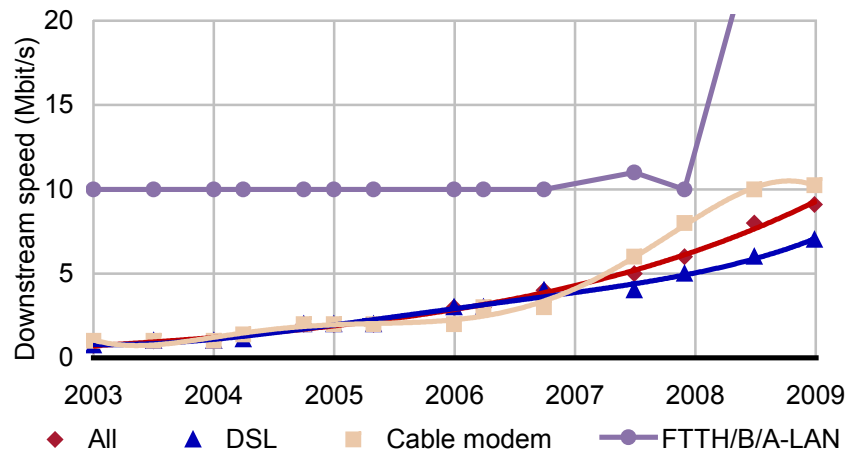


The median downstream speeds of apartment-LAN and fibre reach 50Mbit/s, while cable continues to outpace DSL

Figure 3: Unweighted median downstream broadband speed by access technology, 2003–4Q 2009 [Source: Analysys Mason, 2010]



- The 'median' provides a robust statistic for measuring the central tendency of broadband speeds. This metric is less distorted by extremely high- or low-speed services offered by service providers, and therefore provides a clearer indicator of service speeds that are 'typical' in the broadband market at a particular time.

- Fibre or LAN-delivered broadband services frequently offered a downstream speed of 10Mbit/s during 2003–2008. Most home networking technologies at this time had bandwidth limitations in this range, which may have capped demand.
- Increasingly advanced DSL and cable-modem roll-outs are now commonplace. As the median downstream bandwidth offered by cablecos reached 10Mbit/s in 2009, many existing fibrecos and A-LAN service providers increased their speeds. Cablecos and telcos that launched fibre services for the first time in 2009 frequently offered a downstream speed of at least 100Mbit/s, contributing to an increase in the median downstream speed of fibre and A-LAN services to 50Mbit/s by 4Q 2009.
- The median downstream speed of DSL and cable-modem broadband services reached 7Mbit/s and 11Mbit/s respectively in 4Q 2009, up from 5Mbit/s and 8Mbit/s in 4Q 2008.

Light-usage metered broadband services are a response to mobile broadband tariffs and saturating fixed take-up [2]

- Turkish incumbent Turk Telekom's ISP subsidiary TTNET has launched a light-usage service, 'Davet', offering a broadband service with a downstream bandwidth of 512kbit/s, a 500MB usage cap and a per-megabyte charge of EUR0.0084 once this limit is exceeded. The service, priced at TRL18 (EUR8.2), undercuts the previously cheapest services, which were priced at TRL26.8 (EUR12.2), a base price that had remained relatively unchanged (aside from reductions in the Special Communications Tax) for several years. While this service is aimed at reducing the price barrier to entry for fixed broadband services and is likely to be partly in response to the launch of mobile broadband services in the country, the usage cap of 500MB will possibly be too low for many users to realise a cost saving.
- Polish cableco Multimedia Polska's 'Internet Profit' range offers an innovative approach to pricing entry-level services; it provides the same service as the cableco's regular 'Internet' range of services, but with much lower usage caps (1GB or 1.5GB versus 'unlimited'). These are priced at about 4% of the monthly subscription price of the unlimited service. Subscribers who exceed the usage cap of the Profit services are charged the tariff of the equivalent unlimited service for that month. Users can therefore never be penalised for opting for the Profit service over the regular (unlimited) range of services and light or infrequent broadband users are likely to make significant savings with this offer.
- Spanish ISP Jazztel's 'ADSL hasta 3 Mega Personal + llamadas gratis con Línea JAZZTEL' includes line rental and unlimited national fixed-line voice calls for EUR19.95 (excluding VAT) per month (significantly cheaper than many competing services that may also require additional line rental charges). The 3Mbit/s downstream Internet access service is then charged at EUR1.95 per day above this price.