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## **I. Overview**

As part of its study design for a Financial Modeling Analysis project, Uptown Services incorporates a comprehensive market research approach to satisfy the study objectives. The research methodology includes two key elements:

- Quantitative research of 400 residential/small business respondents
- 10 in-person interviews with industrial, institutional, and governmental representatives

This report summarizes the key findings of 10 interviews with commercial and institutional leaders conducted in Los Alamos during August and September. The majority of the interviews were conducted at the enterprise location with the exception of three interviews conducted by phone at the request of the participant.

## **II. Research Objectives**

The primary role of in-depth interviews is to generate a near-term assessment of the ability of the County of Los Alamos to place these organizations onto their fiber optic network as customers. These larger institutions can be important to the initial success of such a project, as they are potentially significant revenue generators. It is also important to qualify the interest and level of support among community leaders for the County and the Utility to provide broadband services. For this study, the research objectives to be addressed by the in-depth interview technique were the following:

- Uptown will determine the current facilities usage, needs and applicable bandwidth requirements of the large business market (including county government, other government institutions, educational facilities, and medical facilities).
- Identify the community benefit that organizational leaders would expect to be the most important if the County builds a fiber telecommunications system in Los Alamos.
- Identify the most important attributes of local phone, and Internet service according to Los Alamos organizations when they make service provider selections.
- Assess the performance of the current service providers of local phone, and Internet access for these organizations.
- Assess whether the political environment within Los Alamos is aligned with a project of this nature.

## **III. Research Design**

Uptown completed a total of 10 in-depth interviews with management representatives of Los Alamos's largest institutions (commercial, industrial, and governmental). This is an important piece of the overall market research program because it identifies the perspectives of Los Alamos's decision-makers and opinion leaders.

Uptown used a survey questionnaire for the purpose of collecting broadband services market and usage information from these commercial, governmental, and institutional organizations. This interview form is attached as an appendix to this report.

Uptown and the County of Los Alamos identified key stakeholders among local government, educational institutions, and private industry. The following organizations participated in this phase of the research:

- Bechtel
- KSL
- The County of Los Alamos
- Los Alamos Public Schools
- Community Bank
- Los Alamos National Bank
- University of New Mexico – Los Alamos
- TRK
- Shannon Corporation
- Los Alamos National Laboratory

The discussion was organized into several general topic areas to achieve the research objectives, and is reflected in the Interview Form included in the Appendix. The topic areas were:

- Current Telecommunications Applications
- Service Provider Assessment
- Future Needs / Current Gaps
- Public Policy Implications

The participants were candid regarding their communications needs and assessments of their current service providers. They were also very candid about their views on the abilities of the County of Los Alamos in executing a project of this nature. As part of Uptowns technique in ensuring candid and objective feedback from participants, we do not disclose the identities of individual participants, nor do we report individual institution feedback beyond telecommunications needs. All qualitative feedback regarding their current or potential service providers is presented at an aggregate level.

This institutional and commercial market is primarily interested in telephone and Internet services, but not video. There is one exception in this market that is hospitals where TV services are provided in patient rooms. The Los Alamos Medical Center is a potential video services client for this reason. Additionally, Shannon Corporation and TRK were interviewed as owners of apartment complexes where video service could be made available through a fiber network. All other participants were interviewed regarding phone and Internet services only.

#### **IV. Current Telecommunications Applications**

All participants provided an overview of their current telecommunications setup. An overview of their current services is presented in Exhibit One. In some instances this information is limited due to the general management focus of the interviewee versus telecommunications details of the business.

##### **A. *The County of Los Alamos***

The County of Los Alamos has 450 employees placed at 22 locations throughout Los Alamos. The county leases 5 T1's from Qwest for voice and data traffic. Phone system is an Intertel PBX. The total annual county spending on its voice and data services is \$268,000.

The county's ISP is Los Alamos ComNet.

### **B. Los Alamos Public Schools**

Los Alamos Public Schools has 100 staff and 300 teachers across 8 locations in the county (7 school sites, the administration building, and its Pueblo complex). It is using a total of 10 T1's (8 provided by McCleod, a reseller on Qwest's network, and 2 by Qwest) to connect the school sites and Pueblo with the administration building, and then uses 3 DS1's to interconnect on Qwest's network and 2 T1's (Frame Relay) to connect to their ISP in Albuquerque. They are paying \$230 per month for each of the 8 T1's in Los Alamos; others are \$800 per month. The McCleod T1's just entered a five year contract, the DS1's have four years left, and the Qwest T1's have one year left. They are using a Nortel PBX with 600 stations. The total annual spending on its voice and data transport services is approximately \$70,000.

The school is currently using Oso Grande as their ISP under a one-year contract. They are only receiving connectivity from their ISP, as the school administration maintains email and other Internet applications. They are realizing approximately 150Kbps throughput at this time. Oso Grande offers T3s, T1s, DSL, ISDN, 23 dialups in 56 communities and is the for-profit company supporting New Mexico TechNet's non-profit mission. Technet offers free Internet access to educators statewide.

### **C. Shannon Corporation**

Shannon Corporation is a real estate developer that manages two apartment complexes (200 units total) and 250,000 square feet of commercial office space in the county. Qwest and Comcast currently serve its apartment complexes, but neither have exclusive contract terms with Shannon. Comcast is not in a bulk billing arrangement with the apartments, but may be providing revenue sharing. Category 5 wiring has not been installed at the apartments. The commercial offices house tenants with data and voice needs, and one client has 200 employees.

### **D. Bechtel**

Bechtel has 110 employees at its Los Alamos office, which is its single location in the county. It is leasing 3 T1's from Qwest on month-to-month terms. Two of the T1's are used for voice and provide 48 lines serving 150 stations. Bechtel is using 3 ISDN lines for video-conferencing in two conference rooms. The third T1 is used for data and provides Internet access to 280 PC's in the building. Bechtel's corporate office in Las Vegas provides email and firewall services. 20 to 30 employees are using remote access (either VPN or dial-up) to access the company network from home. The total annual spending on voice and data transport services is approximately \$14,000.

### **E. KSL**

KSL is a subcontractor for LANL and as such cannot independently select its telecommunications vendors. It has 30 facility locations in Los Alamos but also has point-to-point connections using telemetry to control equipment throughout the County. It has 1,600 employees.

KSL is leasing a T3 from Qwest for its data services and is subject to LANL for contract duration and terms. The same is true for its voice circuits, which are 300 1FB circuits, of which 40 serve a Merlin PBX at its main office location. These circuits are leased for \$55 or \$75 per month, depending upon which side of the bridge they are on. It uses un-switched twisted pair

connections, leased from Qwest for \$20 per month, to connect its 60 telemetry locations. The total annual spending on voice and data transport services is approximately \$36,000.

The Labs serve as its ISP, and KSL uses their email server, etc.

#### **F. Los Alamos National Bank**

Los Alamos National Bank has 300 employees at three locations (Los Alamos, White Rock, and Santa Fe). The company has a total of 6 T1's connecting each branch to Qwest's central office. Two T1's terminate at each branch and 1 T1 is dedicated to voice and the other is dedicated to data. The bank is currently paying \$700 per month for each T1 and has one to two years remaining on its contract with Qwest. Qwest serves as the ISP with a DNS server, and the bank technical staff provides other applications such as email and firewall. . The total annual spending on voice and data transport services is approximately \$50,000.

The phone system is an Executone PBX with 300 stations.

#### **G. Community Bank**

Community Bank has 8 employees serving its Los Alamos location. The bank has five other branches: Albuquerque, Santa Fe, Espanola (2 locations) and Tia Amaria (90 miles away). The bank has a total of 3 T1's that either originate or connect in Los Alamos. The first is a Direct Inward Dial connection to Qwest's central office in Los Alamos. The second is a point-to-point T1 that connects the Los Alamos branch to Santa Fe. The third is a Frame Relay T1 that carries the banks data traffic. In addition, the bank also leases 9 Centrex lines from Qwest for voice services at a monthly recurring cost of \$546.

The T1's are under a three-year contract with one year remaining. The monthly recurring charge for them is \$1,400. Qwest is their ISP. . The total annual spending on voice and data transport services is approximately \$17,000.

#### **H. University of New Mexico – Los Alamos**

The University of New Mexico – Los Alamos has 145 total employees, with 45 full time staff at its Los Alamos campus. It also has student housing on 9<sup>th</sup> Street (64 units). The Los Alamos campus has a total of 4 T1's serving its voice, data, and video needs. Two of these T1's interconnect in Los Alamos (month-to-month contract) and the other two terminate in Albuquerque (annual contract). The University uses 1½ T1's for voice to serve 80 stations. For data services, it has 2 T1's from Qwest for connectivity in Albuquerque. The University IT department provides its own web hosting, firewall, and email services for the campus. This service supports approximately 40 PC's at the Los Alamos campus with Internet access. They are realizing approximately 1Mbps throughput at this time. . The total annual spending on voice and data transport services is approximately \$24,000.

The University is using video-conferencing in a limited fashion by providing students with the ability to view Albuquerque classes with one-way video and two-way voice.

#### **I. TRK**

TRK is a real estate developer and property management firm that owns several apartment complexes (160 units total), two motels, and six office buildings with 150-200,000 square feet of commercial office space. The firm has entered into bulk billing contracts with Comcast for 130

of its 160 MDU units and both motels. This deal was recently signed for a five-year term. It has two T1's that connect the office buildings. One is via Qwest and the other is from AT&T. There are 2-3 years remaining on the contract for these T1's. The office spaces and one of the motels have category 5 wiring. The interviewee indicated a low probability of using county-provided telecommunications services if they are made available.

#### **J. *Los Alamos National Laboratory***

The Los Alamos National Laboratory has approximately 11,000 employees in Los Alamos. Most are located at the main campus facility, but the institution also has 12 other satellite locations in Los Alamos (many are former school buildings leased from the County).

The Lab has 10 T1's connecting its main campus location and 1 DS3 to each of its satellite locations in Los Alamos. All of these facilities are leased from Qwest and are under a 5-year contract term (half of it is satisfied). Data connectivity is through the DS3's, which support approximately 30,000 devices on the network. ESnet provides Internet backbone connectivity through a DOE contract under federal jurisdiction. This is an OC12 connection. The Lab handoffs to Qwest on its campus, and Qwest takes data traffic to Albuquerque, where facilities connect to an ESnet router. The total annual spending on voice and data transport services is approximately \$240,000.

The Lab also has a campus-wide cable TV system, which secures its video feed via DBS (EchoStar).

**Exhibit 1 – Summary of Telecommunications Usage**

	<b>Bandwidth</b>	<b>Voice</b>	<b>Data</b>	<b>Video/Other</b>
The County of Los Alamos	5 T1's from Qwest	Intertel PBX	ISP is Los Alamos ComNet	
Los Alamos Public Schools	10 T1's, 3 DS1's from McCleod and Qwest	Nortel PBX with 600 stations	ISP is Oso Grande	
Shannon Corporation				No bulk contracts
Bechtel	3 T1's from Qwest	48 lines serving 150 stations	Corporate office serves as ISP	Doing video-conferencing via ISDN
KSL	1 T3 from Qwest	300 lines from Qwest	T3. LANL serves as the ISP	Telemetry for 60 point-to-point sites
Los Alamos National Bank	6 T1's from Qwest	Executone PBX with 300 stations	Qwest is ISP	
Community Bank	3T1's from Qwest	2 T1's and 9 Centrex lines from Qwest	1 T1 (Frame relay). Qwest is ISP	
University of New Mexico - LA	4 T1s from Qwest	80 stations served by 1 T1 (local) and ½ T1 to Albuquerque	The school performs all ISP functions.	Doing limited video-conferencing
TRK	2 T1's (1 from Qwest, 1 from AT&T)			Under bulk deals with Comcast
Los Alamos National Laboratory	10 T1's and 12 DS3's from Qwest	Lucent 5ESS switch with 20,000 lines	ISP is ESnet. Lab provides all support functions	Own cable TV system fed by satellite

**V. Service Provider Assessment**

Uptown asked each of the participants to rank their current level of satisfaction with their telecommunication(s) providers. Each provider's delivered satisfaction was rated on a scale of 1 to 5, with 5 being 'Very Satisfied'. Exhibit Two presents the results for Qwest (as it was the only provider mentioned other than McCleod, which was too early in the relationship to rate).

**Exhibit 2 – Service Provider Satisfaction Levels**

	<b>Rating Range (1 to 5 scale)</b>	<b>Average Rating (1 to 5 scale)</b>
Qwest	3 to 4	3.5

**A. Qwest**

Qwest is marginally satisfying its current customers. Not a single participant gave Qwest a 5 rating. The company did not have any ratings below a 3. Comments received were:

- “The data line goes down once in awhile”
- “Their T1 to Albuquerque is not reliable”
- “Response is poor”
- “Want to see lower price”

Participants clearly stated that Qwest was really the only game in town for local phone and commercial data connectivity. As one might expect in monopoly situation, Qwest is not providing stellar customer service to its major account customers in Los Alamos.

**B. McCleod**

Los Alamos Public Schools just entered into a five-year contract with McCleod for the majority of its T1s. Although the school system could not rate their performance, the reasons it switched to McCleod from Qwest were:

- “Better billing because it is a consolidated bill. With Qwest, each circuit is billed separately.”
- “Slight savings over Qwest”

**VI. Provider Selection Criteria**

Each participant was asked what factors were considered in selecting his or her service provider(s) as an open-ended question. The following verbatims represent the reasons presented for those participants using Qwest (there was one exception involving McCleod presented above):

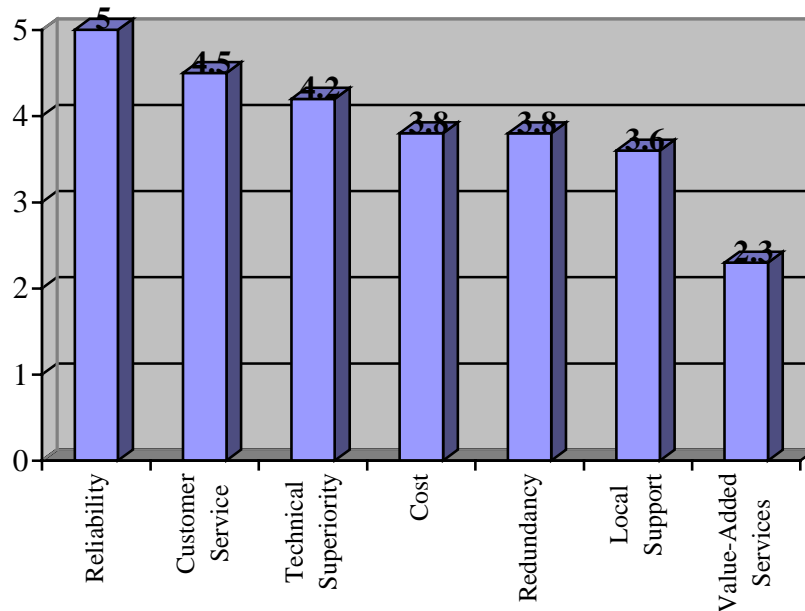
- “Lack of availability”
- “Qwest was the only option”
- “Qwest was only game in town”

In addition, participants were asked to rank the most important service provider selection criteria but rating a list presented by Uptown on a scale of 1 to 5, with 5 being Very Important. The results of this question are presented in Exhibit Three below.

As one would expect from larger institutions, reliability and customer service are paramount to all other selection criteria. When compared to other markets that Uptown has studied, Los Alamos ranks technological superiority high, which has positive implications to a community broadband initiative. Working against this advantage is the fact that cost and redundancy rate lower than normal, both of which are characteristics of alternative, fiber optic networks.



### Exhibit 3 – Summary of Selection Criteria Importance



## VII. Public Policy Implications

Because participants are key decision-makers and opinion-leaders within the community, Uptown solicits the participants' political assessment of this project as well. Uptown has consistently seen the need for some level of public support for a project of this nature given its roots in County government and County services. Whether or not the project ever goes to a referendum (e.g. for financing), there is a need for public support to ensure success.

### A. County and Utility Qualifications

Reactions to the County's qualifications and ability to undertake a fiber optic project are consistently centered on the qualifications and expertise of its personnel. Depending upon the perspective of the participant, it was either positive or negative as the verbatims below demonstrate. There is agreement that utility and/or county staff would need to supplement skill sets with telecommunications expertise. Perspectives differ on whether this would involve training or hiring, and the confidence level that the County would move proactively to accomplish this. Uptown interprets the reaction of the commercial market towards the perceived ability of the county to execute this initiative as positive for the following reasons:

- There is a consistent and single performance attribute that the county and utility can focus upon; employee and management industry expertise and skills. The county can realize this through a combination of recruiting and training.
- With a single, non-representative exception, the current performance of the county and utility is clearly satisfactory, such that participants feel that infrastructure performance, customer service, quality of management, etc. are not appearing as perceived shortcomings.

### Optimistic Reactions

- “Think they would put the right team together.”
- “Have resources to get the personnel they need. People are competent.”
- “Believe they could do it with training and good recruiting.”

### Skeptical Reactions

- “Need to be focused. Not sure they have the right people.”
- “Need new people on staff to do this and bring in the industry expertise.”
- “The county has issues in handling utilities...construction problems knocking out service.”

The image of the electric utility among business leaders is generally positive, with some concerns around reliability and network outages. However, the reputation of the organization is strong:

- “Historically, there has been a problem with brownouts due to old equipment. These were more frequent seven or eight years ago. The quality of the field staff is good.”
- “Frequent outages. The field operations staff does a good job.”
- “Good reputation”
- “Good image. Good reliability”

## **B. Benefits to the Community**

Uptown presented each participant with three choices as to the most appropriate motivation for the County of Los Alamos to undertake a fiber optic project. The three options were:

- Revenue diversification
- New technology and economic development
- Better service by doing it yourself

Participants felt that new technology and economic development was the most viable message for citizens to hear in describing the value of this project. One participant mentioned better service, but all other participants selected new technology and economic development as the primary motivation. The rationale for this response can be seen in the verbatims:

- “The county relies on LANL. We need to diversify the local economy, because when the Lab sneezes, we catch a cold.”
- “Because the town is high-tech and a worthwhile investment.”
- “To attract companies and have infrastructure to connect them to the Lab.”

Based upon responses to this question, Uptown would not recommend using the promise of better service nor revenue diversification as a rationale for undertaking this project in any public relations activities.

## **C. Economic Climate**

Participants are cautiously optimistic in their outlook on the Los Alamos economy. The most consistent description is stability; that neither significant positive nor negative economic swings are likely in the future. This positive perspective is a necessary ingredient for the local business community to support the investment required to construct a fiber optic network. The consistent

component of the economic outlook by commercial institutions is recognition of uncertainty around the LANL management contract renewal next year. There is some level of concern that a management change could result in a reduction in retirement benefits, generating a reduction in discretionary income and spending in the community in the medium to long term.

The county budget is seen as adequate and healthy. None of the participants indicated a budgetary concern around this initiative.

- “Well funded”
- “Very healthy”
- “Good shape”

## **VIII. Research Findings and Conclusions**

### **A. Telecommunications Needs**

The overall telecommunications market in Los Alamos can be characterized by the following:

- There is a general lack of competition among competitive access providers serving commercial and government accounts. Participants indicated that other providers have not approached them for their Internet or local phone business. Qwest and McCleod (which resells Qwest capacity) is the only real choice available.
- There is essentially no competition for commercial ISP service as well. It is a virtual market with Qwest holding most of the market share. One of the organizations that we spoke with had an alternative ISP (Oso Grande), but Qwest dominates the commercial ISP market.
- Potential near and medium-term demand from a new voice and data services provider will be restricted in the near-term by the prevalence of multi-year contractual agreements with Qwest. The vast majority of Los Alamos’ commercial enterprises receiving transport services from Qwest are doing so under five year contracts. These businesses will need to cycle through the remaining commitment term and then evaluate competitive alternatives.
- There is little perceived need for services capability beyond basic transport and connectivity. Most participants expressed little to no need for redundancy (despite a consistent pattern of network downtime among them) and limited need for value added services. The exception to this is LANL, which expressed a strong interest in achieving redundancy. There is some current utilization of video conferencing among Los Alamos’ commercial base, but it is limited as well.
- LANL’s needs are unique to the county and are centered upon either connecting its campus and satellite locations with dark fiber or Gigabit Ethernet (in that order of preference). They are also highly interested in achieving a significant improvement in network redundancy (physical or virtual or both). To this extent, a fiber ring with self-healing capability would be very desirable for connecting the LANL locations. It would also be helpful to have two separate physical points of interconnect.

### **B. Market Potential**

Although Qwest does not have a strong hold on its customer base through strong customer satisfaction, it has the vast majority of its customer base locked into contracts. There will be opportunities to win customers over time with better service, improved reliability and price

discounts, but the County needs to be careful not to assume these revenues will materialize immediately. Uptown has used remaining contract durations to spread the potential revenue stream over the next five years to accurately reflect this constraint.

#### **Exhibit 4 – Percent of Transport Revenues Under Contract by Year**

	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
Percent of Transport Revenues Under Contract	78%	46%	32%	14%	0%

Just as the County will have to provide a pricing advantage to residential and small business customers to entice them to switch to County-provided broadband services, large businesses will need to see price advantages as well. Other key assumptions (see Exhibit 5) that Uptown uses to translate the large business interview data into a reasonable and conservative market sizing and forecast are:

- **Percent of Market Surveyed:** An adjustment to reflect that a portion of the large business market was surveyed, not the entire market
- **Construction Timeframe:** How long it will take the County to build the network to large business users
- **Budget allocated per T1 for local transport portion of T1 budget:** Uptown assumed that the average local portion of each T1 to be \$150. This is the approximate charge for a single channel termination from the Qwest Central Office to the customer location. This takes the overall revenue potential substantially for customers that use T1s to connect to Santa Fe and Albuquerque.
- **Price Discount:** The amount of price discount (compared to incumbent levels) the County will offer to achieve market share
- **Market Share:** The percentage of transport revenues that the County will secure as its customer base and share of the market

#### **Exhibit 5 – Key Assumptions in Sizing the Large Business Market**

<b>Assumption</b>	<b>Value</b>
Percent of Market Surveyed	60%
Construction Timeframe	1 Year
Price Discount	10%
Market Share	40%
Qwest price per local T1 Channel Termination	\$150.00

Given the above assumption set and the detailed information collected from the large business interviews, the following annual revenue stream represents the ‘most likely’ case for the county.

**Exhibit 6 – Annual Revenue Stream from Large Business Sector**

	2004	2005	2006	2007	2008
Utility Department (SCADA savings)	-	\$4,800	\$4,800	\$4,800	\$4,800
County Telecom Expenses	-	\$198,000	\$216,000	\$216,000	\$216,000
Large Business Sector (including LANL)	-	\$11,880	\$265,880	\$269,120	\$277,760
<b>Total</b>	<b>\$0</b>	<b>\$214,680</b>	<b>\$486,680</b>	<b>\$489,920</b>	<b>\$498,560</b>

**C. Generating Community Support**

As mentioned, this research technique provides insight beyond the commercial and institutional segments as potential customers. Uptown has two recommendations as an outcome of the Depth Interview process which will improve the public relations efforts around this project.

- To the extent possible, present this project and its benefits to the community with the endorsement of the County organization. From the perspective of business and opinion leaders in the community, the utility has established a solid reputation for its service and confidence in its people. These leaders see a need for further staffing to seed the industry expertise for this new line of business, but they see the organization as competent and able to deliver on the promise of better broadband. Regardless of the business model, wholesale or retail, the County will need to be the visible ‘brand’ associated with this project.
- In presenting this project to the public, the County should position the initiative as utilizing the latest technology to build an alternative broadband communications infrastructure with the associated benefit of economic development on behalf of the citizens and commercial enterprises in Los Alamos.

## IX. Appendix – Interview Form

Organization: \_\_\_\_\_

Representative: \_\_\_\_\_

Responsibility: \_\_\_\_\_

Phone number: \_\_\_\_\_

Employees: \_\_\_\_\_ Number of Locations within 25 miles \_\_\_\_\_

The County of Los Alamos is studying the state of telecommunications in the community and needs help from local institutions and opinion leaders. This survey is intended to identify how telecommunications services including telephone, video, and data/Internet services are currently being used and what future enhancements might improve the operation and effectiveness of groups like yours. Your response will be used to shape and direct a comprehensive telecommunications plan for the County. Thank you for your time in this critical endeavor.

### a) **Current Telecommunications Applications**

1. Please describe your current set of telecommunications services.
  - Voice
  - Data
  - Other
  
2. How does your organization, as well as your service providers, support these services?
  
3. Please rate your organization's level of satisfaction with these services on a scale of 1 – 5 with 5 being Very Satisfied.
 

1      2      3      4      5
  
4. Why do you say you are (satisfied/dissatisfied) with these services?
  
5. What factors did you/do you consider in selecting your service provider(s)?
  
6. How would you rate the relative importance of the following attributes of these services? Use a scale of 1 – 5 with 5 being Very Important.

- Cost \_\_\_\_\_
- Redundancy \_\_\_\_\_
- Value Added Services \_\_\_\_\_
- Customer Service \_\_\_\_\_
- Reliability \_\_\_\_\_
- Technological Superiority \_\_\_\_\_
- Local Support \_\_\_\_\_

7. How do you currently connect to the Internet and how will that change over time?

**b) Service Provider Assessment**

8. Internet Services

- Who is your organization's current provider of Internet services? \_\_\_\_\_
- What services are they providing? \_\_\_\_\_
- How would you rate their performance (1 – 5 scale)? \_\_\_\_\_

9. Local Phone Services

- Who is your organization's current provider of local phone services? \_\_\_\_\_
- What services are they providing? \_\_\_\_\_
- How would you rate their performance (1 – 5 scale)? \_\_\_\_\_

10. Long Distance Services

- Who is your organization's current provider of Long Distance services? \_\_\_\_\_
- What services are they providing? \_\_\_\_\_
- How would you rate their performance (1 – 5 scale)? \_\_\_\_\_

11. Does your organization currently purchase services from any competitive telephone providers in the Los Alamos area?
12. Currently, what is the most critical telecommunications capability or service in use by your organization?
13. How important are value-added services compared to just getting the network access and capacity you need?

**c) *Future Needs / Current Gaps***

14. What telecommunications capabilities and services does your organization need now that it can't currently get?
15. With regards to the responses to Question #11, are these services not in use because they are not available or not affordable?
16. What is the most important telecommunications-related issue facing your organization at this time?
17. What are the most critical long-term telecommunications needs of your organization?

**d) *Public Policy Implications***

18. In your opinion, how qualified is the County and the Utility to provide broadband services?
19. To what extent should this initiative be motivated by:
  - Revenue diversification
  - New technology and economic development
  - Better service by doing it yourself
20. In your judgment, what are the important issues that will shape public opinion regarding this project?



21. What other major community projects has the County undertaken?
22. How healthy is the County budget currently?
23. What is the local and regional economic outlook?
24. What are the most important issues facing the County?