The State of Connectivity In Maine

EUT Committee - Fall 2025
Andrew Butcher, President
September 18, 2025

*We can get *underline*everywhere*underline* from here!*

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Agenda

1. Quick MCA refresher

2. Key updates as of September 2025

    a. Progress
    b. BEAD Final Proposal (outcomes and implications)
    c. Digital Equity Funding

3. Looking Forward

    a. Middle Mile development
    b. Wireless / Cellular
    c. Affordability and adoption

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Context – 2021

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Fragmented Market
- Service concentrated in denser areas
- **>15%** under- or un-served
- **89%** affected by digital divide

Barriers
- Remote areas commercially *unviable*
- Large & rocky geography
- Pole connection process
- Workforce
- Financing

"You can't get there from here!"

**2020 Bond
75% support**

GLOBAL TRENDS

Undeniable Need for Connectivity

- **Health & Human Services**
- **Education**
- **Workforce & Economy**
- **Transportation**
- **Safety**
- **Data & Analytics**
- **AI**

Accelerated by COVID-19 Pandemic

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2 Agencies 1 Door

1. 2022 - MCA and ConnectMaine Functionally Integrated

2. Full Integration pending completion of

   a. *2021 NTIA Broadband Infrastructure Program ($28M)*
   b. *2020 Bond projects ($15M)*

3. CME Assessment Fee is only the State investment for Connectivity
   a. Match for federal grants (leveraging $100M / yr)
   b. Capacity to administer over 100 grants / projects
   c. Capacity for policy and program development

4. Plan for full integration in 2026 / 2027

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Interconnected Statutory Objectives

Connect Every Home & Business in Maine

- ~$400 million in investment
- 110,000 broadband connections facilitated
- As of 2024, every Mainer has an option for a connection

Support Digital Skills & Affordability

- Key to sustain technical infrastructure & realize benefits
- In 2025, Maine was prepared to invest $35 million
- Digital skills, devices, internet safety education, and tech support

Future-Proof

- The demand digital connectivity will only grow
- Increase our state's capacity and resilience
- ~500 mile backbone network
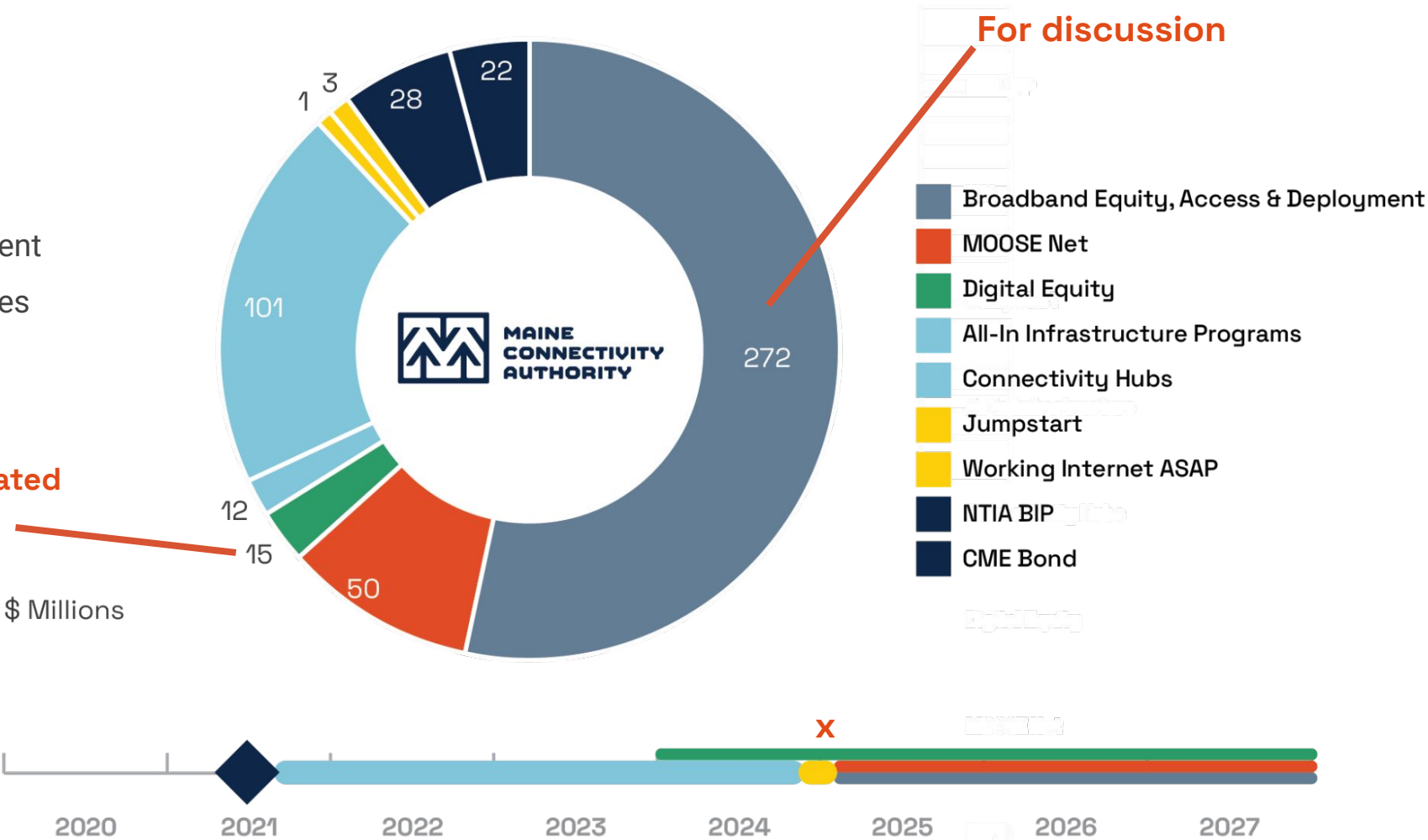- Plan for improving Maine's cellular access

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Sources and Uses of Funding

Braid Multiple Funding Sources

- State, Federal, Private
- $400M currently under management
- 91% of funds for program expenses

Funding terminated May 2025

$ Millions

For discussion

Legend:
- Broadband Equity, Access & Deployment
- MOOSE Net
- Digital Equity
- All-In Infrastructure Programs
- Connectivity Hubs
- Jumpstart
- Working Internet ASAP
- NTIA BIP
- CME Bond

Pie values: 272, 50, 15, 12, 101, 1, 3, 28, 22

Timeline: 2020, 2021, 2022, 2023, 2024, X, 2025, 2026, 2027

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MCA Strategy

Reinforce Partnerships

- Regional & Wabanaki Broadband Partners
- Local needs, local capacity

No One Size Fits All

- Community centric
- Geography > technology
- Place-based, multi-use investments in Connectivity Hubs

Drive Demand & Sustainability

- Digital skills, devices, internet safety education, and tech support for 50,000 Maine people
- Needed to sustain technical infrastructure & realize benefits

Resiliency & Redundancy

- MOOSE Net
- Review cellular service expansion
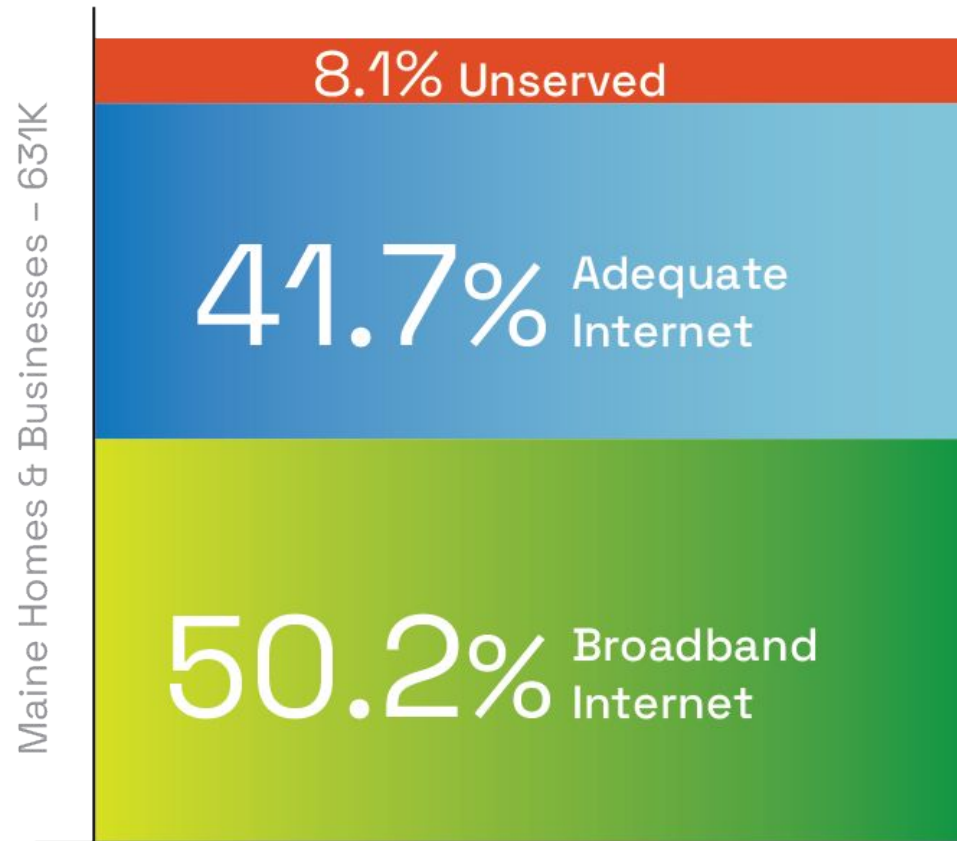- State economic and development goals

Reduce Barriers

- Training program with MCCS
- Utility pole attachment action
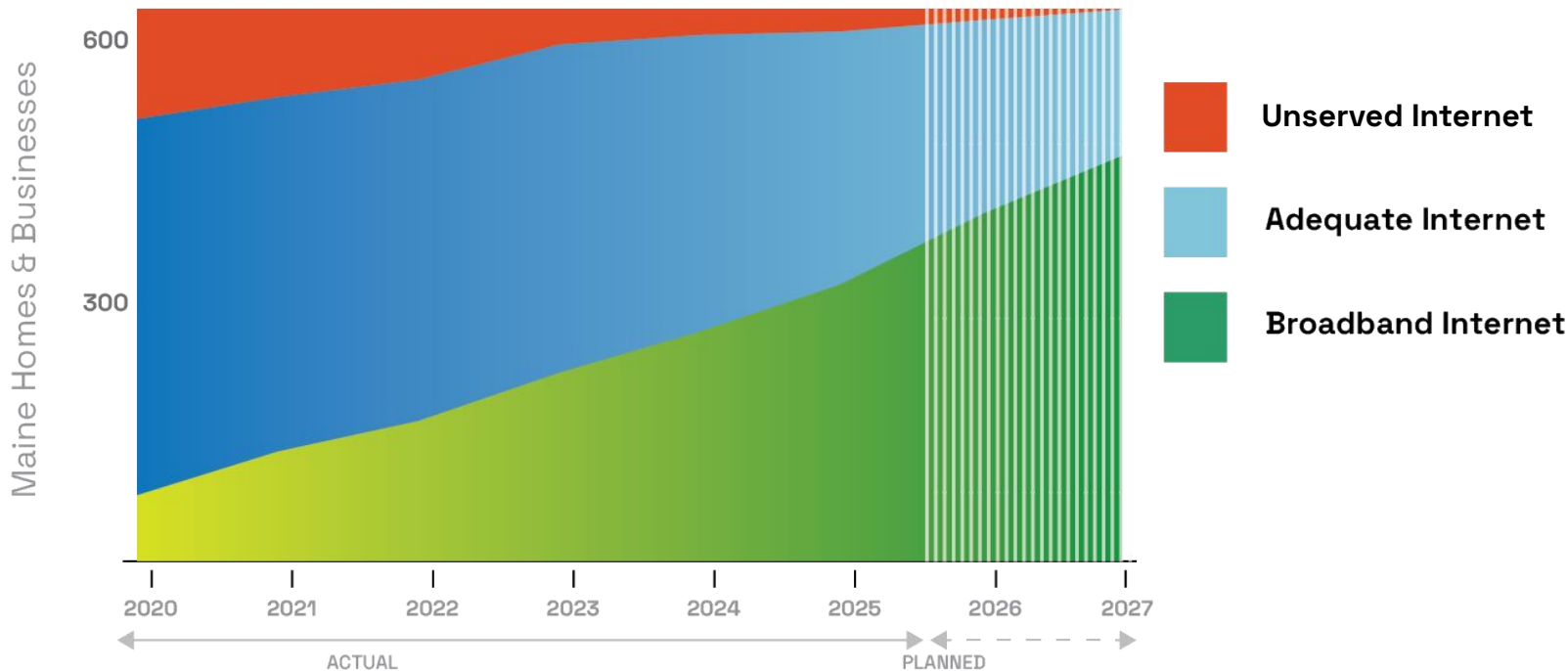- Connectivity in Multi-Dwelling Units (MDUs)

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The Last-Mile "Problem" *(Jan 2025)*

Maine Homes & Businesses – 631K

- 8.1% Unserved
- 41.7% Adequate Internet
- 50.2% Broadband Internet

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Progress

Maine's Connectivity

Maine Homes & Businesses

600

300

Unserved Internet

Adequate Internet

Broadband Internet

2020　2021　2022　2023　2024　2025　2026　2027

ACTUAL　PLANNED

Bridging The Digital Divide

- Including BEAD provisional awards, 110,000 connections funded (17% of total locations statewide)

- EVERYONE can get a connection by the end of 2024

- Maine has 3rd highest fiber growth in the country for the period of June to December 2024.

- $20M invested in local capacity, place based investments, affordable devices, digital literacy and technical assistance in every county

- Long term investment in middle mile via MOOSE Net design - build contract awarded

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Community Demand Drives Delivery
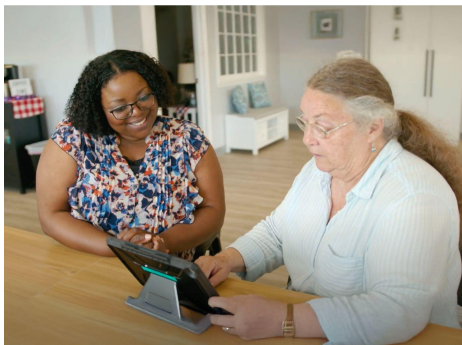
2,730 digital skills trainings have been provided to 4,639 Maine people impacted by the digital divide.

Community leaders gathered to see the completion of 8 years of broadband organizing by Isle au Haut

Veterans at the House in Woods in Lee celebrated high speed internet availability in their area

Washington, ME celebrated broadband coming to the community with a Broadband Festival

GPCOG adopts local affordability offerings to service areas around Sebago

150 partners gathered at the second annual Digital Equity Workshop

MCA partners with the Maine Community College System at the Fiber Optic Technician Program.

St. George Connectivity Hub will have a classroom, shop spaces, a makerspace, areas for online courses and workforce training, and private spaces for telehealth.

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Maine Tech Share

- **MCA hopes to source 25,000 refurbished devices to distribute to families and individuals over the next few years**.

- Maine Tech Share seeks device contributions from businesses and institutions across New England

- give IT. get IT. is a Waterville-based nonprofit whose purpose is to increase technology access and literacy, and is the only licensed and permitted electronics recycler in New England


MAINE TECH SHARE
SHARE TECH. SPARK CHANGE.

Give your underused tech new purpose.

Maine businesses are stepping up to lead the charge in responsible technology recycling—will you join us? Maine Tech Share, funded by the Maine Connectivity Authority's Digital Opportunity Fund, is more than just an initiative—it's a movement. MCA partners with give IT. get It., a non-profit electronics recycler that has more than two decades of experience working with Maine organizations. Together, we can safely transform unused or underutilized technology into opportunity, converting your retired devices into tools for helping bridge the digital divide.

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Tech Help for ME

- **Tech Help for ME is a new tool for helping people in Maine who struggle to get online to find places near them that offer free wifi, computer classes, low-cost computers, one-on-one tech help, and more**.

- The mobile friendly website makes it easier for people who might not feel tech savvy, might only be able to access it on a phone, or who speak many different languages.

- It includes both an interactive map, and list view of resources across the state and down to the community level.
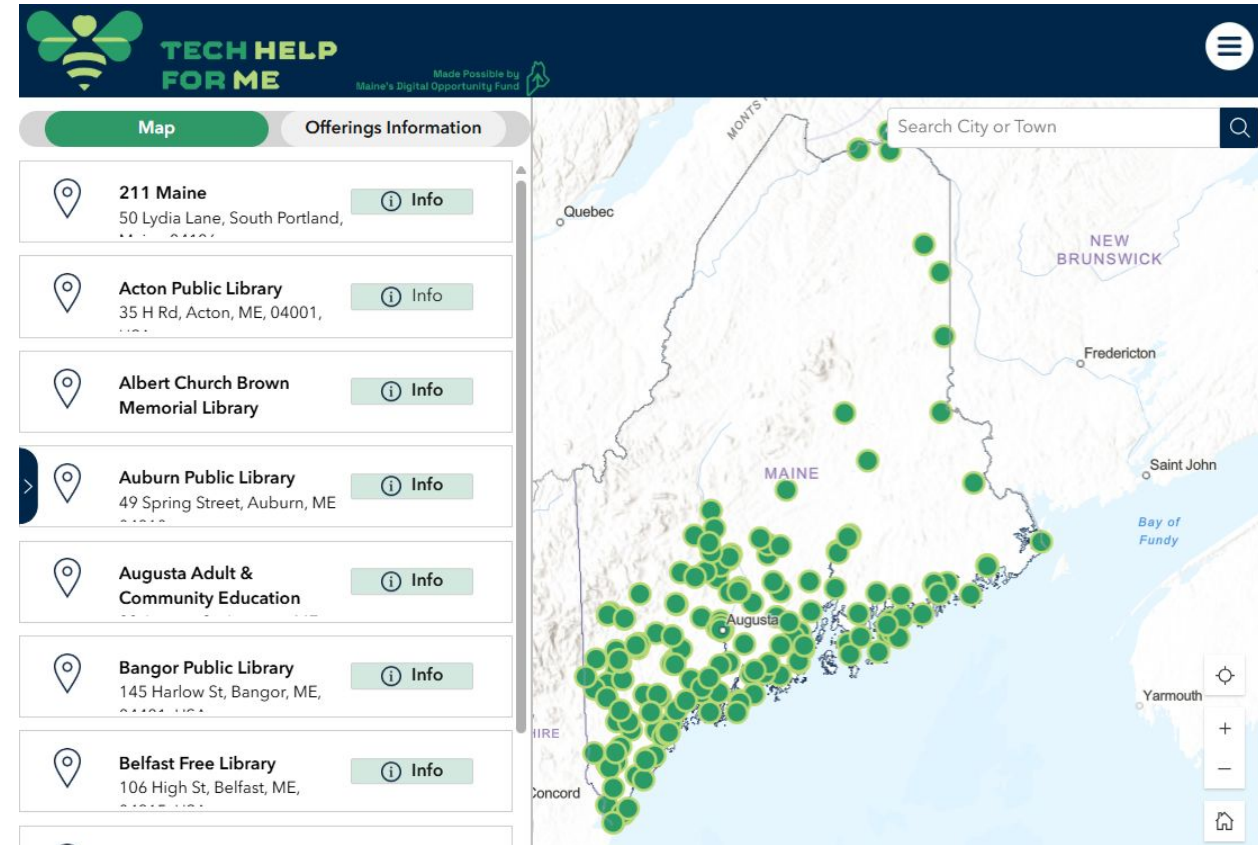
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Local Insights: Caribou

Reach Me Line Extension award (CPF 1A funding)

- **600 locations** being connected through an award to Charter in Caribou and Presque Isle

- **$1,757,160 in grant funding** and **$1,237,650 in private investment** for these communities
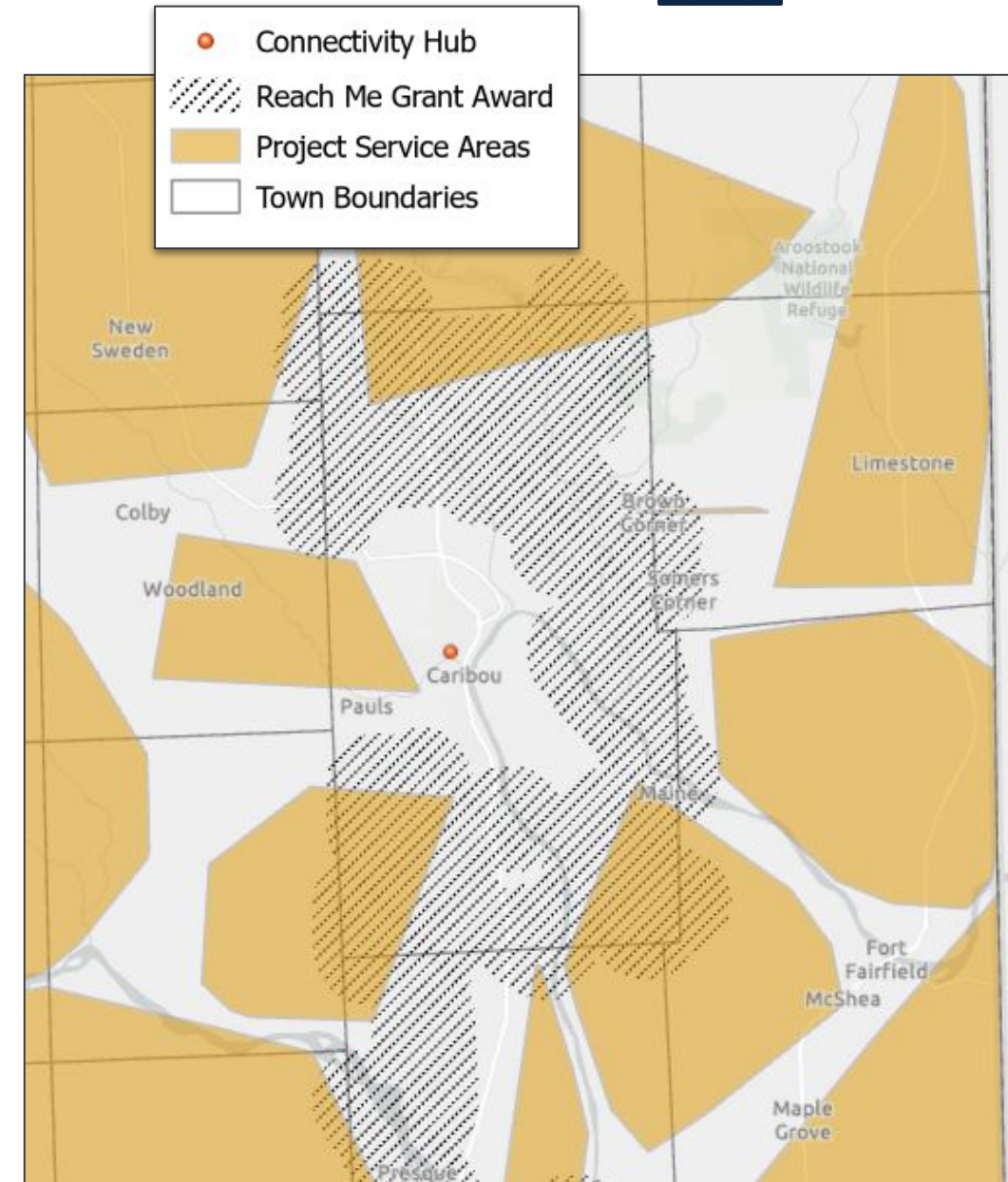
Connectivity Hub (CPF 1C funding)

- **Caribou Public Library** Digital Commons, a state-of-the-art Connectivity Hub, including private **telehealth** rooms, improved **digital literacy skills training**, and promotion of **workforce initiatives**

- **$1,847,528 in grant funding currently contracted**, and the project is underway but less than 25% complete.

BEAD deployment (NTIA funding)

- **1,690 BEAD-eligible locations** in a 10-mile radius of Caribou

- Representing an estimated **$7,557,036 in BEAD subsidy**, and an estimated **$2,838,731.08 in private investment**

Regional Partner (SLFRF funding)

- Northern Maine Development Corporation is slated to receive $200K in funding for 2025, and additional funding in 2026-2029

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Legend:
- Connectivity Hub
- Reach Me Grant Award
- Project Service Areas
- Town Boundaries

September 2025 Updates

BEAD
Digital Opportunity
Middle Mile +

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BEAD

Maine was allocated **$272 million** by NTIA to connect every unserved location **(<100/20 Mbps) and eligible Community Anchor Institution.**

- On September 3, MCA submitted Maine's BEAD Final Proposal which outlines the plan to serve the remaining **23,000 locations** and **750 CAIs** with no internet connection or slow and unreliable internet service.

- High-level provisional outcomes included in Maine's BEAD Final Proposal:

  - **100% coverage for all locations**
  - $2,080 average subsidy per location (lowest average in the country!)
  - **$48 Million** in BEAD deployment funding provisionally awarded
  - $109 Million in matching funding from applicants
  - 25 Projects with 6 ISP Partners
  - Diverse technologies, including 85% Fiber, 14% Low Earth Orbit Satellite (LEO), and 1% Hybrid Fiber/Coax

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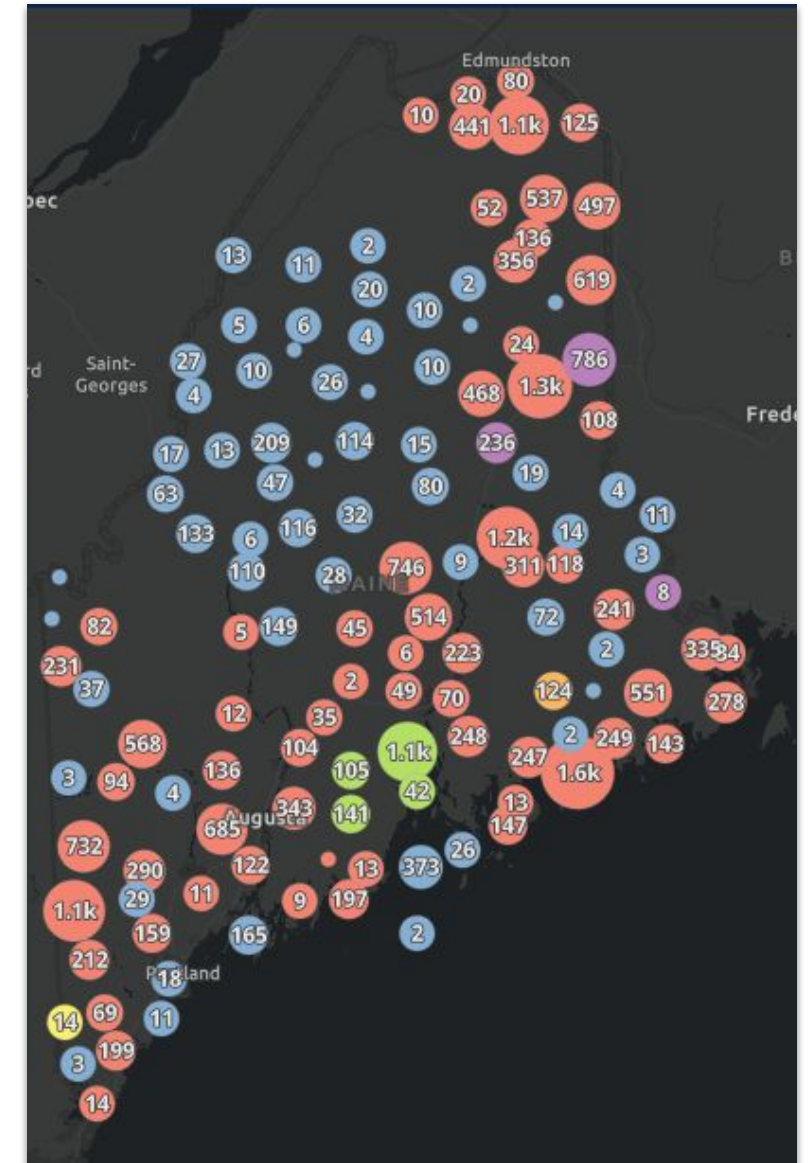
Digital Opportunity in Maine

Key to success for overall connectivity strategy

- Local / regional capacity to engage, plan, educate, and share

- Places to go for public access, tools, and learning

- Affordable options for service

- Affordable devices

- Technical assistance

- Cross-sector coordination

- Diverse funding

Terminated:
- $10M in State Digital Equity Capacity Funding
- $25M of competitive grants to 17 entities
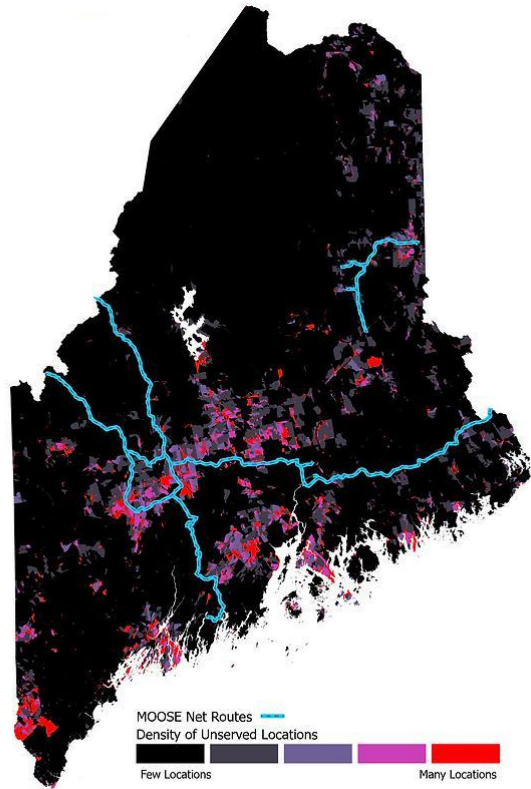

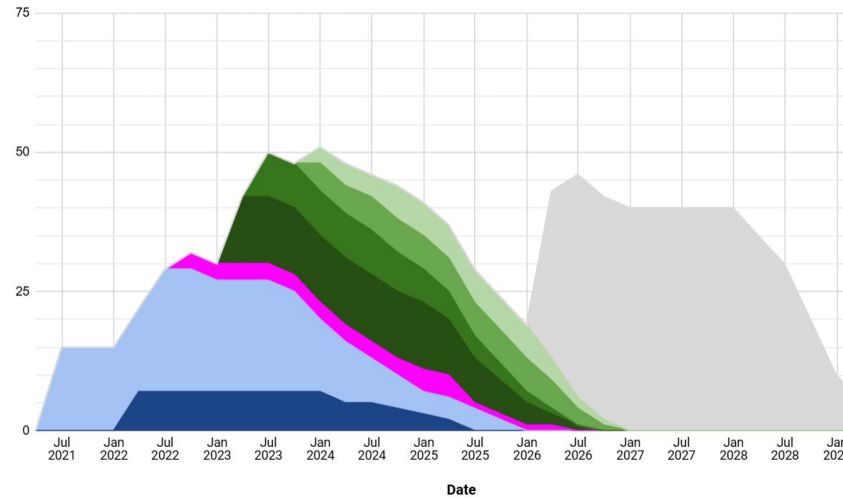MAINE CONNECTIVITY AUTHORITY

Powered by
Maine's Digital Opportunity Fund

The Work Continues

Matching funds for Competitive Grants

Administering hundreds of grants over 10 years

Policy development and coordination

Key Take-Away

1. **BEAD deployment** is a major milestone - <u>But the work is not done</u>.

2. Termination of <u>funding for **digital equity**</u> impacts affordability, adoption and sustainability

3. The next phase includes expanded <u>cellular infrastructure</u>, <u>cybersecurity</u>, <u>middle mile</u> expansion, <u>affordability measures</u>, and sector efficiency

4. Federal <u>funding remains uncertain</u>

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Thank you

abutcher@maineconnectivity.org
207.209.3868 (c)

www.maineconnectivity.org/

We can get everywhere from here!

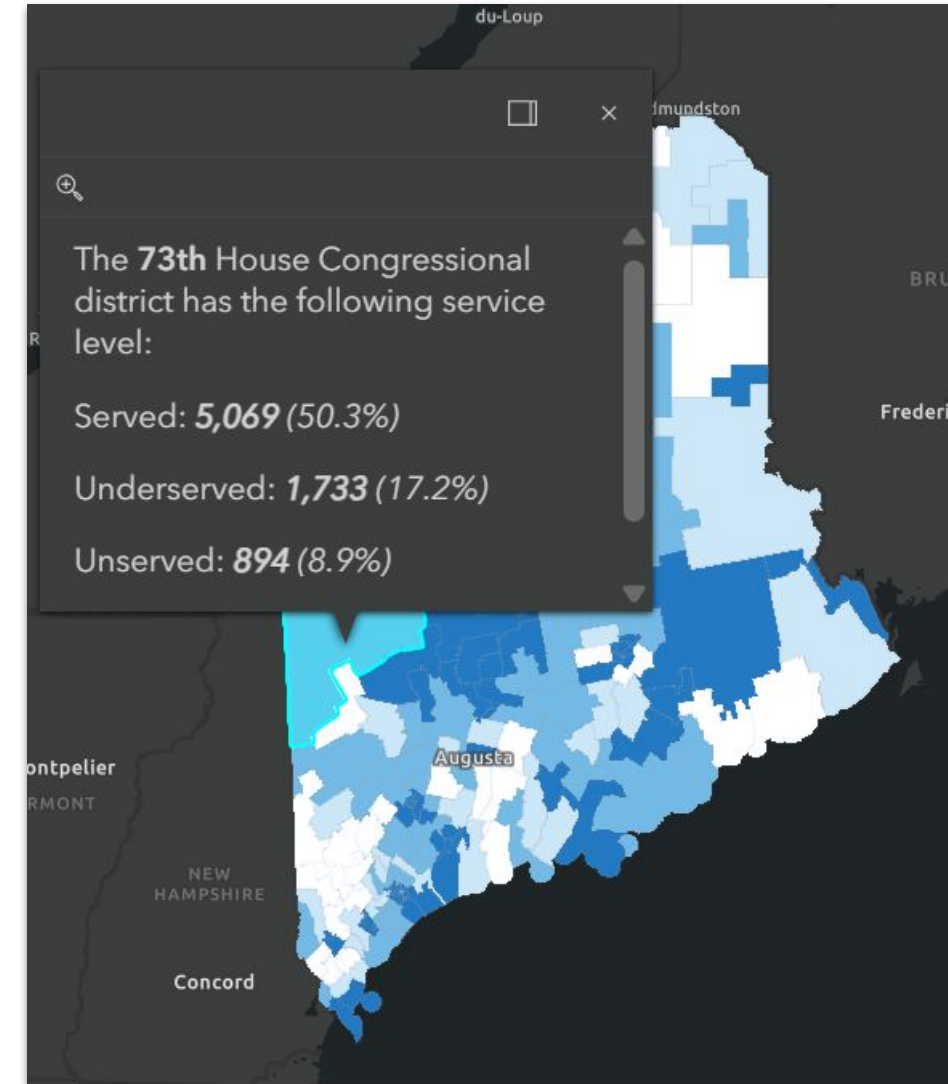**MAINE CONNECTIVITY AUTHORITY**

CHART

- Connectivity Headquarters for Analysis, Research and Transparency (**CHART**) is a centralized mapping and analysis platform that incorporates diverse and complex data to address the geospatial, economic, and cultural needs identified in the broadband planning process, *and* **shares real-time progress of MCA's investments**.

- Internet service availability can be viewed by several levels include statewide, county, towns, Senate districts, House districts, and where MCA has made investments in each of these.

- CHART was critical in complex decision-making throughout the BEAD Program, including the identification of BEAD-eligible locations, project areas, and Community Anchor Institutions.

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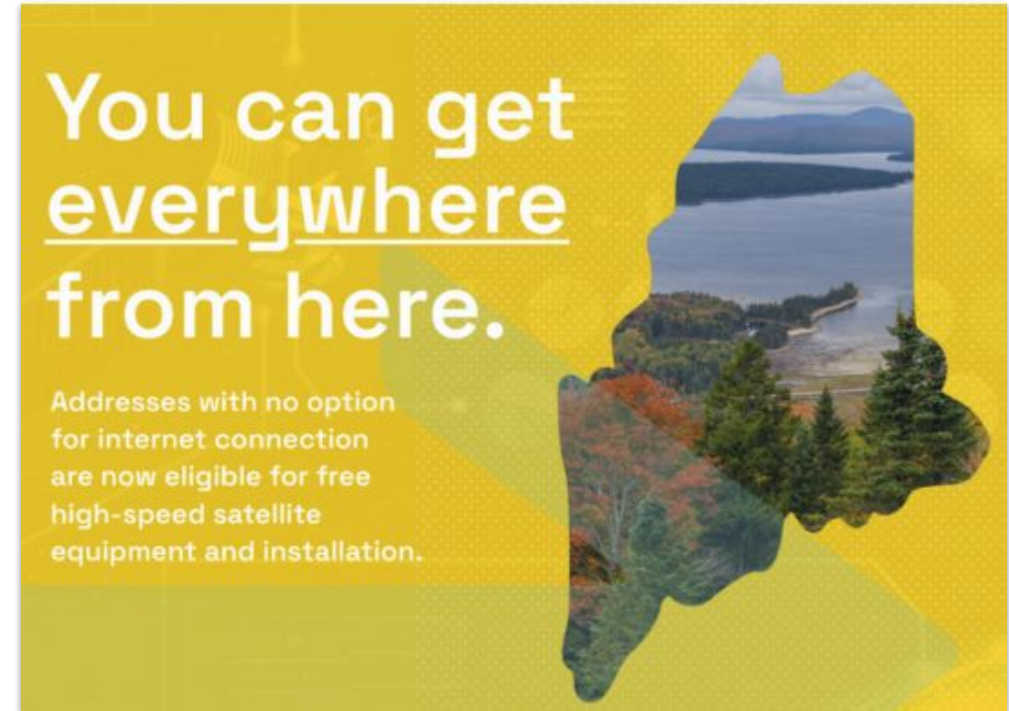
BEAD Provisional Awards

Provisional Subgrantee	Technology	BEAD Subsidy Request	Financial Match	Total Locations	Number of Projects
Comcast	Hybrid Fiber/Coax (HFC)	$139,122.00	$56,658.84	71	1
Consolidated Communications	Fiber	$35,451,257.12	$97,449,003.90	17,390	17
Pioneer Broadband	Fiber	$1,681,301.31	$560,433.78	974	3
SpaceX	Low Earth Orbit (LEO)	$6,797,558.99	$6,225,831.96	3,464	1
Union River (Direct Communications)	Fiber	$1,488,686.92	$1,388,887.61	145	2
UniTel (Direct Communications)	Fiber	$2,811,359.19	$3,731,846.13	1,218	1
TOTAL		$48,369,285.53	$109,412,662.23	23,260	25

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Working Internet ASAP

- Designed to **ensure an internet option for the approximately 8,800 locations** that had no existing internet service of any kind.
  - Competitive procurement of Starlink Low-Earth-Orbit (LEO) satellite hardware and service reservations for eligible locations
  - Hardware and qualified installation subsidized by MCA.
  - An integrated marketing campaign (direct mail, radio/print advertising) partner outreach, and events key to success
- Enrollment opened in 2024 and will continue to be open to all eligible locations pending approval of the BEAD proposal.
- Starlink plans to run several marketing campaigns and promotions this fall to reach residents and businesses eligible for the program.


You can get **everywhere** from here.

Addresses with no option for internet connection are now eligible for free high-speed satellite equipment and installation.
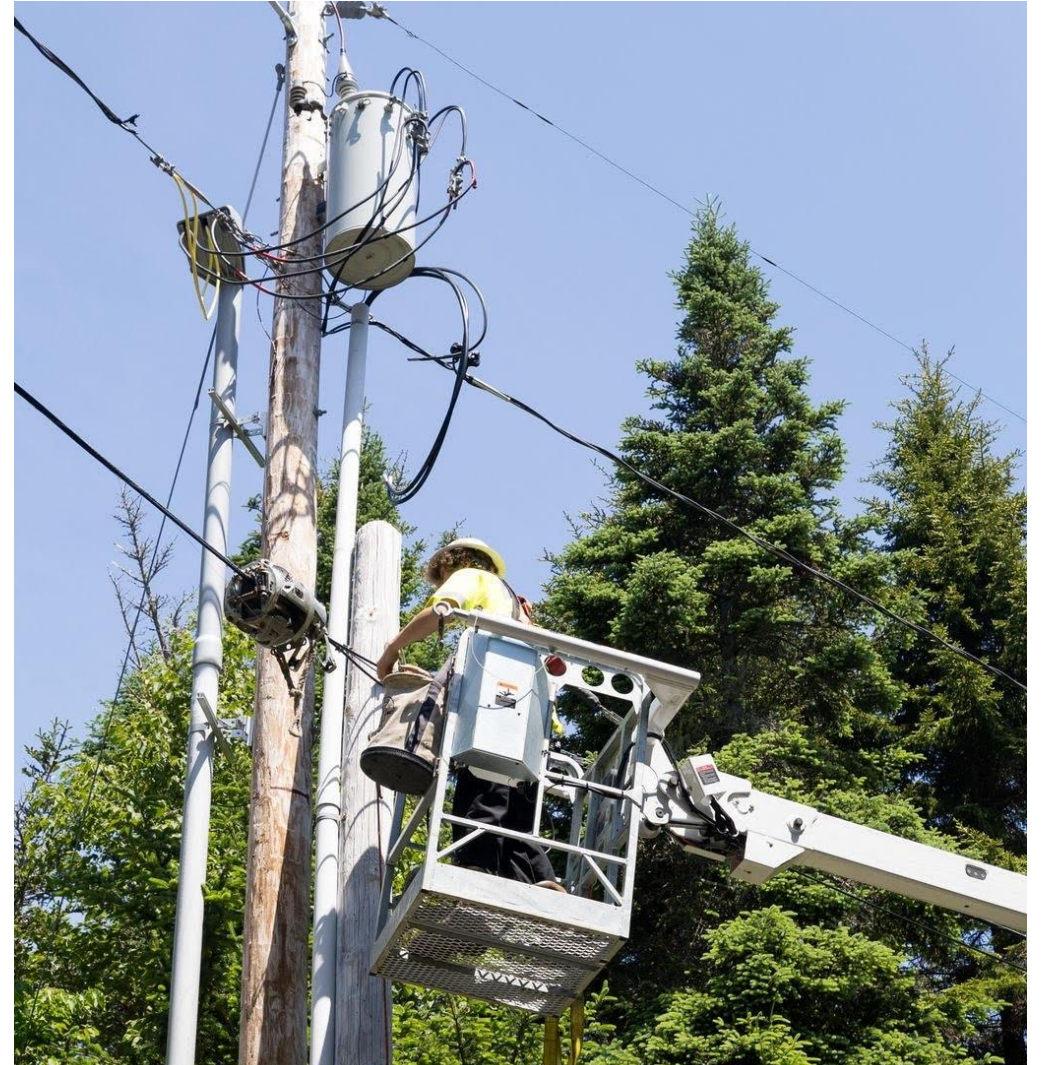
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Middle Mile Backbone

- The [Maine Online Optical Statewide Enabling Network](#) (MOOSE Net) is a new **$53 million initiative** bolstered by a **$30 million competitive grant** from NTIA

- Partnership with MDOT, University of Maine, Maine OIT, and Maine Municipal Bond Bank

- **~500 miles, 131 communities** reaching more than **200 community anchor institutions**, including schools, hospitals, libraries, local government buildings, and civic centers.

- Owned by MCA and used to: expand wireless and cellular communications; support grid modernization; support State and local facilities; and **sustain connectivity efforts for public benefit.**

MOOSE Net Routes ───
Density of Unserved Locations

Few Locations — Many Locations
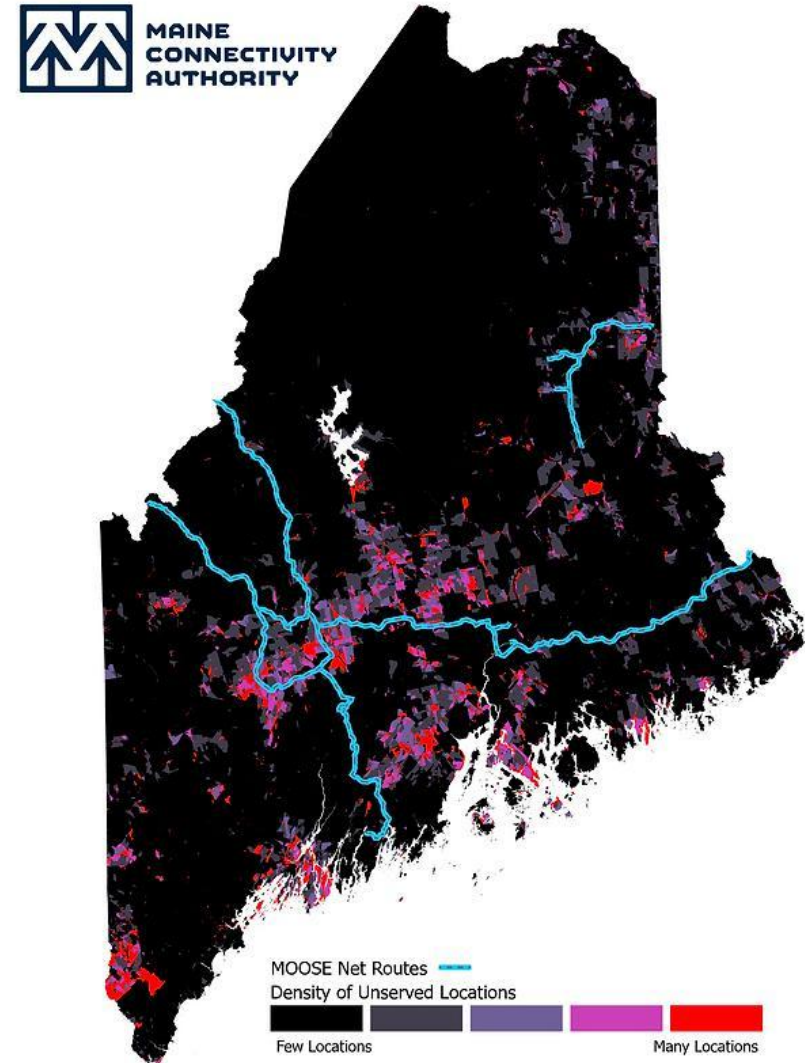
Utility Pole Data & Performance Working Group

- The Utility Pole Data & Performance Working Group (UPDPWG) includes almost 75 members across pole owners and attachers and has met 3 times in 2025.
  - It is a product of the 2024 Utility Pole Access Study
- UPDPWG is actively working through
  - the integration and maximization of Alden One,
  - reduction of pole attachment and make-ready barriers, and
  - implementation of pole study recommendations.
- Pole owners are actively working with MCA on BEAD/MOOSE Net pole surveying alignment to reduce impact and costs.

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Expanded Cellular & Wireless

- Cellular & Wireless Action Plan under development Fall 2025, including stakeholder engagement and public survey

- Leverage expanded middle mile

- Complementary technologies

- Address deficiencies

- Advance economic development, public safety, and other priorities


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1. **Where is Maine in the BEAD Program implementation timeline?**

On September 3, MCA submitted Maine's BEAD Final Proposal to the National Telecommunications and Information Administration (NTIA) for approval. This proposal outlines the plan to serve the remaining 23,260 homes and businesses in Maine with reliable, affordable broadband internet, taking us one step closer to closing the digital divide for all people in Maine. NTIA has committed to reviewing and approving final proposals within 90 days.

Maine's BEAD Final Proposal supports MCA's ability to continue deploying fast, reliable internet in a way that leverages both public and private funding to reach as many homes and businesses as quickly as possible. High-level provisional outcomes of Maine's BEAD Subgrantee Selection Process include:

- **100% coverage for all locations**
- $48 million in BEAD deployment funding provisionally awarded
- $109 million in matching funding from applicants
- $2,080 average subsidy per location
- 25 Projects with 6 ISP Partners
- Diverse technologies, including 85% Fiber, 14% Low Earth Orbit Satellite (LEO), and 1% Hybrid Fiber/Coax
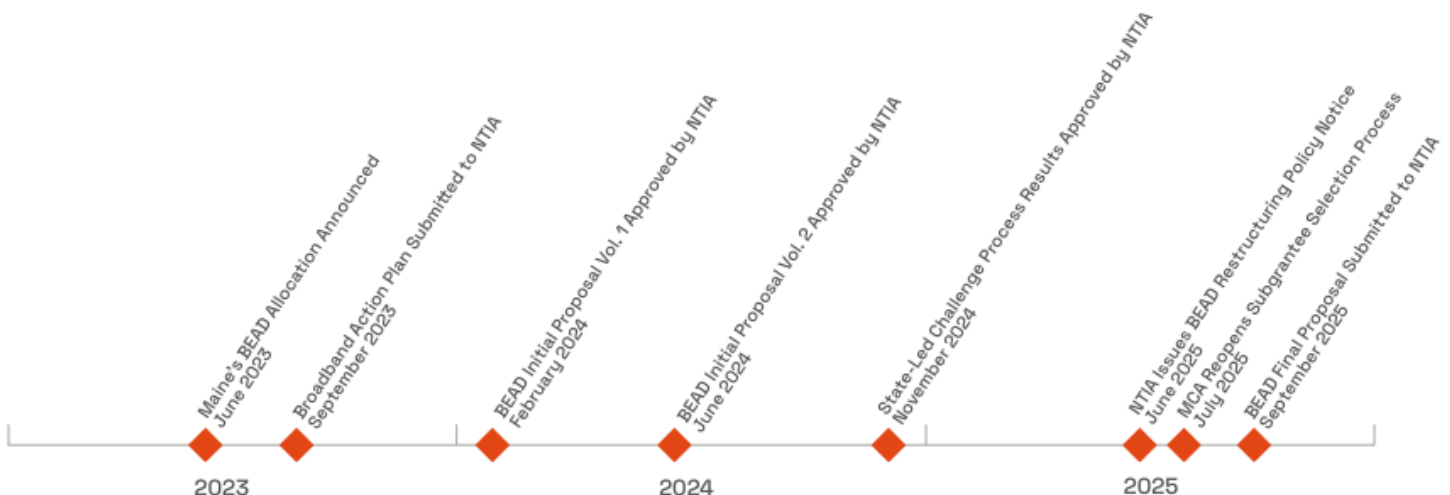
2. Which communities will be served by the BEAD-funded infrastructure projects?

Provisionally awarded locations are available on the BEAD Public Viewer map. Select the Provider Map to display BEAD-awarded locations by provisionally winning provider, or select the Technology Map to display locations by provisionally winning technology. The number shown above each point represents the number of locations served by that provider or technology in a general area. Detailed locations become visible as you zoom in.
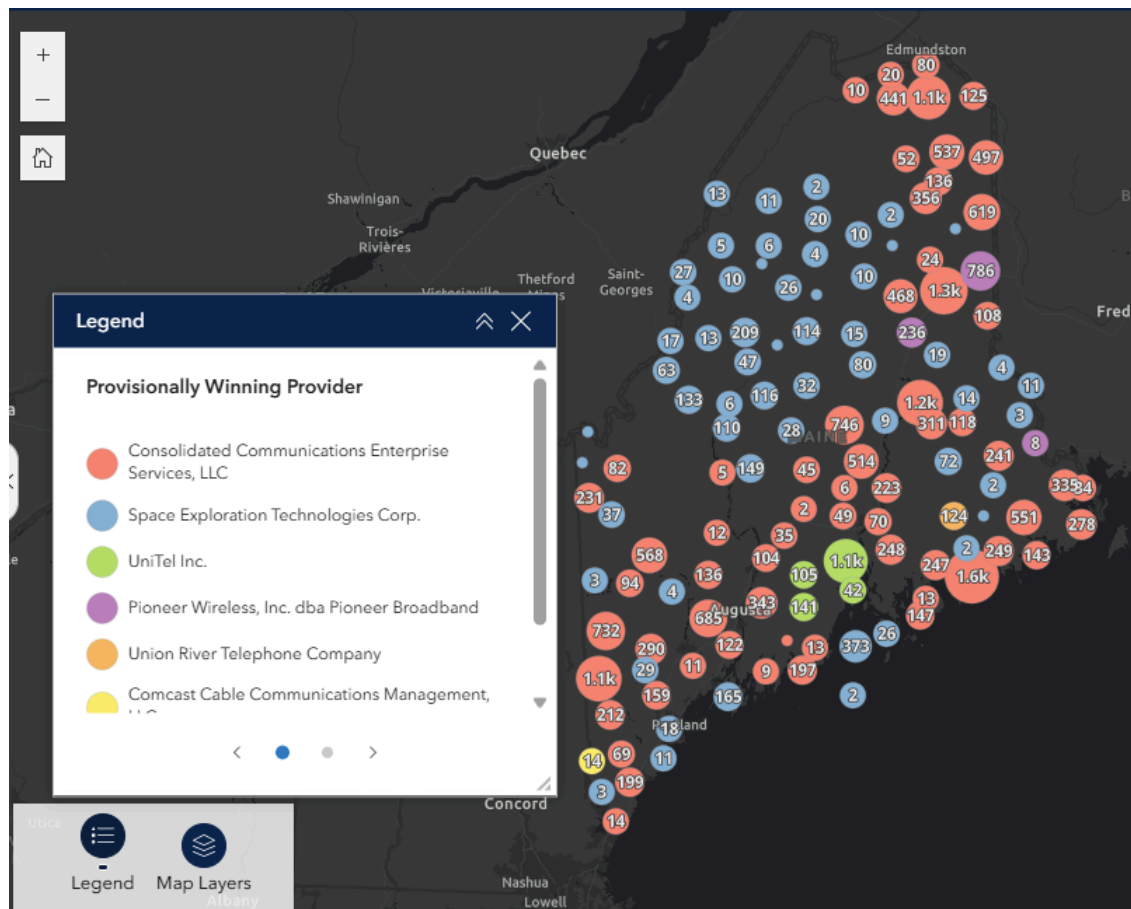
3. How were different technologies selected for BEAD-funded projects?

As with prior programs, MCA evaluated all technologies and applied them to different areas to meet a comprehensive set of needs, including geography, terrain, cost, and population density. Through BEAD, MCA received applications for fiber, cable, hybrid fiber/coax, and Low Earth Orbit (LEO) satellite projects. In accordance with the BEAD NOFO and NTIA's BEAD Restructuring Policy Notice, all internet technologies were considered for funding as long as they could meet reliability and scalability requirements.

Ultimately, provisional BEAD-funded projects in Maine will consist of 85% fiber, 14% LEO, and 1% hybrid fiber/coax. Using the BEAD Public Viewer map, select the Technology Map to display locations by provisionally winning technology.

4. **What is the timeline for the completion of BEAD-funded infrastructure projects?**

NTIA has committed to reviewing and approving final proposals by early December 2025. Once MCA has received approval for Maine's BEAD Final Proposal from NTIA, we will promptly work with the awarded ISPs to execute contracts, which must be completed within 90 days.

Following contract execution, awarded ISPs will take additional next steps, including design, engineering, and permitting (pole attachment permits and NEPA/EHP), which can range from 6-18 months. This stage will be followed by construction, which can range from 1 to 4 years.

Following the completion of the construction process, MCA then reviews all projects through a verification & validation process, which includes both a technical audit of physical infrastructure and a desk audit of costs and grant funding uses. This process typically takes 1 to 2 months. While the final verification and validation process is underway, the network is generally operational, and customers can begin subscribing.
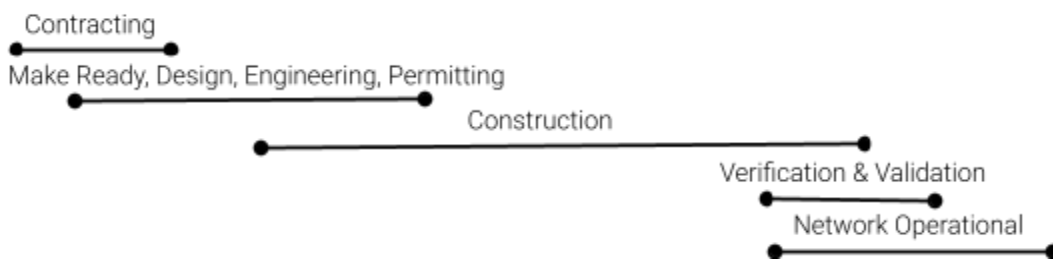
The process and timing for each project can vary due to several factors. In some cases, one portion of a large project might be completed before another. MCA will work with the awarded ISPs to proactively communicate the progress of each project to the communities and individuals who will be receiving the service.

5. **What will happen to locations in Maine not served with BEAD funding?**

The purpose of the BEAD Program is to reach remote, hard-to-reach homes and businesses that currently have no internet or have unreliable internet with speeds <100/20 Mbps. There are instances where locations may not be served by the BEAD Program, such as newly constructed homes or locations that do not appear on the FCC National Broadband Map.

Although there are specific locations that can not be directly funded by the BEAD Program, MCA will work with ISPs to proactively identify alternative funding sources and where service can be provided purely through private ISP investment. As these networks expand into new areas, there will be a greater overall ability for all homes and businesses to be served with fast, reliable internet. Recognizing that the baseline will continue to evolve, MCA will continue to strive to achieve true universal broadband coverage for all residents of Maine.

6. **What is the status of the Working Internet ASAP (WIA) Program, as it relates to the BEAD Program?**

    MCA designed the Working Internet ASAP (WIA) Program to align with the requirements and locations served through the BEAD Program. Through the implementation of the WIA Program, MCA has gained valuable insights that can now be applied to the BEAD Program. As MCA awaits approval of its BEAD Final Proposal, WIA enrollment for eligible locations remains open. You can learn more and enroll at www.maineconnectivity.org/wia.

7. **Maine's BEAD allocation was $272 million, but only $48 million in BEAD funds have been provisionally awarded. Why is there a difference in funds allocated and provisionally awarded?**

    Submission and approval of Maine's BEAD Final Proposal are critical steps to accessing Maine's full $272 million allocation through the BEAD Program. And yet, there is one major outstanding unknown: what happens to the remaining BEAD funds that are not included in the infrastructure deployment awards?

    Understanding the outcome of these remaining funds is crucial to ensuring sustainable access, affordability, and adoption of our expanded connectivity infrastructure. MCA is currently awaiting further guidance from NTIA on this topic and will continue to work with federal and state partners to ensure we can maximize the impact of Maine's full BEAD allocation.

    How did we get here? Here's what we do know:

    1. Maine's BEAD Final Proposal recommends infrastructure awards totaling $48 million to reach the last 23,000+ homes and businesses, and up to 750 Community Anchor Institutions (CAIs), including libraries, community centers, and healthcare facilities. 85% of the awards will fund fiber to the premise.
    2. Applicants have committed to matching BEAD funds with a 69% private financial match, resulting in an average subsidy of $2,080 per location.
    3. The "Benefit of the Bargain (BOB)" round resulted in nearly $200 million in deployment cost savings in Maine. This can be attributed to the significant private financial match from ISP partners, NTIA's BEAD Restructuring Policy Notice, which prioritized competition, and MCA's deployment of $250 million of state, federal and private funds over the last three years, resulting in the connection of 86,000 unserved and underserved locations.
    4. Lastly, our work is not done. To achieve the TRUE benefit of the bargain, we need to ensure the long-term sustainability of infrastructure deployment through critical enabling investments identified in the legislation that created the BEAD Program.

8. **How would MCA use Maine's remaining allocated BEAD funds?**

Infrastructure deployment, combined with enabling investments, ensures that no one is left in the digital dark, empowering people, businesses, institutions, and communities to thrive in a connected world. Based on the Infrastructure Investment and Jobs Act (IIJA) legislation, which created the BEAD Program, BEAD funds can be used for "non-deployment" uses that facilitate critical enabling investments in internet infrastructure. These investments include:

- Wireless and Cellular Infrastructure: Enhancing network capacity and reliability for remote areas.
- Service to Community Anchor Institutions (CAIs) and Multi-Dwelling Units (MDUs): Ensuring vital community hubs and residential complexes have high-speed internet, including telehealth, distance learning, and remote work.
- Job Training & Skill Expansion: Equipping the workforce of tomorrow through digital literacy and technical training, central to the rapidly expanding Artificial Intelligence-based economy.
- Cybersecurity: Infrastructure hardening, training, interagency coordination

MCA is working with NTIA and other states to ensure Maine's full BEAD allocation is fulfilled.

9. **How will MCA sustain investments being made in internet infrastructure through the BEAD Program?**

The key to sustaining investments in internet infrastructure through the BEAD Program is ensuring that individuals and communities can meaningfully utilize the internet once it's available to them. This can take several forms, including:

- Affordable internet service
- Access to a device that meets the user's needs, and technical support if something goes wrong
- Digital skills, including the ability to stay safe online
- Accessible local and state government resources

Beyond internet infrastructure, MCA has invested in places and people to facilitate these needs. MCA has also recently launched Maine Tech Share, which sources and redistributes underused devices from private companies and public organizations, and Tech Help for ME, a resource for people in Maine to find local resources that meet their needs. Both initiatives are powered by the Digital Opportunity Fund.

10. **Outside of the BEAD Program, how is MCA contributing to comprehensive connectivity for Maine?**

Including the BEAD provisional awards, MCA has facilitated the investment of more than $400M of state, federal, and private funds to connect more than 110,000 homes and businesses across Maine in the last four years.
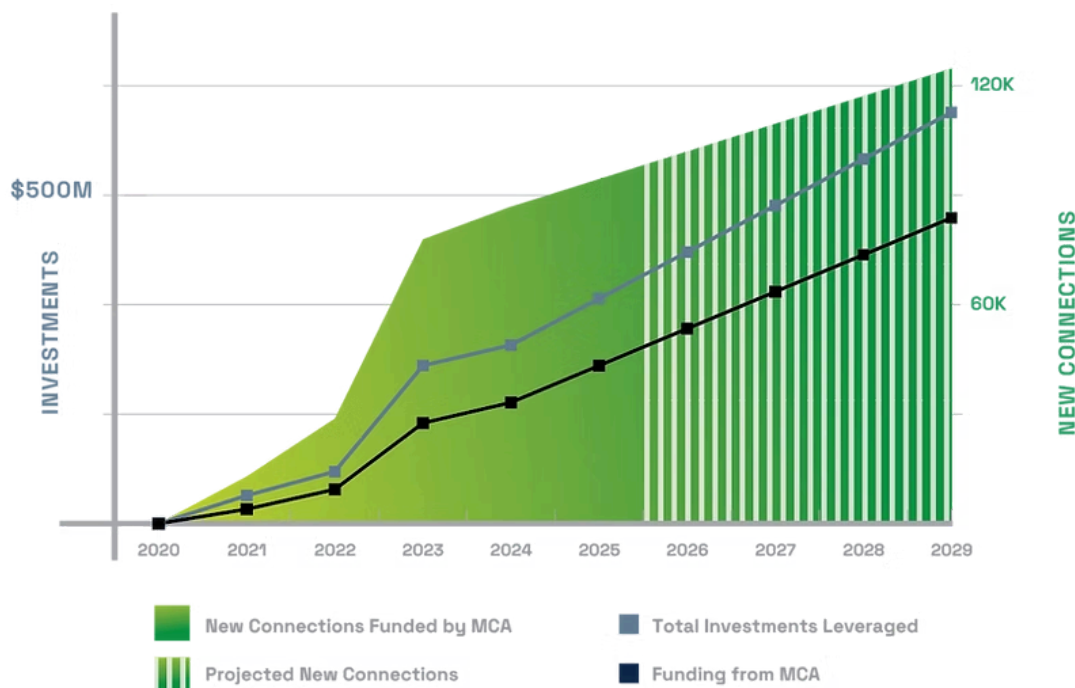
According to data from the Federal Communications Commission (FCC), Maine experienced the third-highest fiber growth among states between June and December 2024. Maine's fiber growth can be attributed to MCA's All-In Programs (Connect the Ready, Reach Me Line Extensions, Partnerships Enabling Middle Mile), legacy ConnectMaine programs including ConnectMaine Bond Fund projects, and NTIA's Broadband Infrastructure Program "Mountains to the Sea" projects, and significant direct investments from private internet service providers. MCA has also contributed to reliable wireless and Low Earth Orbit satellite internet service through Jumpstart and the Working Internet ASAP Program.

This fall, MCA will begin developing a Cellular & Wireless Action Plan to assess and better understand the cellular and wireless connectivity needs across the State. Stakeholder engagement, including a public survey, will begin in Fall 2025, with an interim report scheduled for release in December 2025. The final Cellular and Wireless Action Plan is expected to be complete by Summer 2026 and will include a public comment period.