and Leadership is required in order to advance broadband infrastructure.

### Proposed Areas of Policy, Planning, and Investment

#### A. Encourage Regional Tables for Planning & Broadband Coordination

- Collaboration and co-planning among levels of government that encourages working together with the private sector / service providers.
- Establish Local Planning Committees regionally to include neighbouring municipalities, First Nations, and Metis Locals, in order to build trust, foster dialogue, and improve collaboration.
- Initiate “pilot” Community Projects to highlight strategic partners and cross sector relationships.

#### B. National Communications and Engagement

- Grant funding and renewed policy that incentivizes and benefits regional planning among Indigenous partners and local Municipalities
- Work closely with our Provincial counterparts and Service Providers to accelerate the distribution of proposed Federal / CRTC funds.
- Encourage the CRTC to recognize the rural and remote nature of Saskatchewan in terms of Federal funding, and avoid a population-based approach (e.g., 3% to Saskatchewan).
- Identify and pursue funding opportunities and partnerships provincially and federally.

#### C. Industry Partnerships & Involvement

- Examine and redesign existing provincial policies in order to remove barriers to entry for Service Providers.
- Enhance and introduce provincial policies that encourage greater competition and market options for communities.

#### D. Incentivized Grant-Funding that Rewards Regional Partnerships

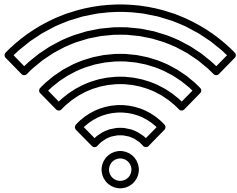
- Encourage the province to establish a stand-alone Regional Broadband Planning grant fund specific to the adoption and digital readiness needs of Saskatchewan.

## Priority #3 - Elevated Community Access and Infrastructure Development

Concurrent with enhancing local capacity and regional collaboration, this province will require a greater focus on accessibility for more communities and increased infrastructure development.

### Proposed Areas of Policy, Planning, and Investment

#### A. Promote Shared Access



- Where applicable, communities should be encouraged to share access to existing broadband infrastructure.
- Planning at a broader regional level, with supports and toolkits in place to assist communities, should be encouraged.
- Through planning, identify opportunities for sharing access to existing infrastructure, technologies, and connectivity networks.

#### B. Improve the Growth and Access to Broadband Technologies at the Local Level



- Encourage current Service Providers (when working at the local level) to include greater regional planning among a broader set of communities in order to create economies of scale and improve access.
- With respect to the existing transport infrastructure (e.g., dark fibre), all Service Providers should adhere to a more “equitable access” policy.
- Encourage all levels of government to deploy a “dig once” policy to coordinate their utility and infrastructure upgrades. This “dig once” policy will allow for more fibre cable to be installed province-wide.



#### C. Cost-Sharing Models & Financial Partnership Incentives

- Grant funding and policy that incentive and benefits regional planning among Indigenous partners and local Municipalities



## Priority #4 - Strengthened Industry Partnerships and Market Development

The fourth proposed Building Block to advancing broadband infrastructure and community accessibility within Saskatchewan relates to focusing on a strong industry and encouraging greater market development, combined with a more specific emphasis on financial tools.

### Proposed Areas of Policy, Planning, and Investment

#### A. Tax and Fee Incentives

- Examine the option of tax and fee incentives for new market entrants and start-up Service Providers.
- As noted earlier, encourage the province and municipalities to cooperatively examine introducing a Broadband Levy targeted for broadband infrastructure efforts and investments.

#### C. Industry Collaboration Table

- In addition to participation at the SBAC Committee, establish an industry lead Partnership Table that improves industry collaboration to the benefit of all communities
- A key focus should be on improving equitable access to backhaul, to avoid building parallel systems and infrastructure.
- Additionally, Service providers should focus on creating a community aggregate through multiple technologies.

#### B. Market Policy Changes

- Regarding smaller and more remote communities, we should examine introducing new competition policies to fit these smaller markets.
- Work with the Province to encourage a CRTC / federal commitment to reinstate the subsidy incentive program that promotes greater investment into the maintenance of telecommunications infrastructure within more remote and under-served communities.
- Examine and redesign existing provincial policies in order to remove barriers to entry for Service Providers.

#### D. Regional Funding Enhancements

- Allow for municipalities to access a broader range of broadband grant funds that encourages economic development and planning at a regional level.
- Work with the Provincial Government to consider establishing a Regional Digital Capacity Building Grant program that supports intermunicipal and regional planning needs and capacity development.

# A Broadband Development & Investment Framework for the Province of Saskatchewan (2023-2027)

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Prepared by:

