

# BReATH project

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## results and tasks ahead

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*BReATH workshop Warsaw, Poland, 15 November 2006*

# Outline



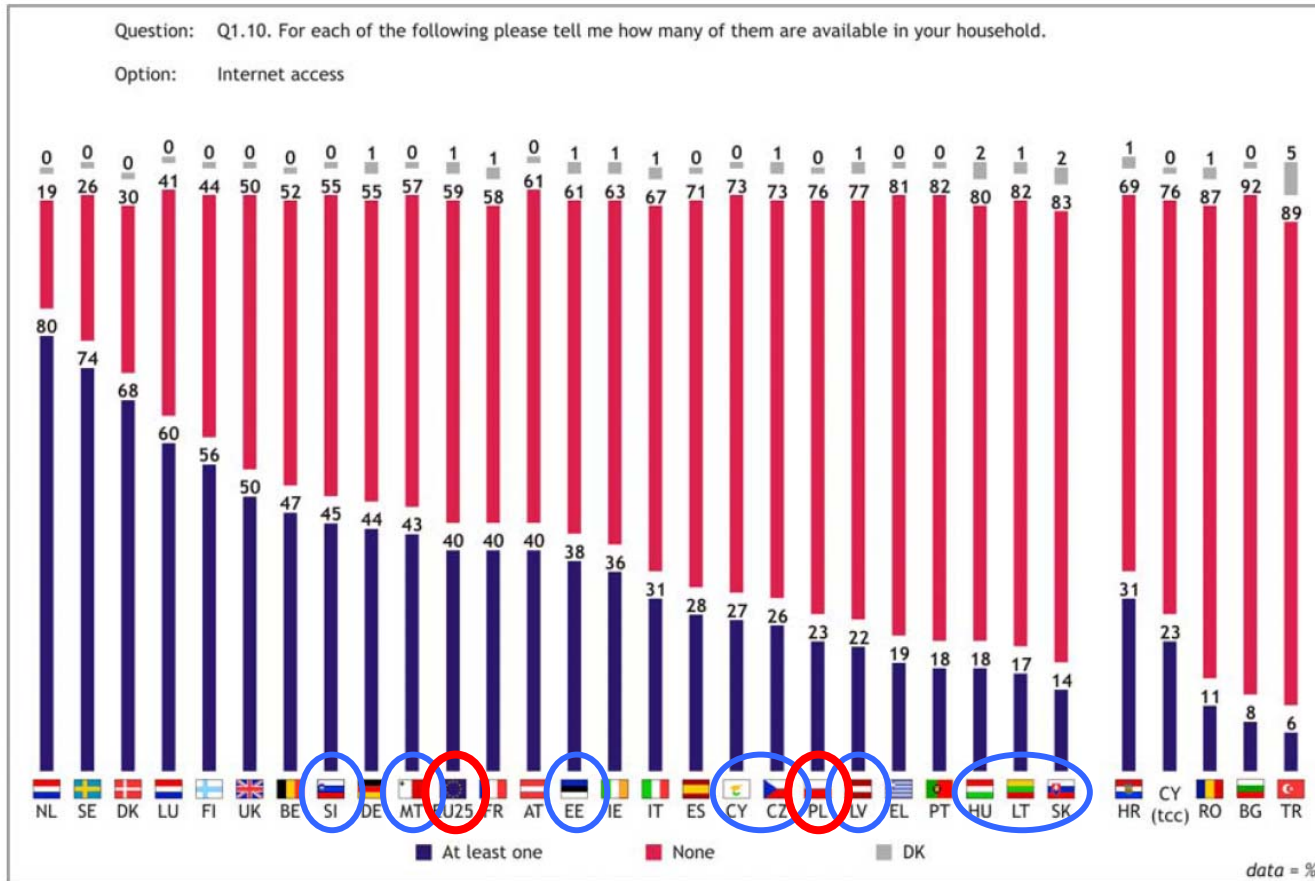
- ⊕ Broadband status in EU
- ⊕ EU-10 population
- ⊕ The BReATH project
- ⊕ Critical factors for broadband development
- ⊕ Intervention funding
- ⊕ Good Practice framework
- ⊕ Roadmap

# Broadband status in EU



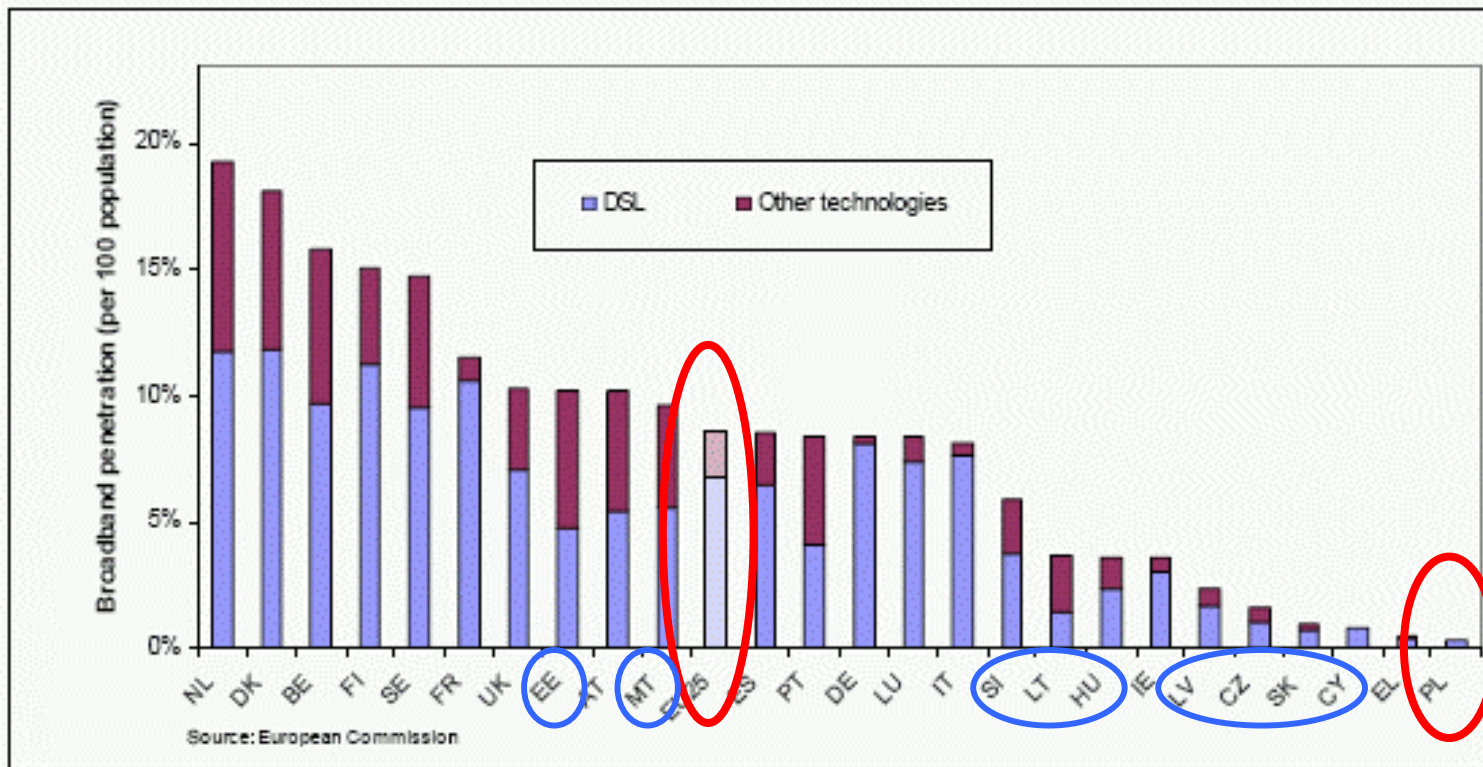
- Broadband penetration in households, questionnaire

Population penetration



# Broadband status in EU

- Broadband penetration per 100 population, January 2005



# Broadband status in EU



- Broadband penetration in businesses, Q1 2004

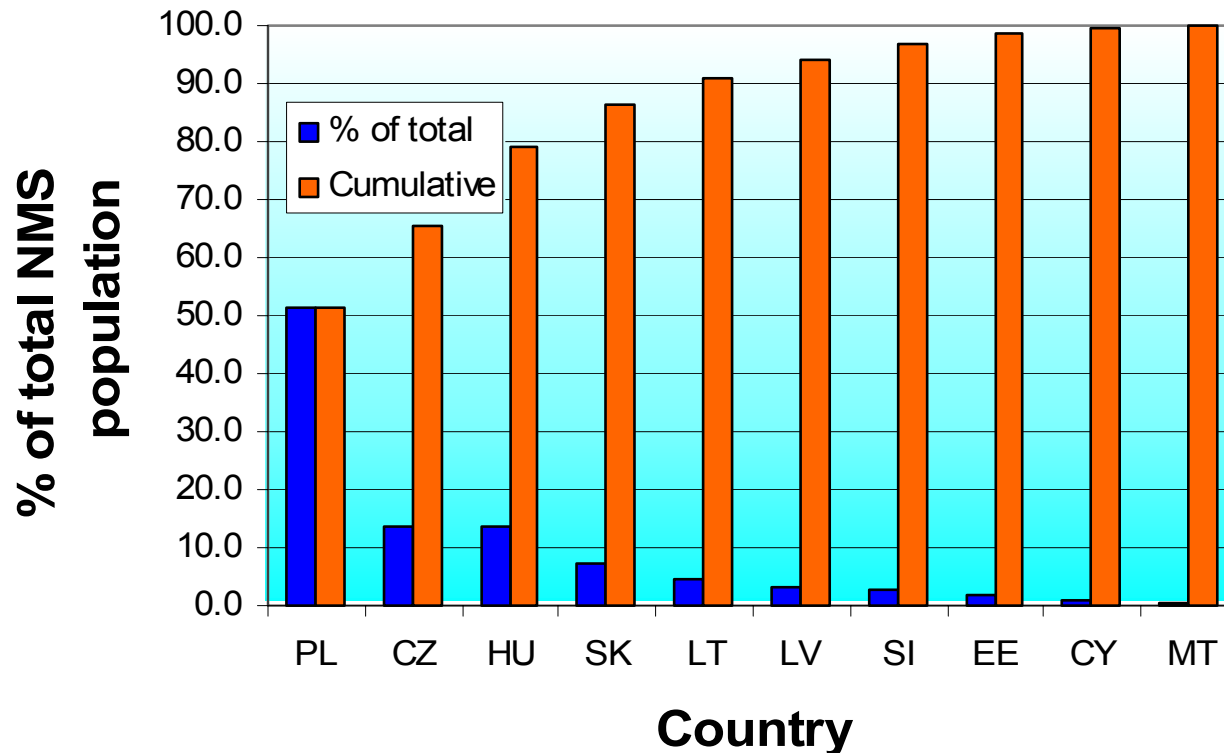
# employees	Poland	EU-25
10-49	21%	48%
50-249	47%	70%
250 and up	79%	87%

- The **digital divide** is thus also a big issue for Poland

Business penetration

# EU-10 population

- Poland: ~39M inhabitants, more than 50% of EU-10 total



# The BReATH project



- **B**roadband **e**-services and **a**ccess for **t**he **h**ome
  - We also look at SMEs and SOHOs besides homes
- FP6 IST Specific Support Action
  - Start in June 2005, end around February 2007
- Objective:  
To stimulate and support the transfer of know-how and best practices in delivering broadband services to the EU New Member States, involving diverse stakeholders and fostering cross-border research collaboration
- Promote the EU i2010 vision of the Information Society and of Broadband for All

Overview

# The BReATH project



- Rationale:

To maximise the benefit of broadband research to the NMSs, there needs to be a strong and competitive industry and a healthy market

- In the NMS and ACC countries, the broadband industry and market are still developing
- The BReATH role is to encourage debate and to stimulate the awareness about opportunities for and of broadband development

- Partners:

Poland (NIT)

Czech Republic (IREE), Slovenia (IJS), Greece (AIT), UK (GTel), Germany (EURESCOM), The Netherlands (TU/e)

# The BReATH project



- BReATH events:
  - **Workshop in Poland, January 2006**
  - Joint conference with other IST projects
  - Workshops in Czech Republic (4), Slovenia (1), Greece (1)
  - **Second workshop in Poland, today**
  - Closing conference, 11 December in Geneva

In total more than 900 attendees so far

Activities

# The BReATH project



- Supporting studies
  - Broadband surveys
  - Case studies
    - For Poland: Stoszowice, Zielonka, Kuyavia & Pomerania, Lodz
  - Business, techno-economic, strategic modelling
  - Good Practice framework
  - Roadmaps
- Dissemination
  - Special Interest Groups in Poland, Czech Republic, Slovenia
  - Conferences, workshops, etc.
  - Website

Activities

TU/e

# Critical factors for broadband development



Broadband infrastructures and e-services are key to developing the Information Society

- National policies
  - Set priorities for development and provide focus
- Advancing technologies
  - Enable improved infrastructure and services
- Willingness to invest
  - Essential for developing and deploying new technologies, infrastructures and services
  - Rural areas generally form a higher investment risk
  - Rural areas might however benefit most from broadband
- Regulation
  - Sets environmental conditions for development and fair competition

Supply side

# Critical factors for broadband development



- Awareness of Information Society and ability to use ICT
  - Educational curricula
  - Training facilities
  - PC ownership
- Affordability
  - When national operators adopt national pricing policies, competition in urban areas holds down prices in rural areas
- Demand stimulation, aggregation and advertising
  - Deployment is directly related to take up expectations
  - Higher take up makes broadband more viable, attracts more investment and more competition
  - The importance of demand stimulation is often underrated

Demand side

# Intervention funding



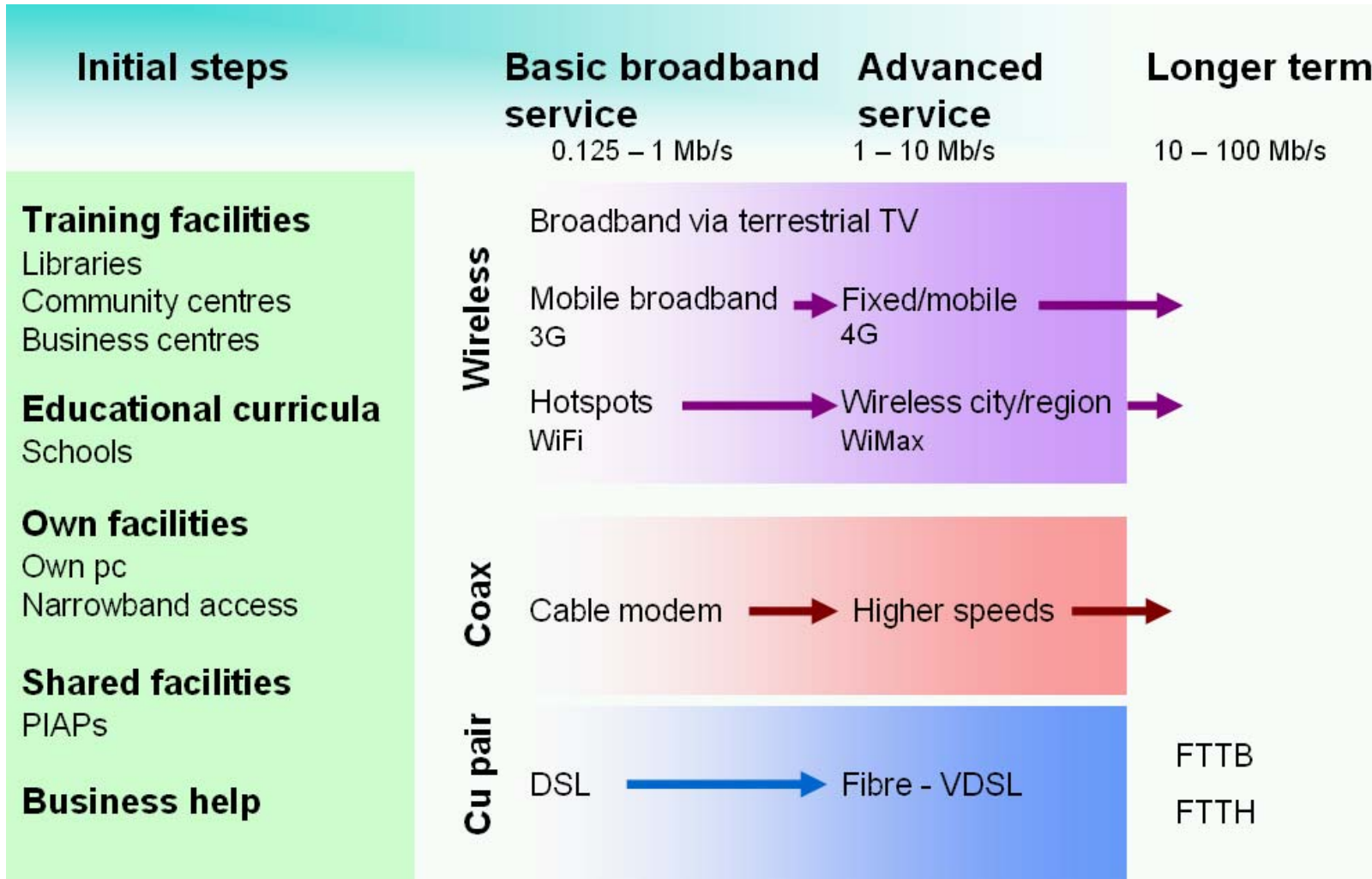
- Funding by international, national, regional or even local government funds
  - Joint Assistance for Preparing Projects in European Regions (JASPERS) since October 2005
- Intervention applied to encourage broadband supply and/or demand
- Supply stimulation shall not distort the market
  - Conditions include 'market failure', e.g. no decent broadband and/or no decent prices
  - Intervention must aim to meet a social need, e.g. more jobs, economic growth, increased Gross Domestic Product
- Public-private partnerships can provide a big leverage to the usually rather limited public funds
  - Sharing of risks
  - More proficiencies in a single project

# Good Practice framework



- The BReATH Good Practice framework is meant to
  - Provide guidance to those concerned with the use of public funding, either to promote the development of broadband or to initiate broadband development projects
  - Help broadband developers by teaching them about approaches taken in similar situations elsewhere
- The Framework is based on the analysis of a series of broadband case studies from OMSs and NMSs
- The Framework identifies
  - The conditions under which intervention is justified
  - Possible intervention methods
- The Framework gives a series of recommendations
- The Framework report is completed and will be available on the BReATH website shortly

# Road map



# Contact information

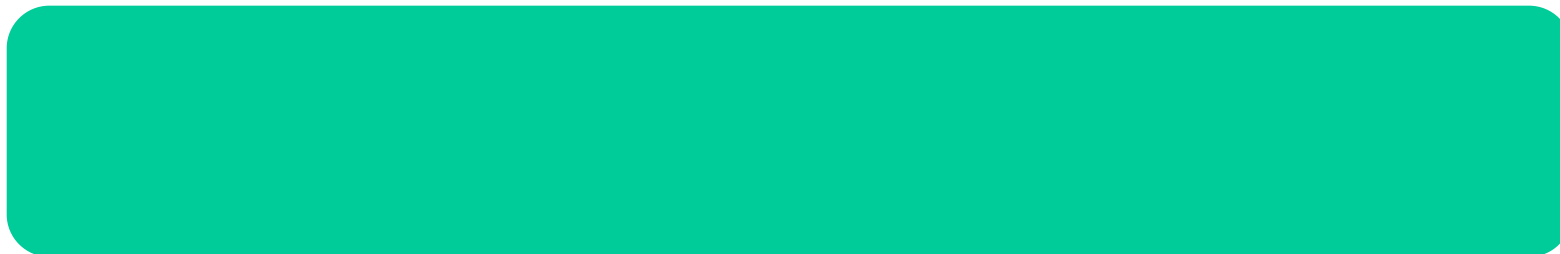


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*-= Thank you for your attention =-*



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