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*Information Society and Media Directorate-General*



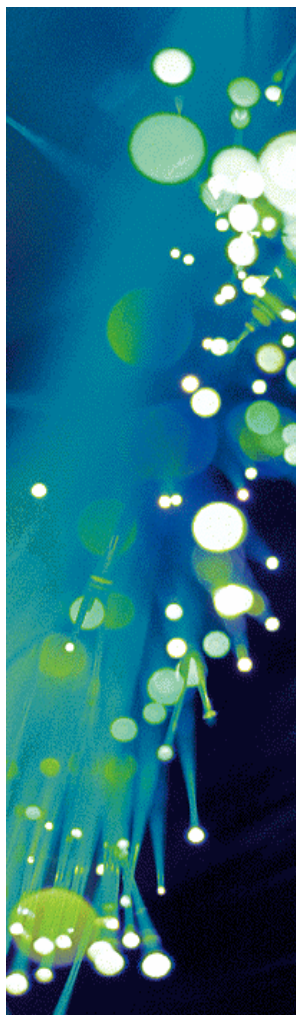
BROADBAND INTERNET  
ACCESS COST (BIAC)

*Second half of 2009  
Prices as at 1-15 October 2009*

*Contract n° 30-CE-0068969/00-12*

***FINAL REPORT***

*January, 2010*



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**Disclaimer: This report has been commissioned as an independent study to examine tariff developments in the European Community. The Commission does not accept any responsibility for the accuracy or completeness of the information contained herein.**

The tariff information is collected by VAN DIJK MANAGEMENT CONSULTANTS from the individual operators, and is believed to be correct as for the period between **October 1<sup>st</sup> – 15<sup>th</sup>, 2009**. VAN DIJK MANAGEMENT CONSULTANTS will not accept responsibility for any decisions made on the basis of information in this report.

**The opinions expressed in this Study are those of the authors and do not necessarily reflect the views of the European Commission.**

# **1. INTRODUCTION**

This is the second part of the 2009 comparative study on the Broadband Internet Access Costs in 27 Member States of the European Union and some other countries of reference. It is based mainly on information collected in the period between October 1<sup>st</sup> and 15<sup>th</sup>, 2009. Where appropriate, the information for this period has been compared with the similar information that was previously collected by VAN DIJK MANAGEMENT CONSULTANTS in April 2007, October 2007, April 2008, October 2008 and April 2009.

## **1.1 CONTEXT OF THE STUDY**

In June 2005, the European Commission (Directorate General for Information Services) launched the “i2010 – A European Information Society for growth and employment” initiative. i2010 is a policy framework laying out broadband policy guidelines for the information society and media up to 2010.

The three main priorities of the initiative are:

- 1) to create a Single European Information Space, which promotes an open and competitive internal market for information society and media services.
- 2) to strengthen investment in innovation and research in ICT.
- 3) to foster inclusion, better public services and quality of life through the use of ICT.

Under this initiative, the Commission will in particular promote high-speed and secure broadband networks.

As data available to the Commission indicate that pricing strategies have a direct impact on the take-up of broadband, the Commission has launched a study to provide price data on Broadband Internet Access Costs (BIAC).

## **1.2 SCOPE AND LIMITS OF THE STUDY**

### **1.2.1 SCOPE OF THE STUDY**

“Broadband Internet Access” is defined as *an access assuring an always-on service with speeds in excess of 144 kbps*<sup>1</sup>. This speed is measured in download terms.

The identification of the different broadband offers is limited to those intended for *residential* subscribers. Business packages or offers for professional users only are not taken into account. Note however that *residential* packages are also available to and used by small and medium enterprises (SMEs) as the speeds are also satisfying the needs of

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<sup>1</sup> This definition of “Broadband Internet Access” is consistent with the definition used in the 13<sup>th</sup> Implementation Report of the European Commission (cf. [http://ec.europa.eu/information\\_society/policy/ecomms/library/communications\\_reports/annualreports/13th/index\\_en.htm](http://ec.europa.eu/information_society/policy/ecomms/library/communications_reports/annualreports/13th/index_en.htm), Volume 2, p. 92). It should be noted, however, that it was observed that most often the lowest broadband access speed equalled 256kbps. Exceptions to this rule are speeds equal to 192 kbps (2 offers in Lithuania and 1 offer in Latvia), and speeds equal to 240 (1 offer in Bulgaria).



these customers. Furthermore, the study only deals with supplies at retail level, and not at wholesale level.

The study covers 33 countries: the 27 Member States of the EU, Norway, Iceland, Japan, South Korea, Canada and the USA. For the USA, three different States have been selected based on their population density: New York, California and Colorado. The two first States have a highly developed broadband access supply, whereas Colorado's is less developed.

### **1.2.2. LIMITS OF THE STUDY**

It should be noted that the comparison of Broadband Internet Access Cost as presented in this report is characterised by a number of limitations. The main limitations can be summarised as follows:

***1. The basis for the comparison is limited to a number of parameters and characteristics.***

It was observed that the cost structures for broadband access services can be very complex<sup>2</sup> which means that costs as well as the service itself can vary depending on a broad set of parameters (e.g. location of the client in terms of a specific city or even street, time of day for the consumption of additional downloadable volume, distinct prices or speeds for local or international content, usage of the ISP of its own network or not, etc.). Furthermore, it is difficult to include the value of qualitative characteristics (e.g. level of protection, available webspace, etc.) in a quantitative comparison exercise (i.e. based on the cost of the service).

***2. The study is limited to a targeted coverage of 80%<sup>3</sup> of the market.***

Given the often very high number of ISPs representing the remaining 20% of the market, it was deemed not to be feasible to cover the market fully.

***3. The study presents an overview of what offers are available, not of what is actually consumed by the customers.***

As no information is available on the volumes of each offer actually sold in the sample, no weight could be attributed to the different offers for which data is collected for the same country. Furthermore and as a consequence, no weight other than the number of offers available could be given to the baskets defined in paragraph 3.2.1.a.

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<sup>2</sup> Some ISPs provide offers for which the costs are 'to be negotiated' or 'subject to deal'. As this study relies on price information that is publicly available and confirmed by ISPs, such offers have not been taken into account. No evidence could be found of the prices obtained in such negotiations.

<sup>3</sup> For some countries (Bulgaria, the Czech Republic and Lithuania), due to a significant fragmentation of the market, it was observed that the number of ISPs globally representing at least 80% of the overall market was extremely high. In those cases, a few small market players were included in the sample of ISPs to ensure that it would be as representative as possible.

**4. The study excludes discounts based on promotions.**

Since promotions are considered to be – by definition<sup>4</sup> – limited to specific circumstances (e.g. limited in time), it was held that these do not provide a good indication of the actual cost for broadband Internet access. Please note however that some ISPs offer consecutive and repeated promotions, making these offers quasi permanent, so it could be argued that the cost of promotions do correctly reflect the cost of the broadband Internet access offer.

**5. The normalisation of metered offers (cf. paragraph 3.2.1.b.) is based on theoretical parameters.**

As for the metered offers, no information is available on the actual consumption (especially in terms of downloaded volumes and the average number of hours that the Internet was accessed), theoretical normalisation parameters have been defined. These parameters can be considered to be best estimates for the average metered offer in a specific basket, but could not be checked against actual consumption statistics.

This theoretical normalisation cannot always be attained because of constraints that occur in reality; e.g. the theoretical parameters cannot be reached because of restrictions in the form of a maximum usage (i.e. a strict maximum) in terms of downloadable volume (e.g. in Malta, Iceland, United Kingdom, Canada and Lithuania), and the 'fair use principle'<sup>5</sup>.

As the minimum service level, imposed by our normalisation parameters cannot be reached in such cases, the offers concerned have not been included in the sample and will therefore not be taken into account when determining the least expensive or median offer per country.

These limitations should not be confused with maximum invoice (strict maximum amount on the monthly invoice, e.g. in Spain, Denmark, Japan, Canada and Hungary): in this case the invoice limit does not prevent the user from obtaining the minimum service level as defined for each basket.

**6. The 7 baskets to which the offers are allocated for the comparison of the broadband access costs group offers with considerable technical differences.**

A trade-off had to be made between limiting the number of baskets to a reasonable number and defining baskets that are suitable for all of the countries included in the study, independent of the degree to which the broadband Internet service market is already developed in these countries. Consequently, it can be observed that within one basket, the cost of offers with relatively divergent speeds is compared.

**7. The packages included in the study are limited to the 'pre-defined' packages (in contrast to the 'à la carte' packages).**

Several ISPs offer bundled offers 'à la carte', i.e. the customer can define a level of consumption for each individual service included in the package (e.g. combination of a

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<sup>4</sup> As a general rule in this study, an offer is considered as a promotion when the time to subscribe to the offer under the specific conditions mentioned, is less than 12 months or when it is aimed at a specific group of consumers (e.g. students).

<sup>5</sup> The fair use principle is used by ISPs to limit download volume of a broadband internet offer by fixing an upper limit, considered as a reasonable monthly download capacity for private use. Once this limit is attained, the ISP has the right to lower the speed of the internet access or charge a fee for additional downloads.

volume of mobile call minutes, fixed call minutes, download speed for broadband Internet access, number of TV-channels). Including a cost for all of these packages would require defining multiple profiles for the additional services, which would then need to be combined in different ways with the baskets defined for the broadband Internet access service. This exercise is considered to be outside the scope of this study. However, whenever pre-defined packages with different levels of service were available, they were all considered (e.g. packages with limited or unlimited telephony service included, with analogue or digital television service, etc.). Finally, the possibility of obtaining simultaneously multiple single services at one ISP has not been considered in case this was not presented as a package. This implies that possible (negotiated) reductions that could be obtained in this case were not considered.

**8. As the cost of the broadband Internet access service cannot be isolated in case of a bundled<sup>6</sup> offer, the cost of bundled offers are analysed globally.**

'Pre-defined' packages, the proportion of which in the sample of offers grew steadily from April 2007 to October 2008 and which represented more than half of the total number of offers at the second half of 2008, decreased slightly in the period between October 2008 and April 2009 although the number of offers that include 'pre-defined' packages is increasing. This change can be explained by the fact that a separate selection of mobile ISPs and a separate collection of offers from these operators was made in April 2009 (cf. section 2.2). This increased the proportion of non-'pre-defined' package offers in the sample.

In conclusion, it should be stressed that this study is not exhaustive. Consequently, it is possible that offers less expensive than those presented in this study are available on the market.

Also, in such a dynamic market, it is possible that some prices are out-of-date from the day the report is published. It is therefore important to keep the date of the data collection in mind when making use of the data.

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<sup>6</sup> The offers in the BIAC study include both "Internet Access only offers" (or "non-bundled offers") and "bundled offers" (i.e. including services other than Internet Access). The name "unbundled offers" will not be used as this refers to broadband access provided by alternative operators by means of (wholesale) LLU access. The wholesale products based on which the retail broadband internet access service is offered are not relevant for the BIAC study.

## **2. METHODOLOGY FOR THE DATA COLLECTION**

The data collection for the Broadband Internet Access Costs comparison exercise requires first a selection of ISPs per country. After that, detailed information can be collected for each of the individual relevant offers of the selected ISPs.

The following sections present the approach for the selection of the ISPs and the offers. Furthermore, an overview of the selected ISPs and the technologies offered by these ISPs are presented, as well as an indication of the high level composition of the offers in our sample.

This report, which handles mainly data collected in October 2009, related in fact to the sixth data collection exercise. Comparable data as presented below had previously been collected in April 2007, October 2007, April 2008, October 2008 and April 2009. These five databases have also been taken into account while carrying out the Broadband Internet Access Cost study for October 2009.

### **2.1. SELECTION OF ISPs**

#### **2.1.1. CRITERIA APPLIED FOR THE SELECTION OF THE ISPs**

For each of the 33 countries, the top Broadband Internet Services Providers, ranked by number of subscribers, have been identified, and the largest ISPs representing globally at least 80% of the overall national market were selected. These ISPs are presented in section 2.4. In case a new ISP has appeared in the list of October 2009 (compared with the database for April 2009), this one is indicated with an asterisk. Even though the ISPs in the sample are dynamic in terms of offered services and prices, we could observe that out of the 147 ISPs that make up the sample in October 2009 only thirteen are new. Furthermore, thirteen ISPs included in the sample of April 2009 are no longer considered.

For some countries, due to a significant fragmentation of the market, it was observed that the number of ISPs globally representing at least 80% of the overall market was extremely high (e.g. Bulgaria, the Czech Republic and Lithuania). In those cases, a few small market players were included in the sample of ISPs to ensure that it would be as representative as possible.

Finally, for the second time in October 2009, a selection of mobile ISPs was also added. More precisely, all mobile network operators, irrespective of their share in the global telecom and broadband market, were taken into account. As the offers from these ISPs are only used to provide a global indicator of the evolution of broadband services offered via mobile technologies and not for the comparison of the Broadband Internet Access Cost (BIAC), they have been listed separately. The list of mobile ISPs taken into account for each country is available in Annex 1.

#### **2.1.2. INFORMATION SOURCES**

Information coming from a number of sources has been analysed and cross-checked for defining the sample of ISPs per country. For most of the countries, information on the

market shares per ISP, or on the list of ISPs representing globally over 80% of the total market, was obtained directly from the National Regulatory Authority (NRA). For other countries, information was found and cross-checked in various publications and databases regarding broadband statistics.

The Excel tool accompanying this report and provided to the Commission contains detailed information for each country on the sources used for the selection of the ISPs. Given the fact that the use of more general publications or databases indicates that not all required information could be obtained from a number of NRAs, it was decided more appropriate to consider the individual sources per country as confidential for this report.

The list of mobile ISPs was compiled based on the list of mobile network operators as indicated by the NRAs and was cross-checked with a number of additional sources.

### **2.1.3. PERIOD UNDER CONSIDERATION**

The most recent information on the market shares per ISP has been requested and searched for systematically. In practice, all data concerning the market shares essentially relates to the first semester of 2009.

## **2.2. SELECTION OF THE BROADBAND OFFERS OF THE ISPs**

### **2.2.1. CRITERIA APPLIED WHEN COLLECTING AND SELECTING THE BROADBAND OFFERS**

For all ISPs selected and presented in section 2.4, information was collected for all their broadband offers available to residential subscribers, independent of whether they are:

- Non-bundled or bundled with other services (the categories of bundles considered are: Internet Access + Fixed Telephony; Internet Access + Television; Internet Access + Fixed Telephony + Television);
- Unmetered or time-metered / volume-metered (cf. subsection 2.5.4);
- Based on xDSL, Cable or any other technology (cf. section 2.3).

It was observed that ISPs in some countries also consider a connection with a speed of 128 kbps as a broadband offer. Information on these offers was also collected, but is excluded from the baskets used for the comparison analysis (cf. paragraph 3.2.1.a). A brief analysis of these offers is presented in section 4.1.

Furthermore some countries (e.g. Lithuania) have offers of which the prices are based on negotiations. These offers have not been taken into account as these negotiations are not a good basis for cost comparison.

In total, data on 3,209 offers was collected for October 2009 (i.e. resp. 85, 699, 1379, 1633 and 1969 more offers than in April 2009, October 2008, April 2008, October 2007 and April 2007) which shows that the market is very dynamic. Ten of all collected offers have speeds up to 144 kbps (cf. paragraph 3.2.1.a). Twenty-two of all collected offers could not offer the assumed minimum service level because of the system of maximum invoice or maximum usage (cf. page 7). Four offers were negotiable on the price and five offers had no price information. For one offer, no speed information could be obtained. Consequently, the comparison analysis relates to 3,088 offers.

### **2.2.2. DEFINITION OF BUNDLED OFFERS**

In the 2007 databases, no explicit definition for bundled offers was included in the BIAC study.<sup>7</sup> As for the 2008 and 2009 reports, because the comparison methodology has been extended to include bundled offers, a more detailed definition of what can be considered as being a bundled offer is provided.

A bundled offer was previously defined by the European Commission as '*a product where operators offer a variety of services for a single overall price, provided through different platforms for the benefit of consumers*'.<sup>8</sup> The following paragraphs comment on how this definition has been narrowed or broadened to determine the bundled offers that fall within the scope of the BIAC study.

#### **Criterion 1: The offer contains a variety of services**

Regarding the variety of services included in the bundled offer, three categories of bundles are distinguished in the BIAC study. These are:

- Internet Access + Fixed Telephony;
- Internet Access + Television;
- Internet Access + Fixed Telephony + Television.

These three categories are the only ones that both include Internet Services and are bought by more than 2% of all households of the EU27.<sup>9</sup> Consequently, no other categories of bundles – especially those that include mobile telephone services – were included (e.g. Internet Access + Mobile Telephony or Internet Access + Fixed Telephony + Television + Mobile Telephony).

Two additional arguments for not including bundles with Mobile Telephony are:

- the observation that Mobile Telephony is most often offered as an additional option in a bundle that is also offered without this Mobile Telephony service;
- the tariff structures of this option are very comparable with the 'stand alone' rates for Mobile Telephony services, which implies that they distinguish between e.g. calls during different time periods, on-net calls, off-net calls, SMS tariffs, etc. and makes it very difficult to derive a normalised total charge per month.

In conclusion, the categories of bundles were limited to the three most important ones and no specific costs were collected for bundles including mobile services. In the data collected for the retained categories of bundles, a parameter was nonetheless included to indicate those bundles for which it is possible to add Mobile Telephony as an option.

<sup>7</sup> The only description was limited to '*packages containing multiple services*'. In addition, a distinction has been made between 'pre-defined' packages and 'à la carte' packages with the latter being defined as offers for which '*the customer can define a level of consumption for each individual service included in the package (e.g. combination of a volume of mobile call minutes, fixed call minutes, download speed for broadband Internet access, number of TV-channels)*'.

<sup>8</sup> Cf. 12<sup>th</sup> Implementation Report of the European Commission (cf. [http://ec.europa.eu/information\\_society/policy/ecommm/implementation\\_enforcement/annualreports/12threport/index\\_en.htm](http://ec.europa.eu/information_society/policy/ecommm/implementation_enforcement/annualreports/12threport/index_en.htm)).

<sup>9</sup> Cf. E-communications Household Survey Special Eurobarometer, European Commission. [http://ec.europa.eu/information\\_society/policy/ecommm/doc/library/ext\\_studies/household\\_07/eb68\\_2infoecomm\\_full.pdf](http://ec.europa.eu/information_society/policy/ecommm/doc/library/ext_studies/household_07/eb68_2infoecomm_full.pdf) (June 2008)

### **Criterion 2: The cost of the offer equals a single overall price**

It was observed that the tariff structures of packages containing multiple services can be very complex and are not necessary 'flat'.<sup>10</sup> So even if the consumer is receiving one single invoice at the end of a period (e.g. per month), the amount due will not necessarily always be the same.

As for the BIAC 2008 and 2009 study, the approach was taken that packages containing multiple services – even if some of the services have 'metered' charging – are perceived as a bundle by the consumer and therefore need to be included in the sample of the selected offers. This implies that a rather large interpretation is given to the above-mentioned definition in the Implementation Report. More precisely, all packages of multiple services grouped into one invoice are considered bundled offers, independent of whether they are fully or partially metered (for the Internet Service included) or limited (for the other services included in the bundle). The only exceptions are the offers that are fully 'à la carte'; i.e. an offer that enables the customer to define the level of consumption of the individual services included in the package.

### **Criterion 3: The services are provided through different platforms**

Depending on what is exactly meant by 'a platform', it was assumed as for the BIAC 2008 study that different services in one bundle could be offered by the same platform. An example is the combination of an xDSL Internet Access with VoIP Fixed Telephony services. Again, this implies that the definition previously given to 'bundled offers' by the European Commission was interpreted broadly.

#### **2.2.3. INFORMATION SOURCES**

The data required for the BIAC comparison have been collected from primary sources (i.e. the ISPs), mainly via the information that is published on their websites. In addition, ISPs were contacted directly by telephone or e-mail in cases where further clarification regarding the published information was needed.

#### **2.2.4. PERIOD UNDER CONSIDERATION**

The financial and technical parameters for all of the selected broadband offers in this second part of the report were collected in the period between October 1<sup>st</sup> and October 15<sup>th</sup>, 2009 and compared with the information in the 2007 database (data collected in the period between April 1<sup>st</sup> and April 15<sup>th</sup> 2007 and between October 1<sup>st</sup> and October 15<sup>th</sup> 2007), the information in the 2008 database (data collected in the period between April 1<sup>st</sup> and April 15<sup>th</sup> 2008 and between October 1<sup>st</sup> and October 15<sup>th</sup> 2008) and the information in the database of the first semester of 2009 (data collected in the period between April 1<sup>st</sup> and April 15<sup>th</sup> 2009).

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<sup>10</sup> 'Flat costs' are not a function of a specific volume of a service.



### **2.3. OVERVIEW OF THE TECHNOLOGIES INCLUDED IN THE SELECTED OFFERS**

In the sample of selected offers several technologies for Internet data transmission can be observed.

'xDSL' stands for digital subscriber line and represents a family of technologies that provide digital data transmission over the wires of a local telephone network (e.g. ADSL, ADSL2+, SHDSL, ...). xDSL technologies allow for a download speed of up to 24 Mbits (ADSL2+) and an upload speed of up to 1 Mbit for asymmetrical DSL, and somewhat higher for symmetric offers (SHDSL). For a number of ISPs, the criteria of speed has permitted the distinction of networks to be made where fibre is used for the main routes only and the FTTx networks (see definition below) which allow for higher speeds. Due to the technology used by VDSL and VDSL2, and the thereby increased speeds offered, these technologies were classified under FTTx.

'Cable Internet' works by using TV channel space for data transmission, with certain channels used for downstream transmission, and other channels for upstream transmission. The recent development of new technologies has permitted cable internet to attain speeds comparable to FTTx, in particular thanks to the use of Docsis 3.0 decoders. Download speeds of up to 200 Mbits and upload speeds of up to 100 Mbits can be obtained thanks to this new standard.

'Satellite Internet' uses a satellite in geostationary orbit to relay data from the ISP to its customers. Speeds provided are usually lower than offers based on the other technologies.

'FTTx', groups Fibre to the Home (FTTH), Fibre to the Building (FTTB), Fibre to the Cabinet (FTTC), ... and is defined as a telecommunications architecture in which data transmission is provided over optical fibre cables extending from the telecommunications operator's switching equipment to (at least) the boundary of the home living space or business office space, cabinet, ... In the case of FTTC, VDSL or VDSL2 is often used for the remaining distance between the cabinet and the home. Some of the FTTx offers in the sample are based on an architecture using Local Area Network (LAN) or metropolitan Access Network (MAN) techniques (e.g. LAN in Bulgaria and MAN in Korea). FTTx offers are characterised by much higher up and download speeds, and in a number of cases, symmetrical speeds. Among the offers collected, upload speeds vary usually between 2 Mbits and 60 Mbits, and download speeds between 2Mbits and 80 Mbits, though both lower and higher speeds were also observed.

'Plug & Play' can be used with technologies like WiMAX and 3G. With the exception of 'WiMAX at home'<sup>11</sup> these technologies are characterised by the fact that the broadband Internet access is not limited to a specific location, as opposed to where the Internet access is provided through a telephone line, cable or fibre. The name of the category 'Plug & Play' refers to the ability of a computer system to configure automatically expansion boards and other devices. The user should be able to plug in a device and run it. As it was observed that the Mobile Broadband Internet Access (MBIAC) offers have technical characteristics that are quite different from the other technologies,<sup>12</sup> a sub-category '(Mobile) Plug & Play' was created. In the October 2009 database (as was the case for the April and the October 2008 database, and the April 2009 database), the MBIAC offers have been identified and isolated. They will not be taken into account in the comparison of the Broadband Internet Access Cost based on the 7 baskets (cf. paragraph 3.2.1.a). The

<sup>11</sup> A specific offer, whereby a modem is fixed at the outside of the customer's premises.

<sup>12</sup> It was mainly observed that the downloadable volume is lower and not related to the download speeds as presented in the definition of the baskets in paragraph 3.2.1.a.



relevance of a further analysis of the '(Mobile) Plug & Play' offers will be further evaluated based on the evolutions observed in the market. This also explains why since April 2009, an additional collection of mobile ISPs was included. Common download speeds observed for Plug&Play offers are up to 8 Mbits for home internet and of 3.6 or 7.2 Mbits for mobile internet.

It can also be noted that the same ISP sometimes offers broadband based on different technologies. A detailed overview of what technologies are offered by which ISPs can be found below in section 2.4.

## **2.4. OVERVIEW OF THE ISPs SELECTED FOR EACH COUNTRY, INCL. THE TECHNOLOGIES USED**

The selected ISPs, for which the cost of the offers is compared in chapter 3, have been sorted alphabetically and according to their status on the market, i.e. incumbent<sup>13</sup> or new entrant. As stated previously, information on the number of offers provided by mobile ISPs was also collected in October 2009 as was the case in April 2009. However, since the cost of these offers is not considered when comparing the Broadband Internet Access Cost (BIAC), they have been listed separately in Annex 1.

Country	ISP	Status	Technology
<b>Austria</b>	Telecom Austria	Incumbent	xDSL and FTTx
	Tele2 Austria	New Entrant	xDSL
	UPC Austria	New Entrant	Cable and xDSL
<b>Belgium</b>	Belgacom	Incumbent	xDSL
	Telenet	New Entrant	Cable
<b>Bulgaria</b>	Vivacom (BTC)	Incumbent	FTTx
	Cable Tel	New Entrant	Cable and FTTx
	Eurocom Cable	New Entrant	Cable and FTTx
	For Craft	New Entrant	FTTx
	Internet Group	New Entrant	FTTx
	Megalan Network	New Entrant	FTTx
	Networx	New Entrant	Cable and Plug & Play
	Powernet	New Entrant	FTTx and Plug & Play
	Spectrum Net	New Entrant	FTTx
	Speedy Net *	New Entrant	FTTx
<b>Canada</b>	Bell Canada	Incumbent	FTTx
	Shaw Communications	Incumbent	Cable
	Videotron	Incumbent	Cable
	Rogers Communications	New Entrant	Cable
	Telus	New Entrant	xDSL and FTTx
<b>Cyprus</b>	Cytanet	Incumbent	xDSL
	Otenet Telecommunications	New Entrant	xDSL

<sup>13</sup> Incumbents are defined as the organisations enjoying special and exclusive rights or de facto monopoly for provision of voice telephony services before liberalisation, regardless of the role played in the provision of access by means of technologies alternative to the PSTN.

<b>Czech Republic</b>	Telefónica O2	Incumbent	xDSL
	Ceské Radiokomunikace	New Entrant	xDSL and Plug & Play
	GTS Novera	New Entrant	xDSL
	RIO media *	New Entrant	FTTx
	UPC Česká republika	New Entrant	Cable
	VOLNY + Dial Telecom	New Entrant	xDSL
<b>Denmark</b>	TDC	Incumbent	xDSL
	Dansk Kabel TV	New Entrant	Cable
	Fullrate	New Entrant	xDSL
	Telenor Denmark (Cibercity and Sonofon)	New Entrant	xDSL and FTTx
	Telia-Stofa	New Entrant	Cable
	You see *	New Entrant	Cable
<b>Estonia</b>	Elion	Incumbent	xDSL and Plug & Play
	Starman	New Entrant	Cable
	STV	New Entrant	Cable and FTTx
<b>Finland</b>	Elisa	Incumbent	Cable, and xDSL
	Sonera	Incumbent	Cable, xDSL and FTTx
	DNA group	New Entrant	Cable, xDSL and Plug & Play
	Finnet group	New Entrant	xDSL
<b>France</b>	Orange France	Incumbent	xDSL and FTTx
	Free	New Entrant	xDSL and FTTx
	NeufCegetel (SFR)	New Entrant	xDSL and FTTx
<b>Germany</b>	Deutsche Telecom	Incumbent	xDSL and Satellite
	HanseNet (Alice)	New Entrant	xDSL
	United Internet	New Entrant	xDSL
	Vodafone (Arcor)	New Entrant	xDSL
<b>Greece</b>	OTE	Incumbent	xDSL and Satellite
	Forthnet *	New Entrant	xDSL
	Tellas *	New Entrant	xDSL
<b>Hungary</b>	Magyar Telekom	Incumbent	Cable, xDSL and FTTx
	Digi *	New Entrant	Cable and FTTx
	EnterNet	New Entrant	xDSL
	Externet	New Entrant	xDSL
	Fibernet *	New Entrant	Cable and FTTx
	GTS-Datanet	New Entrant	xDSL
	Invitel	New Entrant	xDSL
	UPC Hungary	New Entrant	Cable
<b>Iceland</b>	Siminn	Incumbent	xDSL
	Vodafone	New Entrant	xDSL and FTTx
<b>Ireland</b>	Eircom	Incumbent	xDSL

	AccessTelecom	New Entrant	Cable and Plug & Play
	BT Ireland	New Entrant	xDSL
	UPC Ireland	New Entrant	Cable
<b>Italy</b>	Telecom Italia	Incumbent	xDSL
	Fastweb	New Entrant	xDSL and FTTx
	Libero	New Entrant	xDSL
<b>Japan</b>	NTT East	Incumbent	xDSL and FTTx
	NTT West	Incumbent	xDSL, FTTx and Plug & Play
	Jupiter Telecommunications	New Entrant	FTTx
	Yahoo Japan	New Entrant	xDSL and FTTx
<b>Korea</b>	Korea Telecom	Incumbent	xDSL, FTTx and Satellite
	LG Powercomm	New Entrant	Cable, xDSL and FTTx
	SK broadband	New Entrant	xDSL and FTTx
<b>Latvia</b>	Lattelecom	Incumbent	xDSL, FTTx and Plug & Play
	Balticom	New Entrant	Cable, FTTx and Plug & Play
	Baltinet Data *	New Entrant	Cable and FTTx
	Baltkom TV	New Entrant	Cable
	Dautkom TV *	New Entrant	Cable, FTTx and Plug & Play
	Izzi	New Entrant	Cable
	Livas Net	New Entrant	Cable
	MFL Serviss	New Entrant	FTTx and Plug & Play
	OSTKOM	New Entrant	Cable
	PRONETS	New Entrant	FTTx
<b>Lithuania</b>	Teo LT	Incumbent	xDSL and FTTx
	Balticum TV	New Entrant	Cable, FTTx and Plug & Play
	Bite Lietuva *	New Entrant	Plug & Play
	Dokeda	New Entrant	FTTx
	Lietuvos radijo ir televizijos centras	New Entrant	Plug & Play
	Mikrovisata	New Entrant	FTTx and Plug & Play
	Penkiu kontinetu komunikacijos centras	New Entrant	FTTx
	Telerena	New Entrant	Cable, FTTx and Plug & Play
	Vinita	New Entrant	Cable
<b>Luxembourg</b>	P&T Lux	Incumbent	xDSL
	Numericable	New Entrant	xDSL
	Tango fixed (Tele2)	New Entrant	xDSL
<b>Malta</b>	GO	Incumbent	xDSL and Plug & Play
	Melita	New Entrant	Cable
<b>The Netherlands</b>	KPN	Incumbent	xDSL
	Tele2 Nederland	New Entrant	xDSL and FTTx
	UPC Nederland	New Entrant	Cable
	Ziggo	New Entrant	Cable

<b>Norway</b>	Telenor	Incumbent	xDSL, FTTx and Plug & Play
	Get	New Entrant	xDSL
	NextGenTel	New Entrant	xDSL and Plug & Play
	Ventelo	New Entrant	xDSL
<b>Poland</b>	TP sa	Incumbent	xDSL
	Aster Group	New Entrant	Cable
	Multimedia Polska	New Entrant	xDSL and Plug & Play
	Netia	New Entrant	xDSL
	UPC Polska	New Entrant	Cable
	Vectra	New Entrant	Cable
<b>Portugal</b>	PT Comunicações	Incumbent	xDSL, FTTx and Satellite
	Sonaecom (Clix)	New Entrant	xDSL and FTTx
	ZON /TV Cabo	New Entrant	Cable
<b>Romania</b>	Romtelecom	Incumbent	xDSL
	NewCom Telecomunicatii	New Entrant	Cable
	RCS & RDS	New Entrant	Cable and FTTx
	UPC Romania	New Entrant	Cable
<b>Slovakia</b>	Slovak Telecom (T-COM)	Incumbent	xDSL and FTTx
	UPC Slovakia	New Entrant	Cable
<b>Slovenia</b>	Telekom Slovenije	Incumbent	xDSL and FTTx
	Amis	New Entrant	Cable, xDSL and FTTx
	T-2	New Entrant	xDSL and FTTx
	Tus Telekom	New Entrant	xDSL
	UPC Telemach	New Entrant	Cable
<b>Spain</b>	Telefonica	Incumbent	xDSL and FTTx
	ONO	New Entrant	Cable
	Orange Spain	New Entrant	xDSL
<b>Sweden</b>	Telia Sonera	Incumbent	xDSL and FTTx
	ComHem	New Entrant	Cable
	Tele2 Sverige *	New Entrant	Cable, xDSL and FTTx
	Telenor Sverige *	New Entrant	xDSL and FTTx
<b>The United Kingdom</b>	BT	Incumbent	xDSL
	BSkyB	New Entrant	xDSL
	TalkTalk/AOL	New Entrant	xDSL
	Tiscali UK <sup>14</sup>	New Entrant	xDSL
	Virgin Media	New Entrant	FTTx
<b>USA</b>			
<b>USA</b>	AT&T	Incumbent	xDSL

<sup>14</sup> Tiscali UK was acquired by Carphone Warehouse in June 2009.

	Verizon	Incumbent	xDSL and FTTx
	Bright House	New Entrant	Cable
	Cablevision	New Entrant	FTTx
	Comcast	New Entrant	FTTx
	Cox Communications	New Entrant	FTTx
	Qwest	New Entrant	xDSL
	Time Warner Cable	New Entrant	Cable and FTTx
<b>State of California</b>	AT&T	Incumbent	xDSL
	Verizon	Incumbent	xDSL and FTTx
	Bright House	New Entrant	Cable
	Cox Communications	New Entrant	FTTx
<b>State of Colorado</b>	AT&T	Incumbent	xDSL
	Verizon	Incumbent	xDSL and FTTx
	Qwest	New Entrant	xDSL
<b>State of New York</b>	AT&T	Incumbent	xDSL
	Verizon	Incumbent	xDSL and FTTx
	Cablevision	New Entrant	FTTx

*Table 1: Overview of the ISPs selected for each country*

Compared to the sample of ISPs analysed in the report of April 2009, there are thirteen new ISPs (indicated with asterisk) in this report (October 2009), while thirteen ISPs of the sample of April 2009 have been excluded from the current comparison. Since October 2008, for all countries, information has been collected for at least two ISPs even if the first one has a market share greater than 80%. Concerning the number of ISPs that represents the 80% national market share, it has been remarked that this number is usually higher in Eastern European countries (more than 5 ISPs for each country except Estonia, Romania and Slovakia) than in Western European ones (3 or 4 ISPs on average).

## **2.5. OVERVIEW OF THE COMPOSITION OF THE SAMPLE OF BROADBAND INTERNET ACCESS OFFERS**

The following subsections present some general comments on the composition of the global sample of broadband Internet access offers as selected based on the criteria outlined in section 2.2. The percentage of offers in the sample is based on the number of offers available to the general public, but neither the actual uptake of the offers nor the individual market shares of the ISPs are accounted for.

The breakdowns of offers of this study (October 1<sup>st</sup>-15<sup>th</sup> 2009) have been placed next to the percentages based on the information from the 2007 database for April 1<sup>st</sup>-15<sup>th</sup> 2007 and October 1<sup>st</sup>-15<sup>th</sup> 2007, and the 2008 database for April 1<sup>st</sup> – 15<sup>th</sup> 2008, October 1<sup>st</sup>-15<sup>th</sup> 2008 and the 2009 database for April 1<sup>st</sup> – 15<sup>th</sup> 2009. This way some trends can be distilled.

### **2.5.1. BREAKDOWN OF THE OFFERS IN THE SAMPLE BETWEEN INCUMBENT OPERATORS AND NEW ENTRANTS**

The first graph outlines the proportion of offers that are presented by the incumbents as against the percentage of offers from new entrants.

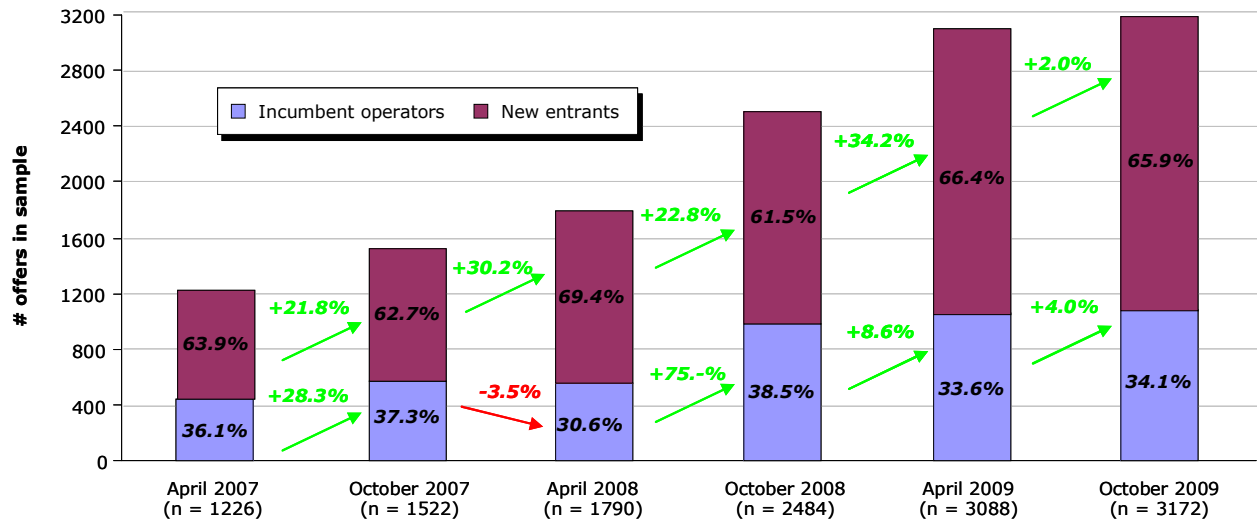


Table 2: Overview of the proportion of broadband offers provided by the Incumbent operators compared to those provided by New entrants

It can be noted that the proportion of incumbent offers in the whole sample slightly increased in October 2009, compared to April 2009. Indeed, the number of incumbent offers increased in the October 2009 sample. However, the rise in the number of offers of the incumbents is weaker than in April 2009 (+ 4.0 %).

Overall, the number of offers has increased by 2.7%. Although the size of the sample is still growing, the increase in the number of offers observed between April and October 2009 is not as sharp as that observed between for the previous periods.

This list of incumbent operators and new entrants selected for each country can be found in section 2.4.

### **2.5.2. BREAKDOWN OF THE OFFERS IN THE SAMPLE IN TERMS OF DIFFERENT TECHNOLOGIES**

The graph below presents a breakdown of the offers in terms of different technologies:

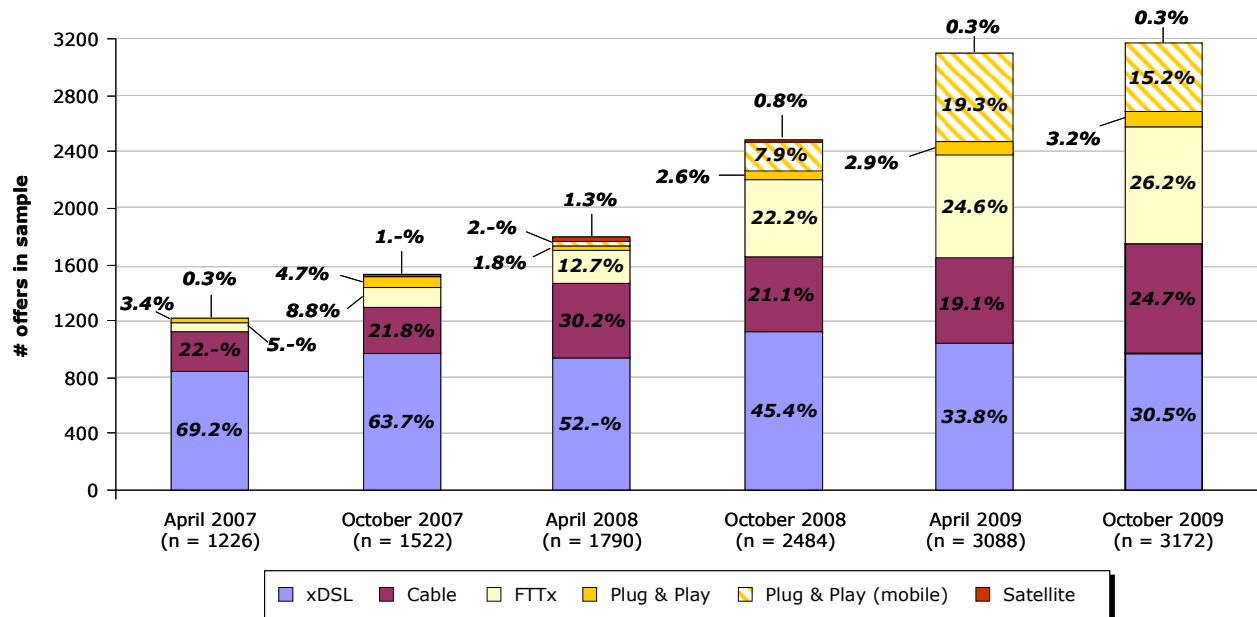


Table 3: Overview of the proportion of the different technologies in the sample of Broadband Internet Access offers

The decline in the proportion of xDSL offers, already observed between 2007 and April 2009, can still be observed in the current sample. This evolution favours the offers using cable (+32.5%) and, more moderately, FTTx (+9.1%), most probably boosted by the developments in fibre networks, in particular FTTC, FTTB and FTTH, and the new technologies in modems for cable internet, both allowing for much higher speeds (see section 2.3). The number of mobile Plug & Play offers collected decreased in October 2009. As these offers are not analysed further in the rest of the chapters of the report, the focus of the data collection was set more particularly on the new technology developments seen in cable and FTTx internet offers.

A description of the different technologies included in the sample can be found in section 2.3.



### **2.5.3. BREAKDOWN OF THE OFFERS IN THE SAMPLE IN CATEGORIES OF BUNDLED OFFERS**

Finally, the following proportions of bundled and non-bundled offers were observed in the sample:

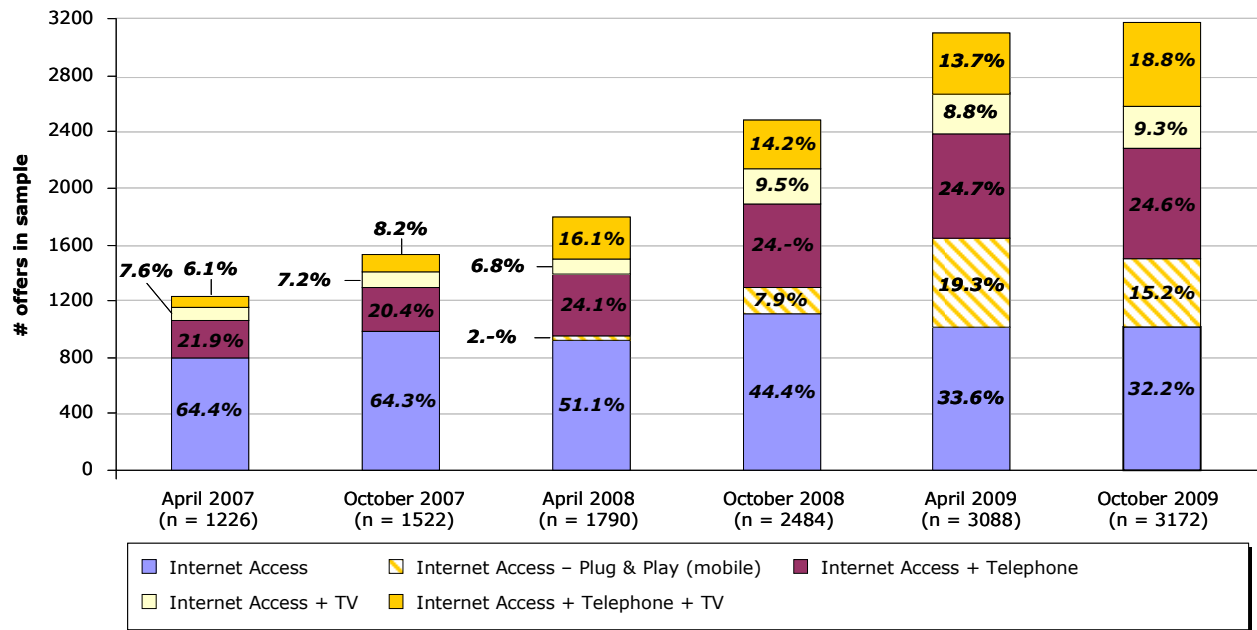


Table 4: Overview of the proportion of the different bundles of services

The same trend was observable in October 2009 as had been observed in April 2009 and October 2008: the proportion of internet access only offers (excl. Plug & Play (mobile)) is still decreasing, reaching 32.2% of the sample in October 2009 compared to 33.6% in April 2009, 44.4% in October 2008 and 51.1% in April 2008.

Within the bundle market, Internet Access + Telephone offers are still predominant (24.6%) but remain, more or less, at the same proportional level of importance as in April 2009 and 2008. Bundles comprising Internet Access and Television represent the smallest share (+9.3 %) but have registered a small increase compared to April 2009, both at relative level (from 8.8% in April 2009 to 9.3% in October 2009) and in absolute figures (+8.9%). Triple play offers in the sample have become more important in absolute figures (595 offers in October 2009 compared to 422 in April 2009, 353 offers in October 2008 and 289 in April 2008) and are at their highest level since April 2007 (18.8%).

More than half of all broadband Internet access packages in the sample contain multiple services. Therefore, it was deemed appropriate to include them in a specific cost comparison exercise (cf. Chapter 5).

#### **2.5.4. BREAKDOWN OF THE OFFERS IN THE SAMPLE BETWEEN METERED AND UNMETERED OFFERS**

Metered offers are those with limited use in terms of the number of hours per month during which access to the Internet is provided (i.e. time-metered) or of downloadable volume (i.e. volume-metered). Unmetered offers are those without usage limits. The unmetered offers represent the large majority of offers selected in the sample.

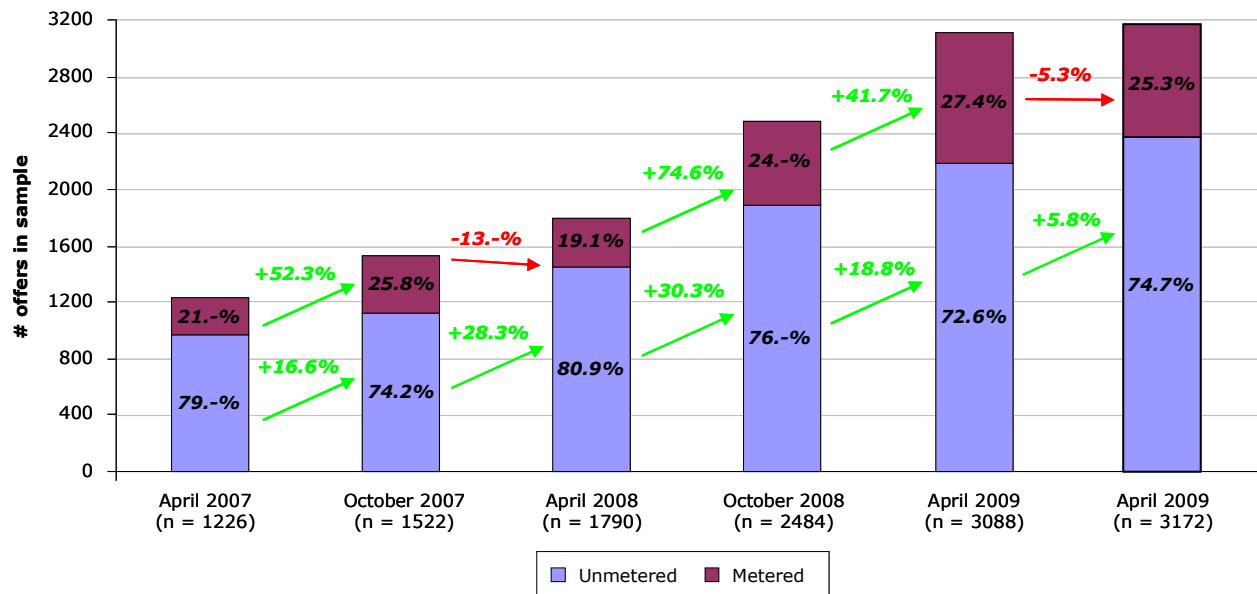


Table 5: Overview of the proportions of metered and unmetered offers

Proportionally there are still fewer metered offers than unmetered offers in the selected sample of October 2009, as in the samples of the previous periods; their absolute number and proportion have however decreased compared to April 2009.

Countries with large numbers of metered offers are: Belgium, Canada, Hungary, Iceland, Ireland and the UK.

### **3. METHODOLOGY FOR DETERMINING AND COMPARING THE BROADBAND INTERNET ACCESS COST**

The following sections outline the methodology that has been applied for determining and comparing the Broadband Internet Access Cost of the selected offers (i.e. excluding Plug & Play (mobile) offers).

#### **3.1. DEFINITION OF THE BROADBAND INTERNET ACCESS COST (BIAC)**

The Broadband Internet Access Cost has been defined as the total monthly charges of the broadband offer, composed of:

- one-time non-recurring charges;
- monthly recurring charges.

This definition applies to both bundled and non-bundled offers.

##### **3.1.1. NON RECURRING CHARGES**

The non-recurring charges can include the following initial cost elements:

- installation;
- modem or router;<sup>15</sup>
- software driver;
- activation;
- additional administrative charges;
- television decoder;<sup>16</sup>
- other charges.

In order to obtain a cost on a monthly basis, the one-time non-recurring charges are divided over an assumed standard contract duration of 12 months. This period was selected after an analysis of the contract duration for broadband services that are currently most common.

If however, for a specific offer, it is not possible to end the contract after 12 months without a penalty, the actual contract duration is taken into account, in order to avoid overestimating the actual importance of the non-recurring charges per month.

Some ISPs present multiple options in terms of contract duration for the same broadband offer. This has been dealt with as follows:

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<sup>15</sup> The less expensive option of renting or buying a modem is chosen. If different types of modems are offered, again the less expensive option is chosen.

<sup>16</sup> When the provider requires a deposit from the user for the rent of the modem or decoder, this has not been included in the total charges as it is not considered a cost. When relevant, it has however been mentioned in the conclusions of each basket.

- If a 12-month option is available, this one is selected for the Broadband Internet Access Costs comparisons.
- If the longest option still implies a period shorter than 12 months, then the longest period is taken into account.
- If the shortest option is a contract duration of a period longer than 12 months, then the shortest period is selected.

Offers with six-month contract durations (and no options over a longer period) have been observed in the following countries: The Czech Republic (9 offers), Denmark (47 offers), Greece (2 offers), Iceland (60 offers) and Ireland (2 offers). In many countries, offers requiring no contract duration can also be observed (e.g. The Netherlands).

The installation and activation charges for non-bundled as well as bundled broadband services will most often depend on the 'status' of the customer (i.e. what services was the customer already subscribed to or what networks is the customer already connected to when determining the additional cost for activating broadband Internet access services). Therefore, it was decided to assume that access to the required *physical infrastructure* is already available to the customer, i.e. that he is indeed already connected to e.g. a copper telephone line, cable or optical fibre. Therefore, non-recurring charges for the installation of this infrastructure were not taken into account.

The installation and/or activation charges for a *specific service* that is part of the offer (bundled or not) will be considered as relevant non-recurring charges for the BIAC study. This implies that the non-recurring cost of an offer that contains solely Internet Access services will not e.g. include the non-recurring cost of the installation and/or activation of the fixed telephone or television service that one is obliged to subscribe to obtain the broadband access service.

Finally, in the case of 'Plug & Play' and Satellite enabled broadband access services, no installation of a physical connection is required, and hence the installation and activation charges included in the Broadband Internet Access Cost will automatically correspond to those of a customer with the status assumed above.

### **3.1.2. MONTHLY RECURRING CHARGES**

The monthly recurring charges correspond, in the case of a non-bundled offer, to the charges for the broadband access service only (as opposed to e.g. the PSTN rental line fee), and in the case of a bundled offer, to the total charge for both the broadband access service as well as for the additional service (i.e. Fixed Telephone and/or Television).

The possibility of isolating the cost of the broadband access service in bundled offers (corresponding to nearly half of the offers in the sample – cf. subsection 2.5.3) was analysed, too, but it was concluded that it required too many assumptions to lead to a monthly charge for broadband services only than could be considered as being reliable.

Therefore, given that ISPs very often offer bundled packages to their customers, it was deemed appropriate to devote a specific chapter to the comparison of bundled offers (Chapter 5).

In addition to the fact that an important part of the offers are bundled, it was also observed that a very wide variety of tariff structures is applied by the different ISPs and in the different countries. In some cases, these structures require additional decisions

regarding which charges of a specific offer will be considered for the purpose of the study on the Broadband Internet Access Costs.

As stated in subsection 1.2.2. in some offers no exact prices are reflected as these are considered subject to negotiation. These offers were left out of the sample as they did not represent a good basis for comparison.

The following examples illustrate some of the tariff structures encountered and the way they have been dealt with:

- In some offers the tariff only includes unlimited access to national internet content (e.g. Iceland – O2 Vodafone – ‘unlimited domestic download’). To have access to international content one needs to pay per time unit. In these cases only the tariff structure of the international download content was taken into account and the offer is considered volume-metered.
- In some countries basic recurring charges differ according to the region or the city you live in (e.g. Finland– Sonera). In these cases we considered the tariffs of the bigger cities and regions.

### **3.1.3. DISCOUNTS AND EXTRA CHARGES**

Finally, the assumption was made that discounts based on limited time<sup>17</sup> and/or limited geographical promotions or discounts for ‘grouped’ subscriptions (e.g. for an apartment building or houses from the same neighbourhood) were not to be taken into account. The offers of Dansk Kabel TV, which are only available to the members of certain organisations, have however been considered as representative given the significant market share of this ISP.

This assumption might seem contradictory to normal commercial practice as in many Member States, ongoing promotions and discounts are widely available. However, as no information on the actual prices paid per offer is available for this study, a comparison of BIAC based on standard price lists, is the only objective comparison possible.

Also, if it is indicated that e.g. an extra fee will be charged when a specific form of payment (e.g. direct debit) is not respected, these extra charges are not taken into account. Conversely, when a discount can be obtained when accepting e.g. direct debit for payments, this discount is not taken into account either. Likewise, discounts for ‘online orders’ are not taken into account.

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<sup>17</sup> An offer is considered a promotion when the time to subscribe to the offer under the specific conditions mentioned is less than 12 months or when it is aimed at a specific group of consumers (e.g. students).

### **3.2. COMPARISON OF THE BROADBAND INTERNET ACCESS COST**

In order to make comparisons between offers as relevant as possible, it is necessary to do so on the basis of similarities. To get such a uniform basis of comparison, a threefold methodology is applied. Firstly, 7 representative user baskets have been defined, and each offer (excl. the '(Mobile) Plug & Play' offers)<sup>18</sup> is placed in one of these baskets; secondly, a total normalised monthly cost is calculated, composed of recurring and non-recurring cost elements for all of the services included in the offer; and finally, the total monthly costs in the different countries are compared by not only using nominal exchange rates, but also by using purchasing power parities. This approach ensures both:

- Uniformity in technical terms and
- Uniformity in financial terms

#### **3.2.1. UNIFORMITY IN TECHNICAL TERMS**

The sample of broadband offers consists of offers that are characterised by different speeds and by different degrees of limitation on access to the internet (both in terms of downloadable volume or number of hours provided for access to the Internet).

Therefore, for comparison, different approaches can be taken, e.g.:

1. Comparison of the cost of each of the offers with the same download speed, regardless of whether access to the Internet is limited;
2. Comparison of the cost of all offers with unlimited access to the Internet, regardless of the download speed;
3. Comparison of the cost of all offers, regardless of download speed or the extent to which access to the Internet is limited.

The first approach was assessed as providing the most worthwhile results. Therefore, in a next step, the offers were first classified according to representative user profiles (called baskets) according to the download speed. Offers with different speeds, but falling between the same lower and upper limits (excluding the lower and including the upper limit<sup>19</sup>) are placed in the same basket. In the chart representing the least expensive charges per country, the nominal download limit is indicated.

Second, within the same basket, the cost of offers with limited access to the Internet (= metered offers) will be normalised to a reasonable access level (both in terms of downloadable volumes and number of hours) by adding a cost for additional downloadable volume or additional hours to access the Internet. In such a way, the normalisation improves the comparability of metered and unmetered offers in the same basket (cf. paragraph 3.2.1.b.).

Third, it is presented how a broad range of additional characteristics (e.g. differentiated speeds depending on the hour of the day or the origin of the content,..) were taken into account.

Finally, for all three services that can be part of the offers in our sample, a list of additional technical parameters were selected, enabling a further and more qualitative comparison.

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<sup>18</sup> As stated above, the relevance of a further analysis of the '(mobile) Plug & Play' offers will be further evaluated based on the evolutions observed in the market.

<sup>19</sup> Cf. Paragraph 3.2.1.a Definition of baskets

### 3.2.1.a. DEFINITION OF BASKETS

Based on an analysis of all of the 3,172 broadband offers making up the total sample and after isolating the mobile plug & play offers (cf. section 2.3), 7 representative baskets were defined. More precisely, in order to increase coherence between different studies commissioned by DG INFSO, the same definitions for the baskets have been used as earlier applied by iDATE in its study on coverage of broadband networks in the EU.<sup>20</sup>

Please note that the percentage of the total number of offers available in the sample does not take into account the number of subscribers for each of these offers.

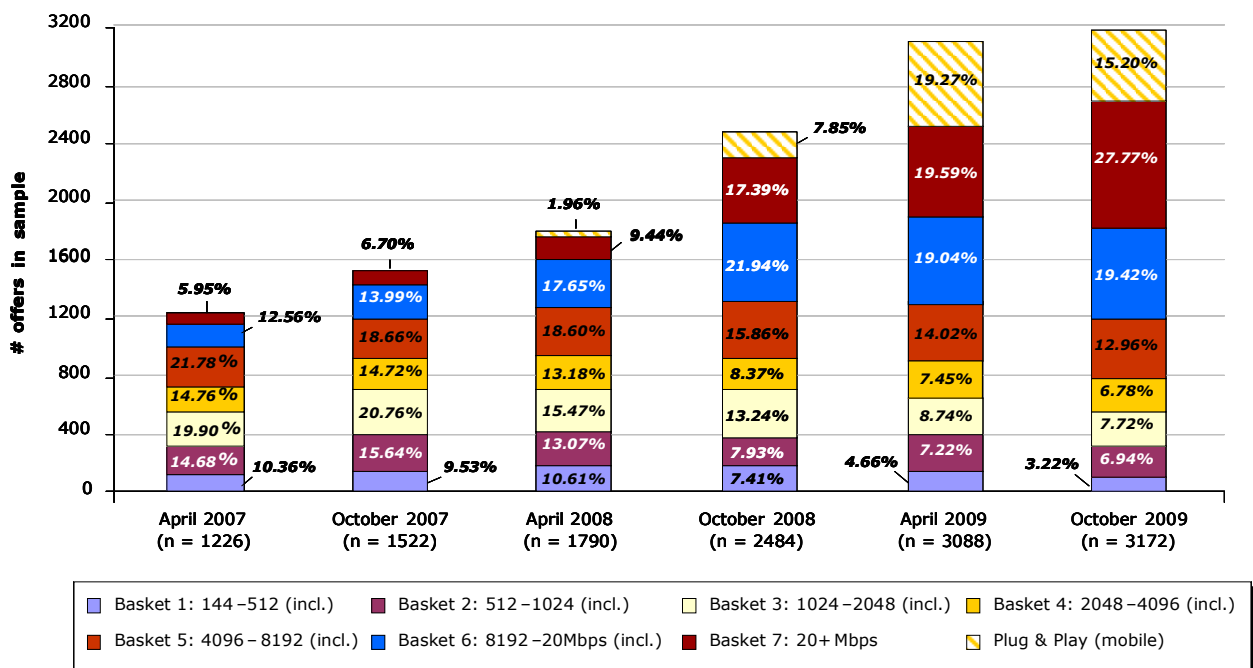


Table 6: Definition and total portion of each basket in the total sample

Based on the table above, it can be concluded that the number of offers with the highest download speeds (i.e. Basket 7) have increased more than average. Due to the technology developments described in section 2.3 and 2.5.2, Cable and FTTH operators are able to offer much higher speeds than before. However, in October 2009, the number of offers with lowest download speeds (i.e. Baskets 1 and 2) has slightly decreased compared to April 2009.

### 3.2.1.b. NORMALISATION OF OFFERS

It will be observed that both metered and unmetered offers are available in the same basket. As defined in subsection 2.5.4, metered offers are those with a limited number of hours per month during which access to the Internet is provided (i.e. time-metered) or of

<sup>20</sup> Cf.

[http://ec.europa.eu/information\\_society/eeurope/i2010/docs/benchmarking/broadband\\_coverage\\_in\\_europe.pdf](http://ec.europa.eu/information_society/eeurope/i2010/docs/benchmarking/broadband_coverage_in_europe.pdf)

downloadable volume (i.e. volume-metered). Unmetered offers are those without usage limits.

In some cases, the costs of offers with limited access to the Internet (i.e. metered offers) provide only a very limited access and need to be normalised to a reasonable access level (both in terms of downloadable volumes and a number of hours). These reasonable levels are referred to as normalisation parameters and have been applied to approximately one fourth of all metered offers.

As the study of the comparison of the Broadband Internet Access Cost also includes the bundled offers, an analysis was performed to discover whether the other services included in the offers (i.e. Fixed Telephony and Television Services) also needed normalisation in order to ensure sufficient uniformity in technical terms. The outcome of this analysis is also presented below.

### Normalisation of the Internet Access Service

Based on an analysis of all of the selected broadband offers, the following normalisation parameters have been defined for each basket:

Basket	Normalisation parameters for the Internet Access Service	
	Volume of data (GB)	Hours peer month
Basket 1: 144-512 (included)	1	20
Basket 2: 512-1024 (included)	1	20
Basket 3: 1024-2048 (included)	2	20
Basket 4: 2048-4096 (included)	10	20
Basket 5: 4096-8192 (included)	30	20
Basket 6: 8192-20Mbps (included)	30	20
Basket 7: 20+Mbps	30	20

*Table 7: Overview of the normalisation parameters for the Internet Access Service*

The normalisation parameters above represent the estimated average downloadable volumes or number of hours per month for each type of basket. For a particular basket, if the volume or number of hours of access to the Internet per month exceeds the levels provided for in the basic metered offer, additional charges per gigabyte downloaded or per hour will be added to the basic monthly charges. The sum of the cost of the basic metered offer and the additional charges will be used for comparison with the unmetered offers.

The inclusion of additional charges to obtain the reasonable level of service presented in *Table 7* sometimes results in very high total monthly costs. It was observed that these total monthly costs in some cases comprised:

- a very low basic monthly charge (sometimes even equal to 0) and very high additional charges ("pay per use" offers);
- a basic monthly charge that is quasi comparable with an unmetered offer, combined with significant additional charges.



It can be assumed that these offers target users with limited service requirements (i.e. lower than the reasonable level of service indicated in *Table 7*). It can thus be assumed that the very high total monthly costs, calculated based on the reasonable levels of service, will most often not be paid by e.g. customers who only use the Internet for services that do not demand high volumes of data exchange such as web browsing or sending and receiving emails.

In other words, it is quite probable that in reality, customers will be paying a lower total monthly cost than that determined based on the normalisation parameters. However, as these low-usage costs are not considered to be comparable with the cost of an unmetered offer, abstraction was made of this probability in the comparison analysis. This means that the same normalisation parameters were applied to all metered offers of the same basket.

It should be noted that the normalisation parameters comprise best estimates (based on e.g. the average downloadable volume or hours included per category that are observed in the sample). The following table presents an overview of the weight of metered offers in each of the 7 baskets and for the MBIAC:

Breakdown of all offers	Total number of offers in the sample (all countries)	Total number of metered offers in the sample (all countries)		Total number of Unmetered Offers in the sample (all countries)	
			%		%
<b>Basket 1: 144-512 (included)</b>	<b>102</b>	<b>10</b>	<b>9,80%</b>	<b>92</b>	<b>90,20%</b>
<b>Basket 2: 512-1024 (included)</b>	<b>219</b>	<b>33</b>	<b>15,07%</b>	<b>186</b>	<b>84,93%</b>
<b>Basket 3: 1024-2048 (included)</b>	<b>246</b>	<b>38</b>	<b>15,45%</b>	<b>208</b>	<b>84,55%</b>
<b>Basket 4: 2048-4096 (included)</b>	<b>215</b>	<b>31</b>	<b>14,42%</b>	<b>184</b>	<b>85,58%</b>
<b>Basket 5: 4096-8192 (included)</b>	<b>411</b>	<b>70</b>	<b>17,03%</b>	<b>341</b>	<b>82,97%</b>
<b>Basket 6: 8192-20Mbps (included)</b>	<b>616</b>	<b>86</b>	<b>13,96%</b>	<b>530</b>	<b>86,04%</b>
<b>Basket 7: 20+Mbps</b>	<b>881</b>	<b>76</b>	<b>8,63%</b>	<b>805</b>	<b>91,37%</b>
<b>Plug &amp; Play (mobile) - MBIAC</b>	<b>482</b>	<b>457</b>	<b>94,81%</b>	<b>25</b>	<b>5,19%</b>
<b>TOTAL</b>	<b>3172</b>	<b>801</b>		<b>2371</b>	

*Table 8: Percentage of metered and unmetered offers in each basket*

It is worth noting that un-metered offers are predominant in fixed connections while almost 95% of mobile plug and play offers are metered.

As no further accurate information could be obtained on the actual average downloaded volumes and hours spent on the Internet, the impact of the normalisation on the results of the study was evaluated. In other words, by using simulations and sensitivity analysis, the extent of the impact of leaving out the normalisation step on the offers that were selected as being the least expensive ones was checked (cf. comparisons presented in Chapters 4 and 5).

It was concluded from the analysis that the normalisation impact was rather limited. In some countries (like Ireland, Malta etc.) where volume-based offers are widespread the normalisation had an influence on the selection of the least-expensive offer. In these cases the normalised charge was a more realistic representation of the cost as the basic

recurring charges were very low and the extra costs per GB and per hour were rather significant.

The additional cost per gigabyte downloaded (for the volume-metered offers) or the 'cost per hour' (for time-metered offers) is most often indicated in the offer. If this is not the case, these parameters are estimated by dividing the recurring charges of the offer by the volume of data (or hours) that is included in the basic offer.

Some ISPs differentiate the additional charges as a function of the hours of the day. For these cases, the charges for the daytime were taken into account, similar to the decision on the different tariff structures in subsection 3.2.1.

Metered offers are either time-metered *or* volume-metered. In the October 2009 sample, there were no offers with both limitations.

As the normalisation is related to the volume of the service (in terms of Gbytes for the volume-metered offers and in terms of hours for time-metered offers), it has no impact on the non-recurring charges.

Finally, in order to provide a transparent overview of the impact of the normalisation, detailed calculations for the offers selected as being the least expensive will be presented on a case-by-case basis in Chapters 4 and 5.

### **Normalisation of the other services included in the bundled offers**

The Fixed Telephone Services included in the bundled offers are often limited which implies that a comparison on a like-to-like basis requires normalisation. Information on the average volumes of Fixed Telephony Services has been found in the reports from European NRAs,<sup>21</sup> indicating an average consumption of approximately 160-180 minutes per month. To split this volume of traffic between daytime and night & weekend, a ratio of 60% / 40% has been taken into account. This has led to a total volume of traffic of approximately 100 minutes during the daytime. This volume has been divided equally between calls to fixed and calls to mobile networks in order to determine the normalisation parameters for the Fixed Telephony Service.

<b>Basket</b>	<b>Normalisation parameters for the Fixed Telephone Service</b>		
	<b>Minutes towards fixed network</b>	<b>Minutes towards mobile network</b>	<b>Average connection time (minutes)</b>
Basket 1: 144-512 (included)	50	50	5
Basket 2: 512-1024 (included)	50	50	5
Basket 3: 1024-2048 (included)	50	50	5
Basket 4: 2048-4096 (included)	50	50	5
Basket 5: 4096-8192 (included)	50	50	5
Basket 6: 8192-20Mbps (included)	50	50	5
Basket 7: 20+Mbps	50	50	5

*Table 9: Overview of the normalisation parameters for the Fixed Telephone Service*

<sup>21</sup> NRA = National Regulatory Authority for electronic communications services

The additional cost per minute was always indicated in the offers of the EU ISPs. In contrast to the cost per gigabyte downloaded (for the volume-metered offers) or the 'cost per hour' (for time-metered offers), the cost per minute can vary significantly depending on the hour of the day and the destination of the calls (e.g. what exact fixed or mobile networks and what distance).

As for the normalisation of the Internet Access service, the normalisation is first of all been based on the daytime additional costs per minute. When different costs apply for different destinations, the arithmetic average of the different options has been taken into account. Finally, the normalisation has been limited to national calls.

No normalisation was applied to the Television service. This implies that the Television service included in the package includes the standard number of channels (and not additional channels offered via premium packages).

### **3.2.1.c. DIFFERENTIATION OF OFFERS**

In addition to the download speed and the total volume of data and/or hours per month included in the Internet Access Service and the volume of minutes included in the Fixed Telephony service, a number of additional parameters can have further impact on the charges set for the service.

The main additional differentiation parameters for Broadband Internet Access, Fixed Telephony and Television service are discussed below.

#### **Internet Access Service**

Referring to the wide variety of tariff structures, it was observed that some ISPs distinguish the speed or the downloadable volume based on a number of criteria. The categorisation of these offers has been dealt with as follows:

- Distinction between national and international download speeds and volumes: the categorisation is based on the international download speeds and volumes provided the strongly international nature of the Internet's content and services;
- Distinction based on the hour of the day: the technical characteristics of the offer during the daytime have been taken into account.
- Distinction based on location: the focus is on ISPs active in larger regions. In cases where ISPs are only active on a regional basis, important regional cities have been taken into account. This explains that it is possible to find cheaper prices for some baskets with higher speeds that are only available in a number of regions or cities.

#### **Fixed Telephone Service**

Within the bundles including Fixed Telephony services, several options can be distinguished leading to different tariff structures. For example: the Fixed Telephony service includes national as well as international calls, rates are different for calls to mobile or fixed networks and for calls during daytime or during night and weekend hours, etc. This has been dealt with as follows:

- Distinction between national and international calls: the cost for the fixed telephony service has been limited to national calls only. Because the tariff structure for the international calls is extremely complex and because the BIAC study focuses on residential customers, the cost of international calls was excluded from the comparison, due to the limited added value of adding these.
- Distinction between calls to mobile and to fixed networks: In the cases where a distinction is made between e.g. local, regional, interregional calls, etc. and between on-net and off-net calls; the cost per minute that was included in the database is the mathematical average of all possibilities.<sup>22</sup>
- Distinction between the daytime tariffs and night and weekend tariffs: focus was on daytime period. However, as it has been observed that most often unlimited calls are allowed at night and during the weekend, qualitative information was collected on this last possibility.

### **Television Service**

With respect to the Television service, information related to a basic package of the channels was considered. This means that special theme packages (e.g. sports, cartoons...) were not taken into account.

#### **3.2.1.d. ANALYSIS OF ADDITIONAL TECHNICAL PARAMETERS**

In addition to the pricing parameters and the technical parameters presented above, information was also gathered on additional technical parameters which enables a further – more qualitative – comparison of the offers. A distinction is made between the parameters related to the Internet Access Services and relevant for all Internet access only and bundled offers and the parameters that have been identified for those bundled offers containing Fixed Telephony and/or Telephony Services.

The cost of these elements is included in the global recurring fees of the offers and can hardly be isolated for quantitative analysis purposes. Therefore, it was decided that details on these additional technical parameters would be provided in the overview of the offers that are selected in the distinct Broadband Internet Access Cost comparison exercises (e.g. Chapters 4 and 5).

#### **Additional technical parameters related to the Internet Access Service**

Additional technical parameters that were collected for the Internet Services are:

- Types of services included (e.g. Television);
- Volume of these services (e.g. number of e-mailboxes, number of addresses per e-mailbox,...);
- Availability of webspace;
- Level of protection (e.g. antivirus, antispam,...).

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<sup>22</sup> No weighting of the different options was introduced as these vary strongly between countries, according to e.g. the demographic spread, definition of the tariff zones of each ISP, etc.

### **Additional technical parameters related to the Fixed Telephony Service**

Additional technical parameters that were collected for the Fixed Telephony Services are:

- Technology used: switched Telephone Service or VoIP;
- Indication of the period during which calls are unlimited;
- Number of minutes included in the offer during daytime (limited/unlimited).

### **Additional technical parameters related to the Television Service**

Additional technical parameters that were collected for the Television Services are:

- Technology used: analog or digital;
- Number of channels included.

#### **3.2.1.e. TECHNOLOGICAL NEUTRALITY**

Finally, for the comparison of the cost of the Broadband Internet Access Service in the 2007 database, the principle of 'technological neutrality' was taken into account for the 'Internet only' costs in the BIAC study, which implies that the information that was collected and compared related to different technologies (Cable, xDSL, FTTx, etc.).

Also for the Fixed Telephone and Television Service included in the bundled offers, it has been assumed that technological neutrality corresponds to the customer's point of view when choosing to subscribe to a service or bundled offer.

More precisely, for Fixed Telephony services, the cost comparison will not distinguish between:

- **Switched voice services:** these are services offered over circuit-switched telephone networks (these can be the Public Switched Telephone Network (PSTN) or the Integrated Services Digital Network (ISDN));
- **VoIP services (or 'IP telephony'):** these services use the Internet or another packet-switched network for the transmission of voice; the generic name 'VoIP' is also used in this report to refer to e.g. VoB (Voice over Broadband).

Neither will the cost comparison of bundles including Television distinguish between analog and digital television.

- **Analog television:** this service refers to the non-interactive television broadcast through the cable distribution network;
- **Digital television:** this service can be offered via different platforms (cable, xDSL, FTTx...) and can include interactive television services.

Note however that, at the qualitative level, it will be indicated whenever possible what kind of Fixed Telephony or Television Service is offered (cf. parameters indicated in paragraph 3.2.1.d).

### **3.2.2 UNIFORMITY IN FINANCIAL TERMS**

In order to make the offers uniform in financial terms, appropriate exchange rates and Euro Purchasing Power Parities (Euro PPP) have been applied. Also, the effect of different levels of VAT percentages has been analysed. The table below lists the parameters that have been used in order to make the data more uniform in financial terms<sup>23</sup>:

Country	VAT percentage	Local Currency (LC)	1 EURO in LC	EURO PPP
Austria	20%	EUR	1.00	1.11
Belgium	21%	EUR	1.00	1.13
Bulgaria	20%	BGN	1.96	0.94
Canada	6%	CAD	1.55	1.92
Cyprus	15%	EUR	1.00	0.98
Czech Republic	19%	CZK	25.74	17.94
Denmark	25%	DKK	7.44	11.10
Estonia	18%	EEK	15.65	11.50
Finland	22%	EUR	1.00	1.25
France	19.60%	EUR	1.00	1.15
Germany	19%	EUR	1.00	1.07
Greece	19%	EUR	1.00	0.92
Hungary	20%	HUF	267.74	178.33
Iceland	24.50%	ISK	290.00	173.35
Ireland	21%	EUR	1.00	1.17
Italy	20%	EUR	1.00	1.09
Japan	5%	JPY	130.33	147.25
Korea	10%	KRW	1,733.58	1,175.93
Latvia	18%	LVL	0.71	0.51
Lithuania	18%	LTL	3.45	2.33
Luxembourg	15%	EUR	1.00	1.20
Malta	18%	EUR	1.00	0.73
Norway	25%	NOK	8.35	10.81
The Netherlands	19%	EUR	1.00	1.12
Poland	22%	PLN	4.21	2.45
Portugal	21%	EUR	1.00	0.86
Romania	19%	RON	4.28	2.32
Slovakia	19%	EUR	1.00	0.74
Slovenia	20%	EUR	1.00	0.83
Spain	16%	EUR	1.00	0.94
State of California	8.25%	USD	1.48	1.27
State of Colorado	7.72%	USD	1.48	1.27
State of New York	8.38%	USD	1.48	1.27
Sweden	25%	SEK	10.31	11.72
The United Kingdom	17.50%	GBP	0.92	0.81

Table 10: Exchange rates, Euro PPP and VAT percentages

The results in this report are expressed in EURO/PPP, VAT included.

<sup>23</sup> Sources: Exchange rate: online European Central Bank, foreign exchange rates (average rate of period 01/10/2009 -23/10/2009). EURO PPP: Eurostat database (27/05/2009).

## 4. RESULTS OF THE BROADBAND INTERNET ACCESS COST COMPARISON FOR NON-BUNDLED OFFERS

The results of the Broadband Internet Access Cost study for October 2009 are presented in the chapter below. These are based on the following selection of offers:

- Least expensive offers per country and per basket incl. indication of the median (cf. paragraph 4.2);
- Least expensive offer per country for each of the 7 baskets (cf. paragraph 4.3);
- Median offer per technology for each of the 7 baskets (cf. paragraph 4.4).

The median is the value separating the upper half of a sample from the lower half. If there is an even number of observations, the median is not unique. In these cases, the mean of the two middle values is taken.

The *median* will be presented in this report for comparison with the least expensive offer per basket as well as for the comparison of the broadband Internet access cost based on different technologies. It is considered to be a more appropriate basis for comparison than e.g. the *mean* (or 'average') as the offers in the same basket often have varying characteristics (e.g. different speeds). A comparison based on the median value – provided that there are a sufficiently large number of offers in the sample – does not give a weight to the (extreme) values so that it is not influenced by e.g. a few very expensive offers with the highest bandwidths observed for just one ISP or country. Offers which were substantially higher than the bulk of the offers were removed from the calculations of averages and median offers.

As the cost of the broadband Internet access service could not be isolated in case of a bundled offer (cf. paragraph 3.1.2), the analyses presented below are based only on the non-bundled offers which represent 55.6% of the total number of offers in the sample. Results for bundled offers are presented in Chapter 5.

### 4.1. OFFERS WITH SPEED LOWER THAN OR EQUAL TO 144 Kbps

As already pointed out in paragraph 2.2.1, in some countries some ISPs in the sample also consider a connection with a speed of 128 kbps as a broadband connection. These countries are Czech Republic (1), Latvia (1), Lithuania (4) and Poland (4). The numbers between the brackets indicate the number of 128kbps offers per country, present in the sample.

It was observed that incumbent operators as well as new entrants offer this type of connection, based on diverse technologies (xDSL, Cable and Plug & Play).

## **4.2. LEAST EXPENSIVE OFFERS PER COUNTRY AND PER BASKET**

The outcome of this analysis is presented by means of:

- A first graph that presents the Broadband Internet Access Cost results in EUR/PPP VAT incl. (total Broadband Internet Access Cost and breakdown in a recurring and non-recurring fee, as well as the additional cost that is added when normalisation took place). The focus is on the least expensive offers. The average of the selected least expensive offers is represented as well. As indicated in paragraph 3.2.1, baskets contain offers for products with different download speeds. The speed of every offer is indicated alongside each chart.
- A second graph that presents the Broadband Internet Access Cost results in EUR/PPP VAT incl. in comparison with the median values. Note that for countries for which only one offer is available in the sample for a specific basket, the median is not presented. The median per basket refers to the median value of the charges of all offers in the sample belonging to a certain basket e.g. Median 27 is the median of all offers in the sample presented in countries of the EU27;
- A third graph that indicates the relative weight of the elements that are composing the Broadband Internet Access Cost (expressed in %);
- A list with the detailed characteristics of the offers that are selected<sup>24</sup>. This table also includes an indexed ranking<sup>25</sup> compared to the median of the offers selected incl. remarks on the results of the comparison;
- A fourth graph that presents the Broadband Internet Access Cost results (in EUR/PPP VAT incl.) of the October 2007, October 2008 and October 2009 cost comparison exercise. The least expensive offers as well as the median offers are represented. For a question of readability of the graphs, it was decided not to include the results of April 2007, April 2008 and April 2009;
- Finally, remarks and conclusions on the data in the graphs are presented for each basket in paragraph f.

<sup>24</sup> Where multiple offers have exactly the same cost and are the least expensive ones, they are all presented in this list.

<sup>25</sup> The indexed ranking expresses the relative price of the offer compared to the median. If e.g. an offer has a ranking equal to 1, this implies that the cost of the offer equals the value of the median. If the value of the indexed ranking of an offer is 1.22, this implies that the cost of the offer is equal to 122% of the value of the median.

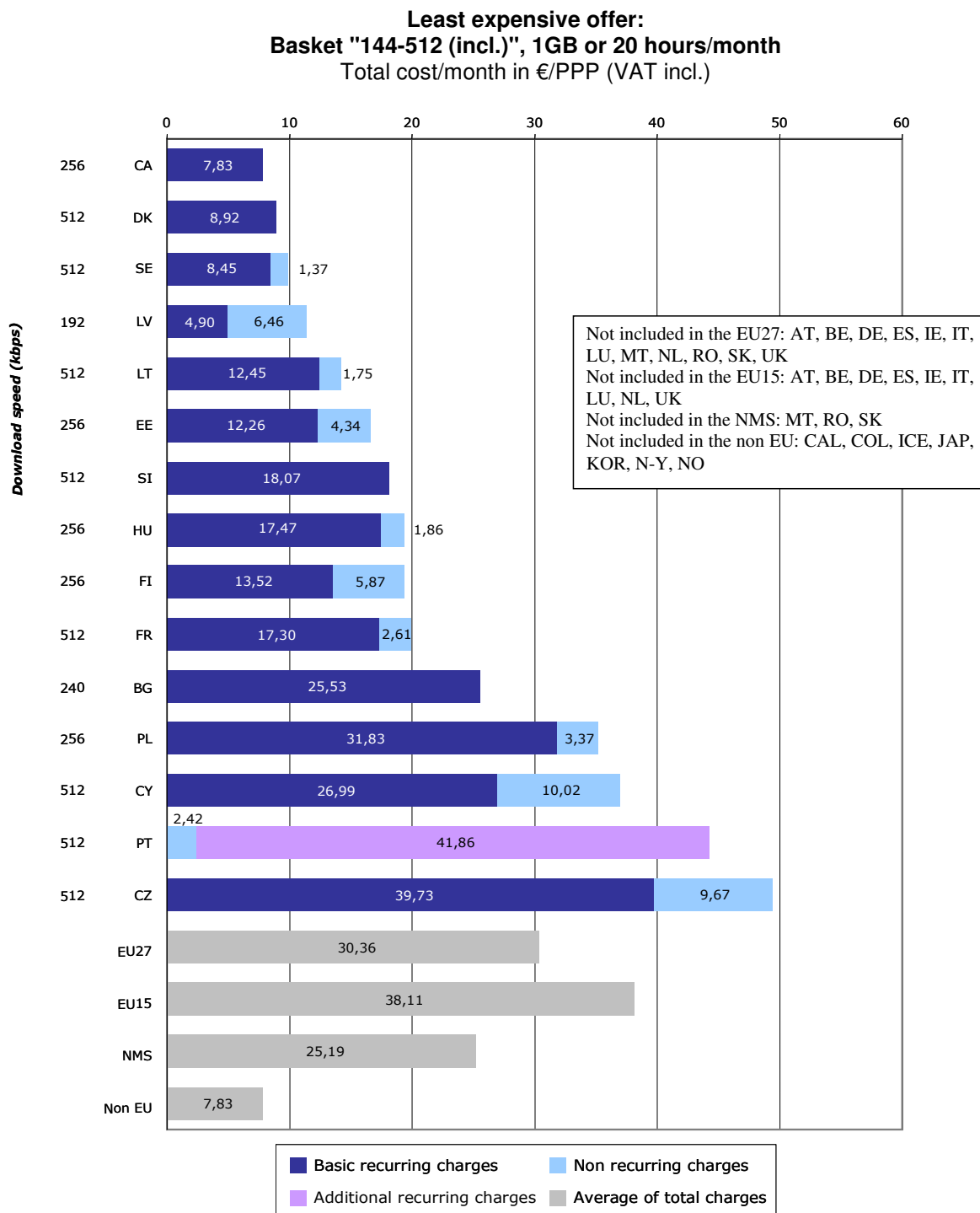


#### **4.2.1 BASKET "144KBPS-512KBPS (incl.)", IN €/PPP (VAT INCL.)**

##### **4.2.1.a LEAST EXPENSIVE OFFER**

From the ISPs selected for some countries, no offer was available in this basket; these countries include *Austria, Belgium, Germany, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Norway, The Netherlands, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*

The *Greek* offer for this basket has not been represented on the graph as its charges are comparatively higher (82.98 EUR/PPP non-recurring charges + 43.37 EUR/PPP recurring charges) than those of the other offers in the basket.

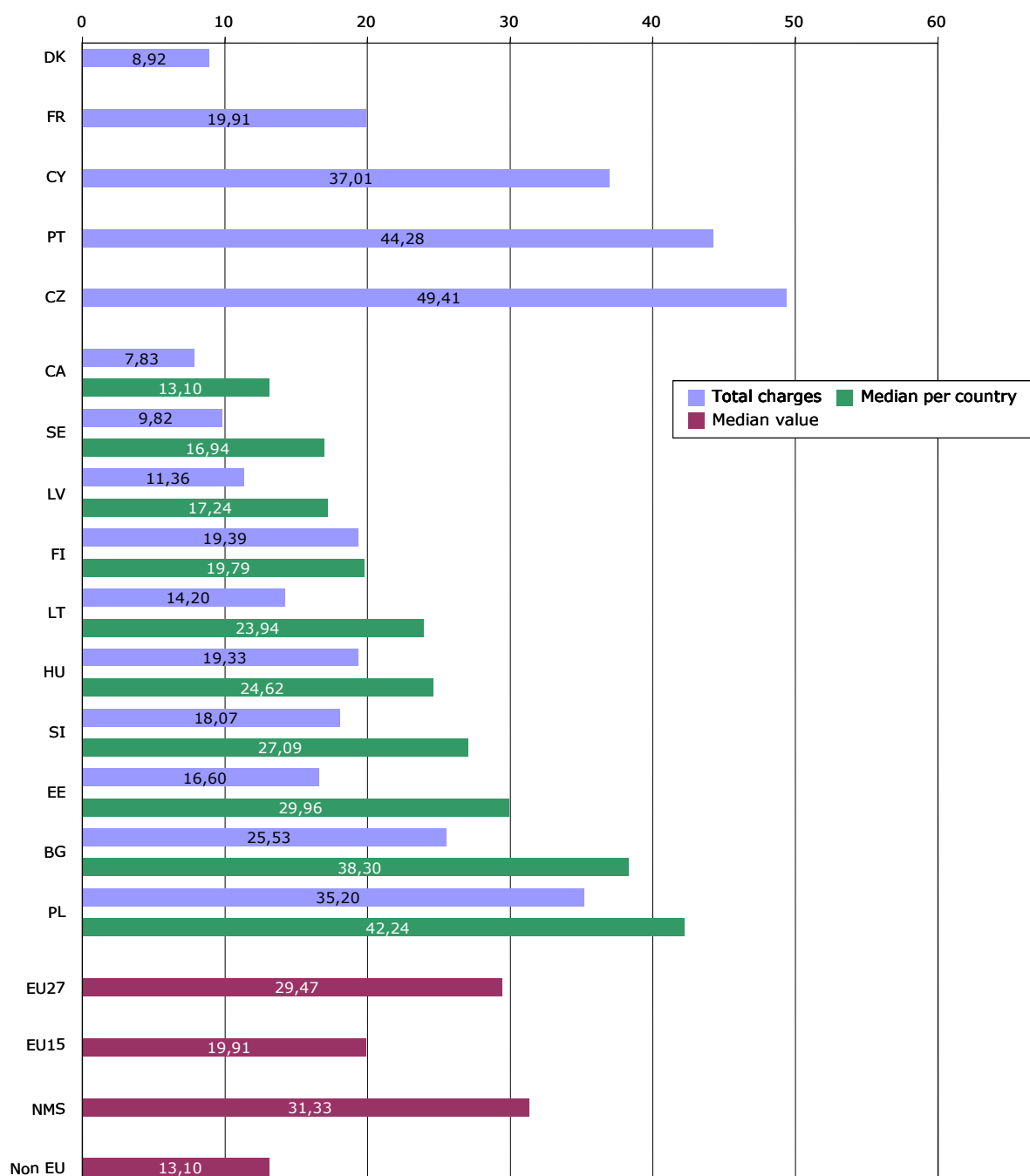


#### **4.2.1.b BASKET "144KBPS -512KBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS**

For the following countries, only one offer was available for this basket: *Cyprus, Czech Republic, Denmark, France, Greece and Portugal*. The charge for this offer equals the least expensive and no median value was determined for these countries.

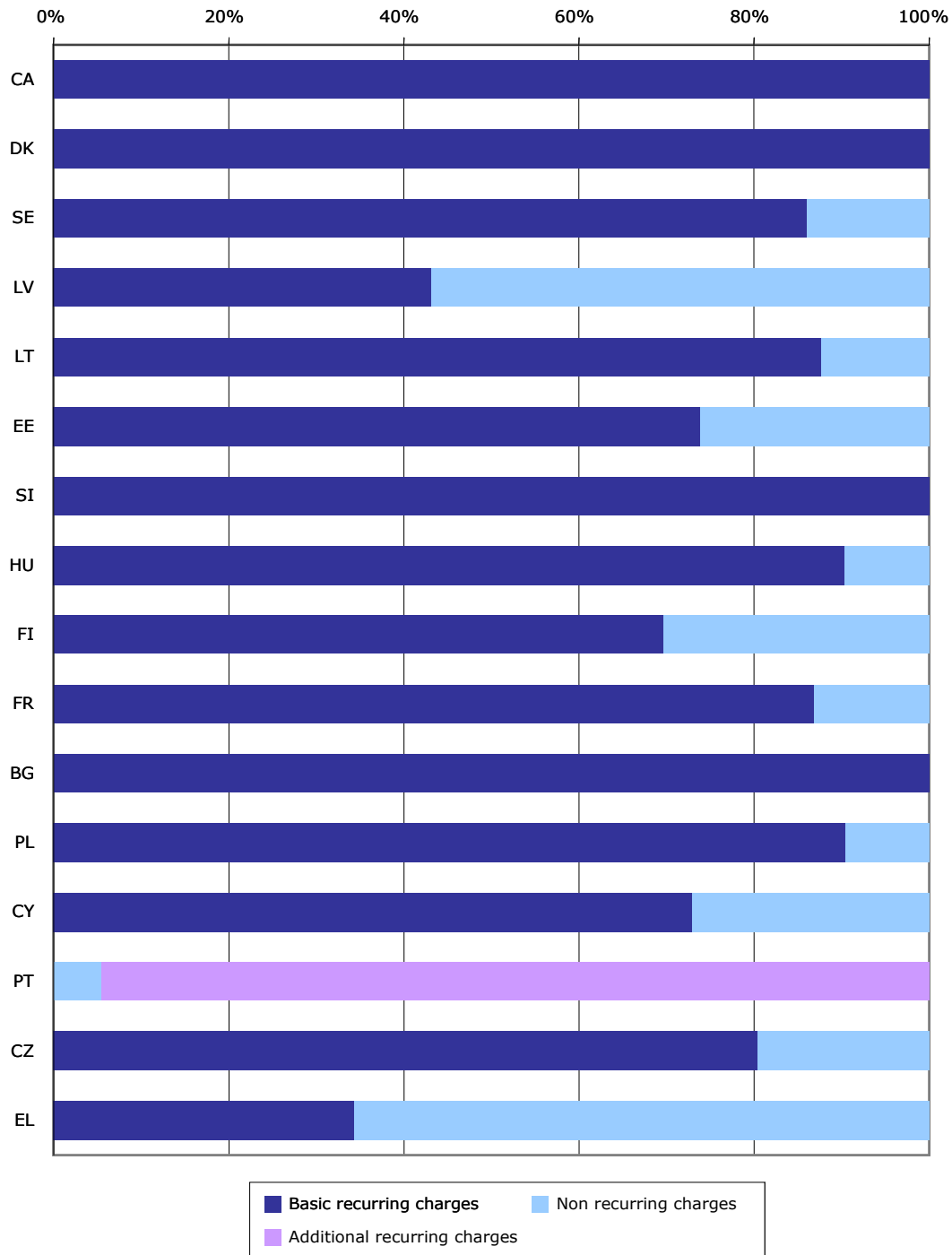
The *Greek* offer has not been represented on the graph as its charges for this basket are comparatively higher than those of the other countries.

**Least expensive and median offers:**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



#### 4.2.1.c BASKET "144KBPS -512KBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month**  
 Total cost/month in €/PPP (VAT incl.)



#### 4.2.1.d BASKET "144KBPS -512KBPS (incl.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
<b>Bulgaria</b>	Powernet	Powernet Wi-Fi 24	Plug&Play	-	240	unlimited	unlimited	N.D.	N.D.	-	-	12,27	25,53	0,88
<b>Canada</b>	Telus	High Speed Lite (British Columbia)	xDSL	12	256	10	-	N.D.	1	100	AV+ASW+FW+PC	9,68	7,83	0,27
<b>Cyprus</b>	<b>Cytanet</b>	NetRunner Home 512 (with DSL Access Home512)	xDSL	-	512	unlimited	unlimited	4	N.D.	20	AV+AS+PC+PM	36,27	37,01	1,28
<b>Czech Republic</b>	Ceské Radiokomunikace	Premium Sky	Plug&Play	12	512	unlimited	unlimited	1	N.D.	0	AV+AS	34,43	49,41	1,71
<b>Denmark</b>	Dansk Kabel TV	Lav hastighed 512 kbit / 256 kbit	Cable	-	512	unlimited	unlimited	1	5	250	-	13,31	8,92	0,31
<b>Estonia</b>	STV	STV Mikro	Cable	-	256	unlimited	unlimited	1	1	100	-	12,20	16,60	0,57
<b>Finland</b>	Finnet group	Valokaista (Tampere) 256	xDSL	12	256	unlimited	unlimited	5	N.D.	100	-	24,23	19,39	0,67
<b>France</b>	NeufCegetel (SFR)	ADSL 512K	xDSL	-	512	unlimited	unlimited	10	N.D.	1024	PC	22,90	19,91	0,69
<b>Greece</b>	<b>OTE</b>	Hellas SAT net! 500	Satellite	6	512	unlimited	unlimited	2	N.D.	50	PU	116,23	126,34	4,36
<b>Hungary</b>	Fibernet	Mikro csomag	Cable	-	256	unlimited	unlimited	1	N.D.	-	-	12,88	19,33	0,67
<b>Latvia</b>	BALTKOM TV	Local Tariff (optical net)	Cable	12	192	unlimited	unlimited	3	1	0	-	8,17	11,36	0,39
<b>Lithuania</b>	Balticum TV	Vilnius	FTTx	12	512	unlimited	unlimited	1	N.D.	N.D.	-	9,58	14,20	0,49
<b>Poland</b>	Multimedia Polska	Internet WiMax 256kbps+	Plug&Play	-	256	unlimited	unlimited	3	N.D.	100	-	20,48	35,20	1,22
<b>Portugal</b>	ZON / TV Cabo	ZON Flex	Cable	12	512	-	0	30	N.D.	N.D.	N.D.	38,08	44,28	1,53
<b>Slovenia</b>	<b>UPC Telemach</b>	Internet XS	Cable	12	512	unlimited	unlimited	5	5	0	-	15,00	18,07	0,62
<b>Sweden</b>	ComHem	Bredband XSmall 0,50	Cable	12	512	unlimited	unlimited	5	1	50	-	11,16	9,82	0,34

(\*) Duration = '-' indicates that 12 months was assumed  
(\*\*) N.D. indicates information is not provided by ISP  
(\*\*\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*\*\*) Indexed ranking: ranking of offers based on the median value of this set of results  
**ISPs in italic & bold** are Incumbent operators

Table 11: Detailed information on least expensive offer per country (144kbps-512kbps (incl.))

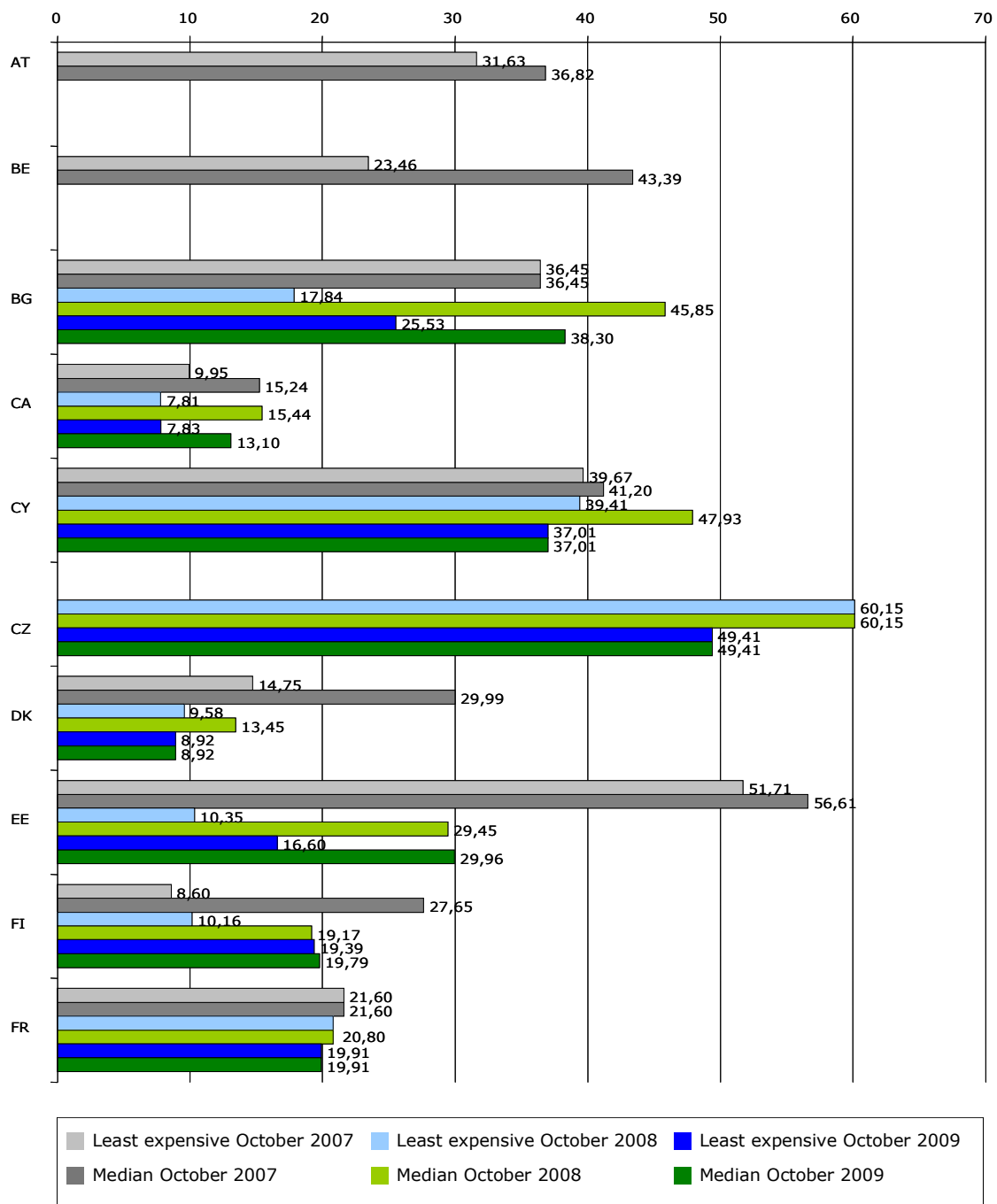
**4.2.1.e BASKET "144KBPS-512KBPS (incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2007 – October 2008 – October 2009

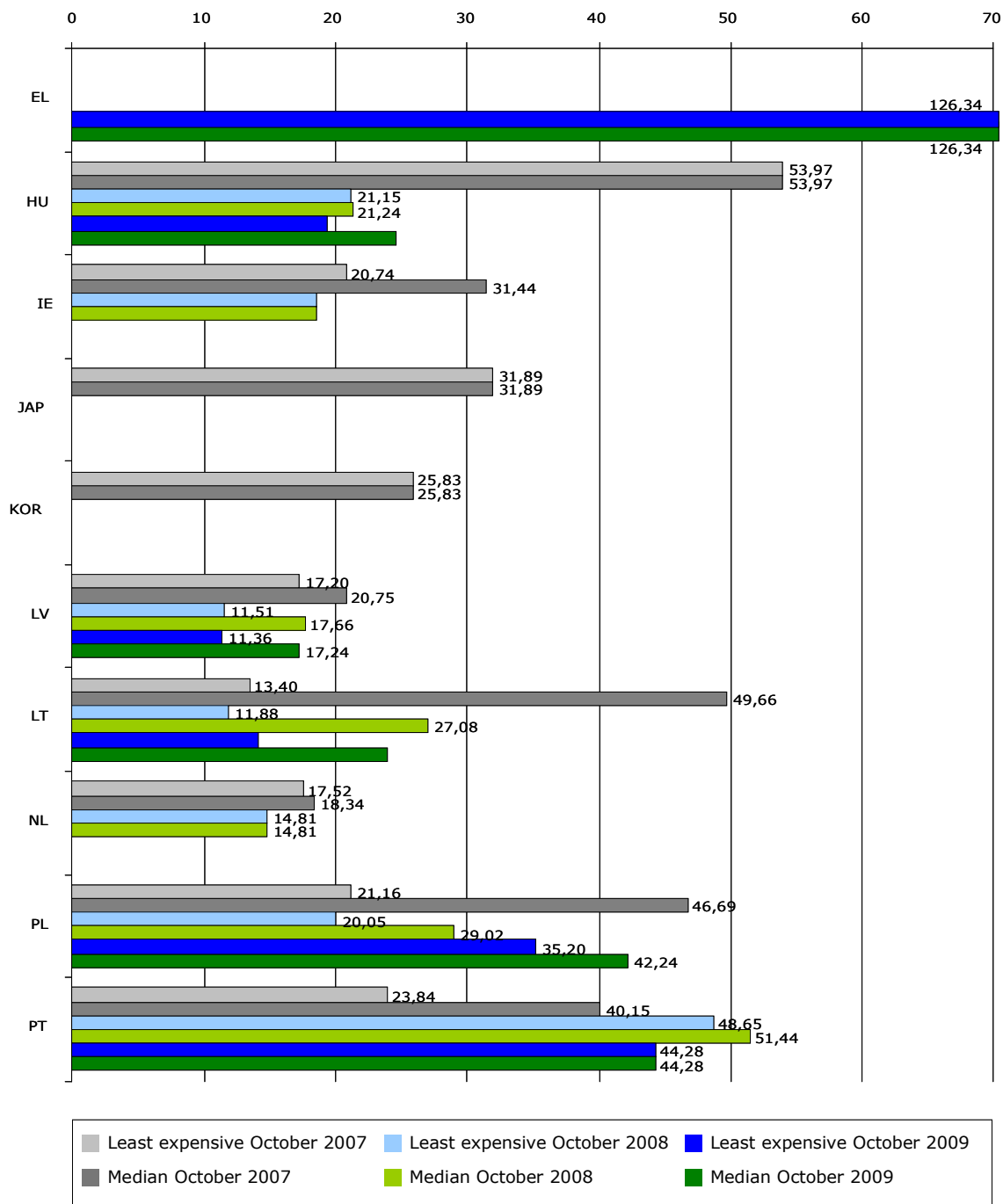
Least expensive and median offers:

Basket "144-512 (incl.)" 1GB or 20 hours/month

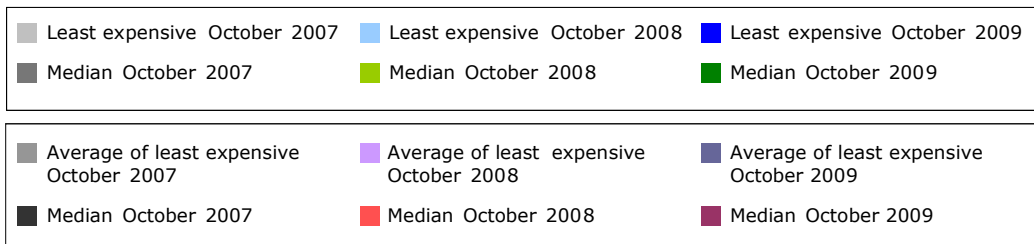
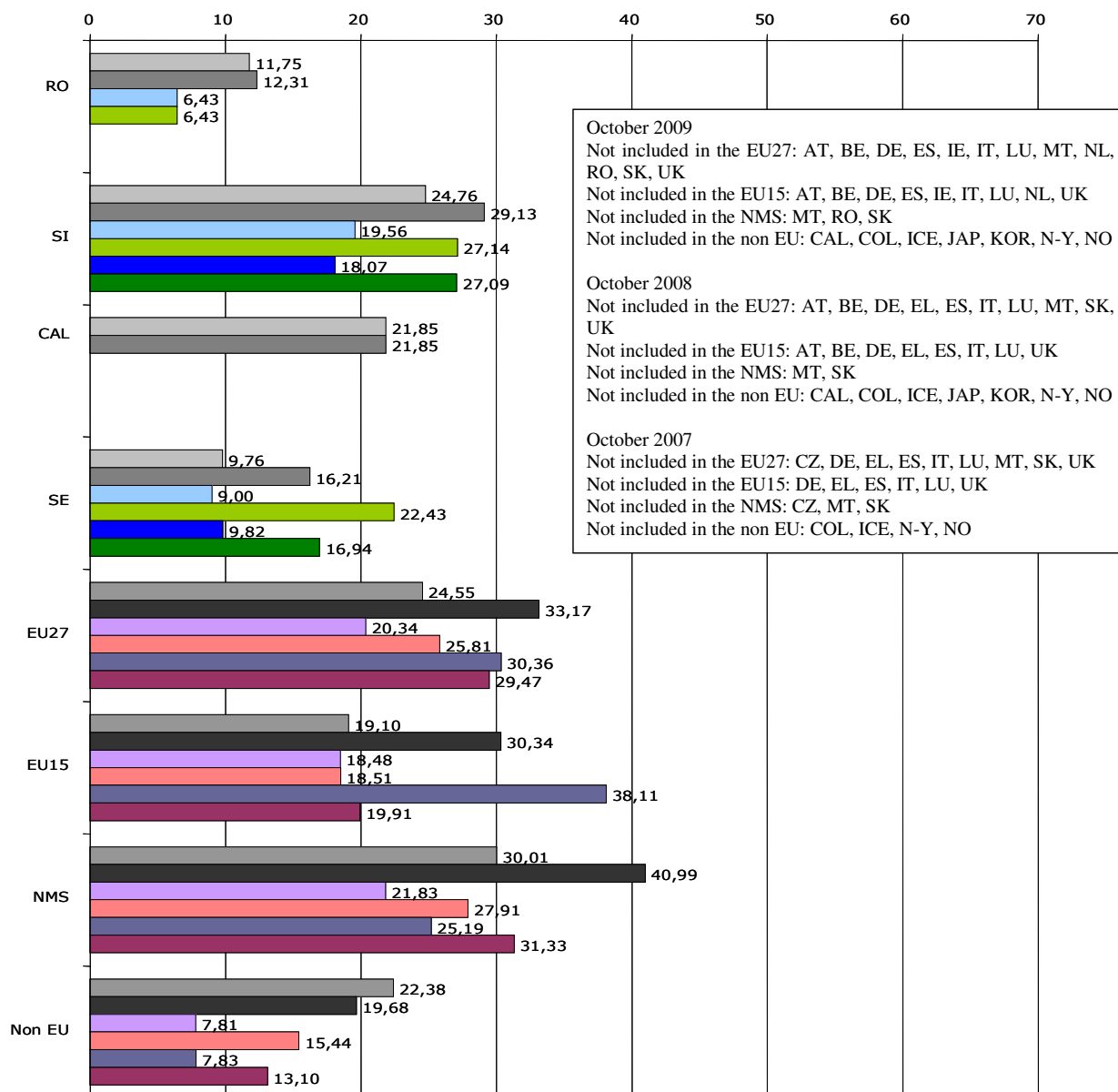
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



#### **4.2.1.f CONCLUSIONS ON BASKET 144KBPS-512KBPS (incl.):**

- For some countries, no offer of the selected ISPs was available in this basket for April 2009; the countries include *Austria, Belgium, Germany, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Norway, The Netherlands, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom*. Three of these countries still had offers in the sample for the 144kbps-512kbps (incl.) basket in April 2009; these were: *Germany, Romania* and *Slovakia*. *Greece* had no offers in the sample for this basket in April 2009, but did in October 2009.
- From the ISPs of the following countries, only one offer was available for this basket: *Cyprus, Czech Republic, Denmark, France, Greece and Portugal*. The charge for this offer equals the least expensive and no median value was determined for these countries.
- The offers for *Canada, Finland, France, Hungary, Lithuania* and *Latvia* are only available in certain areas of the country.
- The *Finnish* offer (Finnet group) is for apartment buildings. It has been kept due to the importance of this type of offer in *Finland*.
- The offer for *Denmark* (Dansk kabel TV) might not be representative, as the ISP focuses on members of certain organisations. It has however been kept in the sample, due to the significant market share of the ISP. It is the only offer in *Denmark* for this basket.
- The offers for *Estonia* (STV) and for *Portugal* (ZON /TV Cabo) are only available to clients who have an analog cable TV contract with the ISP.
- Of the two metered offers selected in this basket, only one needs a normalisation process.
  - The *Portuguese* offer is time-metered and includes 0 hours. As the charge is 2.09 EUR/PPP per hour, the total charge of 44.28 EUR/PPP was calculated as follows: 2.42 EUR/PPP non-recurring charges +  $2.09 * 20 = 41.86$  EUR/PPP for 20 hours.
- For some countries a major difference can be noted between the least expensive and the median offer.
  - *Estonia* has four offers in the basket, of which 2 offers are cable and have a total charge under 25 EUR/PPP. The two other offers are xDSL and Plug&Play and have a total charge of respectively 35.43 and 39.04 EUR/PPP.
- The omission of non-recurring charges in the following countries influences the place they take in the overall ranking of the least expensive offers: *Canada, Denmark* and *Slovenia*. Non-recurring charges represent a significant share of total charges in *Greece, Latvia* and *Portugal*.
- In *Czech Republic*, the charges of the least expensive offer in the sample have decreased visibly compared to the charges in October 2008. The median charges also decreased for this country.
- In three other countries, the charge for the least expensive offers increased compared to October 2009. These countries are *Bulgaria, Estonia, Finland*, and *Poland*. Except for *Poland*, median charges did not increase for these countries.
- The average of least expensive offers has increased since October 2008 for the EU27 countries. This increase is more significant in the EU15 countries. The average remained stable in the non-EU countries. When looking at the median

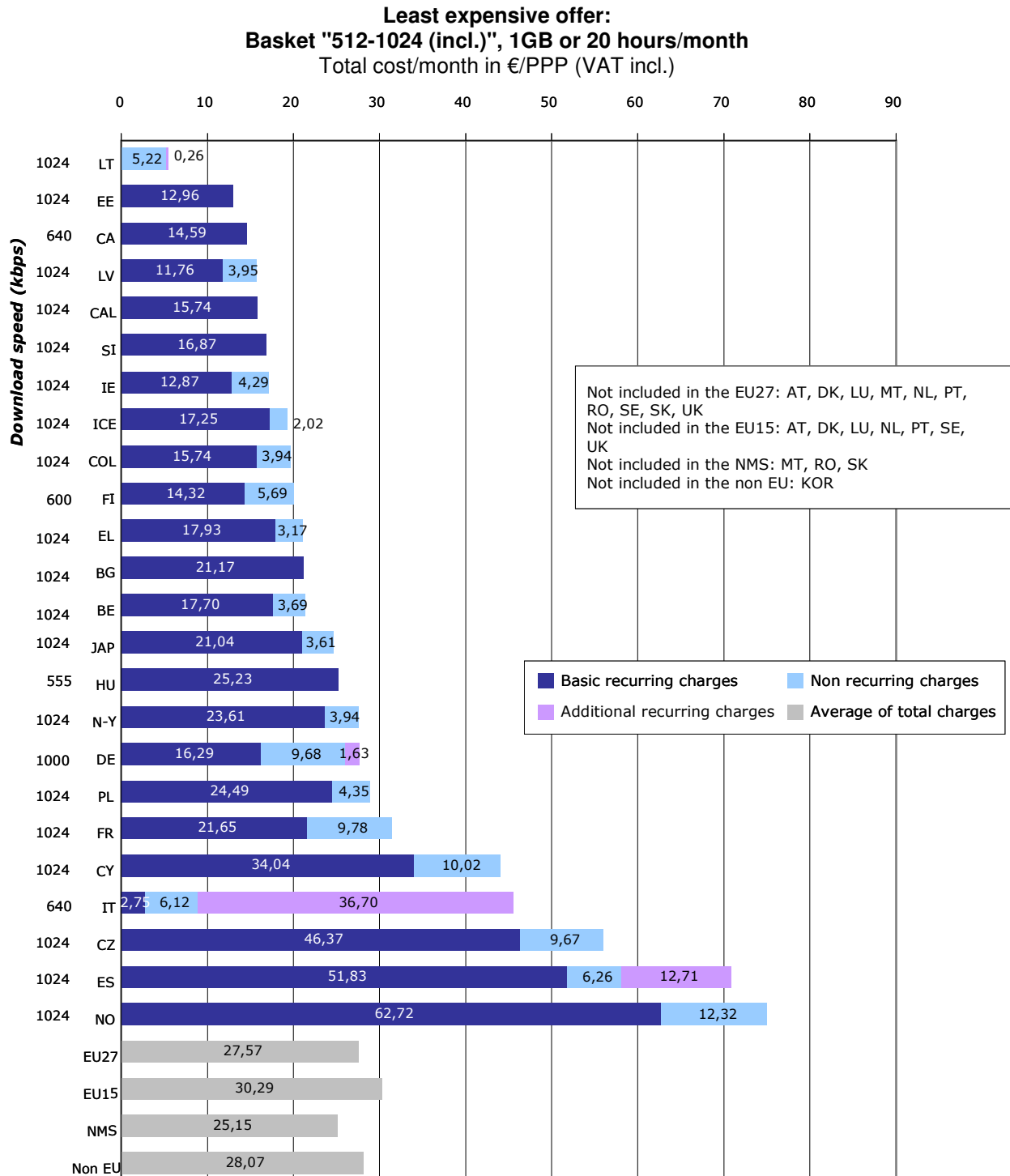


values, it can be observed that the median cost of the offers has increased for the NMS countries while it remained stable for the EU15.

#### **4.2.2 BASKET "512KBPS-1024KBPS (incl.)", IN €/PPP (VAT INCL.)**

##### **4.2.2.a LEAST EXPENSIVE OFFER**

From the ISPs selected for some countries, no offer was available in this basket; these countries include *Austria, Denmark, Korea, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia, Sweden and the United Kingdom*.

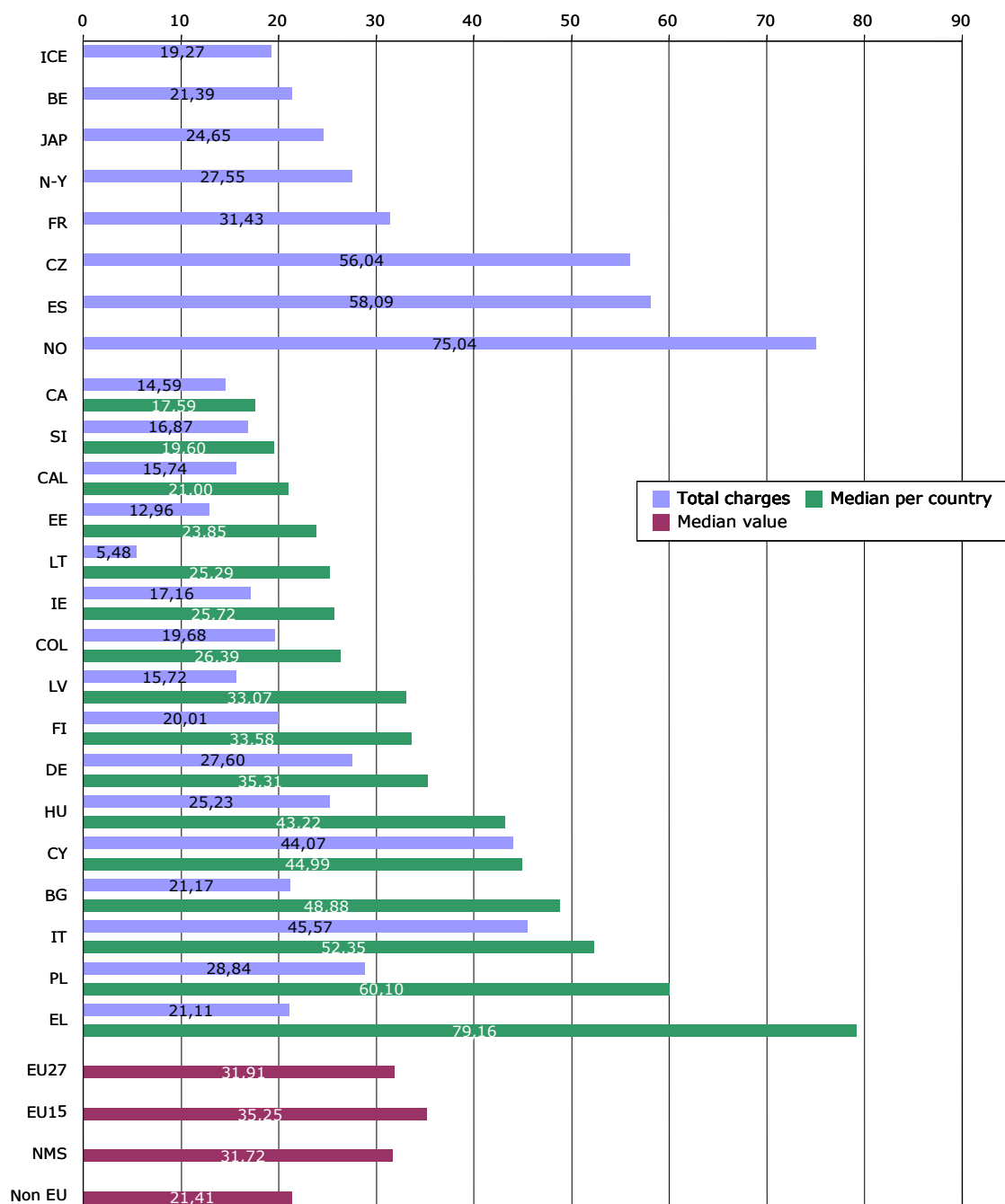


#### **4.2.2.b BASKET "512KBPS -1024KBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS**

For the following countries, only one offer was available for this basket: *Czech Republic, France, Iceland, Japan, Norway and the State of New York*. The charge for this offer equals the least expensive and no median value was determined for these countries.

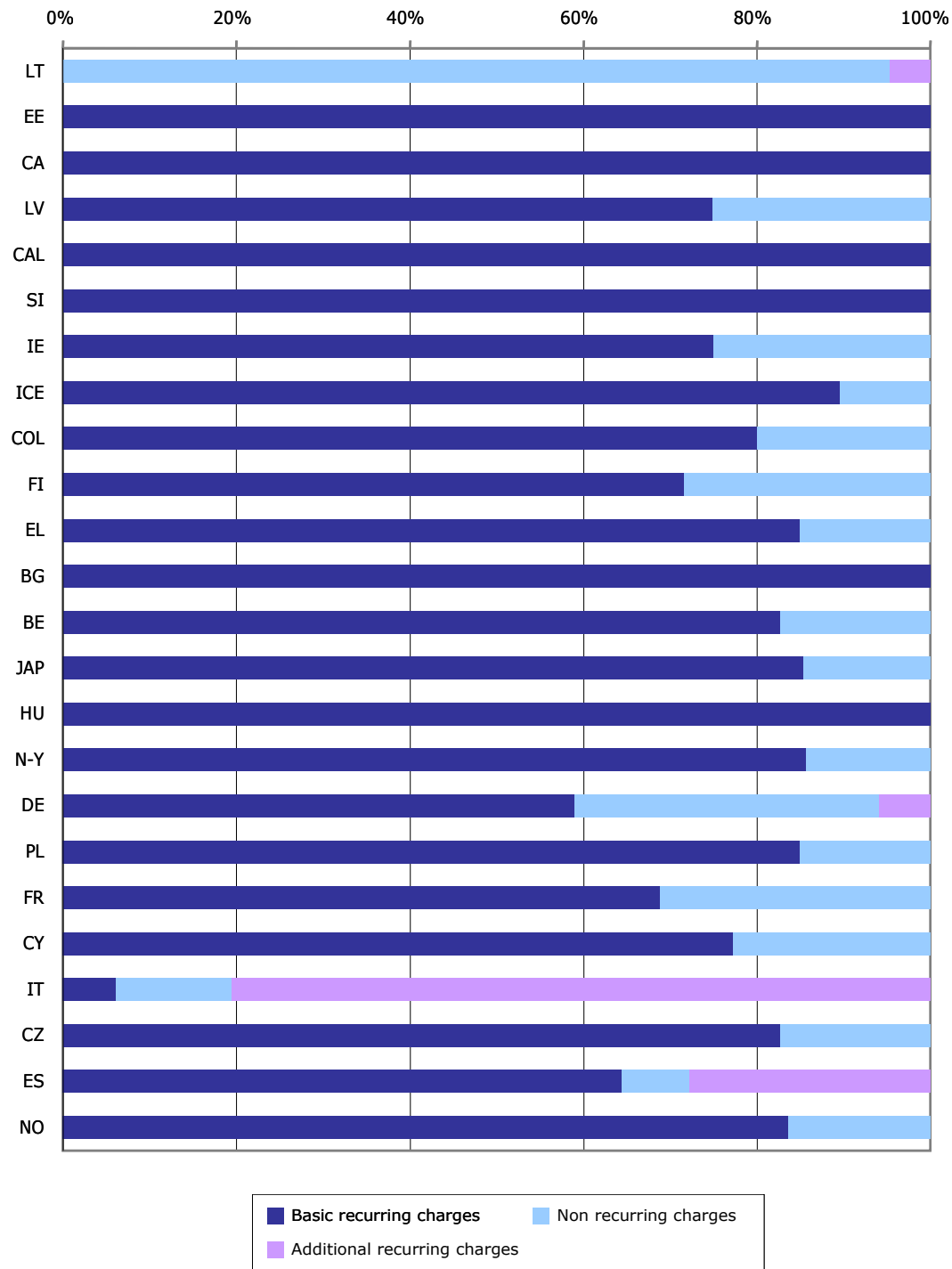
For *Belgium* and *Spain*, respectively two and three offers were available in the basket, which had the same total charges.

**Least expensive and median offers:  
Basket "512-1024 (incl.)", 1GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)**



#### 4.2.2.c BASKET "512KBPS -1024KBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
**Basket "512-1024 (incl.)", 1GB or 20 hours/month**  
 Total cost/month in €/PPP (VAT incl.)



#### 4.2.2.d BASKET "512KBPS -1024KBPS (incl.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
Belgium	Telenet	BasicNet	Cable	12	1024	1	-	1	N.D.	0	AV+AS	24,17	21,39	0,77
Belgium	<b>Belgacom</b>	Belgacom Internet Budget	xDSL	12	1024	1	-	1	5	50	AV+AS	24,17	21,39	0,81
Bulgaria	Cable Tel	CableTEL. Net Alfa Region 3	Cable	12	1024	unlimited	unlimited	1	1	0	-	10,17	21,17	0,76
Canada	<b>Videotron</b>	Basic Internet CABLE	Cable	12	640	2	-	N.D.	6	5	AV+AS	18,03	14,59	0,53
Cyprus	<b>Cytanet</b>	NetRunner Home 1000 (with DSL Access Home1000)	xDSL	-	1024	unlimited	unlimited	4	N.D.	20	AV+AS+PC+PM	43,18	44,07	1,59
Czech Republic	Ceské Radiokomunikace	Premium Sky	Plug&Play	12	1024	unlimited	unlimited	1	N.D.	0	AV+AS	39,06	56,04	2,02
Estonia	STV	Saturn Mini	FTTx	-	1024	unlimited	unlimited	1	1	100	-	9,52	12,96	0,47
Finland	<b>Elisa</b>	Elisa Laajakaista Heti (Tampere) 600 Broadband Instant	Cable	18	600	unlimited	unlimited	5	N.D.	500	-	25,01	20,01	0,72
France	<b>Orange France</b>	Découverte internet 1 mégamax	xDSL	-	1024	unlimited	unlimited	5	N.D.	100	AS+PC	36,15	31,43	1,13
Germany	<b>Deutsche Telekom</b>	Surf DSL 1000	xDSL	12	1000	0	-	25	10	1024	AV+AS	29,53	27,60	1,00
Greece	Tellas	Tella ADSL Best price	xDSL	12	1024	unlimited	unlimited	1	N.D.	0	-	19,42	21,11	0,76
Hungary	GTS-Datanet	YO! Alap	xDSL	12	555	unlimited	unlimited	1	N.D.	15	AV+AS	16,81	25,23	0,91
Iceland	<b>Siminn</b>	Grunnaskrift	xDSL	6	1024	1	-	0	N.D.	0	AS+ASW+FW+PC+PM	11,52	19,27	0,70
Ireland	Access Telecom	Imagine Up to 1 Mb	xDSL	12	1024	10	-	1	5	25	-	20,08	17,16	0,62
Italy	<b>Telecom Italia</b>	Alice Day	xDSL	-	640	-	0	1	N.D.	300	AV+AS	49,67	45,57	1,64
Japan	<b>NTT East</b>	Flet's ADSL Entry (1M Type)	xDSL	-	1024	unlimited	unlimited	N.D.	N.D.	N.D.	-	27,22	24,65	0,89
Latvia	Dautkom TV	Bronze	FTTx	12	1024	unlimited	unlimited	3	1	0	-	11,30	15,72	0,57
Lithuania	Vinita	Laikas	Cable	12	1024	0	-	N.D.	N.D.	N.D.	-	3,70	5,48	0,20
Norway	Ventelo	Bredbaand - 1024/1024 kbps shdsl	xDSL	12	1024	unlimited	unlimited	1	5	30	AS+FW	97,15	75,04	2,71
Poland	Vectra	Internet 1Mbps	Cable	-	1024	unlimited	unlimited	1	N.D.	400	-	16,79	28,84	1,04
Slovenia	T-2	VDSL 1M / 256 Kbps	FTTx	-	1024	unlimited	unlimited	1+	N.D.	100	AV+AS+FW	14,00	16,87	0,61
Spain	<b>Telefonica</b>	ADSL a tua medida unlimited nights & weekends	xDSL	12	1024	-	0	5	N.D.	25	-	54,61	58,09	2,10
Spain	<b>Telefonica</b>	ADSL a tua medida unlimited nights	xDSL	12	1024	-	0	5	N.D.	25	-	54,61	58,09	2,10
Spain	<b>Telefonica</b>	ADSL a tua medida unlimited weekends	xDSL	12	1024	-	0	5	N.D.	25	-	54,61	58,09	2,10
State of California	Charter Communications	Lite	Cable	-	1024	unlimited	unlimited	10	N.D.	20	AS+ASW+FW+PC+PM	13,51	15,74	0,57
State of Colorado	<b>Verizon</b>	Verizon High Speed internet Starter Plan	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	16,88	19,68	0,71
State of New York	<b>Verizon</b>	Verizon High Speed internet Starter Plan	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	23,64	27,55	0,99
(*) Duration = '-' indicates that 12 months was assumed														
(**) N.D. indicates information is not provided by ISP														
(***) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line														
(****) Indexed ranking: ranking of offers based on the median value of this set of results														
ISPs in <b>italic &amp; bold</b> are incumbent operators														

Table 12: Detailed information on least expensive offer per country (512kbps-1024kbps (incl.))

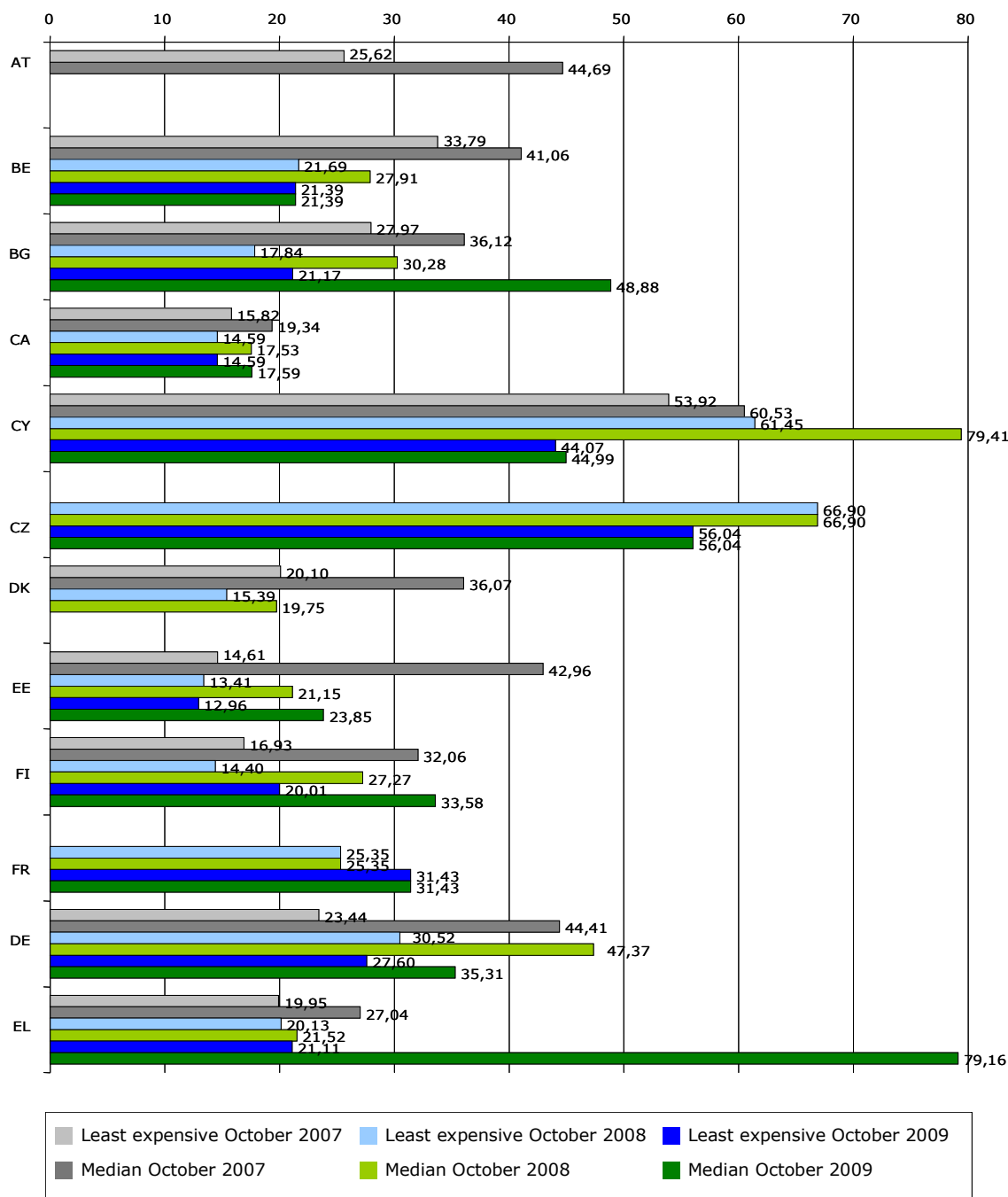
**4.2.2.e BASKET "512KBPS-1024KBPS (incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2007 – October 2008 – October 2009

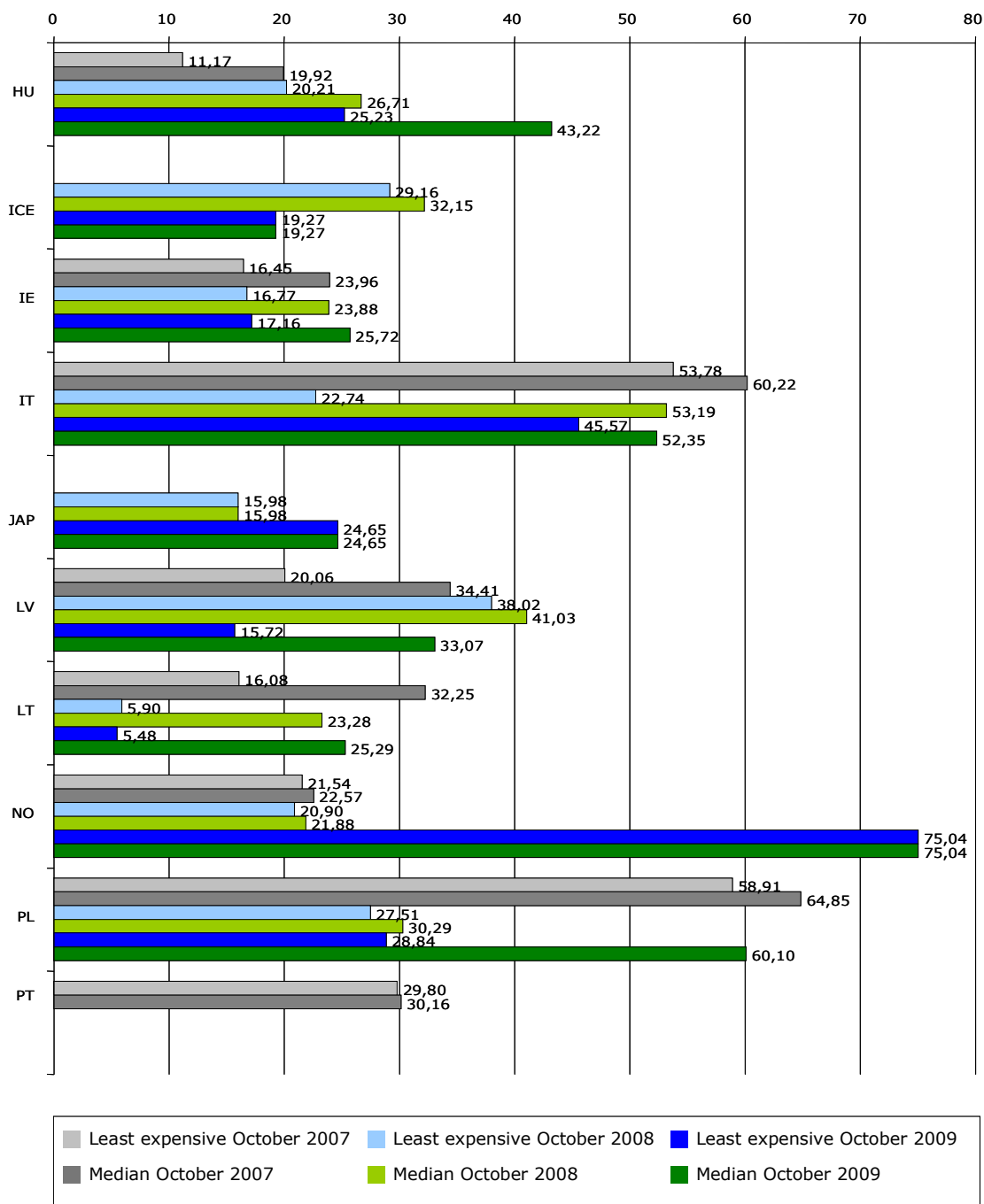
Least expensive and median offers:

Basket "512-1024 (incl.)", 1GB or 20 hours/month

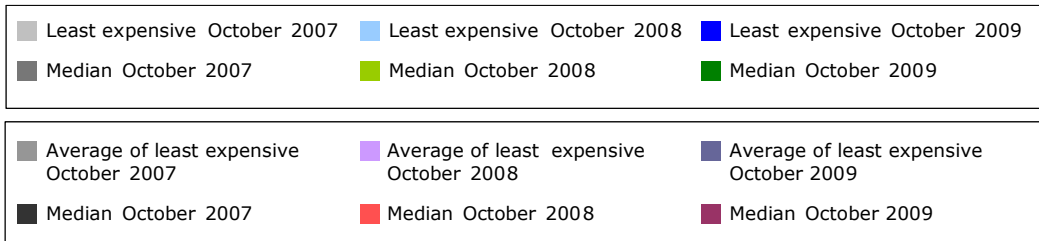
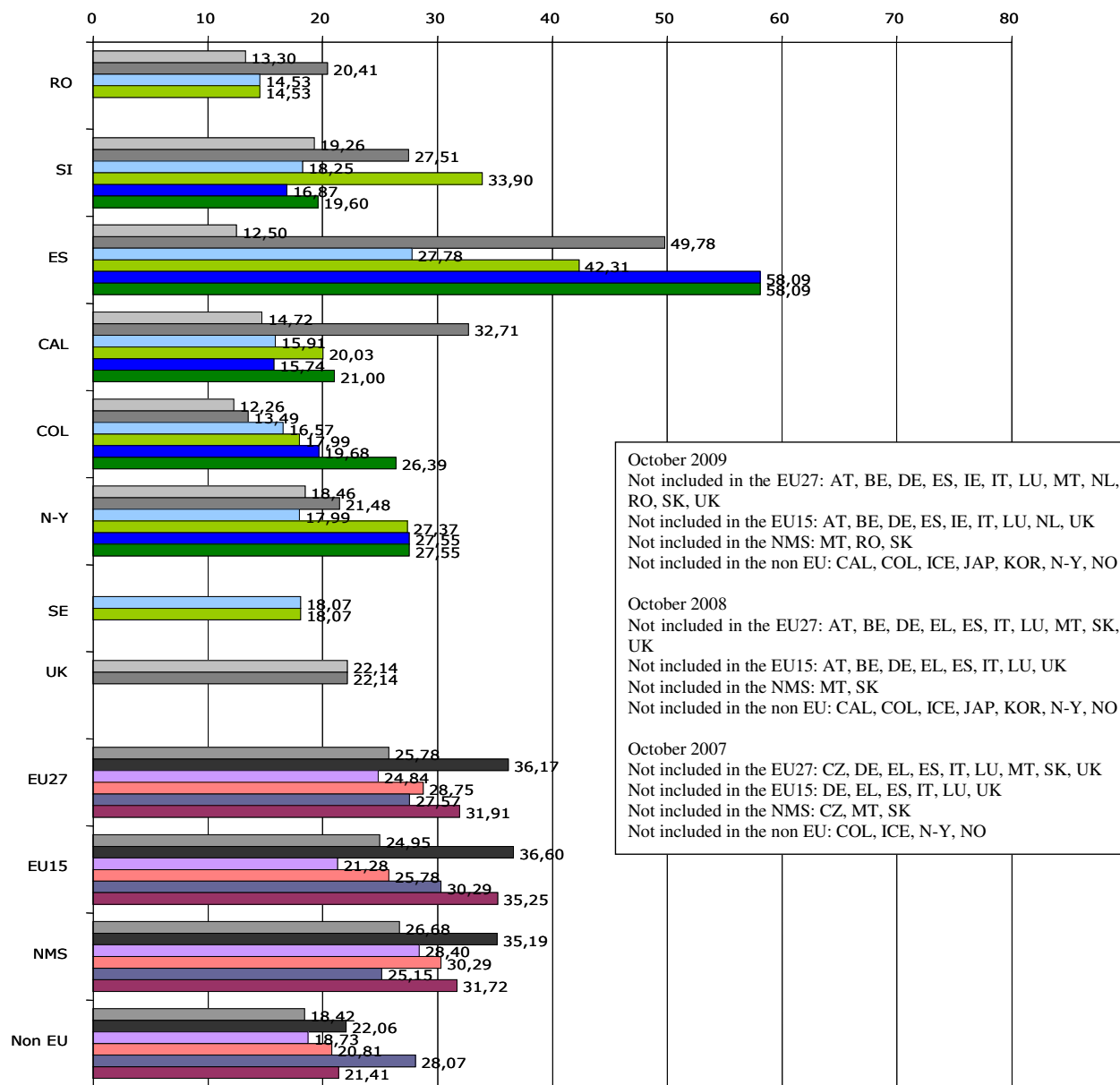
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "512-1024 (incl.)", 1GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "512-1024 (incl.)", 1GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**





#### **4.2.2.f CONCLUSIONS ON BASKET 512KBPS-1024KBPS (incl.):**

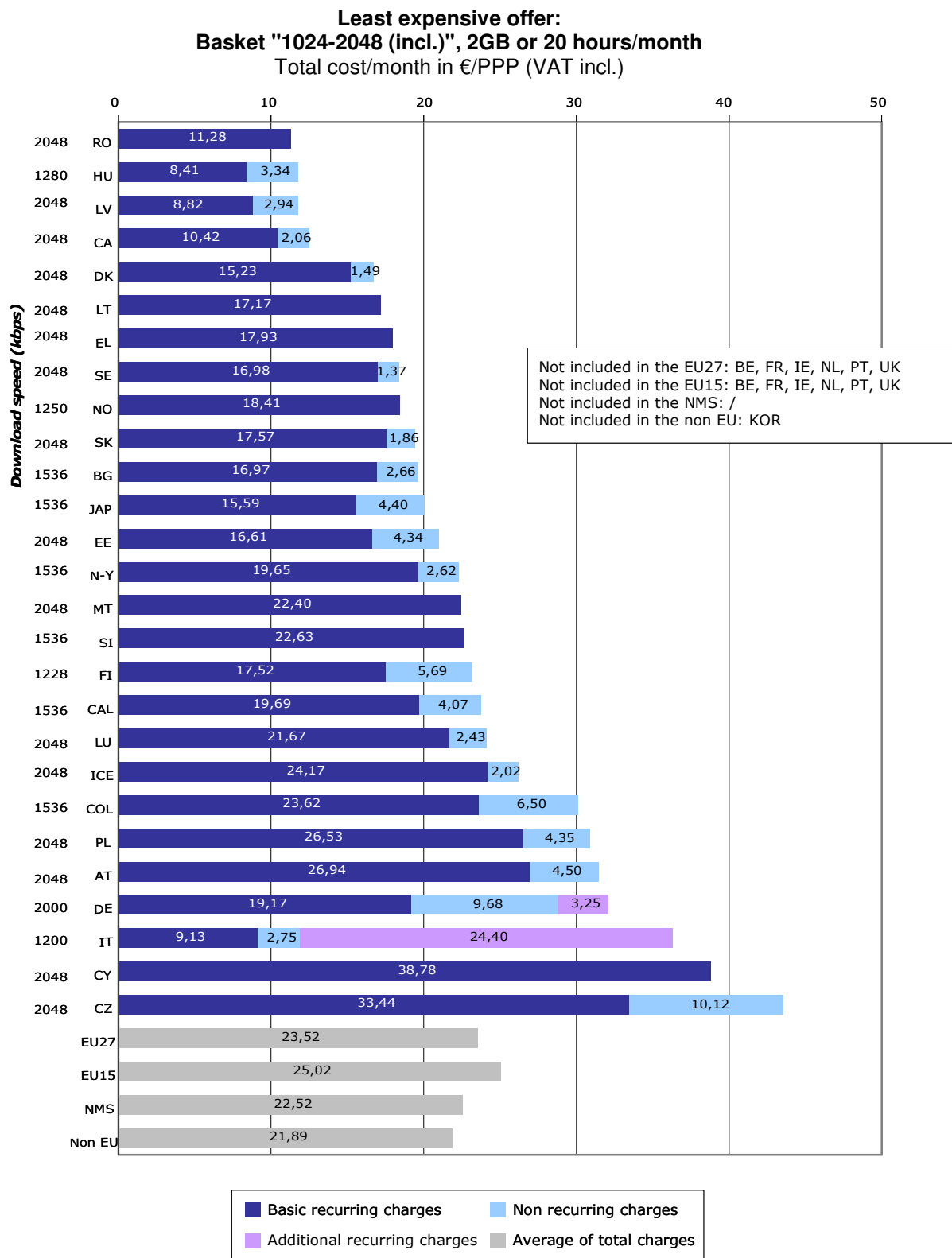
- For some countries, no offer of the selected ISPs was available in this basket for April 2009; these countries include *Austria, Denmark, Korea, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia, Sweden* and *the United Kingdom*. *Denmark* and *Sweden* still had offers in this basket in October 2008. No country had no offers for this basket in October 2008, but did in April 2009.
- From the ISPs of the following countries, only one offer was available for this basket: *Czech Republic, France, Iceland, Japan, Norway, Spain* and *State of New York*. The charge for this offer equals the least expensive and no median value was determined for these countries.
- For Belgium, two offers are presented as both have the same price. For *Spain*, three offers from the same provider were available, which had the same total price, but which include unlimited download during night time and/or weekend.
- The offers for *Bulgaria, Finland, Greece, Hungary* and *Latvia* are only available in certain areas of the country.
- The *Greek* offer is naked DSL, and does not require a telephone or cable connection.
- The offers for *Bulgaria* (Cable Tel), *Estonia* (STV) and *Finland* (Elisa) are only available to clients who have an analog cable TV contract with the ISP.
- The *Spanish* offer provides unlimited download volume during night time.
- Of the nine metered offers selected in this basket, four needed a normalisation.
  - The offer for *Germany* includes 0 GB. The additional cost per GB is 1.63 EUR/PPP. The total charge of 27.60 EUR/PPP is calculated as follows: 9.68 non-recurring charges + 16.29 recurring charges + 1 \* 1.63 for 1GB download volume.
  - The *Italian* offer is time-metered and includes 0 hours. As the charge is 1.83 EUR/PPP per hour, the total charge of 45.57 EUR/PPP was calculated as follows: 6.12 non-recurring charges + 2.75 recurring charges + 1.83 \* 20 = 36.70 EUR/PPP for 20 hours.
  - The metered offer for *Lithuania* includes 0 GB download volume. As the charge is 0.26 EUR/PPP per GB, the total charge of 5.48 EUR/PPP was calculated as follows: 5.22 EUR/PPP non-recurring charges + 0.26 \* 1 for 1 GB.
  - The *Spanish* offer is time-metered and includes 0 hours. The cost per hour is 1.79 EUR/PPP, with a maximum monthly cost of 22.34 EUR/PPP. The total charge of 58.09 is calculated as follows: 6.26 non-recurring charges + 29.49 recurring charges + 22.34 for 20 hours.
- For some countries a major difference can be noted between the least expensive and the median offer.
  - *Bulgaria* has two offers in this basket, one of which is a cable offer with a charge of 21.17 EUR/PPP, while the other is Plug&Play with a monthly charge of 76.60 EUR/PPP.
  - The high median for *Greece* is explained by the fact that there are two offers in this basket, one of which is xDSL with a monthly charge of 21.11 EUR/PPP, and the other is a satellite offer with a monthly charge of 137.21 EUR/PPP (82.97 non-recurring charges + 54.24 recurring charges).

- For *Lithuania*, there are 30 offers for this basket, of which 13 offers have a monthly charge over 30 EUR/PPP, and six of these have a charge over 100 EUR/PPP.
- There are seven offers in *Poland* for this basket, of which five have a charge over 50 EUR/PPP. The two offers with lower charges are cable offers, while the others are xDSL or Plug&Play.
- The omission of non-recurring charges influences the ranking of the following countries: *Bulgaria, Canada, Estonia, Hungary, Slovenia*, and *the State of California*. Non-recurring charges represent a significant share of total charges in *Germany, Italy* and *Lithuania*.
- In three countries, the charges of the least expensive offer in the sample increased significantly compared to the charges in October 2008. These countries are *Italy, Norway* and *Spain*. In seven other countries, there was a more moderate increase in charges: *Bulgaria, Finland, France, Hungary, Japan, the State of Colorado* and *the State of New York*.
- In four other countries, the charge of the least expensive offers decreased significantly compared to October 2008. These countries are *Cyprus, Czech Republic, Iceland* and *Latvia*.
- Overall, it could be observed that the average cost of the least expensive offers in the EU27 countries increased slightly. This result comes from higher average least expensive charges in the EU15 and lower charges in the NMS. The average of least expensive charges also increased in non-EU countries. The median offer for both the EU27 and the non-EU countries increased compared to October 2008.

### 4.2.3 **BASKET "1024KBPS -2048KBPS (incl.)", IN €/PPP (VAT INCL.)**

#### 4.2.3.a **LEAST EXPENSIVE OFFER**

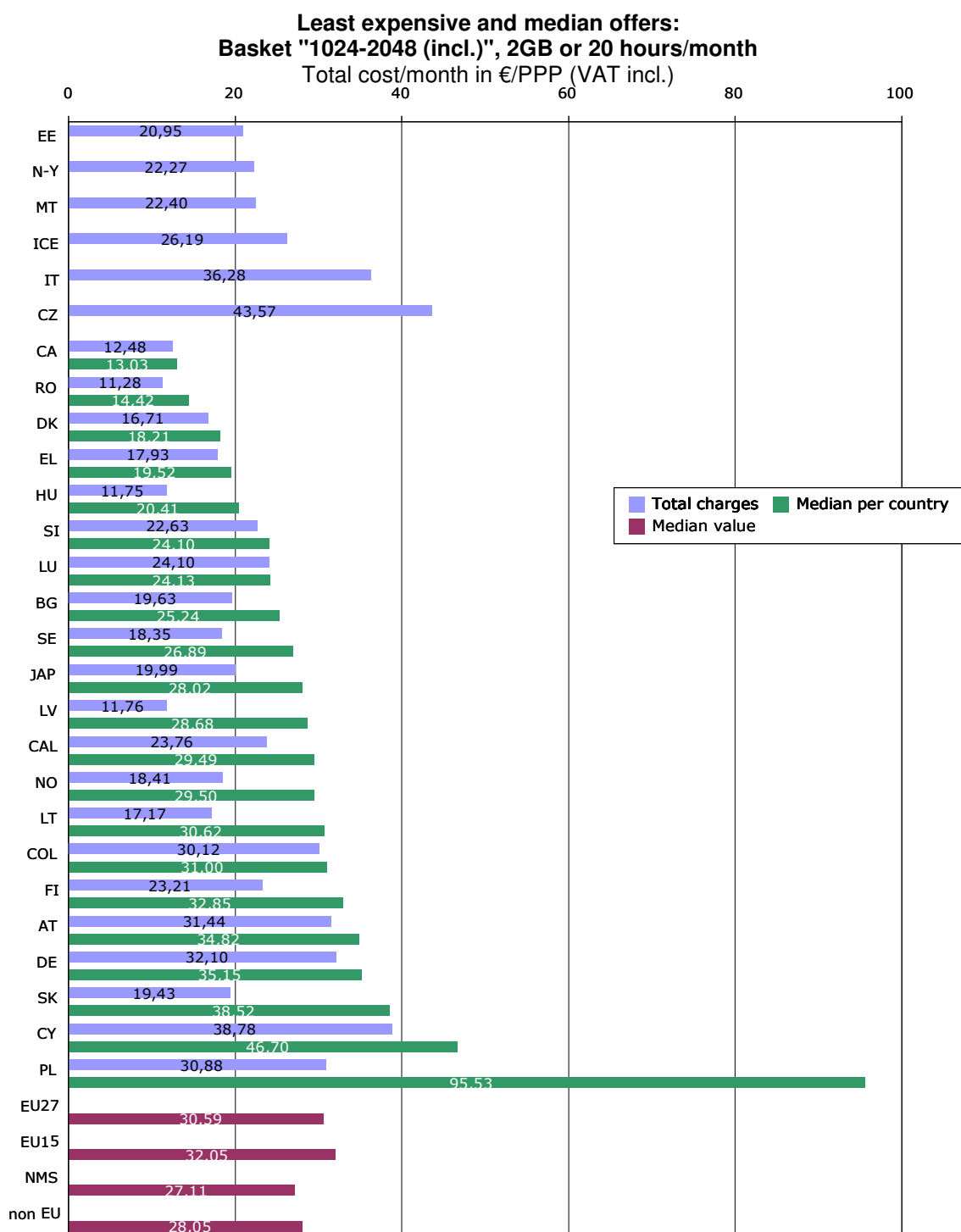
There were no offers in the sample for *Belgium, France, Ireland, Korea, Portugal, The Netherlands, Spain and the United Kingdom*.



#### **4.2.3.b BASKET "1024KBPS -2048KBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS**

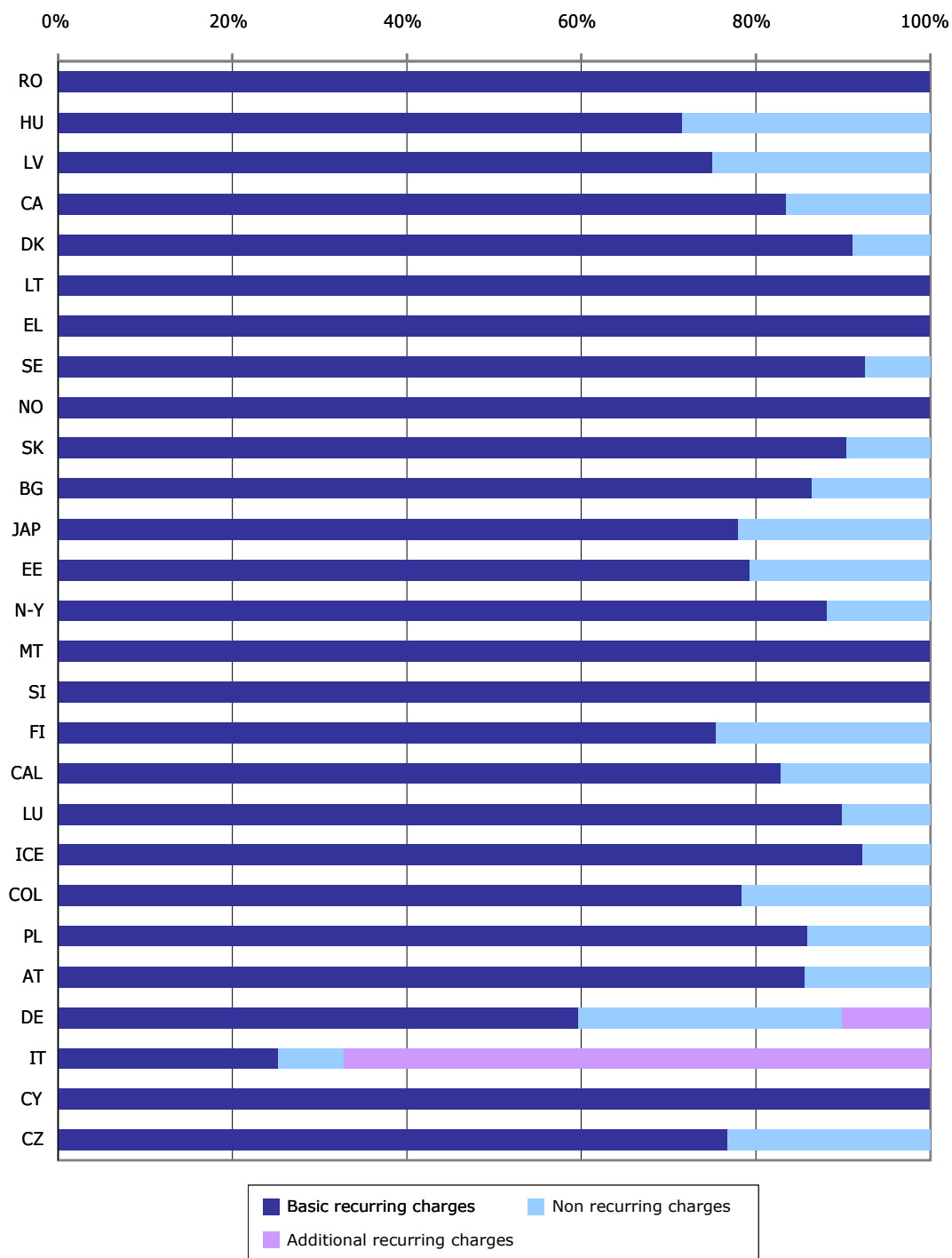
For the following countries, the median value is equal to the charge of the least expensive offer and was therefore not represented: *Czech Republic, Estonia, Iceland, Italy and the State of New York*.

For *Malta*, two offers were available in the basket and both had the same total charges.



#### 4.2.3.c BASKET "1024KBPS -2048KBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
**Basket "1024-2048 (incl.)", 2GB or 20 hours/month**  
 Total cost/month in €/PPP (VAT incl.)



#### 4.2.3.d BASKET "1024KBPS -2048KBPS (incl.)", LIST OF THE SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
Austria	Telekom Austria	aonBlizz light	FTTx	12	2048	unlimited	unlimited	1	5	20	AV+AS	34.90	31.44	1,36
Bulgaria	Internet group	Internet Group Economic 1.5Mbps	FTTx	12	1536	unlimited	unlimited	0	0	0	-	9.43	19.63	0,85
Canada	Bell Canada	Bell Internet Essentiel Plus (ON)	xDSL	12	2048	2	-	N.D.	11	5	PC+PU+PM	15.42	12.48	0,54
Cyprus	Otenet Telecommunications	OnDSL Fast	xDSL	-	2048	unlimited	unlimited	1	N.D.	0	AV+AS	38.00	38.78	1,68
Czech Republic	Telefonica O2	O2 Internet Start	xDSL	-	2048	unlimited	unlimited	1	5	30	AV	30.36	43.57	1,89
Denmark	Fullrate	redbaand 2 Mbit / 512 kbit bredbåndsforbindelse med ta	xDSL	6	2048	unlimited	unlimited	0	0	0	-	24.93	16.71	0,72
Estonia	STV	STV Mini	Cable	-	2048	unlimited	unlimited	1	1	100	-	15.40	20.95	0,91
Finland	Elisa	Elisa Laajakaista Heti (Tampere) 1.2M	Cable	18	1228.8	unlimited	unlimited	5	N.D.	500	-	29.01	23.21	1,00
Germany	Deutsche Telekom	Surf DSL 2000	xDSL	12	2000	0	-	25	10	1024	AV+AS	34.35	32.10	1,39
Greece	OTE	Conn-x 2 mbps	xDSL	12	2048	unlimited	unlimited	1	N.D.	0	-	16.50	17.93	0,78
Hungary	Externet	Otthoni Prepaid Traffic Alfa	xDSL	12	1280	2	-	3	N.D.	100	AV+AS	7.83	11.75	0,51
Iceland	Siminn	Leið 1	xDSL	6	2048	10	-	5	N.D.	0	AS+ASW+FW+PC+PM	15.66	26.19	1,13
Italy	Liberio	ADSL Light	xDSL	-	1200	-	6	1	N.D.	150	AV+AS	39.55	36.28	1,57
Japan	NTT West	Flet's ADSL 1.5M Plan	xDSL	-	1536	unlimited	unlimited	N.D.	N.D.	N.D.	-	22.08	19.99	0,87
Latvia	Livas Net	Email	Cable	12	2048	unlimited	unlimited	1	1	2048	-	8.46	11.76	0,51
Lithuania	Dokeda	Kaunas D1	FTTx	12	2048	unlimited	unlimited	2	N.D.	N.D.	-	11.58	17.17	0,74
Lithuania	Dokeda	Vilnius D1	FTTx	12	2048	unlimited	unlimited	2	N.D.	N.D.	-	11.58	17.17	0,71
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 2 Mbits/s	xDSL	24	2048	unlimited	unlimited	5	N.D.	100	-	28.92	24.10	1,04
Malta	GO	Wimax	Plug&Play	24	2048	25	-	4	N.D.	N.D.	AV+AS	16.35	22.40	0,97
Malta	GO	Go home up to 2 Mbps	xDSL	-	2048	25	-	4	N.D.	N.D.	AV+AS	16.35	22.40	0,92
Norway	Get	Bredbaand - Small	Cable	12	1250	unlimited	unlimited	1	1	5	AV+FW	23.83	18.41	0,80
Poland	Vectra	Internet 2Mbps	Cable	-	2048	unlimited	unlimited	2	N.D.	400	-	17.97	30.88	1,34
Romania	UPC romania	UPC INTERNET SMALL	Cable	-	2048	unlimited	unlimited	1	N.D.	N.D.	-	6.12	11.28	0,49
Slovakia	UPC Slovakia	FIBER power 2	Cable	12	2048	unlimited	unlimited	3	15	25	AV+AS	14.38	19.43	0,84
Slovenia	Amis	Amis internet 1536/256	Cable	-	1536	unlimited	unlimited	unlimited	6	50	AV+AS+FW+PC	18.78	22.63	0,98
State of California	AT&T	DSL Express	xDSL	-	1536	unlimited	unlimited	11	11	N.D.	AV+ASW+FW	20.39	23.76	1,03
State of Colorado	Qwest	Fast	xDSL	12	1536	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	25.84	30.12	1,30
State of New York	Time Warner Cable	NY Connect Basic	Cable	12	1536	unlimited	unlimited	5	N.D.	N.D.	AV+AS+FW+PC	19.11	22.27	0,96
Sweden	ComHem	Bredband Small 2	Cable	12	2048	unlimited	unlimited	5	1	125	-	20.86	18.35	0,79
(*) Duration = '-' indicates that 12 months was assumed														
(**) N.D. indicates information is not provided by ISP														
(***) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line														
(****) Indexed ranking: ranking of offers based on the median value of this set of results														
ISPs in <i>italic</i> & <b>bold</b> are Incumbent operators														

Table 13: Detailed information on least expensive offer per country (1024kbps-2048kbps incl.)

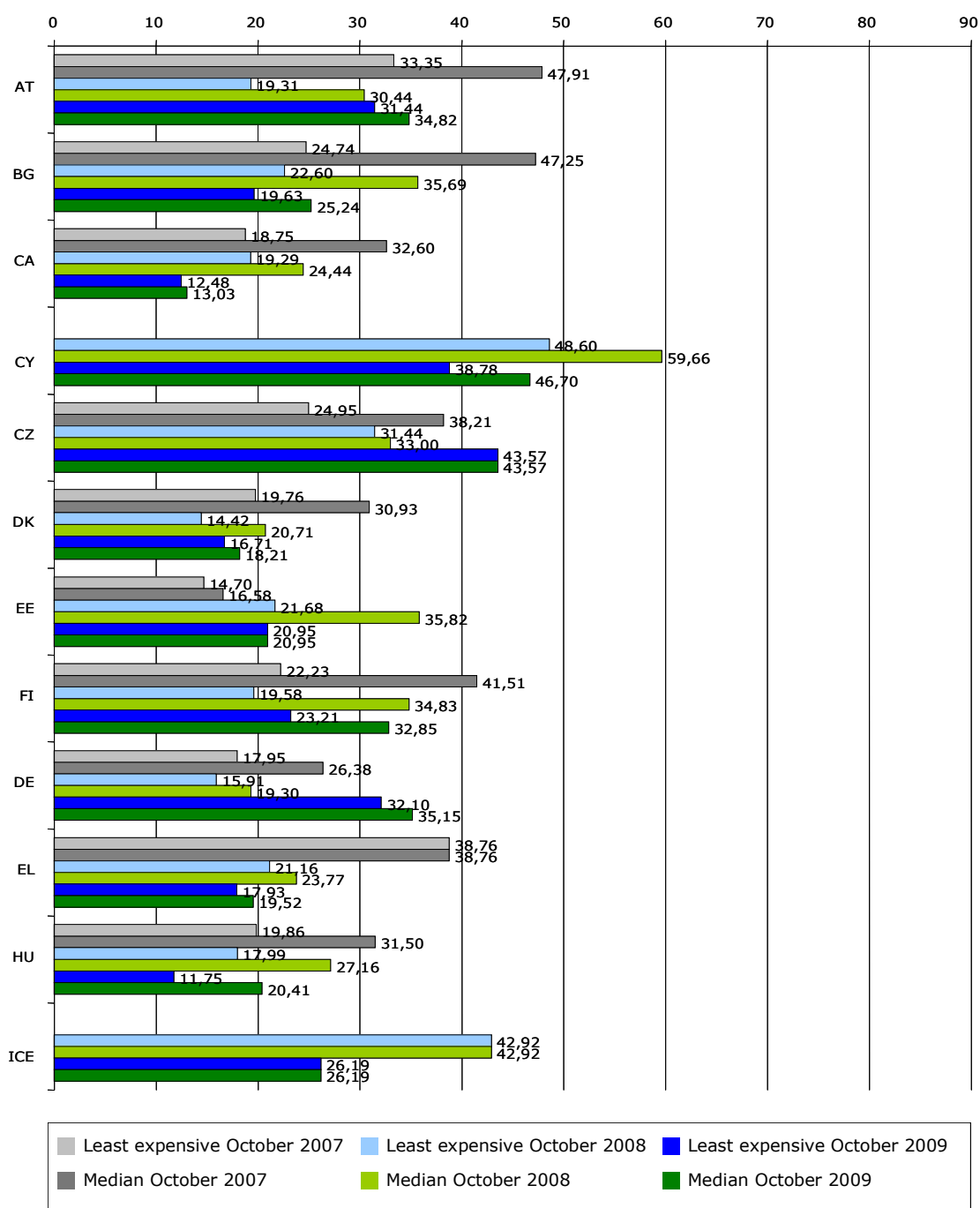
**4.2.3.e BASKET "1024KBPS-2048KBPS(incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2007 – October 2008 – October 2009

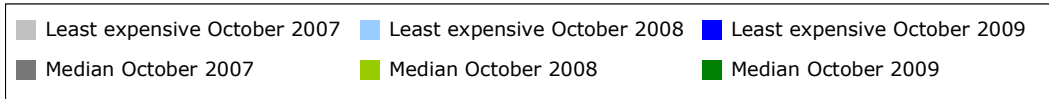
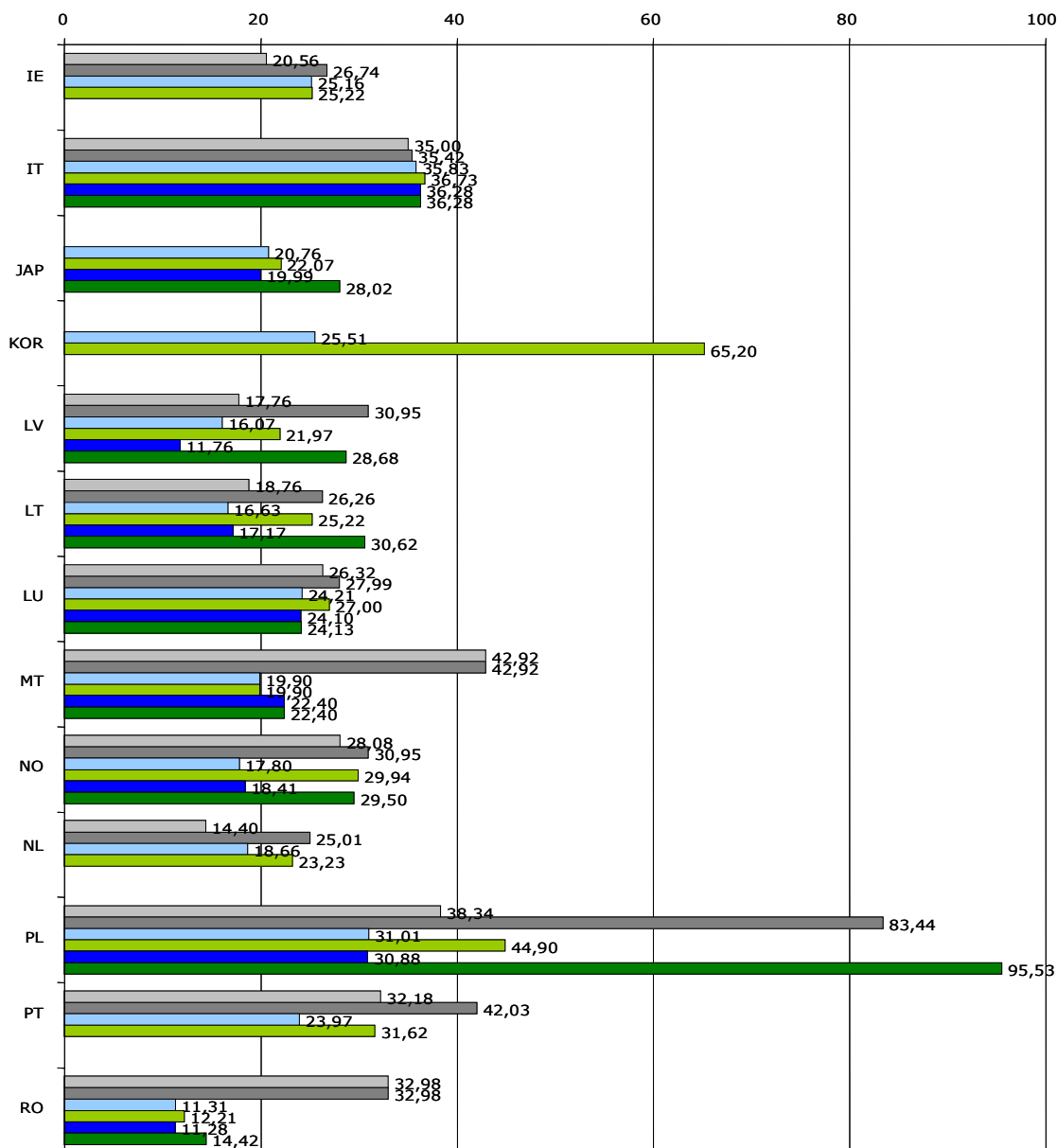
Least expensive and median offers

Basket "1024-2048 (incl.)", 2GB or 20 hours/month

Total cost/month in €/PPP (VAT incl.)

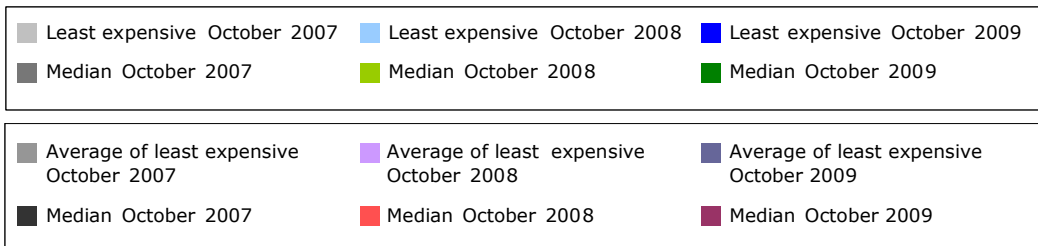
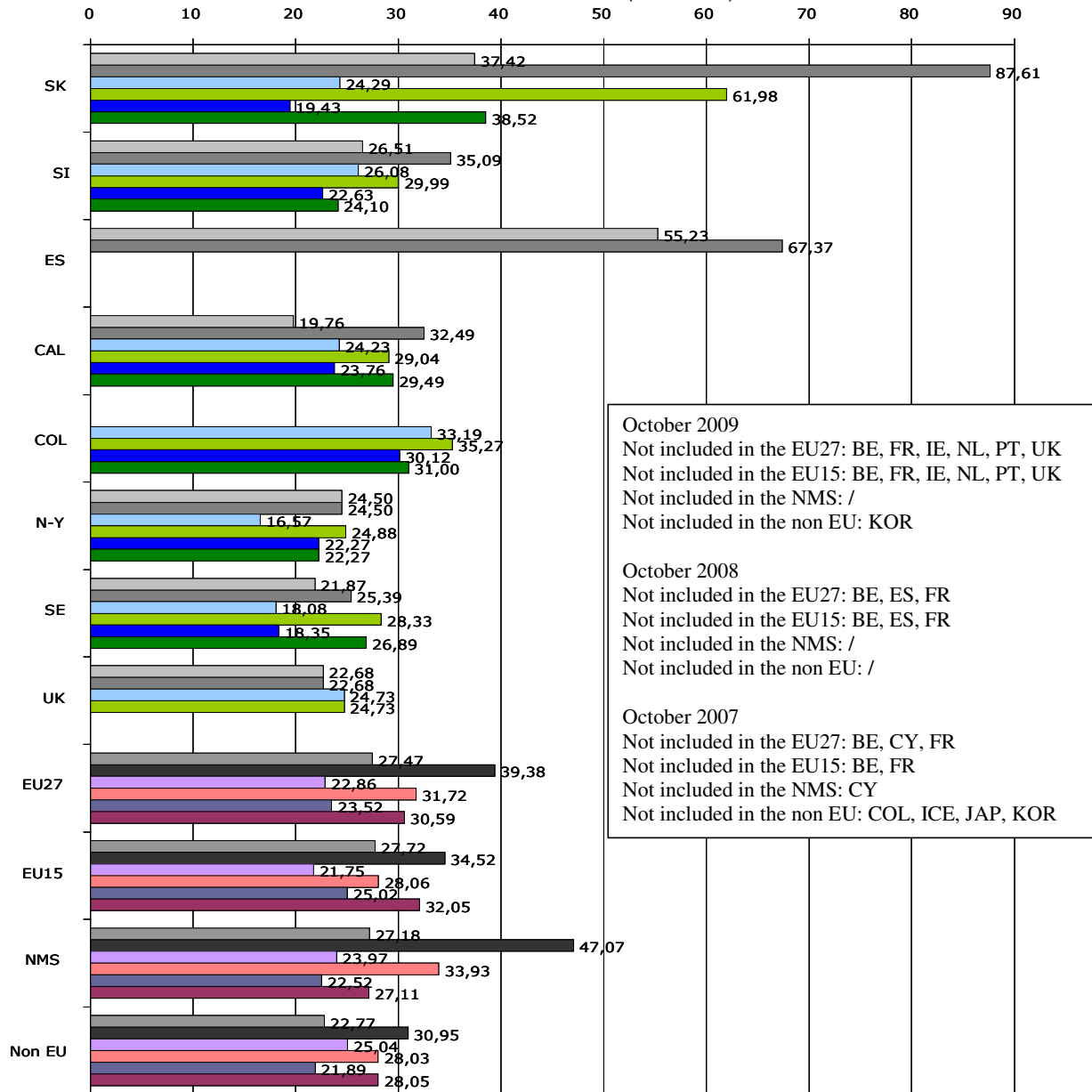


**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers**  
**Basket "1024-2048 (incl.)", 2GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**





**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers**  
**Basket "1024-2048 (incl.)", 2GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



#### **4.2.3.f CONCLUSIONS ON BASKET 1024KBPS-2048KBPS (incl.):**

- For some countries, no offer of the selected ISPs was available in this basket: *Belgium, France, Ireland, Korea, Portugal, Spain, The Netherlands and the United Kingdom*. Two of these countries, *The Netherlands and the United Kingdom*, still had offers in this sample in April 2009.
- From the ISPs in the following countries, only one offer was available for this basket: *Czech Republic, Estonia, Iceland, Italy and the State of New York*. This shows that the charge for this offer equals the least expensive and no median value was determined for these countries.
- For two countries, *Lithuania* and *Malta*, two offers are presented as both have the same price. In both cases, these are offers of the same provider: in Lithuania these offers are available to customers in two different regions (Vilnius and Kaunas); in Malta the technology of the two offers is different (Plug&Play and xDSL).
- The offers for *Austria, Bulgaria, Canada, Finland, Hungary, Latvia, Lithuania and Luxembourg* are only available in certain areas of the country.
- The offers for *Estonia* (STV) and *Finland* (Elisa) are only available to clients who have an analog cable TV contract with the ISP.
- In *Slovakia*, the ISP requires a deposit for use of equipment.
- Of the six metered offers selected as least expensive in this basket, two offers needed a normalisation process.
  - *Germany*: the German offer includes 0GB. The charge for an additional GB is 1.63 EUR/PPP. As 2 GB need to be added, the total charge is equal to 32.1 EUR/PPP: 9.68 EUR/PPP non-recurring charges + 19.17 EUR/PPP recurring charges + 3.26 EUR/PPP additional internet access charges.
  - *Italy*: 6 hours during daytime are included in the offer and the charge per additional hour is 1.74 EUR/PPP. 14 hours need to be added, which totals 24.40 EUR/PPP for additional recurring Internet access charges. 2.75 EUR/PPP non-recurring charges + 9.13 EUR/PPP recurring charges + 24.40 EUR/PPP additional internet access charges equals 36.28 EUR/PPP.
- For some countries a major difference can be noted between the least expensive and the median offer.
  - *Hungary*: 7 out of 14 offers for this basket have charges above 20 EUR/PPP while the least expensive offer have charges equal to 11.75 EUR/PPP.
  - *Lithuania*: there are 18 offers for this basket, out of which ten with charges over 30 EUR/PPP and two of these with charges over 125 EUR/PPP.
  - There are 3 offers in *Slovakia* for this basket. Two of these are xDSL offers and have charges higher than 35 EUR/PPP; the other one have charges equal to 19.43 EUR/PPP and is a cable offer.
  - *Poland*: 4 out of 5 offers have charges above 70 EUR/PPP and two of these even above 115 EUR/PPP, which explains the high median

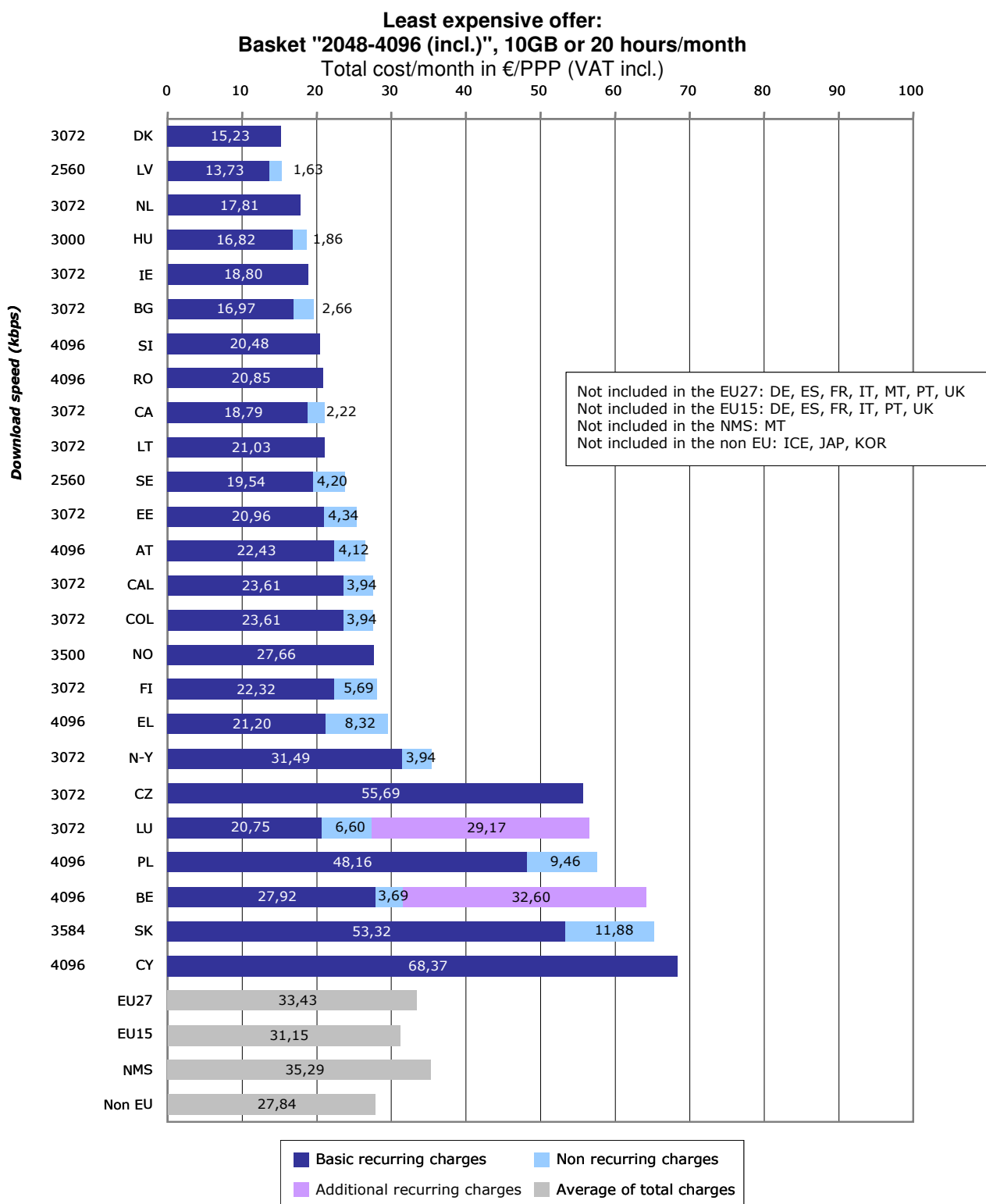
of 95.53 EUR/PPP compared to the value of 30.88 EUR/PPP of the least expensive offer. These 4 offers are xDSL while the least expensive one is a cable offer.

- The omission of non-recurring charges in the following countries influences the place they take in the overall ranking of the least expensive offers: *Cyprus, Greece, Lithuania, Malta, Norway, Romania* and *Slovenia*. Non-recurring charges do not represent a significant share of total charges in any country.
- In eight countries, the charges of the least expensive offer in the sample of October 2009 decreased significantly compared to the charges in October 2008. These countries are *Canada, Cyprus, Greece, Hungary, Iceland, Latvia, Slovakia* and *Slovenia*.
- In five other countries, the charge of the least expensive offers increased compared to October 2008. These countries are *Austria, Czech Republic, Finland, Germany* and *the State of New York*.
- Overall, it could be observed that the average cost of the least expensive offers in the EU27 countries has slightly increased. This increase results of a significant increase in the charges of the least expensive offers in the EU15, while charges remained stable in the NMS. The median charges decreased however significantly in the NMS. In the non-EU countries, the average least expensive offers decreased slightly but median value remained at the same level compared to October 2008.

#### **4.2.4. BASKET "2048KBPS-4096KBPS (incl.)", IN €/PPP (VAT INCL.)**

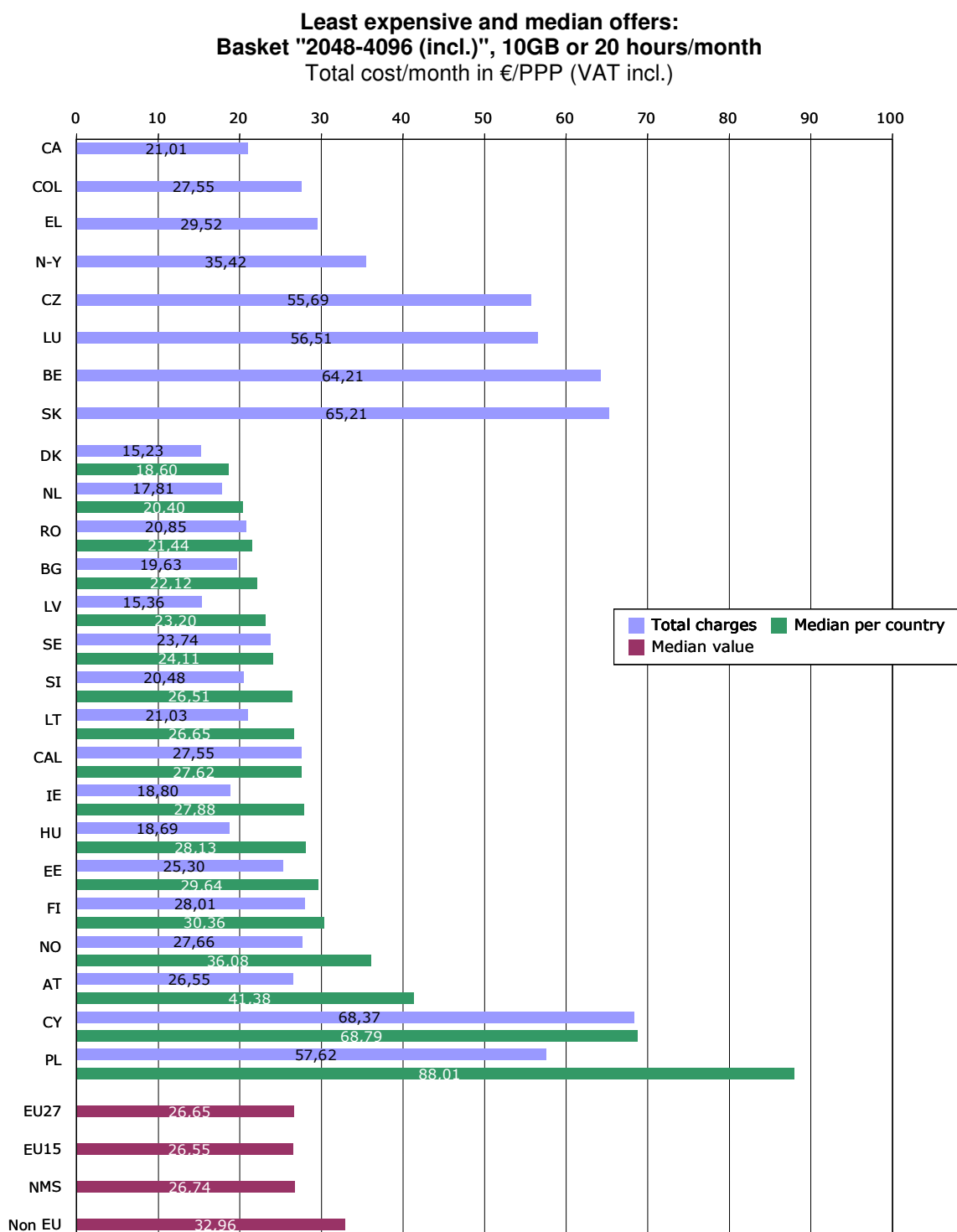
##### **4.2.4.a LEAST EXPENSIVE OFFERS**

For France, Germany, Iceland, Italy, Japan, Korea, Malta, Portugal, Spain and the United Kingdom there were no offers in the sample for this basket in our selection.



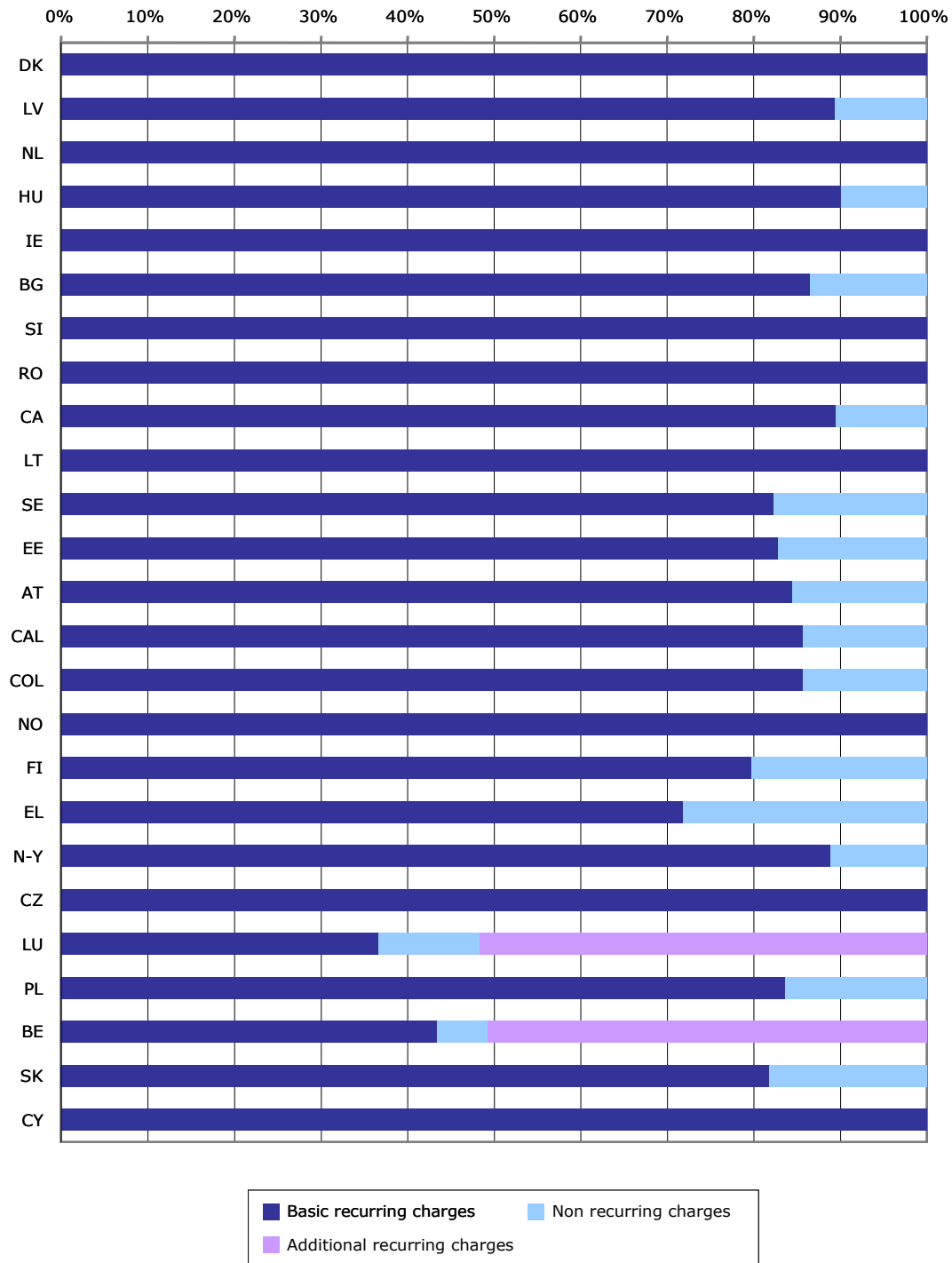
#### **4.2.4.b BASKET "2048KBPS-4096KBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS**

For the following countries, only one offer was available for this basket: *Belgium, Canada, Czech Republic, Greece, Luxembourg, Slovakia, the State of Colorado and the State of New York*. Consequently, no median value could be determined.



#### 4.2.4.c BASKET "2048KBPS-4096KBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
Basket "2048-4096 (incl.)", 10GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



#### 4.2.4.d BASKET "2048KBPS-4096KBPS (incl.)", LIST OF THE SELECTED OFFERS

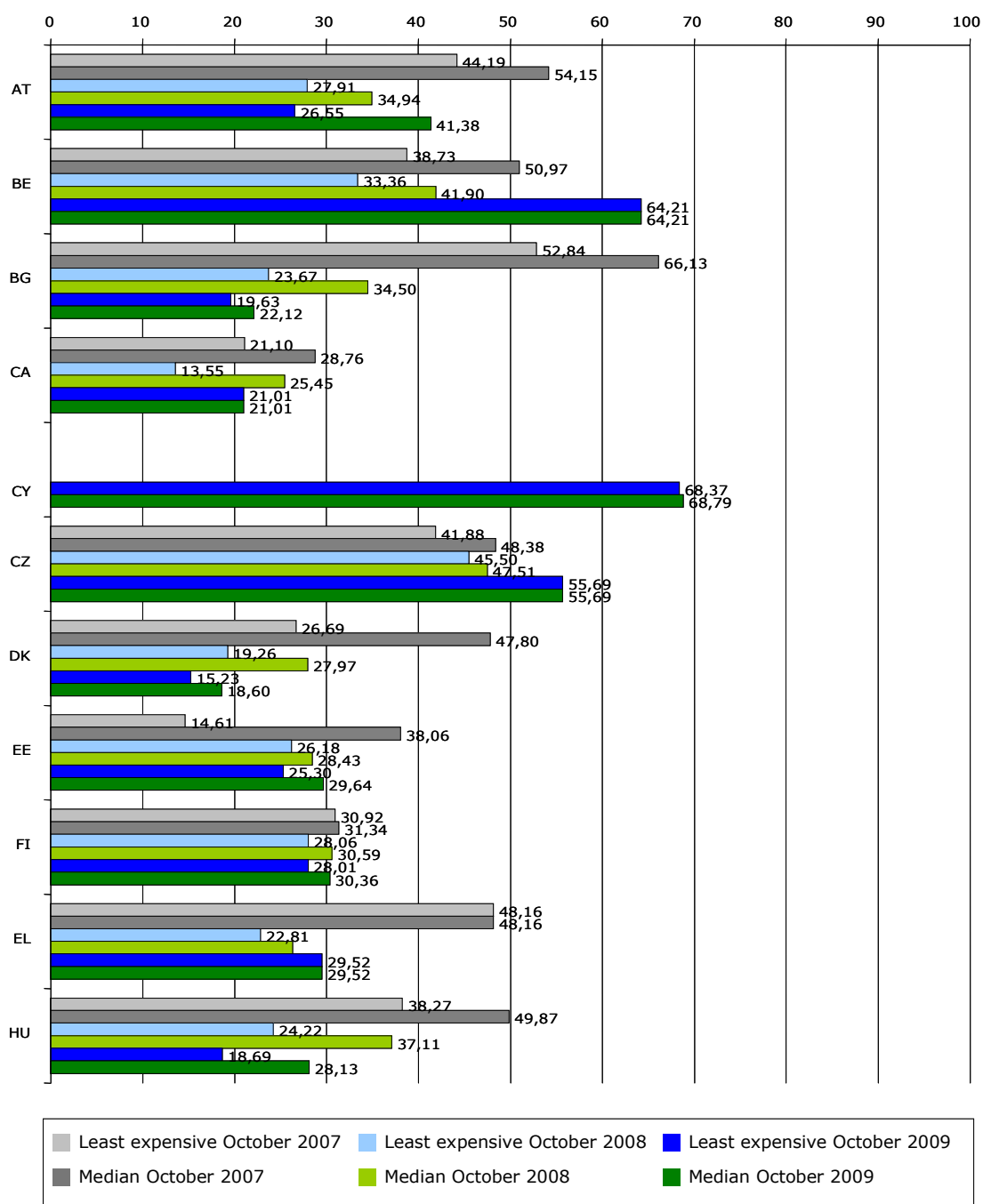
Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	PPP	
Austria	Tele2 Austria	Volles Rohr! M	xDSL	12	4096	unlimited	unlimited	1	5	10	-	29,48	26,55	0,82
Belgium	<b>Belgacom</b>	Belgacom Internet Light	xDSL	12	4096	4	-	1	5	50	AV+AS	72,56	64,21	1,99
Bulgaria	Internet group	Internet Group Economic 3Mbps	FTTx	12	3072	unlimited	unlimited	0	0	0	-	9,43	19,63	0,61
Canada	Rogers Communications	Rogers Lite Internet	Cable	12	3072	25	-	1	5	N.D.	AS+ASW+FW+PC+PM+PU	25,96	21,01	0,65
Cyprus	Otenet Telecommunications	OnDSL Xstream	xDSL	-	4096	unlimited	unlimited	1	N.D.	0	AV+AS	67,00	68,37	2,12
Czech Republic	Ceské Radiokomunikace	Premium WIMAX	Plug&Play	12	3072	unlimited	unlimited	1	N.D.	0	AV+AS	38,81	55,69	1,72
Denmark	Dansk Kabel TV	Lav hastighed 3 Mbit / 512 kbit	Cable	-	3072	unlimited	unlimited	1	5	250	-	22,72	15,23	0,47
Estonia	STV	STV Kodu	Cable	-	3072	unlimited	unlimited	1	1	100	-	18,59	25,30	0,78
Finland	<b>Elisa</b>	Elisa Laajakaista Heti ( Tampere) 3M	Cable	18	3072	unlimited	unlimited	5	N.D.	500	-	35,01	28,01	0,87
Greece	Forthnet	Forthnet ADSL	xDSL	12	4096	unlimited	unlimited	1	N.D.	0	AV+AS	27,16	29,52	0,91
Hungary	Fibernet	EXO1	Cable	-	3000	unlimited	unlimited	1	N.D.	-	-	12,45	18,69	0,58
Ireland	UPC Ireland	3 Mb Broadband Value	Cable	12	3072	30	-	1	15	300	-	22,00	18,80	0,58
Latvia	OSTKOM	Prometej	Cable	12	2560	unlimited	unlimited	1	1	0	-	11,04	15,36	0,48
Lithuania	Penkiu kontinentu komunikacijos centras	Sky Silver	FTTx	12	3072	unlimited	unlimited	3	N.D.	20	AV	14,19	21,03	0,65
Luxembourg	Numericable	Forfait Internet 3 Mega	Cable	12	3072	3	-	1	5	50	AV+AS	67,82	56,51	1,75
Norway	Get	Bredbaand - Medium	Cable	12	3500	unlimited	unlimited	1	3	10	AV+FW	35,81	27,66	0,86
The Netherlands	Ziggo	Internet Z1	Cable	-	3072	unlimited	unlimited	5	N.D.	50	AV+AS	19,95	17,81	0,55
Poland	Aster Group	Pakiet Twoj Dom	Cable	-	4096	unlimited	unlimited	5	10	300	AS	33,53	57,62	1,78
Romania	<b>Romtelecom</b>	Clicknet 4 Mbps	xDSL	12	4096	unlimited	unlimited	1	N.D.	N.D.	-	11,30	20,85	0,65
Slovakia	<b>Slovak Telekom (T-COM)</b>	Turbo 3	xDSL	12	3584	unlimited	unlimited	1	5	N.D.	AV+AS	48,25	65,21	2,02
Slovenia	T-2	VDSL 4M / 512 Kbps	FTTx	-	4096	unlimited	unlimited	1+	N.D.	100	AV+AS+FW	17,00	20,48	0,63
State of California	<b>Verizon</b>	Verizon High Speed Internet Power Plan	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	23,64	27,55	0,85
State of Colorado	<b>Verizon</b>	Verizon High Speed Internet Power Plan	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	23,64	27,55	0,85
State of New York	<b>Verizon</b>	Verizon High Speed Internet Power Plan	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	30,40	35,42	1,10
Sweden	Telenor Sverige	Bredbandsbolaget Bredband 2	FTTx	12	2560	unlimited	unlimited	5	1	-	AV+FW+BU	26,99	23,74	0,73

(\*) Duration = '-' indicates that 12 months was assumed  
(\*\*) N.D. indicates information is not provided by ISP  
(\*\*\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*\*\*) Indexed ranking: ranking of offers based on the median value of this set of results  
**ISPs in italic & bold** are Incumbent operators

Table 14: Detailed information on least expensive offer per country (2048kbps-4096kbps (incl.))

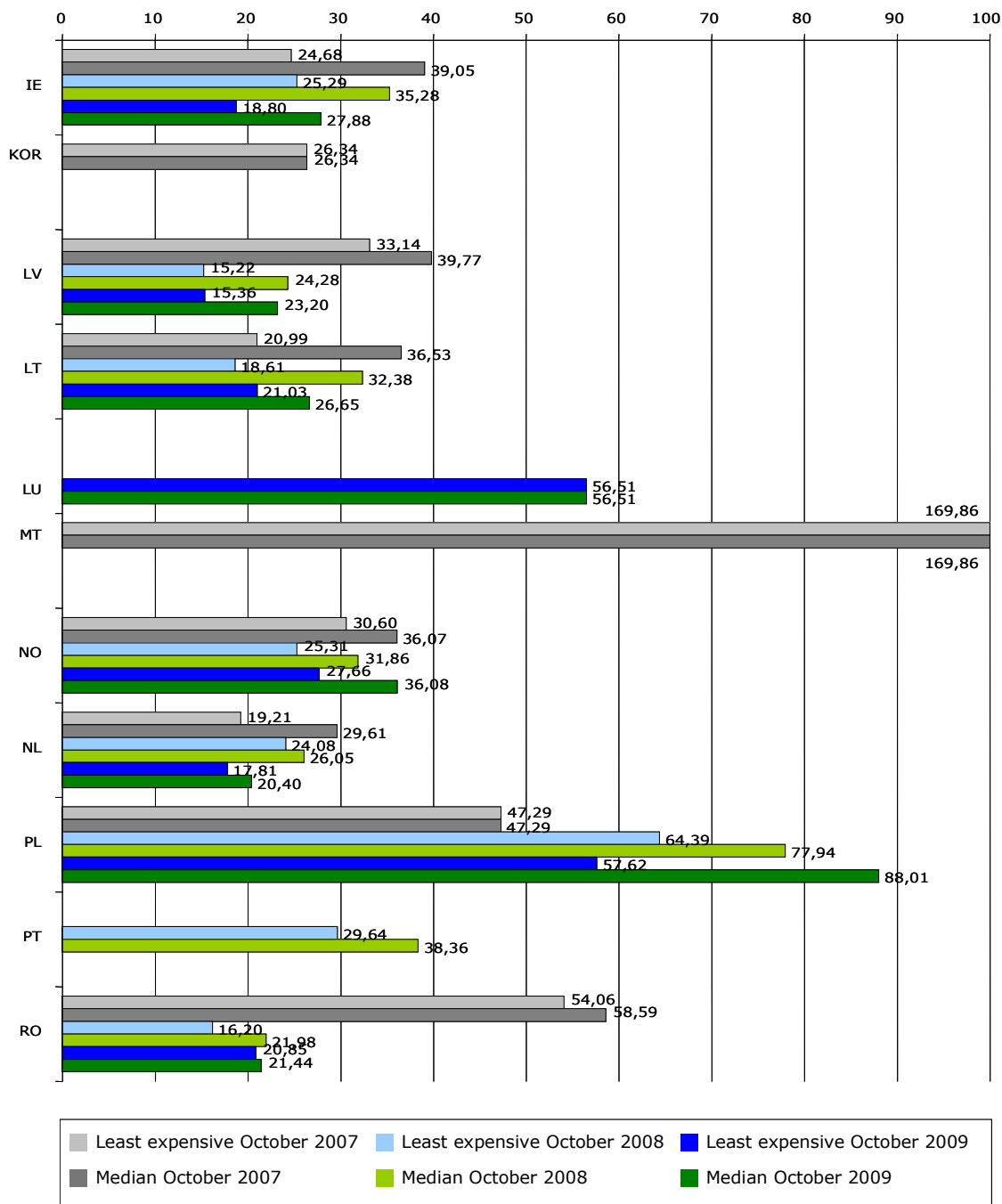
**4.2.4.e BASKET "2048KBPS-4096KBPS (incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009**

**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers**  
**Basket "2048-4096 (incl.)", 10GB or 20 hours/month**  
 Total cost/month in €/PPP (VAT incl.)

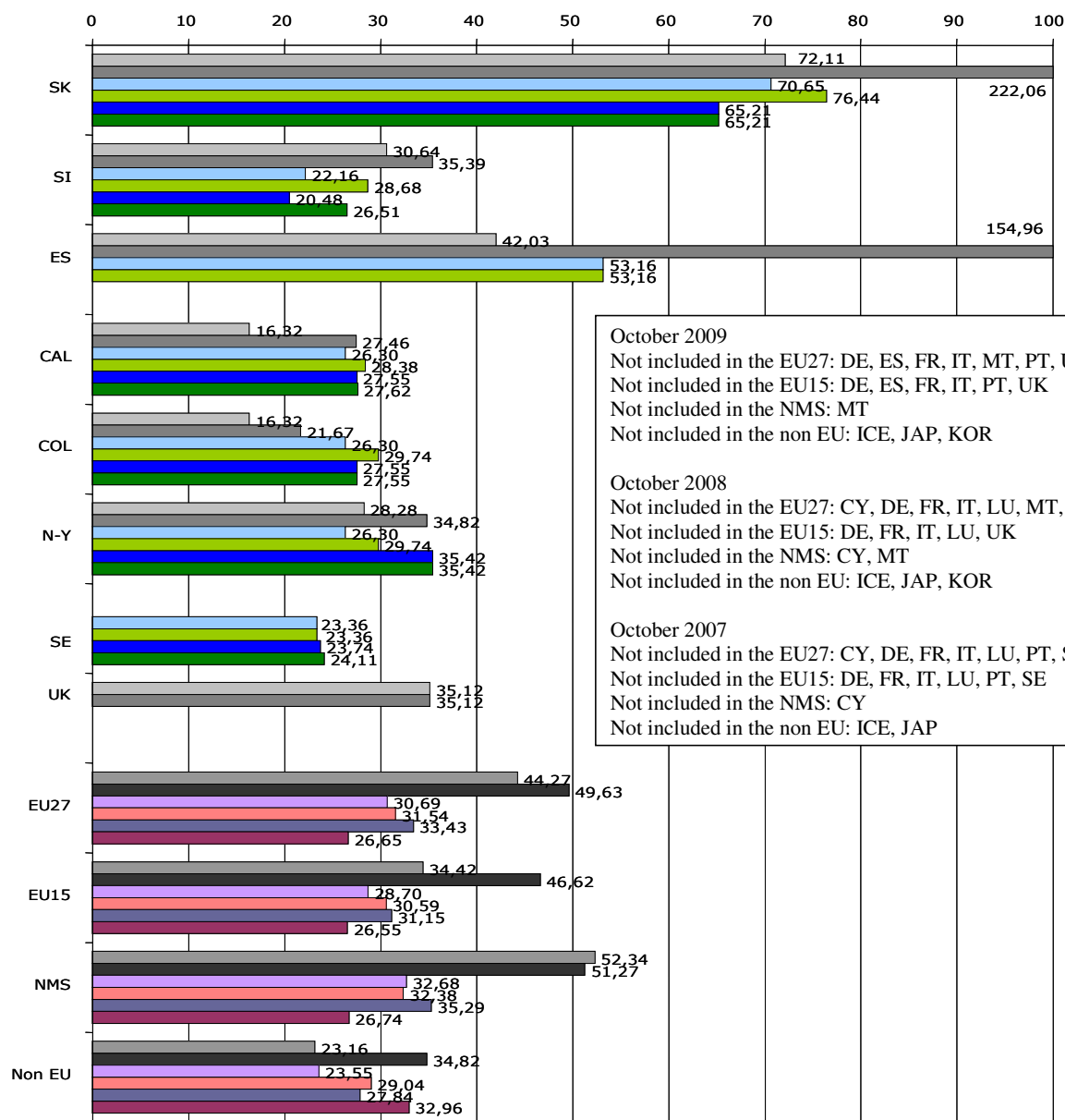




**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers**  
**Basket "2048-4096 (incl.)", 10GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers**  
**Basket "2048-4096 (incl.)", 10GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**October 2009**

Not included in the EU27: DE, ES, FR, IT, MT, PT, UK

Not included in the EU15: DE, ES, FR, IT, PT, UK

Not included in the NMS: MT

Not included in the non EU: ICE, JAP, KOR

**October 2008**

Not included in the EU27: CY, DE, FR, IT, LU, MT, UK

Not included in the EU15: DE, FR, IT, LU, UK

Not included in the NMS: CY, MT

Not included in the non EU: ICE, JAP, KOR

**October 2007**

Not included in the EU27: CY, DE, FR, IT, LU, PT, SE

Not included in the EU15: DE, FR, IT, LU, PT, SE

Not included in the NMS: CY

Not included in the non EU: ICE, JAP

Least expensive October 2007    Least expensive October 2008    Least expensive October 2009  
 Median October 2007    Median October 2008    Median October 2009

Average of least expensive October 2007    Average of least expensive October 2008    Average of least expensive October 2009  
 Median October 2007    Median October 2008    Median October 2009

#### **4.2.4.f CONCLUSIONS ON BASKET 2048KBPS-4096KBPS (incl.)**

- For some countries, no offer of the selected ISPs was available for this basket; these countries include *France, Germany, Iceland, Italy, Japan, Korea, Malta, Portugal, Spain* and *the United Kingdom*. Two of these countries still had offers in the sample for this basket in April 2009; these were: *Japan* and *Portugal*.
- In this basket only one offer was available for the following countries: *Belgium, Canada, Czech Republic, Greece, Luxembourg, Slovakia, the State of Colorado* and *the State of New York*. This means that the charge for this offer equals the least expensive and no median value was determined for these countries.
- The offers for *Bulgaria, Finland, Greece, Hungary* and *Latvia* are only available in certain areas of the country.
- The offer for *Denmark* (Dansk kabel TV) might not be representative, as the ISP focuses on members of certain organisations. It has however been kept in the sample, due to the significant market share of the ISP. The second least expensive offer is offered by You See with a speed of 4 Mbps and a total charge of 17.78 EUR/PPP.
- The offers for *Estonia* (STV), *Finland* (Elisa) and *The Netherlands* (Ziggo) are only available to clients who have an analog cable TV contract with the ISP.
- No phone line or TV contract is required in order to access the *Greek* offer (Forthnet).
- The *Polish* offer (Aster) provides unlimited download volume during the night.
- In the selection of the least expensive offers of this basket there are six metered offers. One of these needed normalisation.
  - The offer for *Belgium* includes 4 GB. The additional cost per GB is 5.43 EUR/PPP. The total charge of 64.21 EUR/PPP is calculated as follows: 3.69 non-recurring charges + 27.92 recurring charges + 6 \* 5.43 for 1GB download volume.
  - *Luxembourg*: The offer includes 3GB. The charge per additional GB is 4.17 EUR/PPP. Charges are calculated as follows: 7 \* 4.17 EUR/PPP + 6.60 EUR/PPP non-recurring charges + 20.75 EUR/PPP recurring charges equals total charges of 56.51 EUR/PPP.
- For some countries a major difference can be noted between the least expensive and the median offer:
  - There are only two offers for this basket in *Austria*, and these are both xDSL: the least expensive offer for which the charge equals 26.55 EUR/PPP and the second one which costs 56.21 EUR/PPP.
  - *Poland* has three offers, of which two based on xDSL technology and the charges for which are above 85 EUR/PPP and one based on Cable technology at 57.62 EUR/PPP. This explains the high median compared to the least expensive offer in this basket.
- The omission of non-recurring charges in *Denmark, Ireland, Lithuania, The Netherlands, Norway, Romania* and *Slovenia* influences the place they take in the overall ranking of the least expensive offers. Non-recurring charges are not

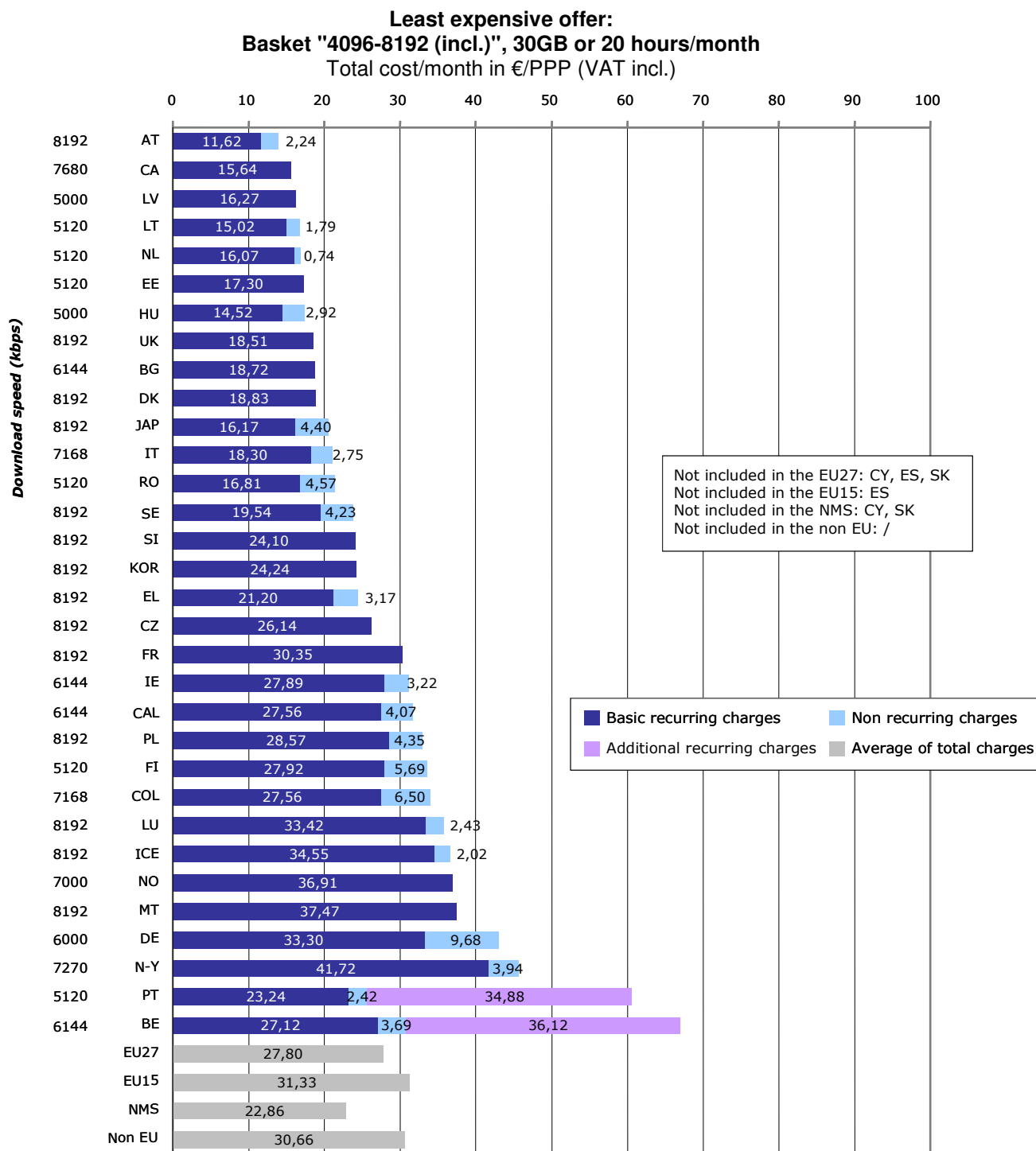
significant any country but additional recurring charges are very high in *Luxembourg* and in *Belgium*.

- In seven countries, the charges for the least expensive offer in the sample of October 2009 decreased significantly compared to the charges in October 2008. These countries are *Bulgaria, Denmark, Hungary, Ireland, The Netherlands, Poland* and *Slovakia*.
- In six countries, the charges for the least expensive offer in the sample of October 2009 increased compared to October 2008. These countries are the following: *Belgium, Canada, Czech Republic, Greece, Romania* and *the State of New York*. However, the greatest increase in charges for the least expensive offers was observed in *Belgium* where they nearly doubled during the one year period.
- Overall, it could be observed that the average cost of the least expensive offers slightly increased in the EU27. This results from a slight increase in charges in both the EU15 and the NMS. The median value of the offers in the EU27 countries decreased. This decrease presents the combined result of a decrease of the median in the EU15 and a movement in the same direction in the NMS. The average least expensive offers in the Non-EU countries clearly increased in October 2009 compared to October 2008. The median value also increased slightly for these countries.

#### **4.2.5 BASKET "4096KBPS-8192KBPS (incl.)", IN €/PPP (VAT INCL.)**

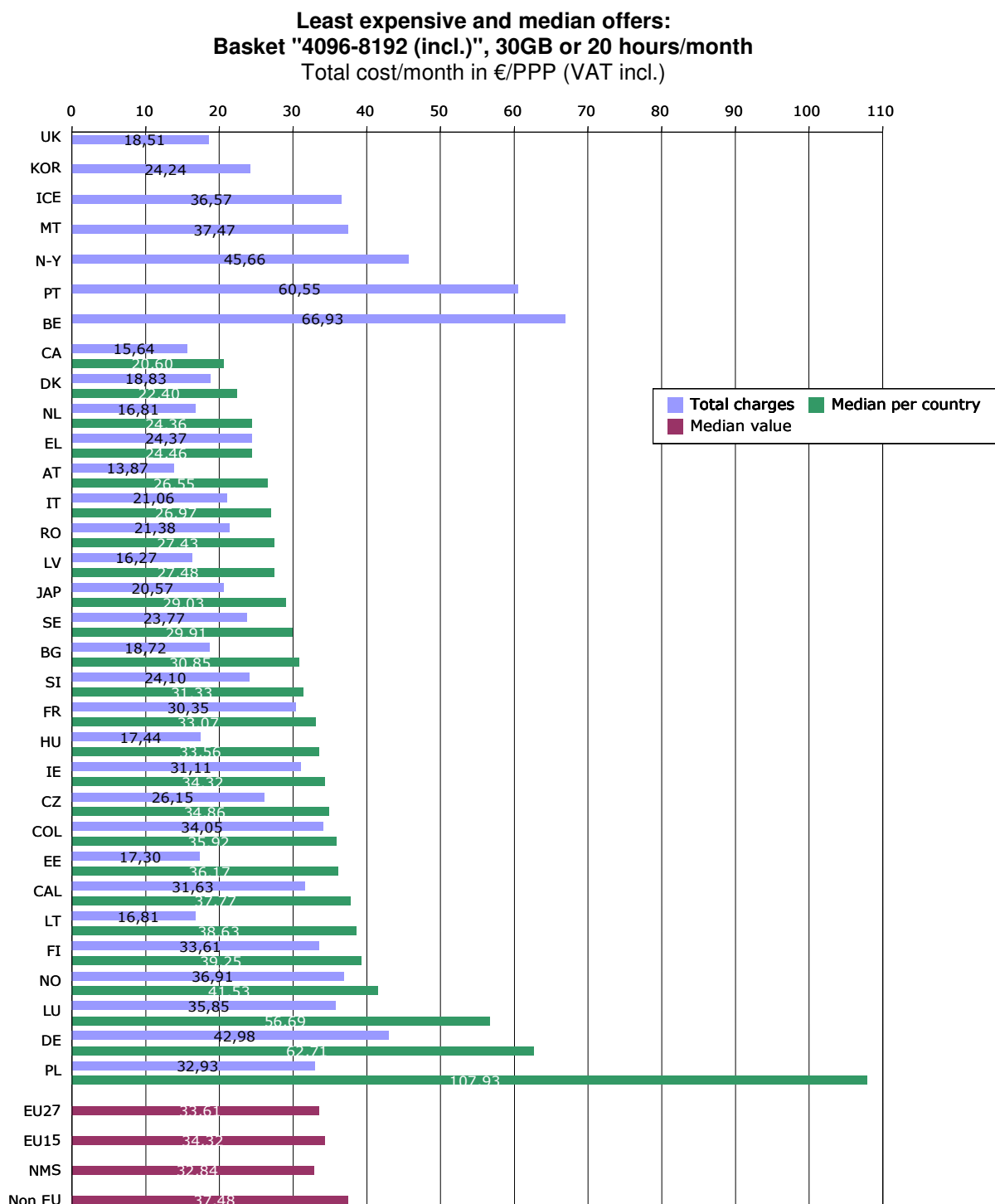
##### **4.2.5.a LEAST EXPENSIVE OFFER**

The ISPs selected for *Cyprus*, *Slovakia* and *Spain* do not offer any broadband access services for this basket.



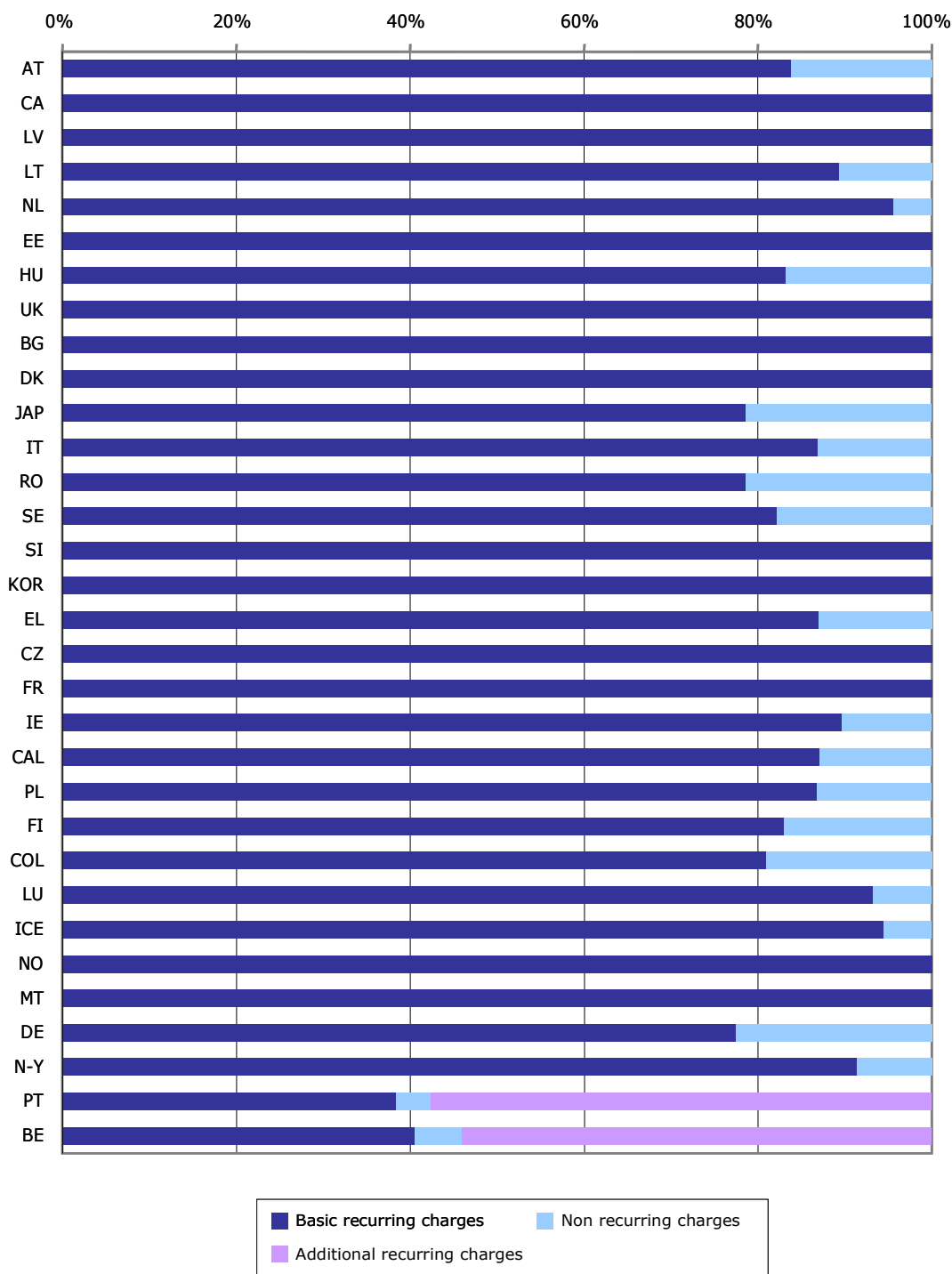
#### **4.2.5.b BASKET "4096KBPS-8192KBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS**

For the following countries, only one offer was available in the sample for this basket: *Belgium, Iceland, Korea, Malta, Portugal, the State of New York and the United Kingdom*. Consequently, no median value could be determined.



#### 4.2.5.c BASKET "4096KBPS-8192KBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
Basket "4096-8192 (incl.)", 30GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



#### 4.2.5.d BASKET "4096KBPS-8192KBPS (incl.)", LIST OF THE SELECTED OFFERS

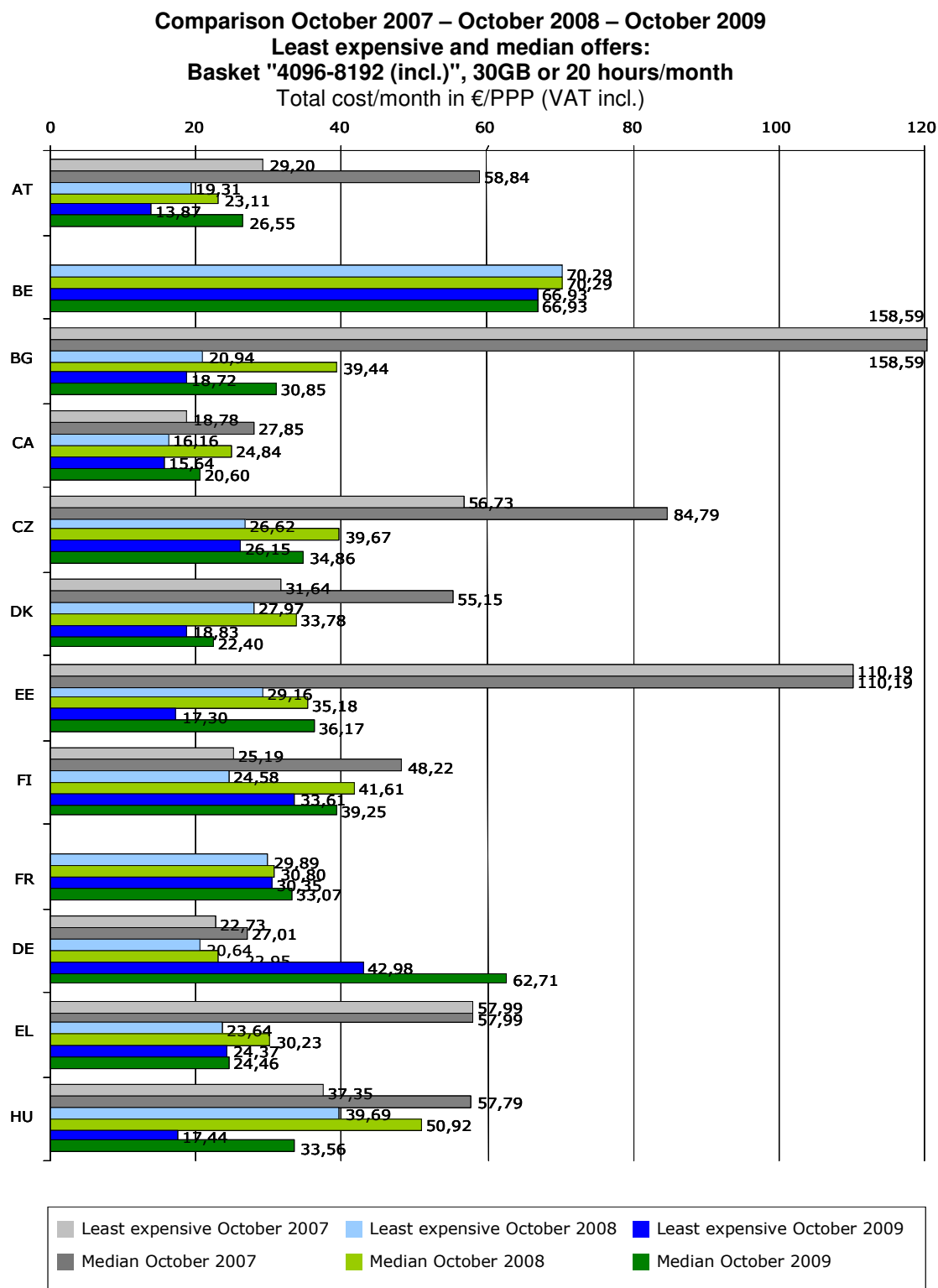
Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Addreses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
Austria	UPC Austria	inode aDSL Simple	Cable	12	8192	unlimited	unlimited	10	10	20	-	15,39	13,87	0,49
Belgium	Telenet	ComfortNet	Cable	12	6144	4	-	1	N.D.	0	AV+AS	75,63	66,93	2,35
Bulgaria	Eurocom Cable	Eurocom Intro	Cable	12	6144	unlimited	unlimited	1	1	N.D.	-	9,00	18,72	0,66
Canada	Videotron	High Speed Internet CABLE	Cable	12	7680	30	-	N.D.	6	5	AV+AS	19,32	15,64	0,55
Czech Republic	VOLNY+Dial Telecom	Volny internet 8M	xDSL	24	8192	unlimited	unlimited	0	0	0	AV+AS	18,22	26,15	0,92
Denmark	Dansk Kabel TV	Mellem hastighed 8 Mbit / 1 Mbit	Cable	-	8192	unlimited	unlimited	1	5	250	-	28,09	18,83	0,66
Estonia	STV	Saturn Neo	FTTx	-	5120	unlimited	unlimited	1	1	100	-	12,72	17,30	0,61
Finland	Elisa	Elisa Laajakaista Heti (Tampere) 5M	Cable	18	5120	unlimited	unlimited	5	N.D.	500	-	42,01	33,61	1,18
France	NeufCegetel (SFR)	neufbox de SFR 8M	xDSL	-	8192	unlimited	unlimited	10	N.D.	1024	PC	34,90	30,35	1,06
Germany	Deutsche Telekom	Surf DSL Flat 6000	xDSL	12	6000	unlimited	unlimited	25	10	1024	AV+AS	45,99	42,98	1,51
Greece	Tellias	Tellia ADSL	xDSL	12	8192	unlimited	unlimited	1	N.D.	0	-	22,42	24,37	0,85
Hungary	EnterNet	EnterNet 5 Mbps prepaid Csomag	xDSL	12	5000	unlimited	unlimited	3	N.D.	100	AV+AS	11,62	17,44	0,61
Iceland	Siminn	Leið 2	xDSL	6	8192	60	-	5	N.D.	0	AS+ASW+FW+PC+PM	21,86	36,57	1,28
Ireland	BT Ireland	Broadband (Option 2)	xDSL	12	6144	30	-	1	N.D.	N.D.	-	36,40	31,11	1,09
Italy	Libero	ADSL Flat	xDSL	-	7168	unlimited	unlimited	3	N.D.	150	AV+AS	22,95	21,06	0,74
Japan	NTT West	Flet's ADSL 8M Plan	xDSL	-	8192	unlimited	unlimited	N.D.	N.D.	N.D.	-	22,72	20,57	0,72
Korea	Korea Telecom	QOOK Internet Lite (ADSL)	xDSL	12	8192	40	-	N.D.	N.D.	40	-	16,44	24,24	0,85
Latvia	Pronets	For Kids	FTTx	12	5000	unlimited	unlimited	1	1	0	-	11,70	16,27	0,57
Lithuania	Telerena	A1	Cable	12	5120	78,125	-	2	N.D.	N.D.	-	11,34	16,81	0,59
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 8 Mbits/s	xDSL	-	8192	unlimited	unlimited	5	N.D.	100	-	43,02	35,85	1,26
Malta	GO	Go Home Up to 8Mbps	xDSL	-	8192	100	-	4	N.D.	N.D.	AV+AS	27,35	37,47	1,31
Norway	Get	Bredbaand - Large	Cable	12	7000	unlimited	unlimited	1	10	50	AV+FW	47,78	36,91	1,29
The Netherlands	UPC Nederland	Internet 5	Cable	12	5120	unlimited	unlimited	3	12	25	AV+AS	18,83	16,81	0,59
Poland	Vectra	Internet 8Mbps	Cable	-	8192	unlimited	unlimited	2	N.D.	400	-	19,16	32,93	1,15
Portugal	ZON / TV Cabo	ZON 5 Mb	Cable	12	5120	10	-	30	N.D.	N.D.	N.D.	52,07	60,55	2,12
Romania	RCS & RDS	Cable Link 39 LEI internet only	Cable	-	5120	unlimited	unlimited	2	N.D.	N.D.	-	11,59	21,38	0,75
Slovenia	T-2	VDSL 8 M / 1 M	FTTx	-	8192	unlimited	unlimited	1+	N.D.	100	AV+AS+FW	20,00	24,10	0,85
State of California	AT&T	DSL Elite	xDSL	-	6144	unlimited	unlimited	11	11	N.D.	AV+ASW+FW	27,14	31,63	1,11
State of Colorado	Qwest	Faster	xDSL	12	7168	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	29,22	34,05	1,19
State of New York	Verizon	Verizon High Speed internet TurboPlan	xDSL	12	7270,4	unlimited	unlimited	9	N.D.	10	-	39,18	45,66	1,60
Sweden	Tele2 Sverige	Bredband 8 Mbit/s	Cable	12	8192	unlimited	unlimited	10	1	40	FW	27,02	23,77	0,83
The UK	Tiscali UK	Broadband only	xDSL	18	8192	unlimited	unlimited	N.D.	N.D.	N.D.	AV+AS	16,29	18,51	0,65

(\*) Duration = '-' indicates that 12 months was assumed  
(\*\*) N.D. indicates information is not provided by ISP  
(\*\*\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*\*\*) Indexed ranking: ranking of offers based on the median value of this set of results  
**ISPs in italic & bold** are Incumbent operators

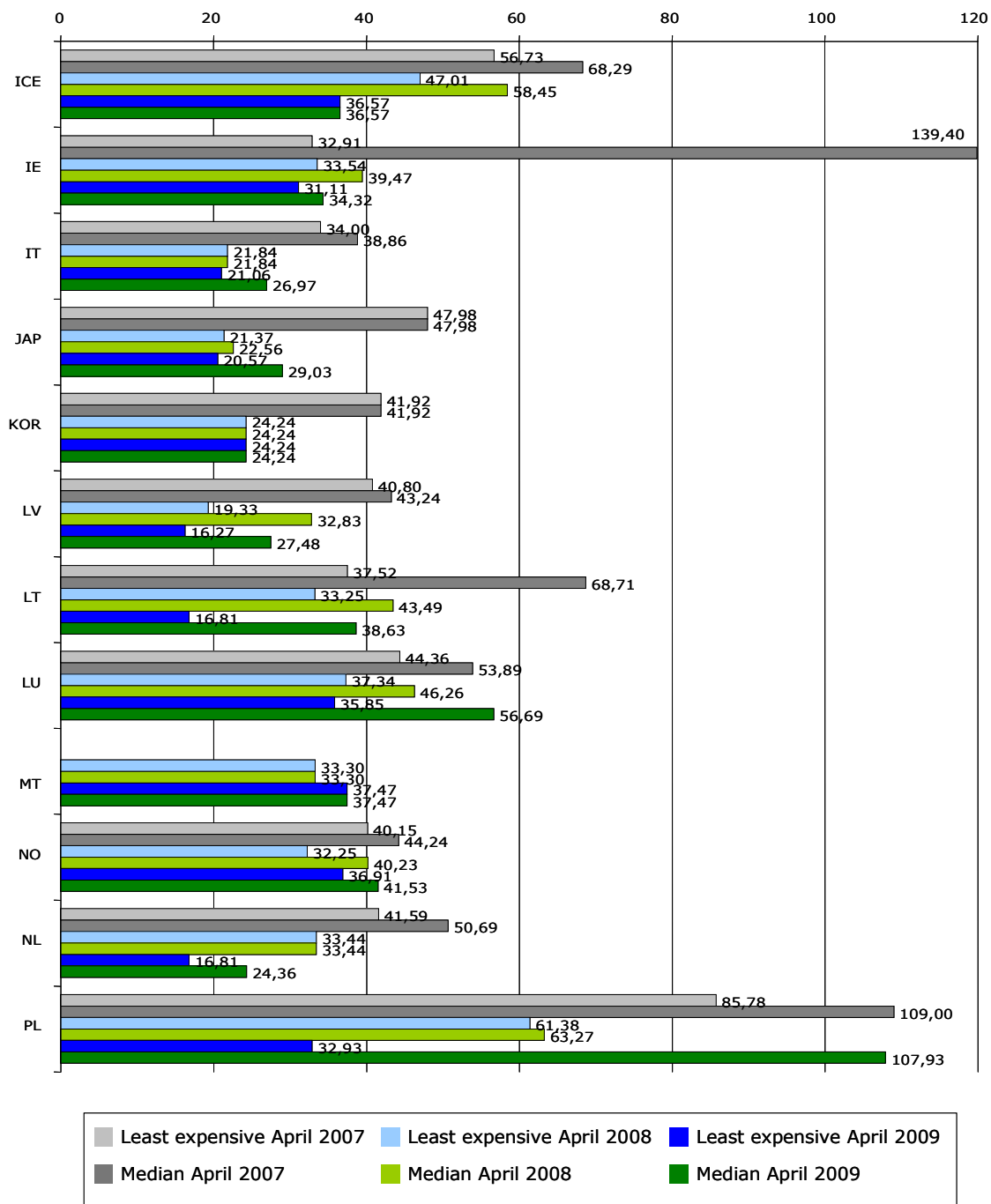
Table 15: Detailed information on least expensive offer per country (4096kbps-8192kbps incl.)



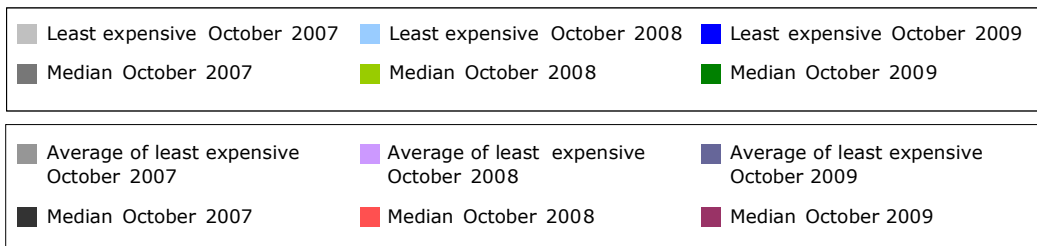
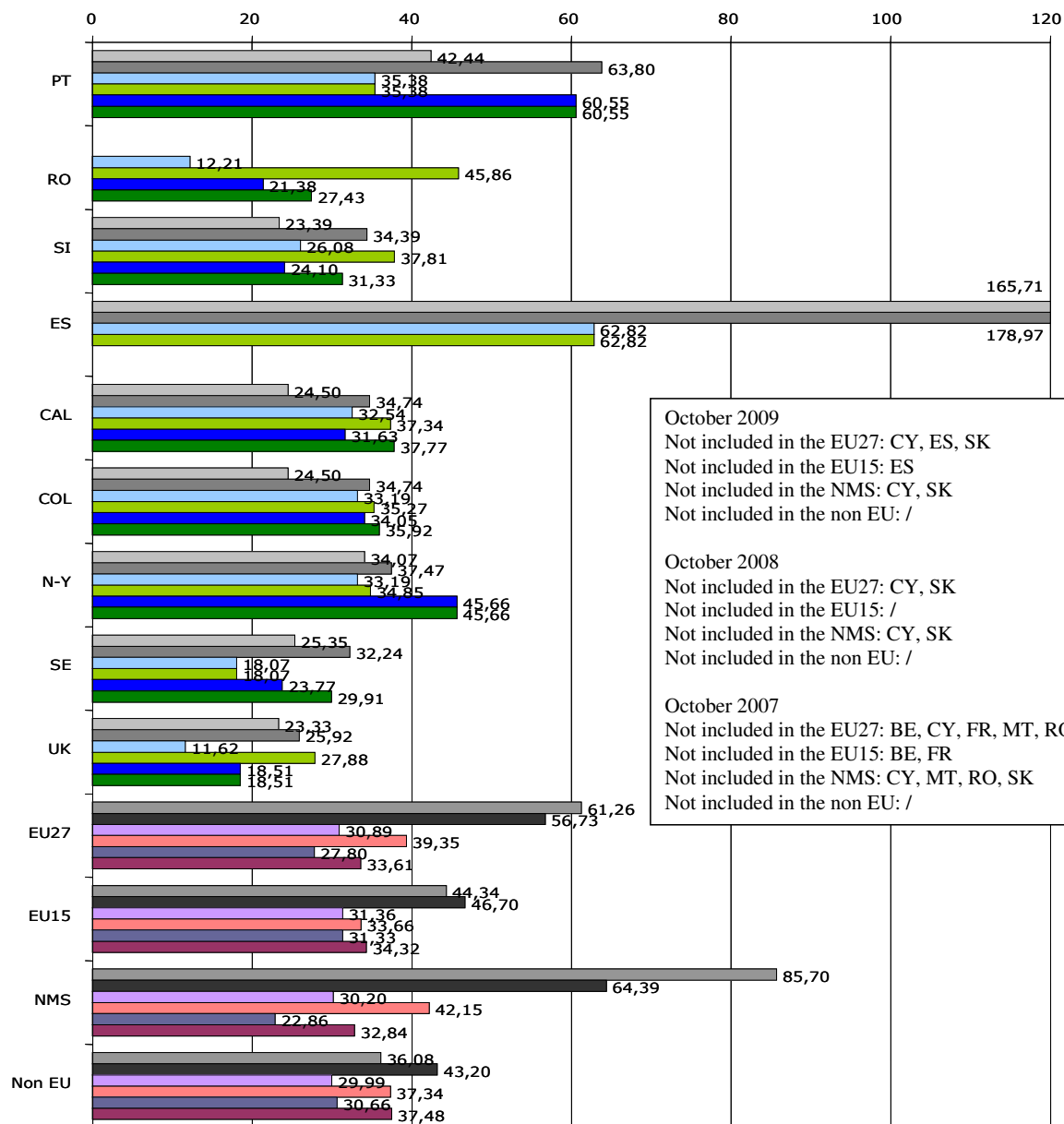
**4.2.5.e BASKET "4096KBPS – 8192KBPS (incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "4096-8192 (incl.)", 30GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



**Comparison October 2007 – October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "4096-8192 (incl.)", 30GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



#### **4.2.5.f CONCLUSIONS ON BASKET 4096KBPS-8192KBPS (incl.)**

- For some countries, no offer of the selected ISPs was available in this basket for April 2009; the countries include *Cyprus*, *Slovakia* and *Spain*. *Spain* had offers for this basket in April 2009 but no longer in October 2009. No country that did not have offers in April 2009 did have in October 2009.
- In this basket only one offer was available for the following countries: *Belgium*, *Iceland*, *Korea*, *Malta*, *Portugal*, *the State of New York* and *the United Kingdom*. This means that the charge for this offer equals the least expensive and no median value was determined for these countries.
- The offers for *Czech Republic*, *Finland*, *France*, *Greece*, *Hungary*, *Latvia* and *Luxembourg* are only available in certain areas of the country.
- The offer for *Denmark* (Dansk kabel TV) might not be representative, as the ISP focuses on members of certain organisations. It has however been kept in the sample, due to the significant market share of the ISP. The second least expensive offer is provided by Fullrate with a speed of 6 Mbps and a total charge of 19.41 EUR/PPP.
- The offers for *Estonia* (STV), *Finland* (Elisa), *Portugal* (ZON/TV Cabo) and *Romania* (RCS & RDS) are only available to clients who have an analog cable TV contract with the ISP.
- The *Portuguese* offer provides unlimited download volume for national content. The *Latvian* offer has a higher download speed for national content.
- In the selection of the least expensive offers of this basket there are eight metered offers. All but two of these offers did meet our predefined normalisation parameters. The offers of *Belgium* and *Portugal* needed normalisation, which strongly impacted their ranking.
  - The only offer for Belgium in this basket includes 4 GB per month; the additional cost per GB amounts to 1.39 EUR/PPP; the total monthly cost of 66.93 EUR/PPP includes 3.69 non-recurring charges + 27.12 recurring charges +  $(1.39 * 26 = 36.12)$ .
  - The *Portuguese* offer is also the only one available for this basket. It includes unlimited national traffic, but the international traffic is limited to 10 GB per month. A fee of 1.74 EUR/PPP is charged per additional GB. The total charge of 60.55 EUR/PPP is calculated as follows: 2.42 non-recurring charges + 23.24 recurring charges +  $(1.74 * 20 = 34.88)$ .
- For some countries a major difference can be noted between the least expensive and the median offers.
  - *Estonia* has four offers in this basket, of which one based on Plug&Play technology at 56.43 EUR/PPP, two based on cable technology at 33.99 and 38.34 EUR/PPP and one based on FTTx technology at 17.30 EUR/PPP.
  - In *Hungary*, 24 offers are available for this basket, of which 21 offers have total charges higher than 20 EUR/PPP and 11 of these offers have charges higher than 40 EUR/PPP.
  - *Lithuania* has 19 offers in this basket, of which 12 have total

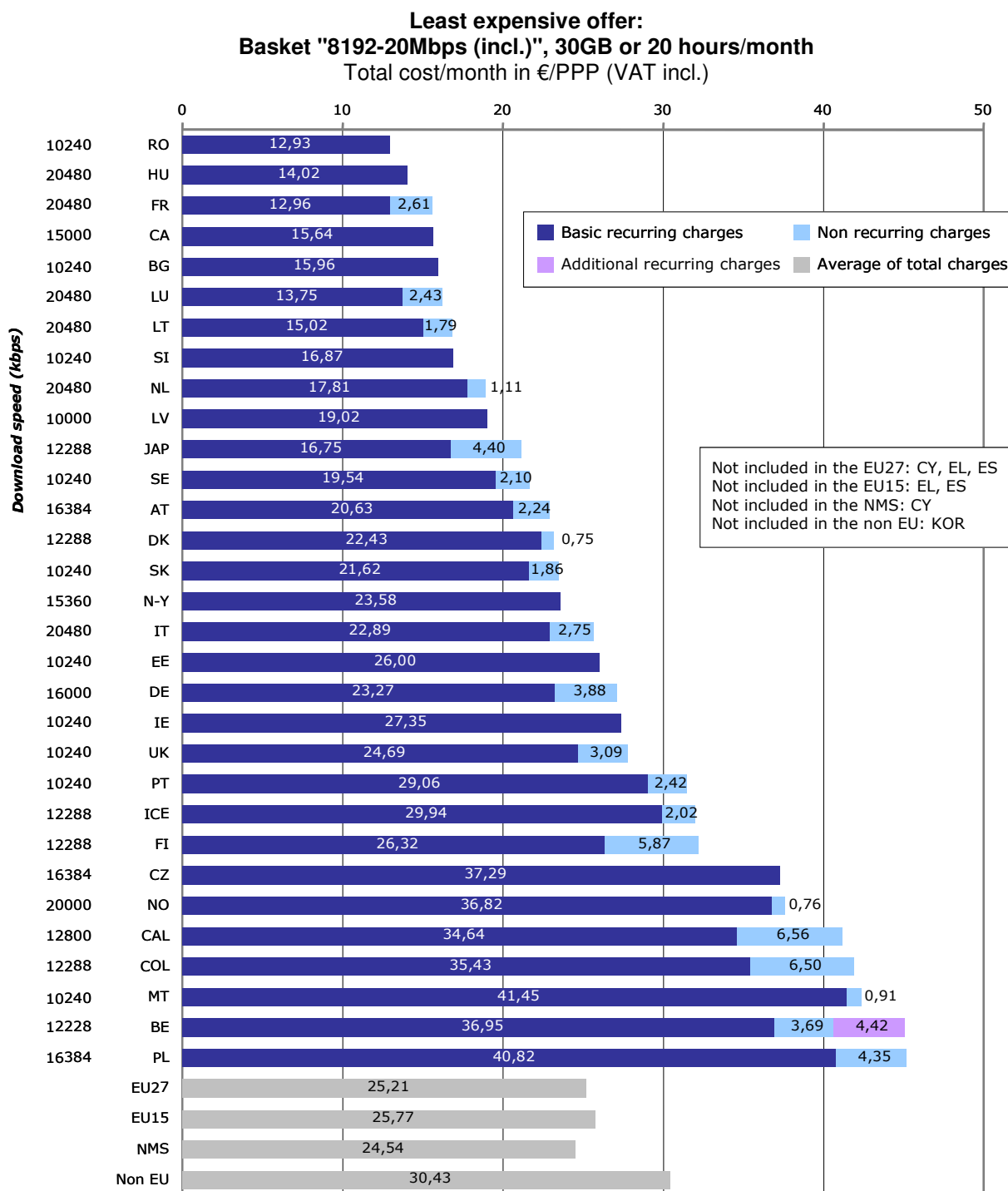
charges over 35 EUR/PPP.

- There are 5 offers for *Poland* in this basket, of which two cable offers with monthly charges of 32.93 and 34.35 EUR/PPP, while the three other offers are xDSL and have total charges of over 100 EUR/PPP.
- The omission of non-recurring charges in the following countries influences the place they take in the overall ranking of the least expensive offers: *Bulgaria, Canada, Czech Republic, Denmark, Estonia, France, Korea, Latvia, Malta, Norway, Slovenia* and *the United Kingdom*. Non-recurring charges are significant in none of the countries.
- Total charges of the least expensive offers decreased significantly in the following countries compared to October 2008: *Denmark, Estonia, Hungary, Iceland, Lithuania, The Netherlands* and *Poland*. A slighter decrease was also observed in *Austria, Belgium* and *Latvia*.
- Charges of the least expensive offers increased in seven countries: *Finland, Germany, Portugal, Romania, the State of New York, Sweden* and *the United Kingdom*.
- Overall, the charges of the least expensive offer in the sample of October 2009 decreased for the EU27 compared to the charges in October 2008. More precisely, the average of the least expensive offers and the median values of the NMS have decreased significantly, while the least expensive and median value for the EU15 remained stable. For the non-EU countries, the least expensive offers and the median values also remained stable.

#### 4.2.6. BASKET "8192KBPS-20MBPS (incl.)", IN €/PPP (VAT INCL.)

##### 4.2.6.a LEAST EXPENSIVE OFFER

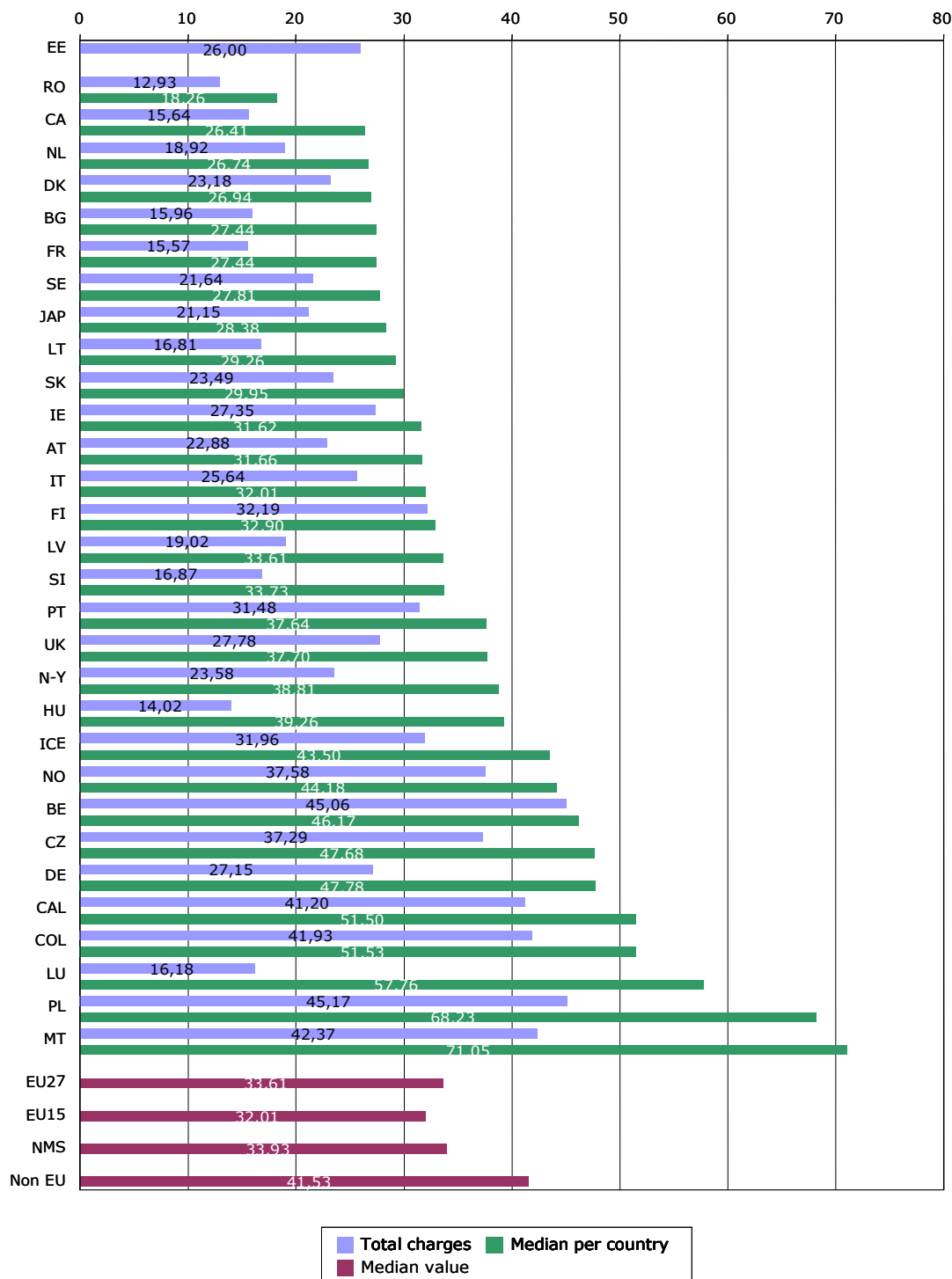
In total, for four countries there are no offers in the sample corresponding to this basket, i.e. *Cyprus, Greece, Korea and Spain*.



#### 4.2.6.b BASKET "8192KBPS - 20MBPS (incl.)", LEAST EXPENSIVE AND MEDIAN OFFERS

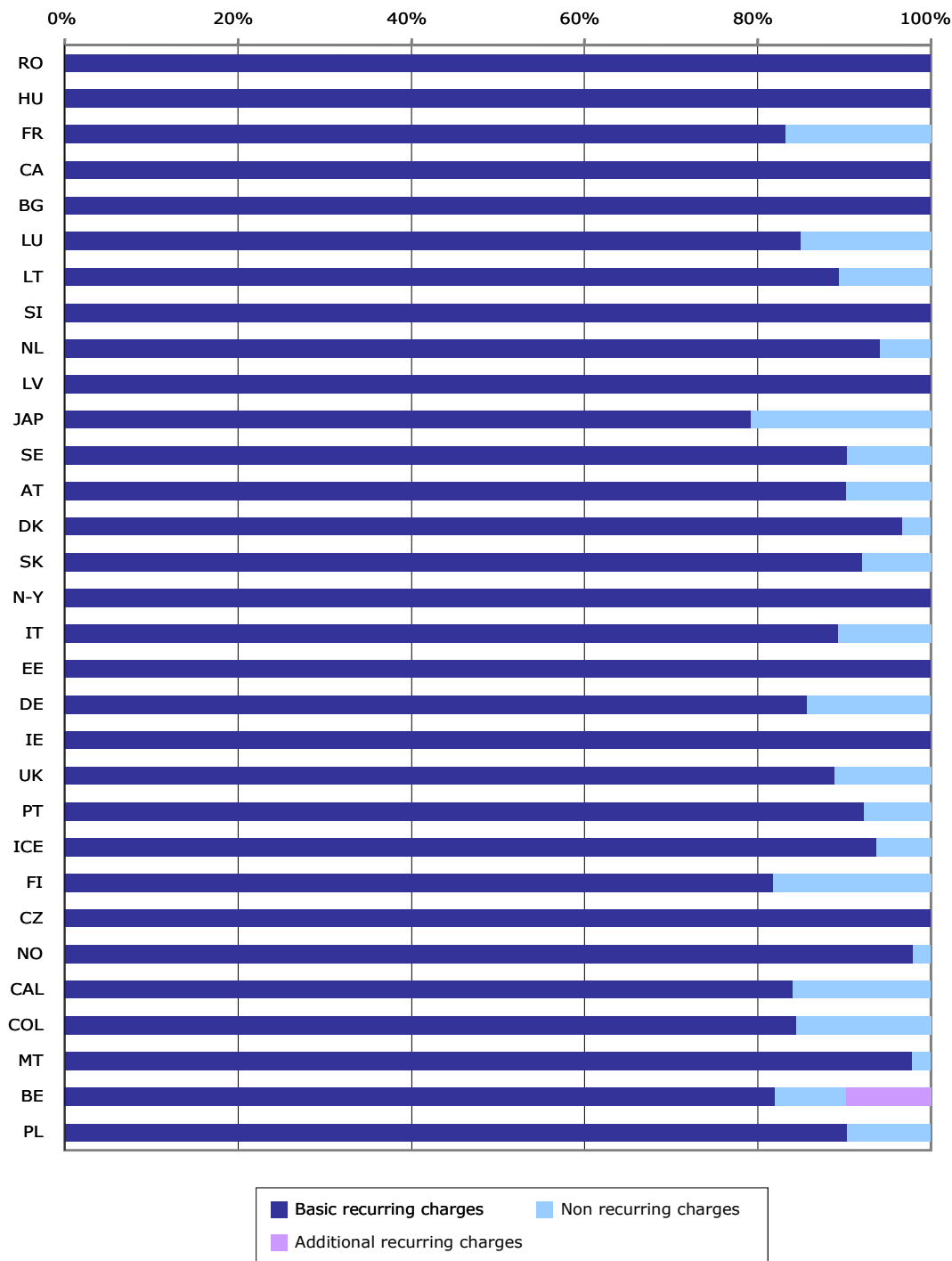
For *Estonia*, only one offer was available in the sample for this basket. Consequently, no median value could be determined.

**Least expensive and median offers:**  
**Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



#### 4.2.6.c BASKET "8192KBPS-20MBPS (incl.)", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
**Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month**  
 Total cost/month in €/PPP (VAT incl.)





#### 4.2.6.d BASKET "8192KBPS-20MBPS (incl.)", LIST OF THE SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
Austria	UPC Austria	inode aDSL Privat max 16384/1024	Cable	12	16384	unlimited	unlimited	10	10	20	-	25,39	22,88	0,87
Belgium	<b>Belgacom</b>	Belgacom Internet Go	xDSL	12	12228	25	-	4	5	50	AV+AS	50,92	45,06	1,71
Bulgaria	Speedy Net	Speedy Net 15	Cable	12	10240	unlimited	unlimited	1	1	0	-	7,67	15,96	0,60
Canada	Telus	Internet HV Extreme (QC)	xDSL	-	15000	-	20	10	N.D.	N.D.	AS+ASW+FW+PC+PM+PU	19,32	15,64	0,59
Czech Republic	VOLNY+Dial Telecom	Volny internet 16M	xDSL	24	16384	unlimited	unlimited	0	0	0	AV+AS	25,99	37,29	1,41
Denmark	You see	12 Mbit/1 Mbit	Cable	-	12288	unlimited	unlimited	1	5	0	-	34,59	23,18	0,88
Estonia	STV	Saturn Kodu	FTTx	-	10240	unlimited	unlimited	1	1	100	-	19,11	26,00	0,99
Finland	Finnnet group	Valokaista (Tampere) 12M	xDSL	12	12288	unlimited	unlimited	5	N.D.	100	-	40,23	32,19	1,22
France	NeufCegetel (SFR)	ADSL 20 Méga	xDSL	-	20480	unlimited	unlimited	10	N.D.	1024	PC	17,90	15,57	0,59
Germany	HanseNet/Alice	Alice Light Das Surfpaket	xDSL	-	16000	unlimited	unlimited	5	N.D.	300	-	29,05	27,15	1,03
Hungary	Digi	StartNET	Cable	-	20480	unlimited	unlimited	1	N.D.	30	-	9,34	14,02	0,53
Iceland	Vodafone	Flotta netið	xDSL	6	12288	30	-	1	0	0	-	19,10	31,96	1,21
Ireland	UPC Ireland	10 Mb Broadband Express	Cable	12	10240	unlimited	unlimited	1	15	300	-	32,00	27,35	1,04
Italy	Liberio	ADSL 20 Mega	xDSL	-	20480	unlimited	unlimited	3	N.D.	150	AV+AS	27,95	25,64	0,97
Japan	<b>NTT West</b>	Flet's ADSL More	xDSL	-	12288	unlimited	unlimited	N.D.	N.D.	N.D.	-	23,36	21,15	0,80
Latvia	Pronets	Kids Plus	FTTx	12	10000	unlimited	unlimited	2	1	0	-	13,68	19,02	0,72
Lithuania	Telerena	OA1	FTTx	12	20480	78,125	-	2	N.D.	N.D.	-	11,34	16,81	0,64
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 20 Mbits/s	xDSL	-	20480	unlimited	unlimited	5	N.D.	100	-	19,42	16,18	0,61
Malta	Melita	Large	Cable	15	10240	80	-	5	N.D.	10	AV+AS	30,93	42,37	1,61
Norway	NextGenTel	Bredbånd Proff	xDSL	12	20000	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	48,65	37,58	1,42
The Netherlands	Tele2 Nederland	Internet ADSL Super	xDSL	12	20480	unlimited	unlimited	1	N.D.	20	AV+AS	21,20	18,92	0,72
Poland	Vectra	Internet 16Mbps	Cable	-	16384	unlimited	unlimited	4	N.D.	400	-	26,29	45,17	1,71
Portugal	ZON / TV Cabo	ZON 10 Mb	Cable	12	10240	unlimited	unlimited	30	N.D.	N.D.	N.D.	27,07	31,48	1,19
Romania	NewCom Telecomunicatii	INJOY Internet Esential	Cable	-	10240	unlimited	unlimited	1	N.D.	N.D.	-	7,01	12,93	0,49
Slovakia	UPC Slovakia	FIBER power 10	Cable	12	10240	unlimited	unlimited	5	25	50	AV+AS	17,38	23,49	0,89
Slovenia	T-2	FTTH 10M / 10M	FTTx	-	10240	unlimited	unlimited	unlimited	N.D.	100	AV+AS+FW	14,00	16,87	0,64
State of California	Cox Communications	Preferred	Cable	-	12800	unlimited	unlimited	7	N.D.	10	AV+ASW+FW+PC+PM	35,35	41,20	1,56
State of Colorado	Qwest	Fastest	xDSL	12	12288	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	35,98	41,93	1,59
State of New York	CableVision	Optimum online	Cable	12	15360	unlimited	unlimited	5	N.D.	0	-	20,24	23,58	0,89
Sweden	Tele2 Sverige	Bredband 10/10 Mbit/s	FTTx	-	10240	unlimited	unlimited	5	1	40	-	24,60	21,64	0,82
The UK	Virgin Media	Broadband Size L	Cable	12	10240	unlimited	unlimited	15	N.D.	5120	AV+ASW+FW+PC+PM+PU	24,46	27,78	1,05
(*) Duration = '-' indicates that 12 months was assumed														
(**) N.D. indicates information is not provided by ISP														
(***) AV = antivirus, AS = antispyware, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line														
(****) Indexed ranking: ranking of offers based on the median value of this set of results														
ISPs in <b>italic &amp; bold</b> are Incumbent operators														

Table 16: Detailed information on least expensive offer per country (8192kbps-20Mbps incl.)

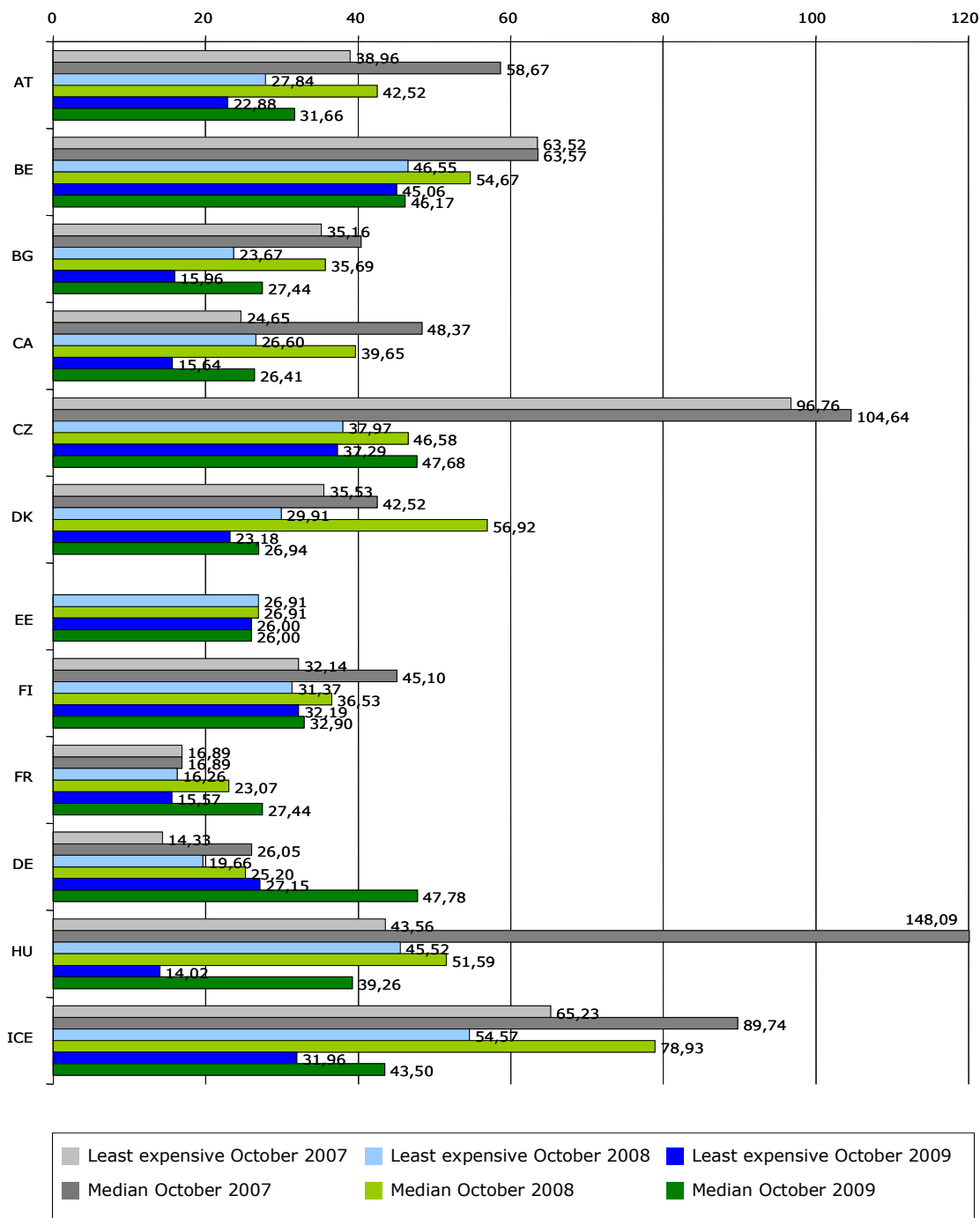
#### 4.2.6.e BASKET "8192KBPS-20MBPS (incl.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009

Comparison October 2007– October 2008 – October 2009

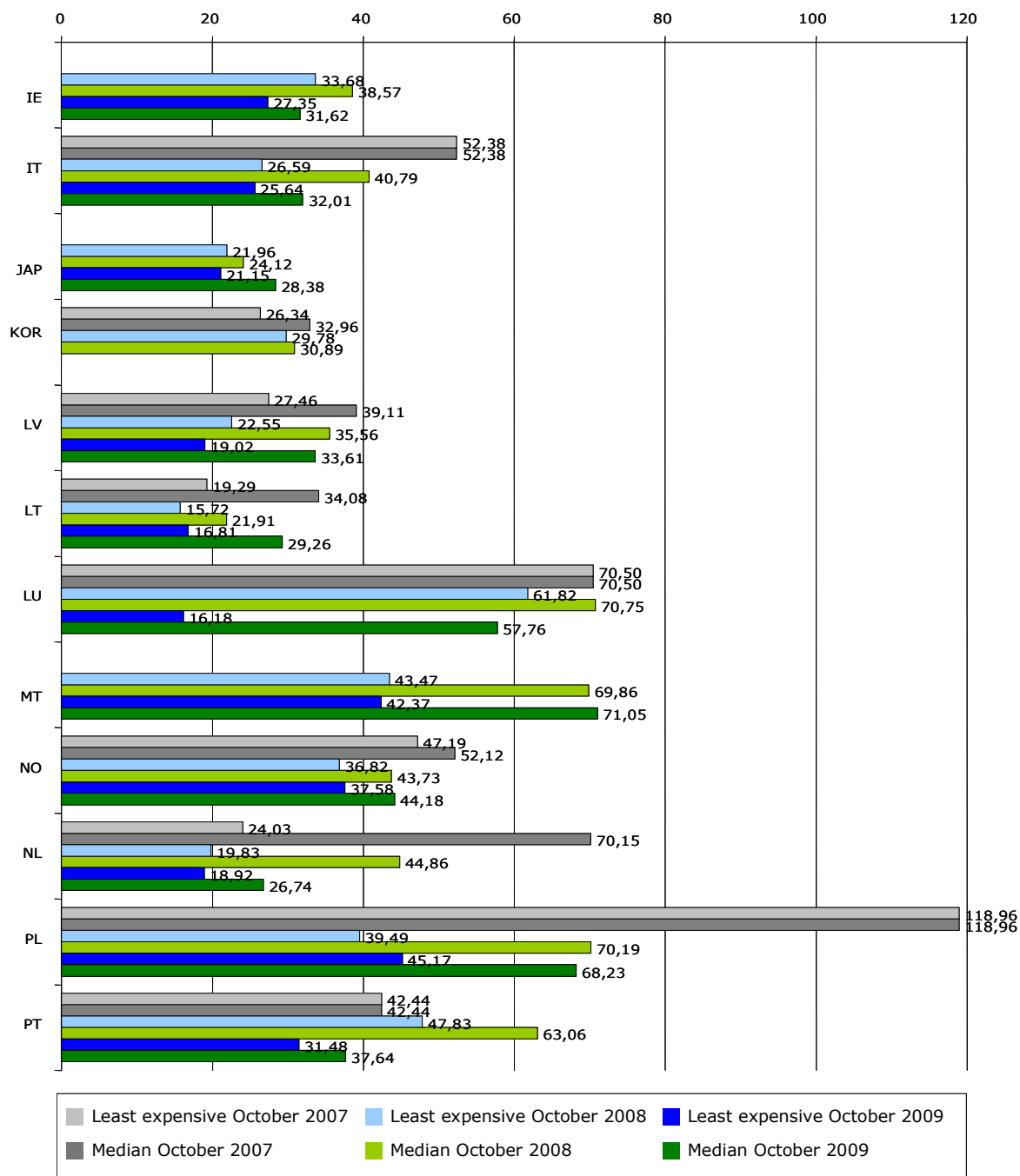
Least expensive and median offers:

Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month

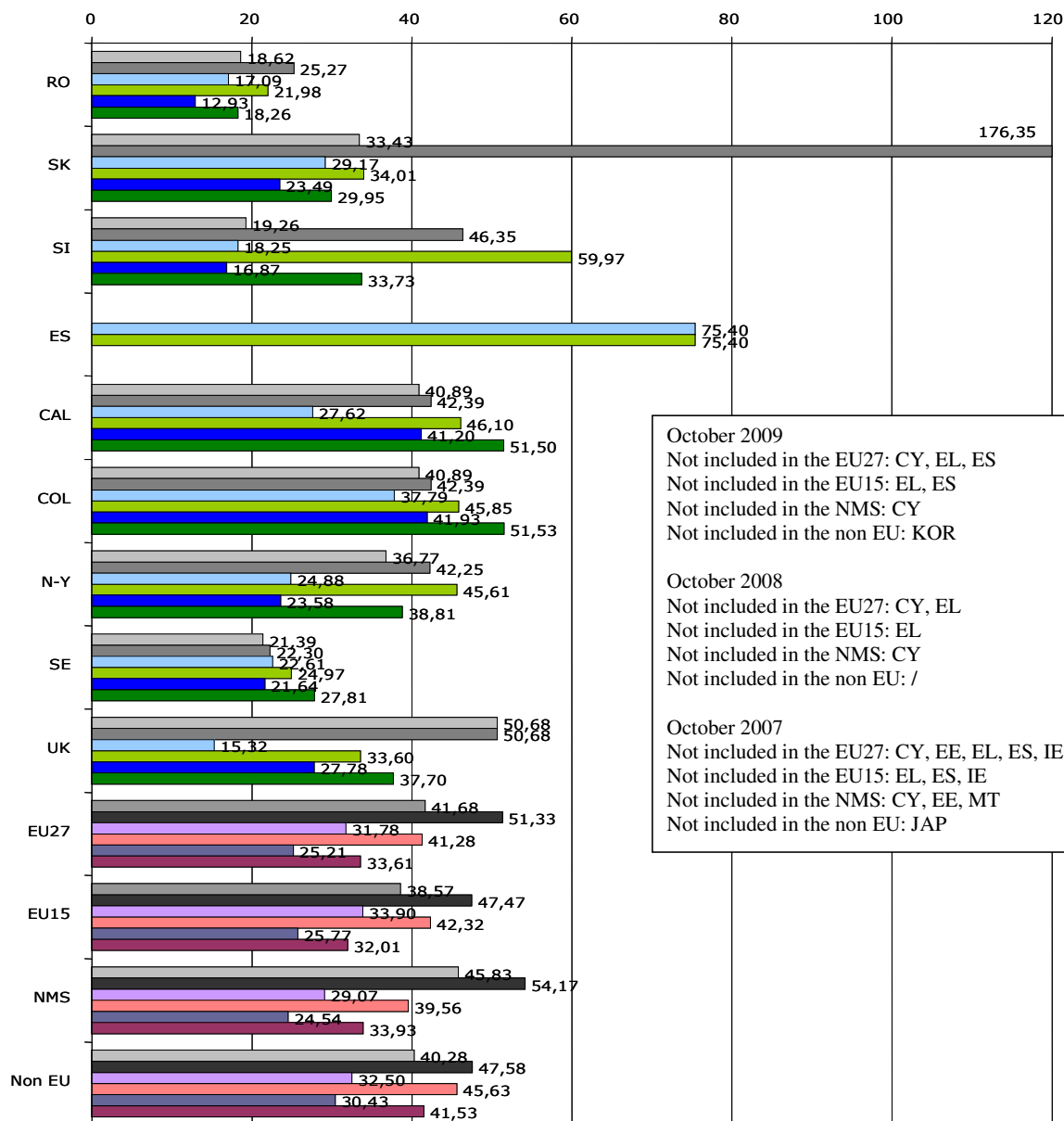
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2007– October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



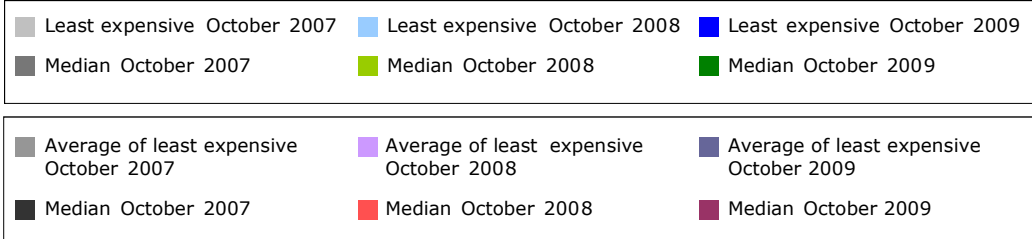
**Comparison October 2007– October 2008 – October 2009**  
**Least expensive and median offers:**  
**Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



October 2009  
 Not included in the EU27: CY, EL, ES  
 Not included in the EU15: EL, ES  
 Not included in the NMS: CY  
 Not included in the non EU: KOR

October 2008  
 Not included in the EU27: CY, EL  
 Not included in the EU15: EL  
 Not included in the NMS: CY  
 Not included in the non EU: /

October 2007  
 Not included in the EU27: CY, EE, EL, ES, IE, MT  
 Not included in the EU15: EL, ES, IE  
 Not included in the NMS: CY, EE, MT  
 Not included in the non EU: JAP



#### **4.2.6.f CONCLUSIONS ON BASKET 8192KBPS-20MBPS (incl.)**

- For some countries, no offer of the selected ISPs was available in this basket; these countries include *Cyprus, Greece, Korea and Spain*. No country that offered broadband with speeds between 8192kbps-20Mbps (incl.) in October 2009 did not do so in April 2009. Two countries stopped offering broadband in this basket in October 2009: these countries are *Korea and Spain*.
- In this basket only one offer was available for *Estonia*. This means that the charge for this offer equals the least expensive and no median value was determined for these countries.
- The offers for *Bulgaria, Canada, Czech Republic, Finland, France, Hungary, Latvia, Lithuania, Luxembourg, Romania and Slovenia* are only available in certain areas of the country.
- The offers for *Estonia* (STV) and *Portugal* (ZON/TV Cabo) are only available to clients who have an analog cable TV contract with the ISP.
- The *Finnish* offer (Finnet group) is for apartment buildings. It has been kept due to the significance of this type of offers in *Finland*.
- In *Slovakia*, the ISP requires a deposit for use of equipment.
- The *Latvian* offer has a higher download speed for national content.
- In the selection of the least expensive offers of this basket there are five metered offers. Only the *Belgian* offer did not meet the requirements set out by our normalisation parameters.
  - The *Belgian* offer included 25GB and following our parameters a charge for 5 additional GB should be added. 1 extra GB costs 0.88 EUR/PPP, which amounts to 4.42 EUR/PPP.
- For some countries a major difference can be noted between the least expensive and the median offer.
  - *Germany* has three offers in this basket, of which one is metered and has a total charge of 87.23 EUR/PPP.
  - *Hungary* has 25 offers for this basket, of which twelve have total charges over 40 EUR/PPP.
  - There are three offers for *Luxembourg* in this basket, of which two have charges over 50 EUR/PPP.
  - *Malta* has four offers for this basket, two of which with a lower download speed of 10 and 12 Mbps at a price of 42.37 and 52.15 EUR/PPP, the two others with a download speed of 20 Mbps at 89.95 and 113.15 EUR/PPP.
  - Twelve of the 18 *Slovenian* offers have a total charge higher than 30 EUR/PPP; five offers are more expensive than 50 EUR/PPP. This explains the difference between the least expensive and the median offer.
- The omission of non-recurring charges in the following countries influences the place they take in the overall ranking of the least expensive offers: *Bulgaria, Canada, Czech Republic, Estonia, Hungary, Ireland, Latvia, Romania, Slovenia* and

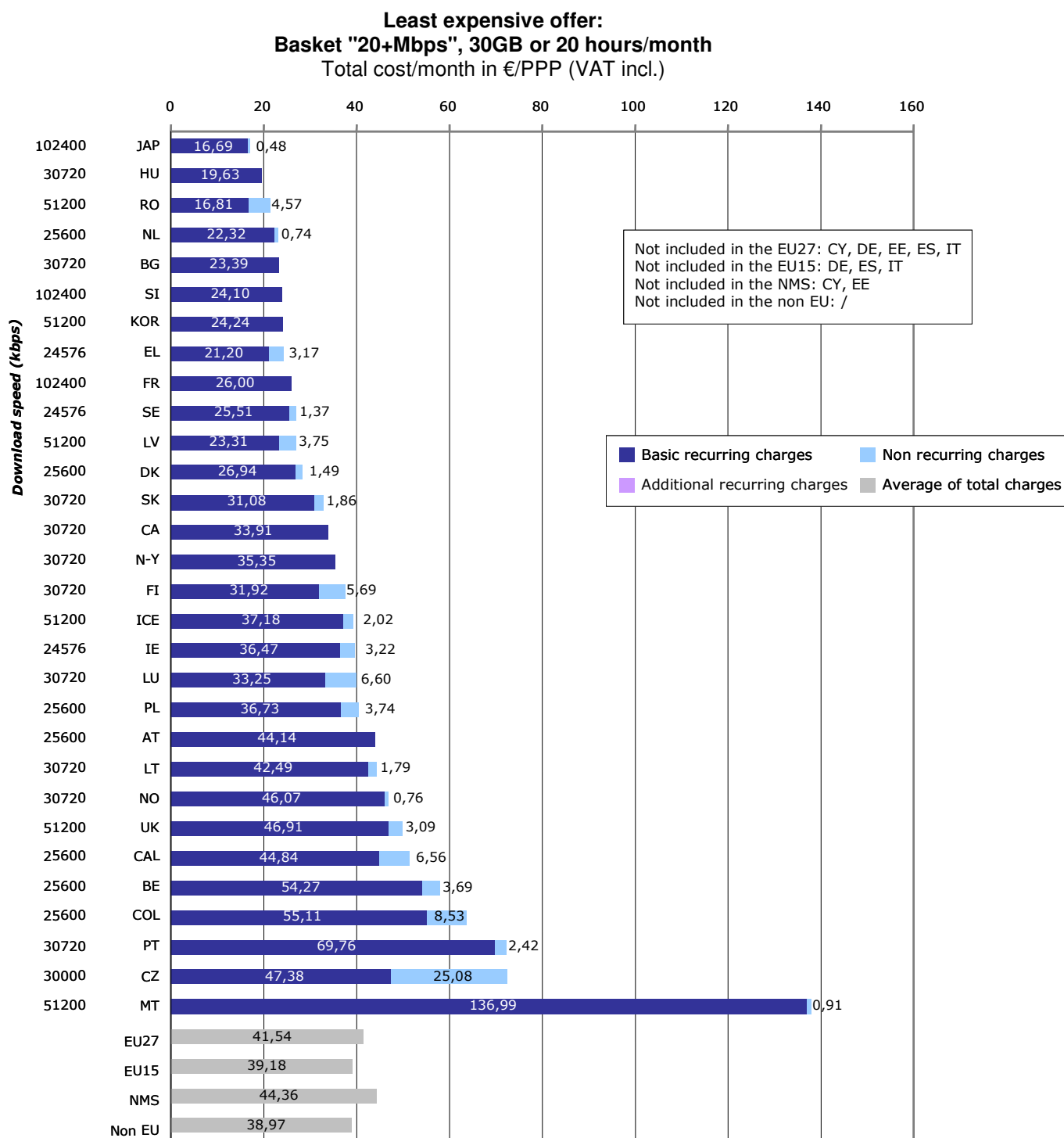
*the State of New-York.* Non-recurring charges are significant in none of the countries.

- It was observed that in most of the countries, the charges of the least expensive offer in the sample of October 2009 decreased compared to the charges in October 2008. For the following countries, this decrease was rather significant: *Canada, Hungary, Iceland, Luxembourg and Portugal.*
- For a number of countries, charges increased. These countries are *Germany, Poland, the State of California, the State of Colorado and the United Kingdom.*
- Overall, average charges for least expensive offers and median values decreased. This decrease is more significant in the EU27 countries than for non-EU countries.

#### **4.2.7 BASKET "20+Mbps", IN €/PPP (VAT INCL.)**

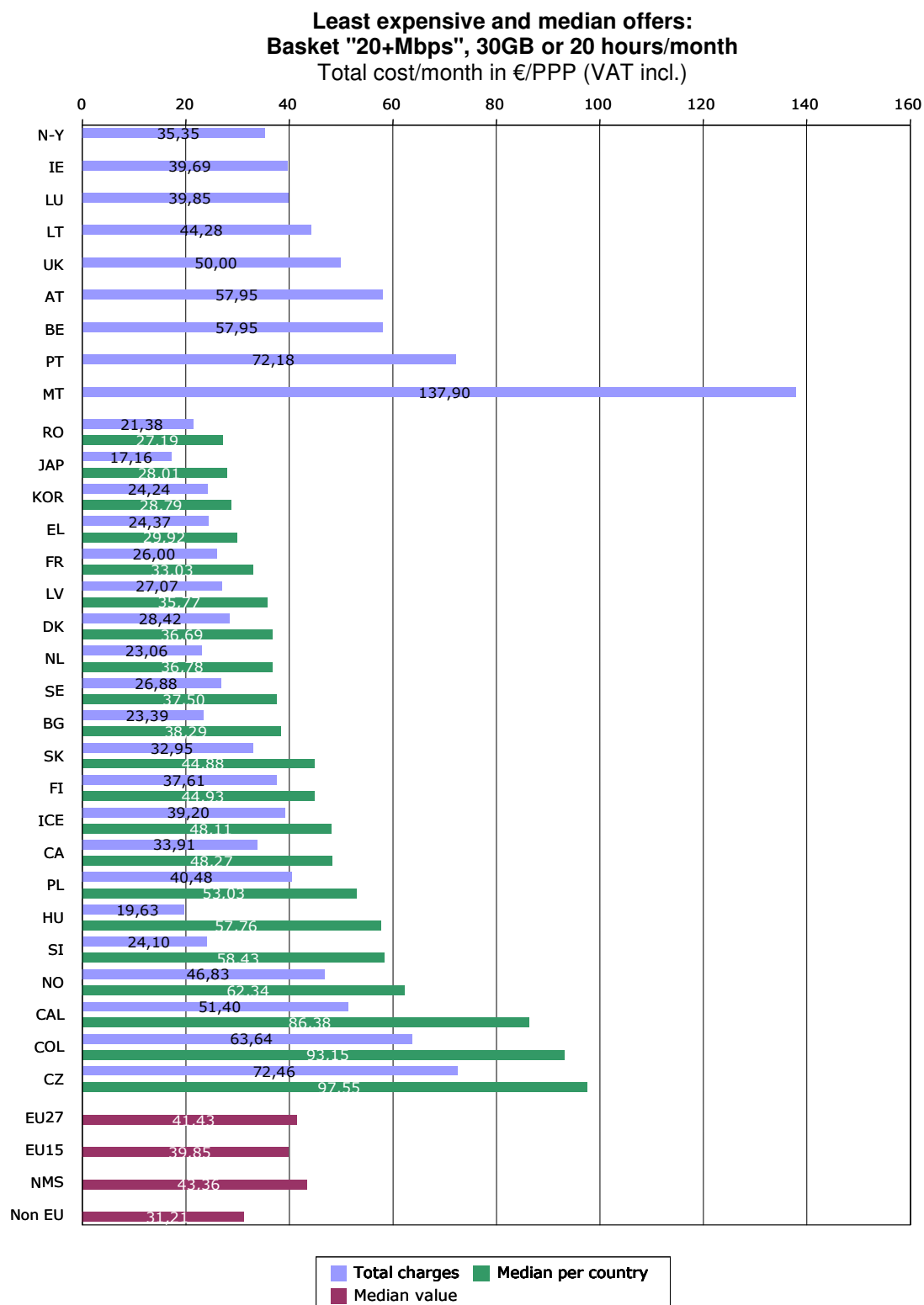
##### **4.2.7.a LEAST EXPENSIVE OFFER**

In total, for five countries there are no offers in the sample corresponding to this basket, i.e. *Cyprus, Estonia, Germany, Italy and Spain*.



#### 4.2.7.b BASKET "20+Mbps", LEAST EXPENSIVE AND MEDIAN OFFERS

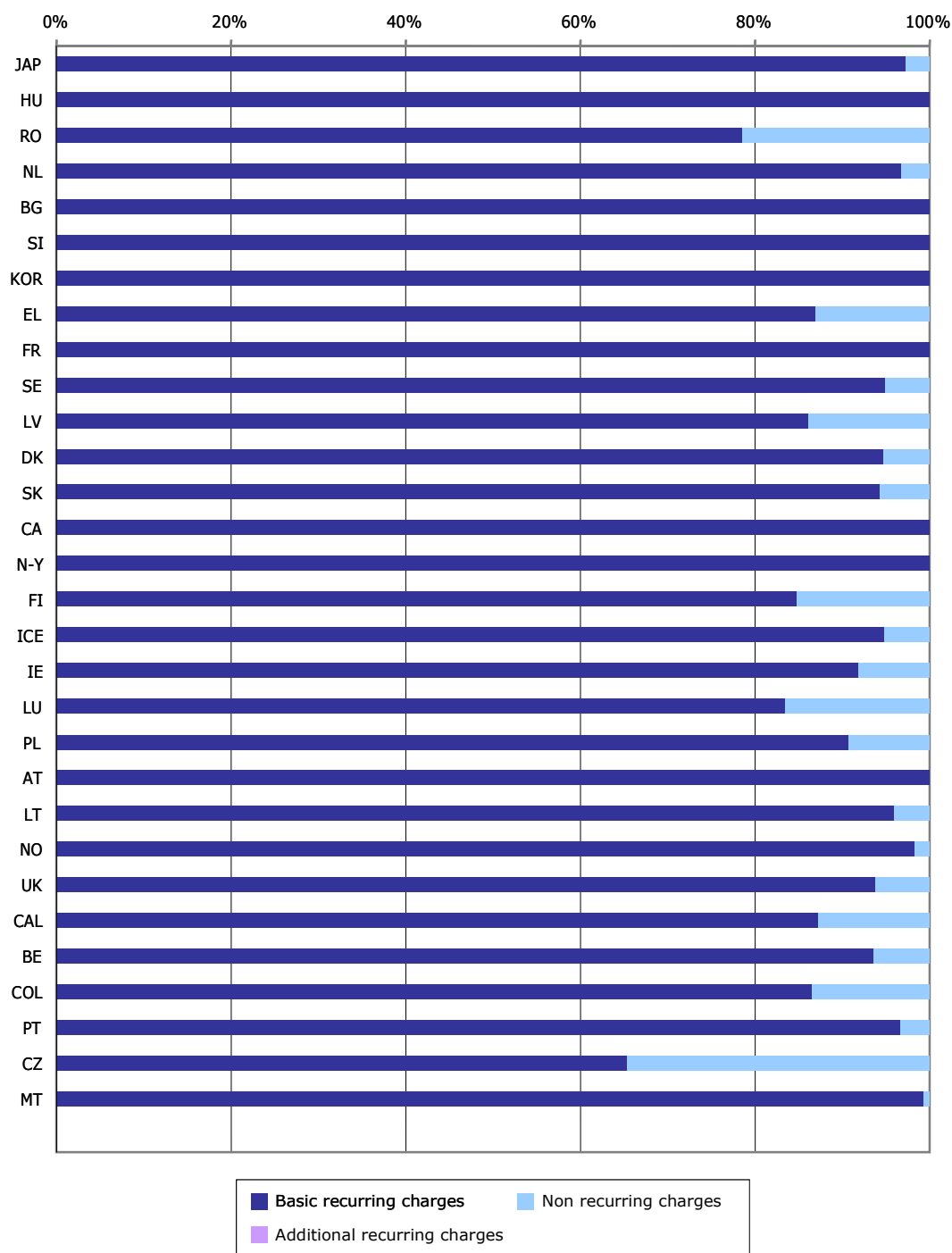
For the following countries, only one offer was available for this basket: *Belgium, Ireland, Lithuania, Luxembourg, Malta, Portugal, the State of New York and the United Kingdom*. Consequently, no median value could be determined.





#### 4.2.7.c BASKET "20+MBPS", COMPOSITION IN %

**Least expensive offer: Charges breakdown**  
Basket "20+Mbps", 30GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



#### 4.2.7.d BASKET "20+Mbps", LIST OF THE SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (*)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (**)	Adresses per mailbox (**)	Webspace (**)	Level of protection (***)	Total cost/month VAT incl.	Total cost/month VAT incl.	Indexed ranking (****)
				Months	Kbps					MB		Euro	EUR/PPP	
Austria	UPC Austria	chello classic	Cable	12	25600	unlimited	unlimited	5	25	20	AV+AS	49,00	44,14	1,08
Belgium	Telenet	TurboNet	Cable	12	25600	60	-	8	N.D.	50	AV+ASW+FW+PC	65,49	57,95	1,42
Bulgaria	Megalan Network	Megalan Network "Unlimited Economic"	FTTx	12	30720	unlimited	unlimited	1	1	0	-	11,24	23,39	0,57
Canada	Videotron	Ultimate Speed 30	Cable	12	30720	70	-	N.D.	6	5	AV+AS	41,90	33,91	0,83
Czech Republic	UPC Česká republika	Fiber Power 30	Cable	6	30000	unlimited	unlimited	5	3	30	AV	50,51	72,46	1,77
Denmark	Telia Stofa	Fiatrate 25Mbit/1mbit	Cable	6	25600	unlimited	unlimited	1	5	10	AV+AS	42,41	28,42	0,70
Finland	Elisa	Elisa Laajakaista Heti (Tampere) 30M	Cable	18	30720	unlimited	unlimited	5	N.D.	500	-	47,01	37,61	0,92
France	NeufCegetel (SFR)	neufbox fibre optique	FTTx	-	102400	unlimited	unlimited	10	N.D.	1024	AV+AS+PC	29,90	26,00	0,64
Greece	Tellias	Tella ADSL	xDSL	12	24576	unlimited	unlimited	1	N.D.	0	-	22,42	24,37	0,60
Hungary	Digi	BaseNET	Cable	-	30720	unlimited	unlimited	2	N.D.	30	-	13,07	19,63	0,48
Iceland	Vodafone	Flotta netið - meiri hraði	FTTx	6	51200	30	-	1	0	0	-	23,43	39,20	0,96
Ireland	BT Ireland	Broadband (Option 3)	xDSL	12	24576	unlimited	unlimited	1	N.D.	N.D.	-	46,44	39,69	0,97
Japan	NTT West	B Flet's Mansion Type Plan 2	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	18,95	17,16	0,42
Japan	NTT West	Flet's Hikari Next Mansion Type Plan 2	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	18,95	17,16	0,42
Korea	Korea Telecom	QOOK Internet Lite (VDSL)	FTTx	12	51200	40	-	N.D.	N.D.	40	-	16,44	24,24	0,59
Korea	Korea Telecom	QOOK Internet Lite ( Fth)	FTTx	12	51200	40	-	N.D.	N.D.	40	-	16,44	24,24	0,59
Latvia	Lattelecom	Internet 2 Optic	FTTx	-	51200	unlimited	unlimited	5	1	0	-	19,46	27,07	0,66
Lithuania	Telerena	OC1	FTTx	12	30720	244,140625	-	2	N.D.	N.D.	-	29,88	44,28	1,08
Luxembourg	Numericable	Forfait Internet 30 Mega	Cable	-	30720	unlimited	unlimited	5	5	50	AV+AS	47,82	39,85	0,98
Malta	Melita	50 Mbps	Cable	15	51200	Unlimited	unlimited	7	N.D.	10	AV+AS	100,67	137,90	3,38
Norway	NextGenTel	Next3 Mini	FTTx	12	30720	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	60,63	46,83	1,15
The Netherlands	UPC Nederland	Internet 25	Cable	12	25600	unlimited	unlimited	5	12	50	AV+AS	25,83	23,06	0,56
Poland	UPC Polska	Internet Fiber Power 25Mbps	Cable	-	25600	unlimited	unlimited	3	15	25	-	23,56	40,48	0,99
Portugal	ZON / TV Cabo	ZON 30 Mb	Cable	12	30720	unlimited	unlimited	30	N.D.	N.D.	N.D.	62,07	72,18	1,77
Romania	RCS & RDS	Fiber Link 39 LEI internet only	FTTx	-	51200	unlimited	unlimited	2	N.D.	N.D.	-	11,59	21,38	0,52
Slovakia	UPC Slovakia	FIBER power 30	Cable	12	30720	unlimited	unlimited	5	25	50	AV+AS	24,38	32,95	0,81
Slovenia	T-2	FTTH 100M / 10M	FTTx	-	102400	unlimited	unlimited	1+	N.D.	100	AV+AS+FW	20,00	24,10	0,59
State of California	Cox Communications	Premier	Cable	-	25600	unlimited	unlimited	10	N.D.	10	AV+ASW+FW+PC+PM	44,11	51,40	1,26
State of Colorado	Verizon	FIOS Faster	FTTx	12	25600	unlimited	unlimited	9	N.D.	10	-	54,61	63,64	1,56
State of New York	CableVision	Optimum online Boost	Cable	-	30720	250	-	15	N.D.	12288	FW	30,34	35,35	0,87
Sweden	ComHem	Bredband Large 24	Cable	12	24576	unlimited	unlimited	5	1	500	-	30,56	26,88	0,66
The UK	Virgin Media	Broadband Size XXL	Cable	12	51200	unlimited	unlimited	15	N.D.	unlimited	V+ASW+FW+PC+PM+P	44,02	50,00	1,22
(*) Duration = '-' indicates that 12 months was assumed														
(**) N.D. indicates information is not provided by ISP														
(***) AV = antivirus, AS = anti-spam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line														
(***) Indexed ranking: ranking of offers based on the median value of this set of results														
ISPs in <i>italic &amp; bold</i> are incumbent operators														

Table 17: Detailed information on least expensive offer per country (20+Mbps)

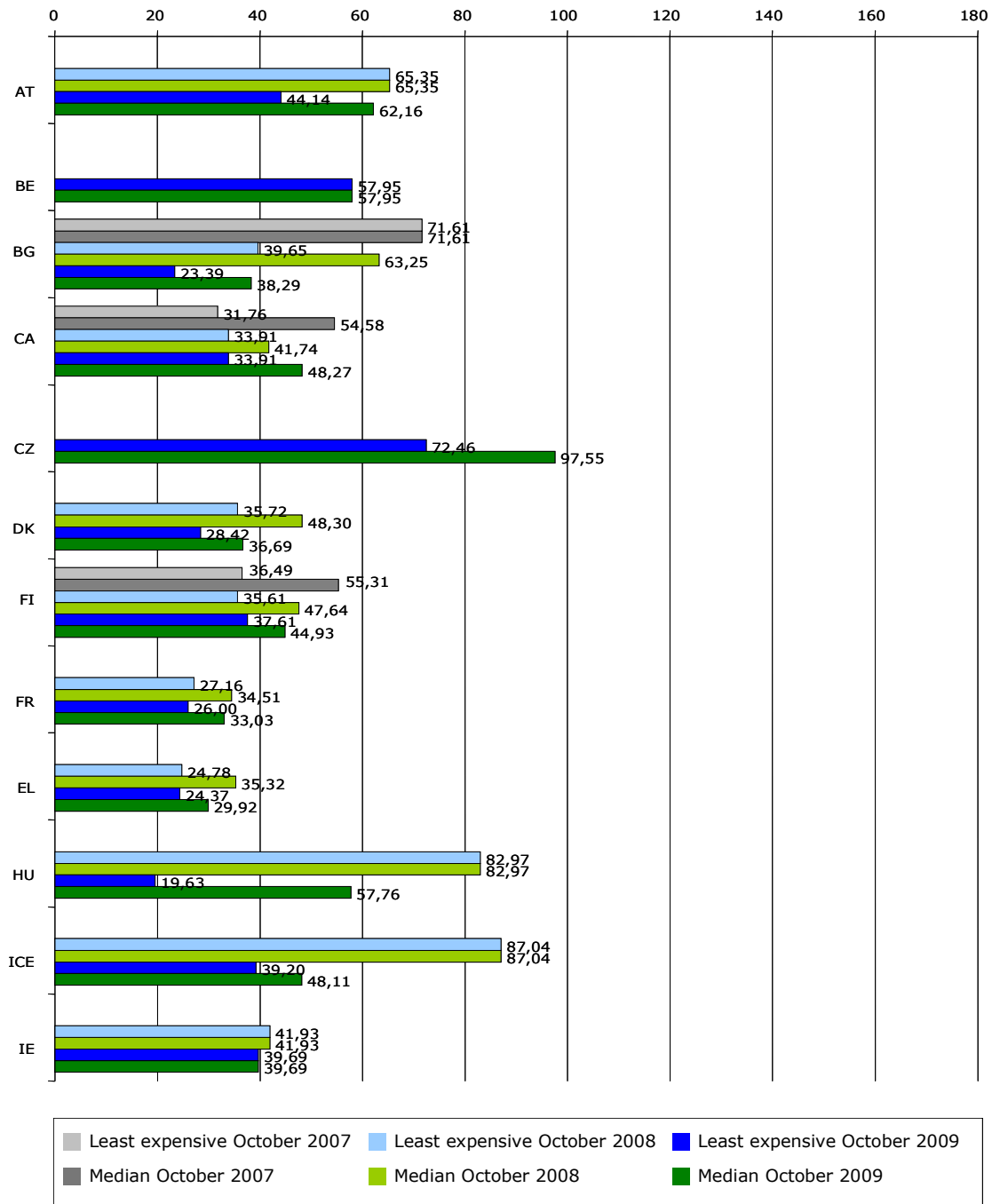
#### 4.2.7.e BASKET "20+ MBPS", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2007, OCTOBER 2008 AND OCTOBER 2009

Comparison October 2007– October 2008 – October 2009

Least expensive and median offers:

Basket "20+Mbps", 30GB or 20 hours/month

Total cost/month in €/PPP (VAT incl.)

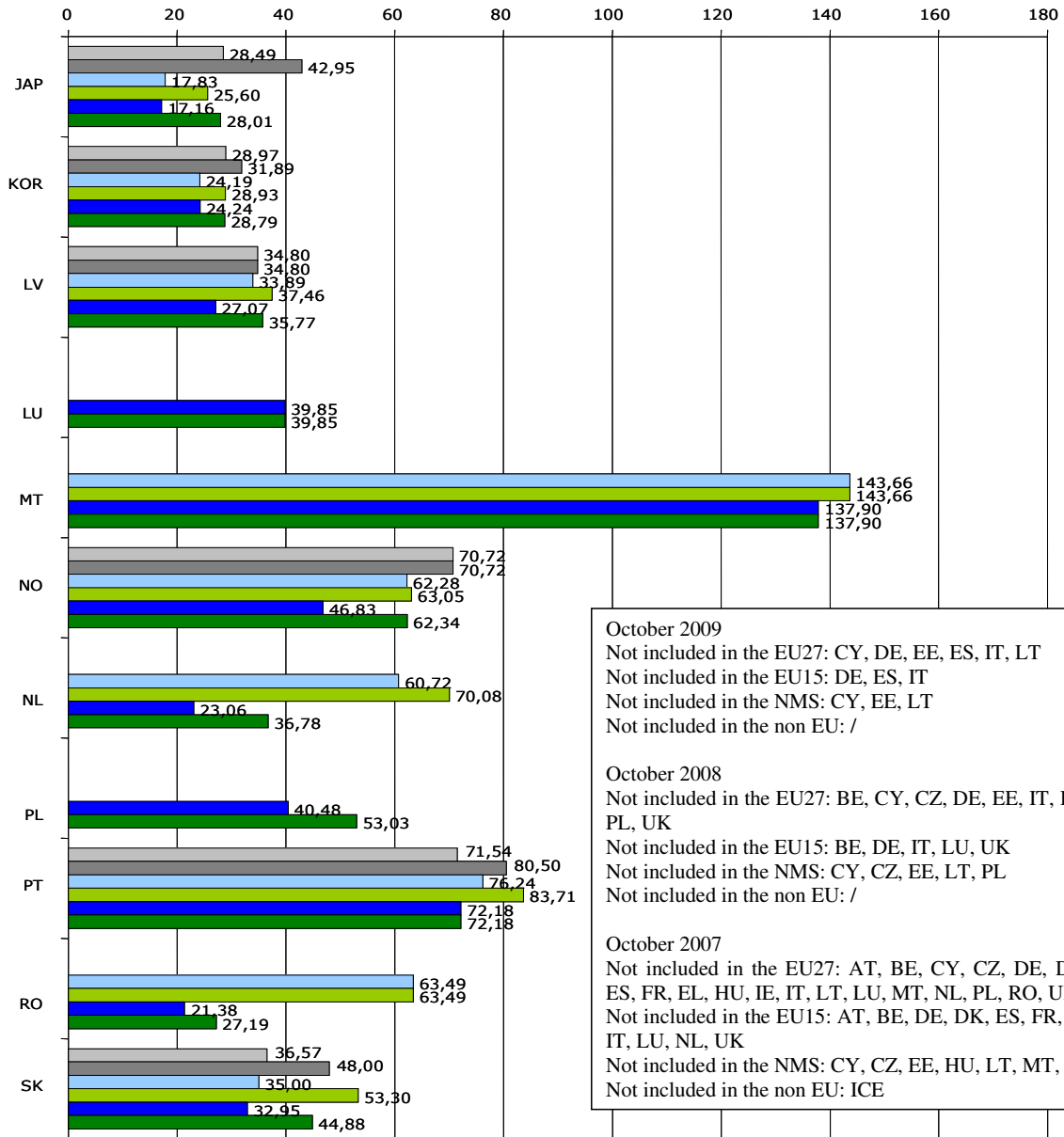


**Comparison October 2007– October 2008 – October 2009**

**Least expensive and median offers:**

**Basket "20+Mbps", 30GB or 20 hours/month (followed)**

Total cost/month in €/PPP (VAT incl.)



**October 2009**

Not included in the EU27: CY, DE, EE, ES, IT, LT

Not included in the EU15: DE, ES, IT

Not included in the NMS: CY, EE, LT

Not included in the non EU: /

**October 2008**

Not included in the EU27: BE, CY, CZ, DE, EE, IT, LT, LU, PL, UK

Not included in the EU15: BE, DE, IT, LU, UK

Not included in the NMS: CY, CZ, EE, LT, PL

Not included in the non EU: /

**October 2007**

Not included in the EU27: AT, BE, CY, CZ, DE, DK, EE, ES, FR, EL, HU, IE, IT, LT, LU, MT, NL, PL, RO, UK

Not included in the EU15: AT, BE, DE, DK, ES, FR, EL, IE, IT, LU, NL, UK

Not included in the NMS: CY, CZ, EE, HU, LT, MT, PL, RO

Not included in the non EU: ICE

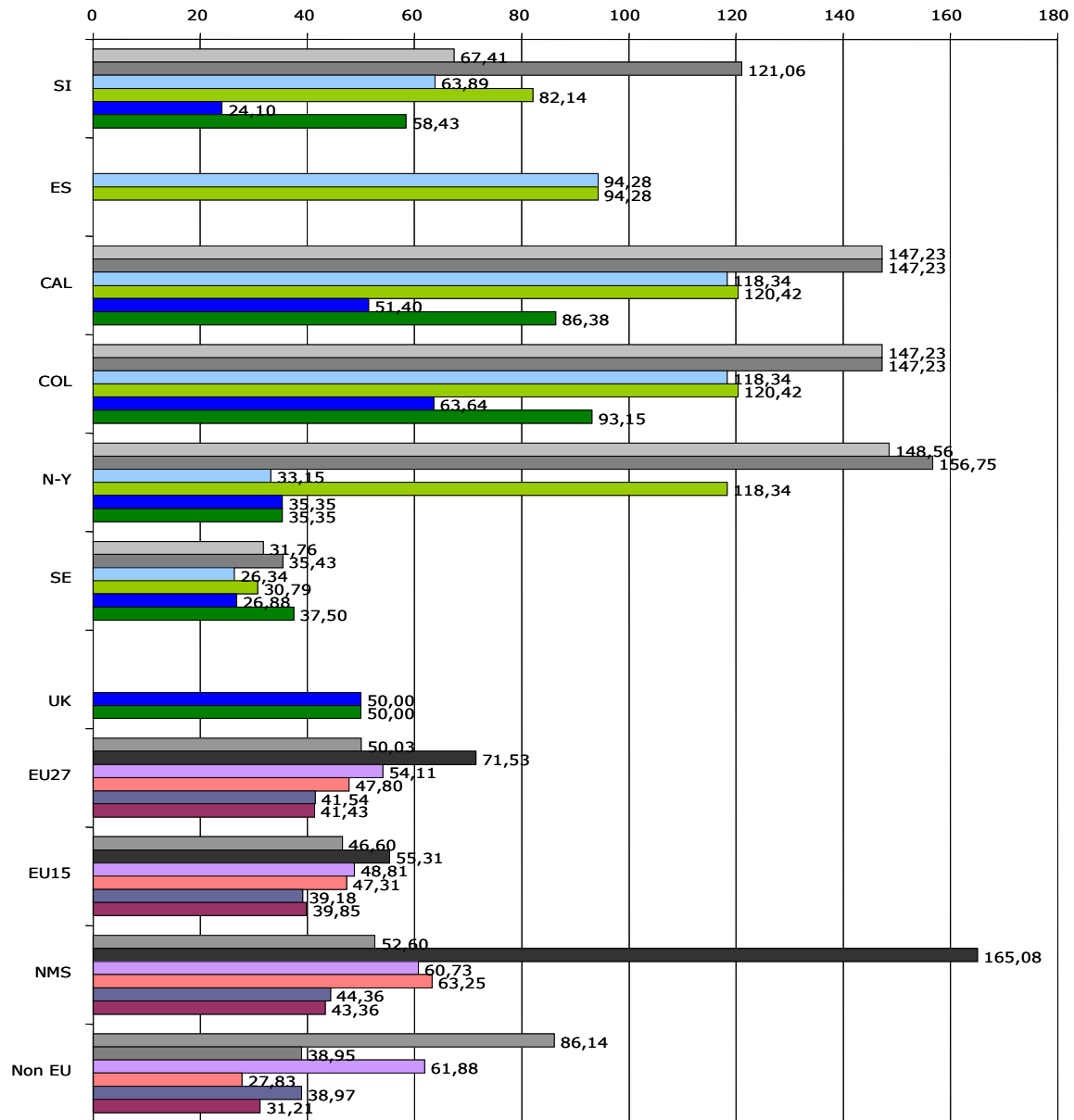
■ Least expensive October 2007   ■ Least expensive October 2008   ■ Least expensive October 2009  
 ■ Median October 2007   ■ Median October 2008   ■ Median October 2009

**Comparison October 2007– October 2008 – October 2009**

**Least expensive and median offers:**

**Basket "20+Mbps", 30GB or 20 hours/month (followed)**

Total cost/month in €/PPP (VAT incl.)



Least expensive October 2007	Least expensive October 2008	Least expensive October 2009
Median October 2007	Median October 2008	Median October 2009

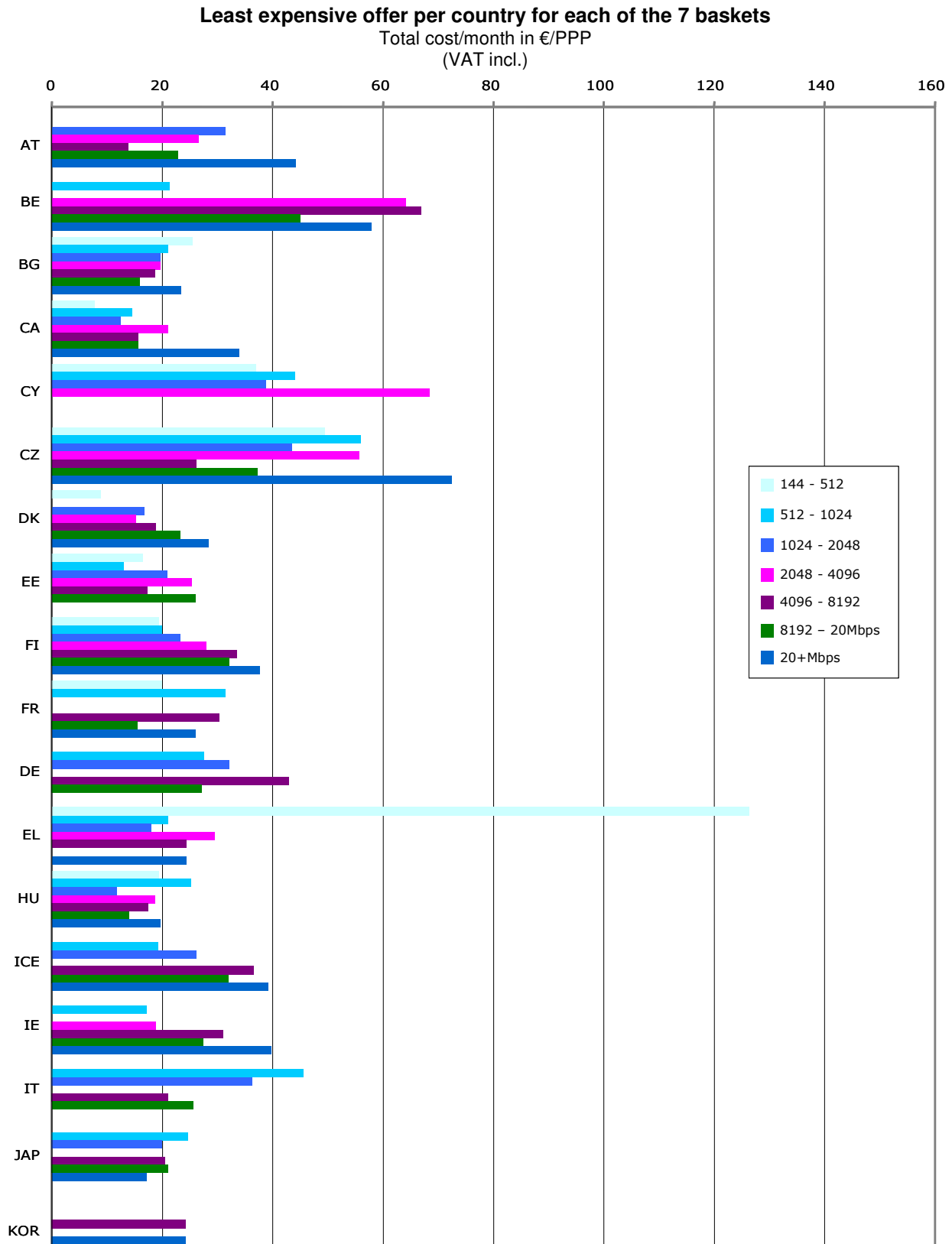
Average of least expensive October 2007	Average of least expensive October 2008	Average of least expensive October 2009
Median October 2007	Median October 2008	Median October 2009

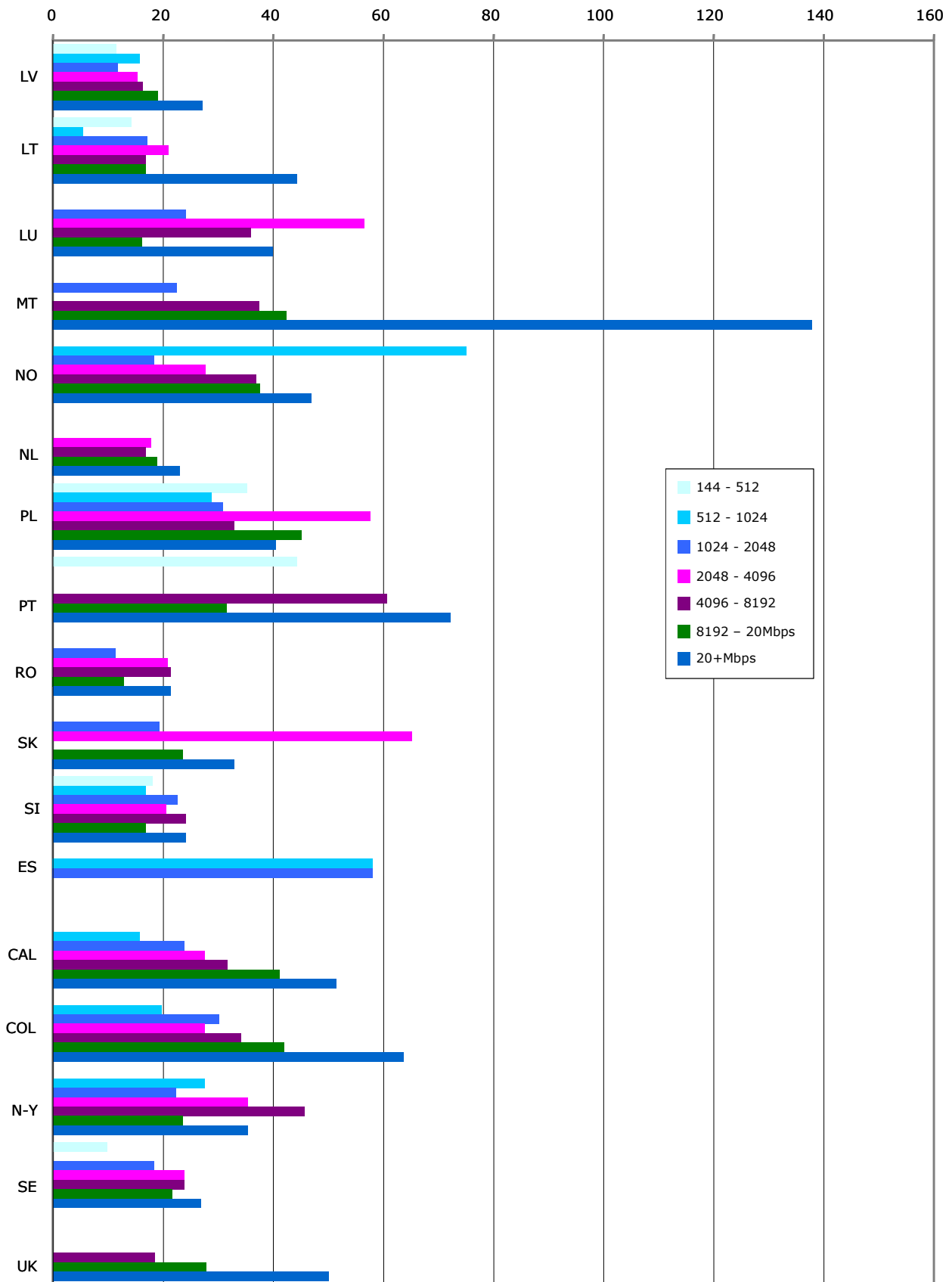
#### **4.2.7.f CONCLUSIONS ON BASKET 20+MBPS**

- For five countries, no offer of the selected ISPs was available for this basket. These countries include *Cyprus, Estonia, Germany, Italy* and *Spain*. Compared to April 2009, the following countries have now offers for this basket: *Czech Republic, Lithuania* and *Poland*. No country had offers for this basket in April 2009 but did not have any offers for October 2009.
- In this basket only one offer was available for the following countries: *Belgium, Ireland, Lithuania, Luxembourg, Malta, Portugal, the State of New York* and the *United Kingdom*. The charge for this offer equals the least expensive and no median value was determined for these countries.
- The offers for *Bulgaria, Canada, Finland, France, Hungary, Latvia* and *Slovenia* are only available in certain areas of the country.
- The offer for *Finland* (Elisa) is only available to clients who have an analog cable TV contract with the ISP.
- No phone line or TV contract is required in order to access the *Greek* offer (Forthnet).
- In *Czech Republic* and *Slovakia*, the ISP requires a deposit for use of equipment.
- In the selection of the least expensive offers of this basket there are seven metered offers. For these offers no normalisation step was needed as the volumes included exceeded our normalisation parameters.
- For some countries a major difference can be noted between the least expensive and the median offers.
  - Nine of the thirteen offers for *Hungary* in this basket have charges over 50 EUR/PPP.
  - For *Slovenia* a major difference can be noted between the least expensive and the median offer. In total there are ten offers in the basket, 6 of which have total charges higher than 50 EUR/PPP.
- The omission of non-recurring charges in the following countries influences the place they take in the overall ranking of the least expensive offers: *Austria, Bulgaria, Canada, France, Hungary, Korea, Slovenia* and *the State of New-York*. Non-recurring charges are significant in *Czech Republic*.
- Charges for least expensive offers decreased in most countries. Significant decreases were observed in *Austria, Bulgaria, Denmark, Hungary, Iceland, Latvia, Malta, Norway, The Netherlands, Romania, Slovenia, the State of California* and *the State of Colorado*. In the other countries, charges decreased slightly or remained stable.
- Overall, the average of the least expensive offers decreased both for the EU27 as for the non-EU countries. The median values decreased in the EU15 and NMS countries, though increased slightly in the non-EU countries.

### 4.3. LEAST EXPENSIVE OFFER PER COUNTRY FOR EACH OF THE 7 BASKETS

Based on the analysis in the previous paragraphs, a summary for all baskets per country can be presented.







## Conclusions on the least expensive offer per country for each of the 7 baskets

Within one country, the offers with higher bit-rates tend to be more expensive offers. This however is not always the case.

- Eight countries had offers in all seven baskets: *Bulgaria, Czech Republic, Finland, Hungary, Latvia, Lithuania, Poland and Slovenia*;
- In Korea and Spain, offers were present in only two baskets; these countries are therefore not included in the analysis below;
- None of the countries offered baskets at costs which are systematically higher for higher download speed;
- Countries that follow the above pattern (higher speeds lead to higher charges) but that do not have offers in all baskets are *Malta, the State of California and the United Kingdom*;
- In a number of countries charges tend to follow the above-mentioned pattern with exception of one basket. This is the case for *Cyprus, Denmark, Finland, Germany, Iceland, Ireland, Latvia, Norway, The Netherlands, Portugal, Romania, Slovakia, the State of Colorado and Sweden*;
- The least expensive offers of the other countries in the sample demonstrate that higher download speeds do not necessarily lead to more expensive offers. In particular in *Bulgaria* prices decrease when download speeds increase (with the exception of the last basket);
- The case of *Cyprus* is exceptional, as only offers for the four baskets with the lowest speeds are available for this country. Other countries that provide offers in only a limited number of baskets, typically mainly offer broadband at higher speeds. This is the case for *Austria, Luxembourg, Malta, The Netherlands, Portugal, Romania, Slovakia and the United Kingdom*;
- Finally, in countries such as *Austria, Czech Republic, Estonia, France, Greece, Hungary, Japan, Slovenia and the State of New York*, charges for Broadband Internet Access with very high speeds do not necessarily differ significantly from the charges of offers with lower speeds.

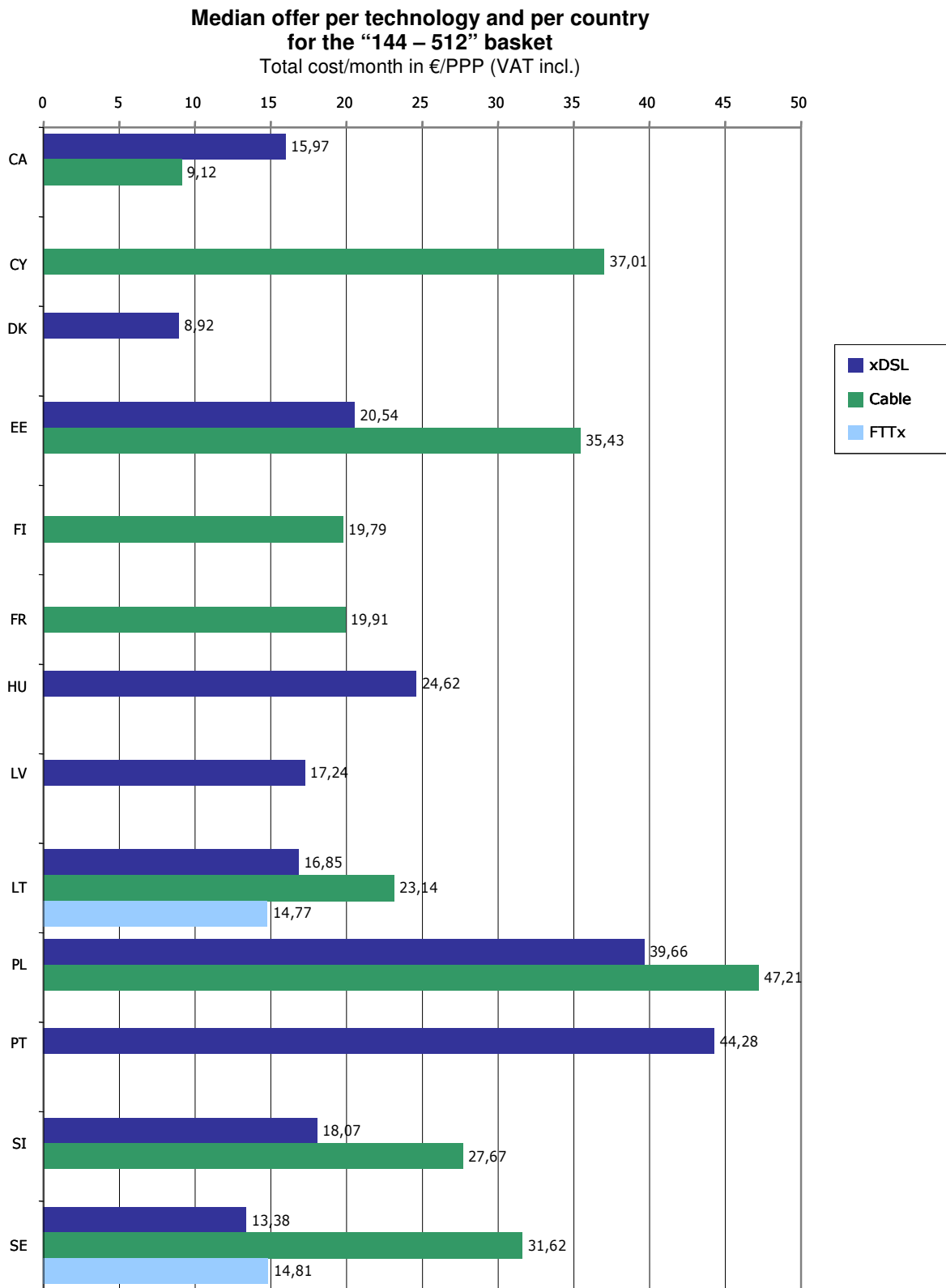
Compared to the previous data collected, it can be observed that the pattern described above (higher speeds lead to higher charges) is less clear than before. The appearance of new technologies, such as e.g. the Docsis 3.0 for cable operators (cf. section 2.3) or the FTTC and FTTH developments, allow ISPs to offer their customers much higher internet access speeds at a very competitive price.

#### ***4.4. MEDIAN OFFER PER TECHNOLOGY FOR EACH OF THE 7 BASKETS***

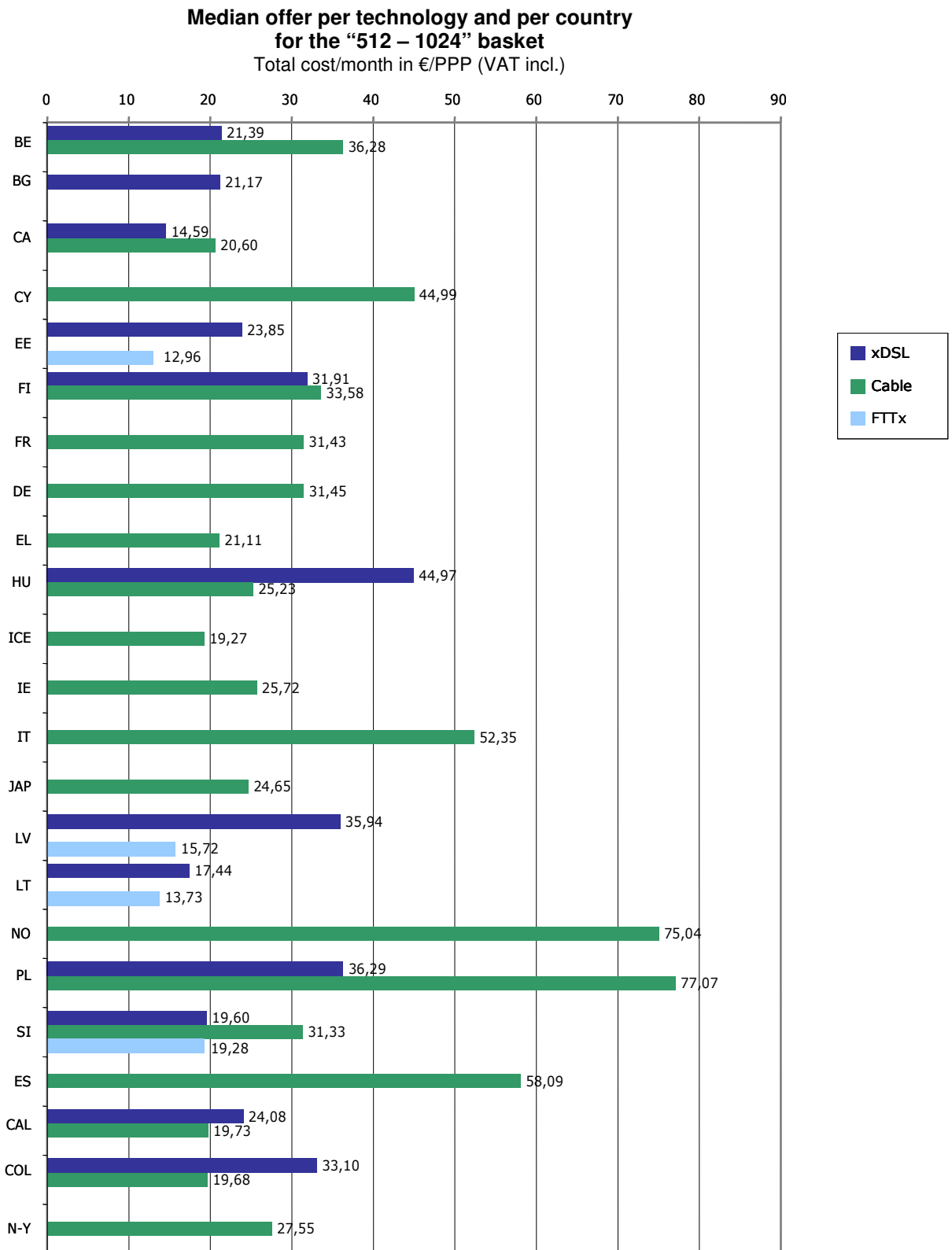
In addition to the analyses of the least expensive offers and their relationship to the median, a comparison was made between the median rates of offers based on xDSL, Cable technology and FTTx. These three technologies each represented over 20% of the total sample of offers collected.

The outcome of this comparison is presented below and shown for each basket separately.

**4.4.1. BASKET "144KBPS-512KBPS (incl.)", IN €/PPP (VAT INCL.)**

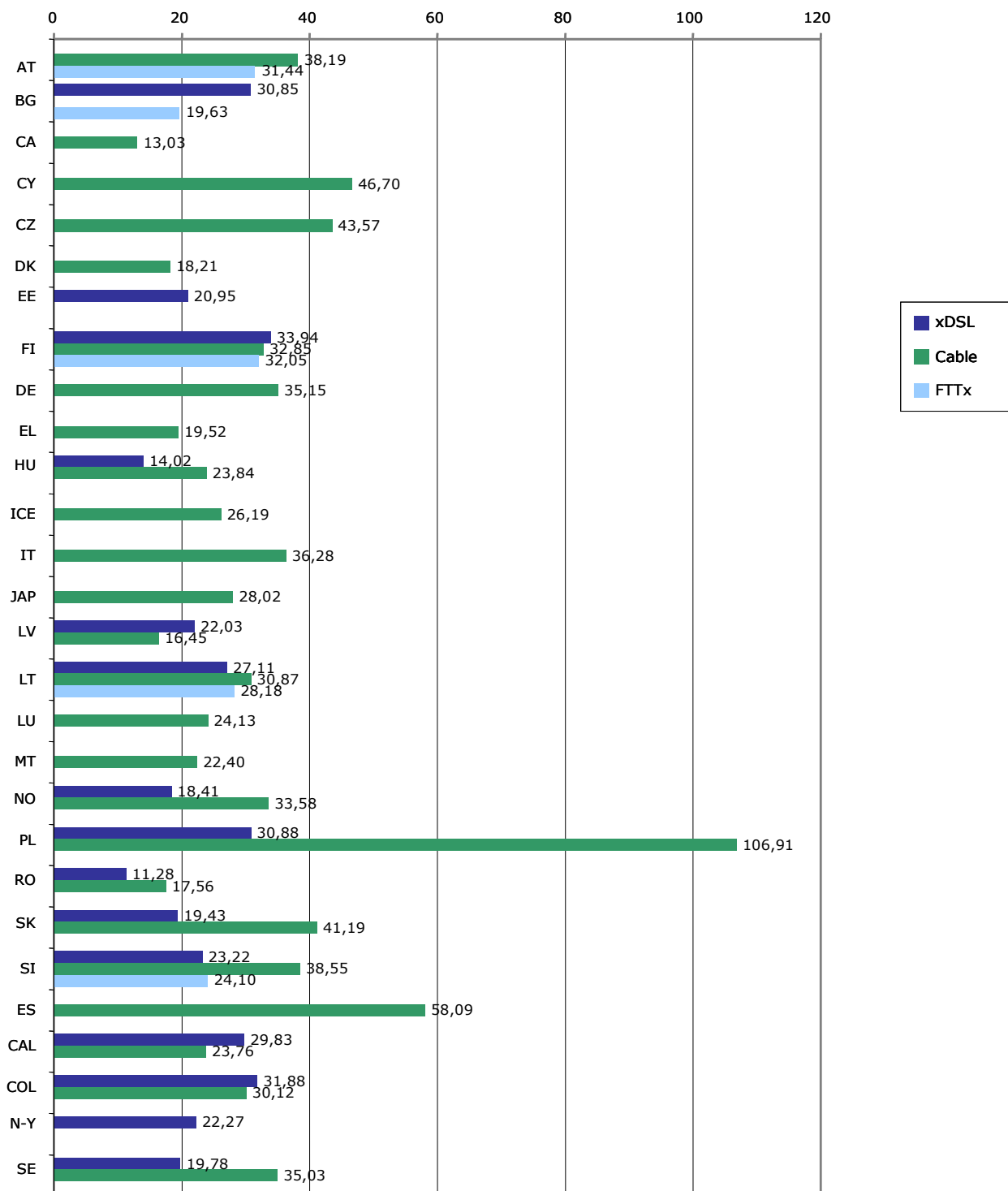


#### 4.4.2 **BASKET "512KBPS-1024KBPS (incl.)", " , IN €/PPP (VAT INCL.)**

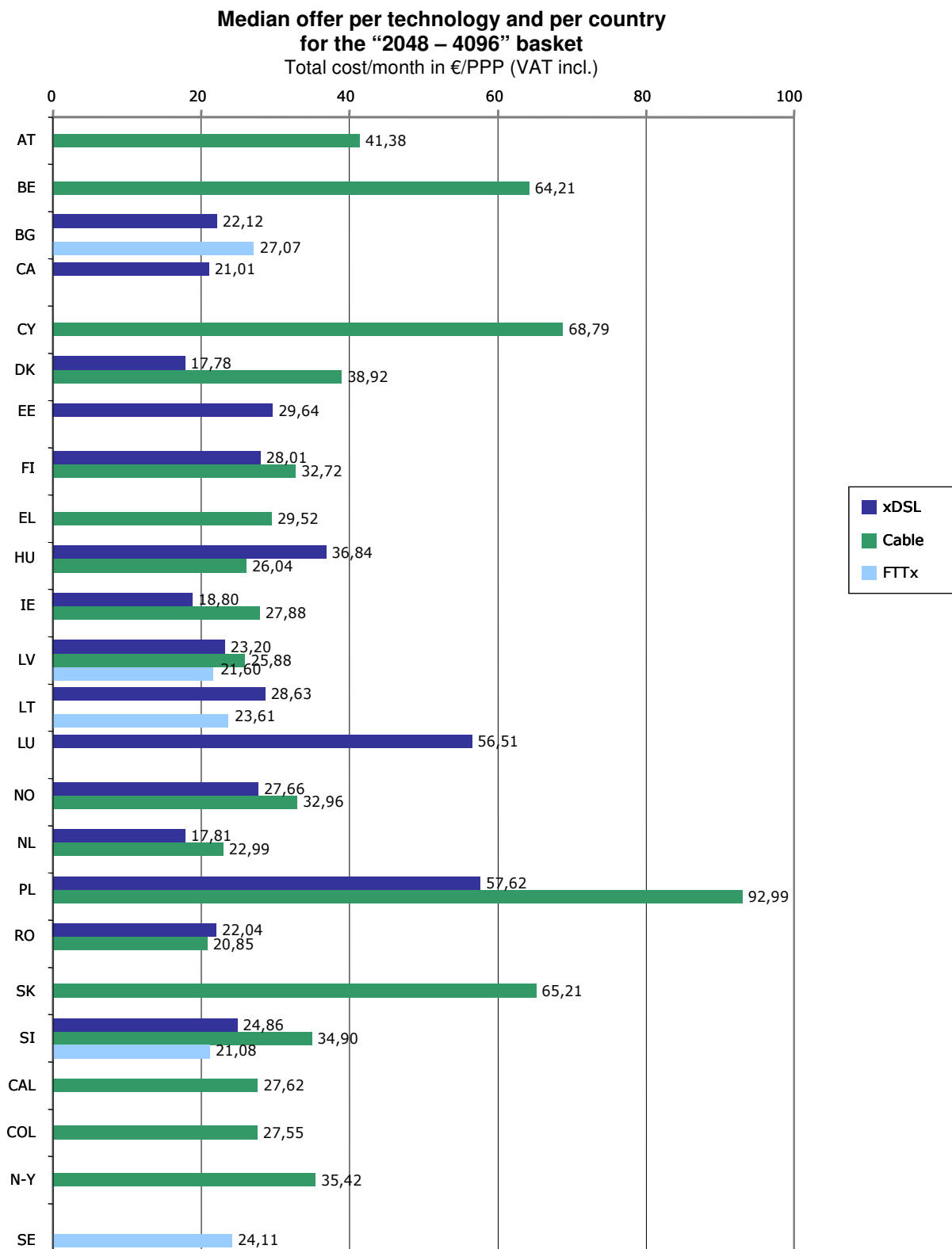


#### **4.4.3 BASKET "1024KBPS-2048KBPS (incl.)", IN €/PPP (VAT INCL.)**

**Median offer per technology and per country  
for the "1024 – 2048" basket**  
Total cost/month in €/PPP (VAT incl.)



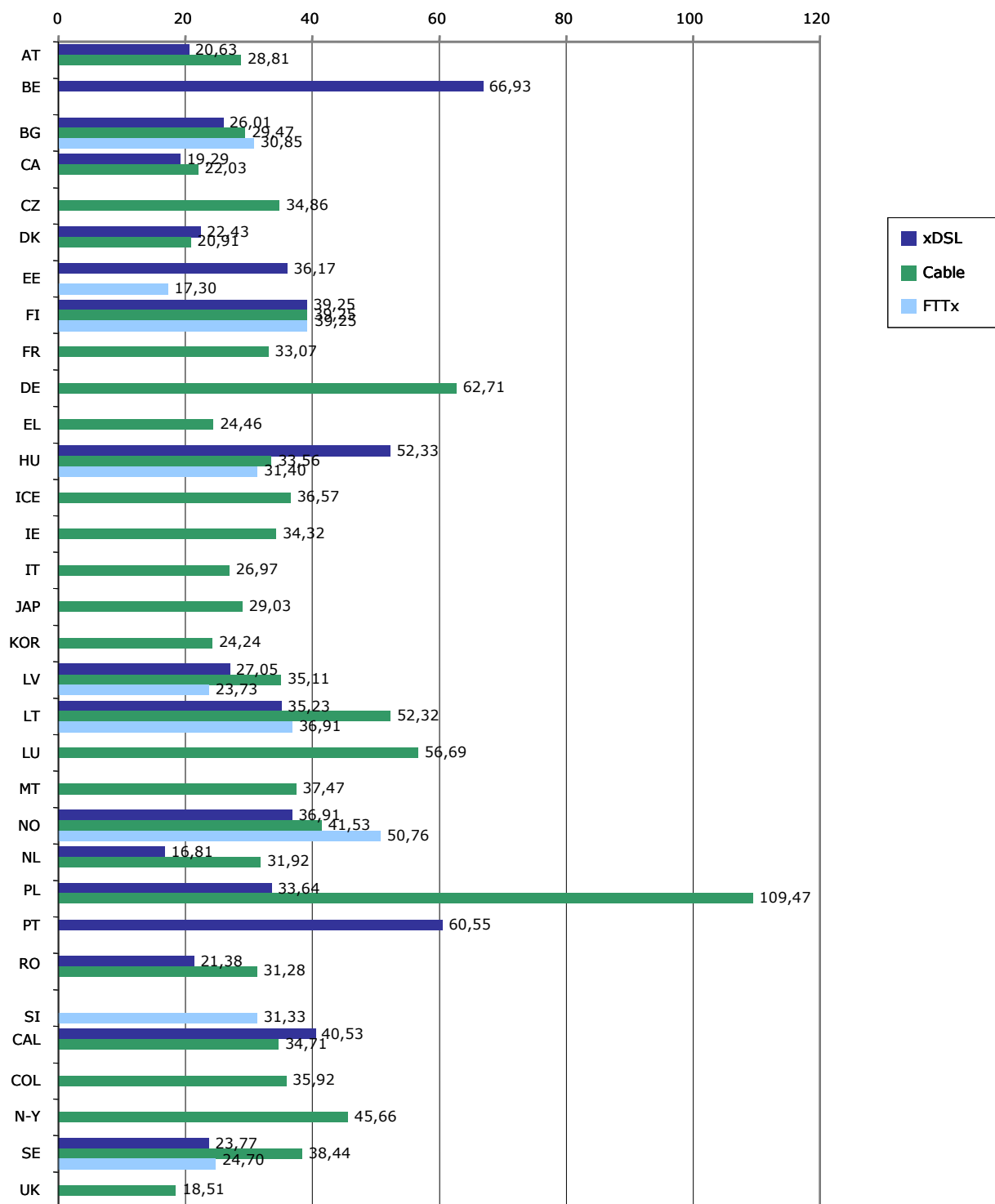
#### 4.4.4 **BASKET "2048KBPS-4096KBPS -(incl.)", IN €/PPP (VAT INCL.)**



#### 4.4.5 **BASKET "4096KBPS-8192KBPS (incl.)", IN €/PPP (VAT INCL.)**

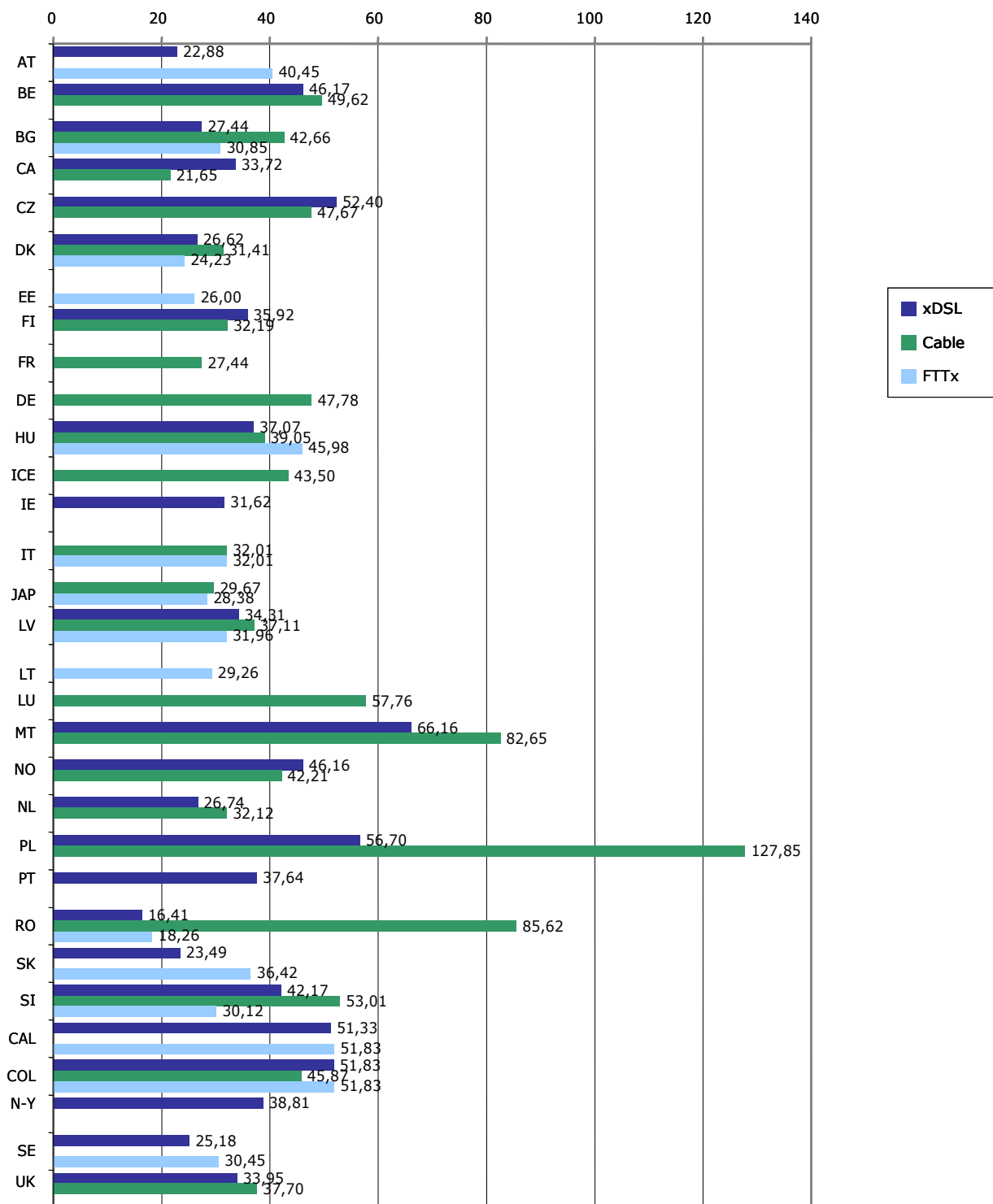
**Median offer per technology and per country  
for the "4096 – 8192" basket**

Total cost/month in €/PPP (VAT incl.)



#### **4.4.6. BASKET "8192KBPS-20MBPS (incl.)", IN €/PPP (VAT INCL.)**

**Median offer per technology and per country  
for the "8192 – 20Mbps" basket**  
Total cost/month in €/PPP (VAT incl.)

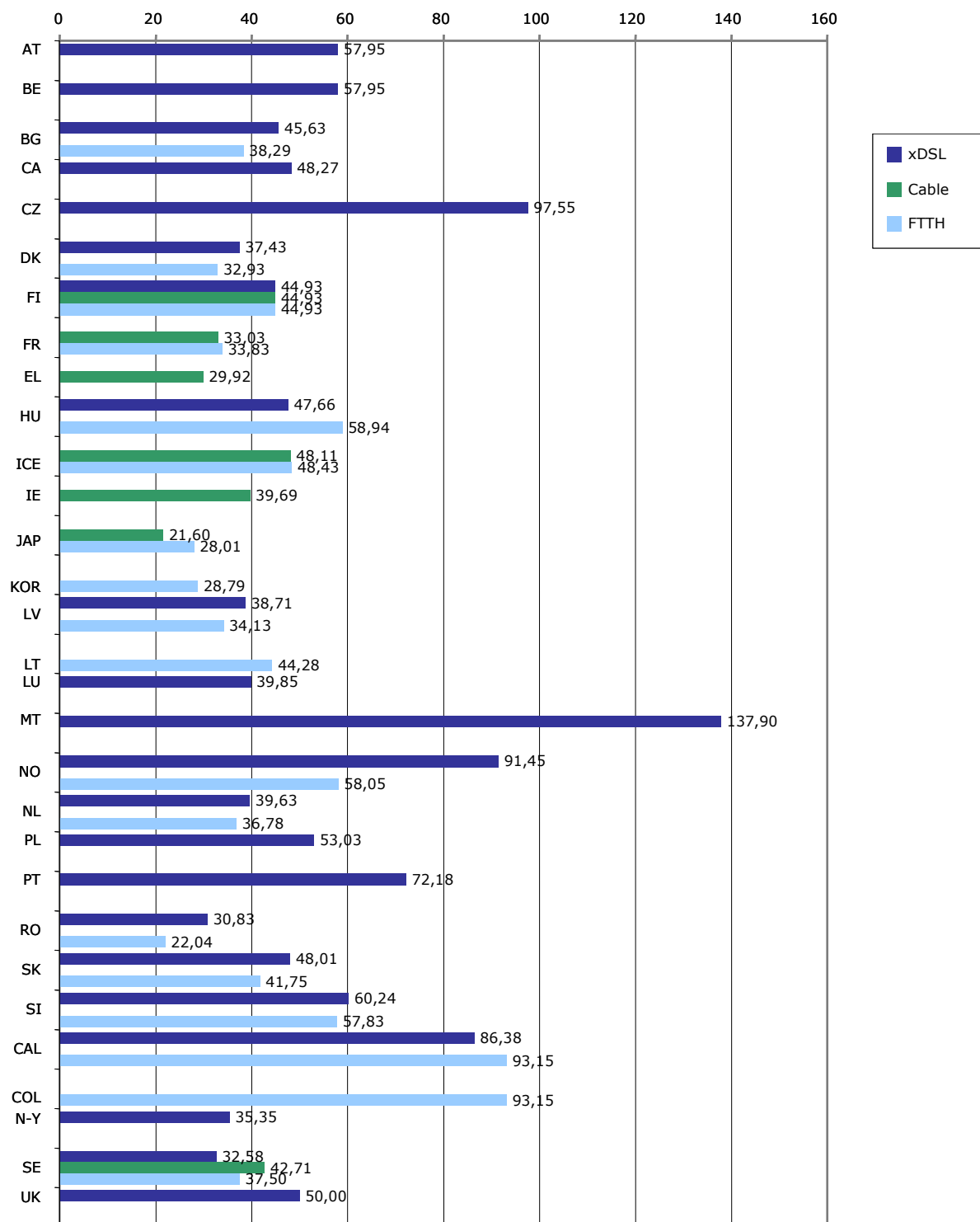




#### 4.4.7 **BASKET "20+MBPS", IN €/PPP (VAT INCL.)**

**Median offer per technology and per country  
for the "20+Mbps" basket**

Total cost/month in €/PPP (VAT incl.)



## **5. RESULTS OF THE BROADBAND INTERNET ACCESS COST COMPARISON FOR BUNDLED OFFERS**

The results of the Broadband Internet Access Cost study for bundled offers are presented in this chapter. They are based on the following selection of offers:

- Least expensive offers per country and per basket for each bundle type (cf. section 5.1 to 5.3);
  - Bundles including Internet Access and Fixed Telephone Service (cf. section 5.1)
  - Bundles including Internet Access and Television Service (cf. section 5.2);
  - Bundled including Internet Access and Fixed Telephone Services and Television Service (cf. section 5.3).
- Summary of the least expensive offer per country and per bundle type for all baskets (cf. section 5.4);
- The least expensive offer per country and per basket for all bundles types (including internet access outside a bundle) for each of the seven baskets (cf. section 5.5).

### **5.1. LEAST EXPENSIVE OFFER PER COUNTRY AND PER BASKET FOR BUNDLES INCLUDING INTERNET ACCESS AND FIXED TELEPHONE SERVICE**

The outcome of this analysis is presented by means of:

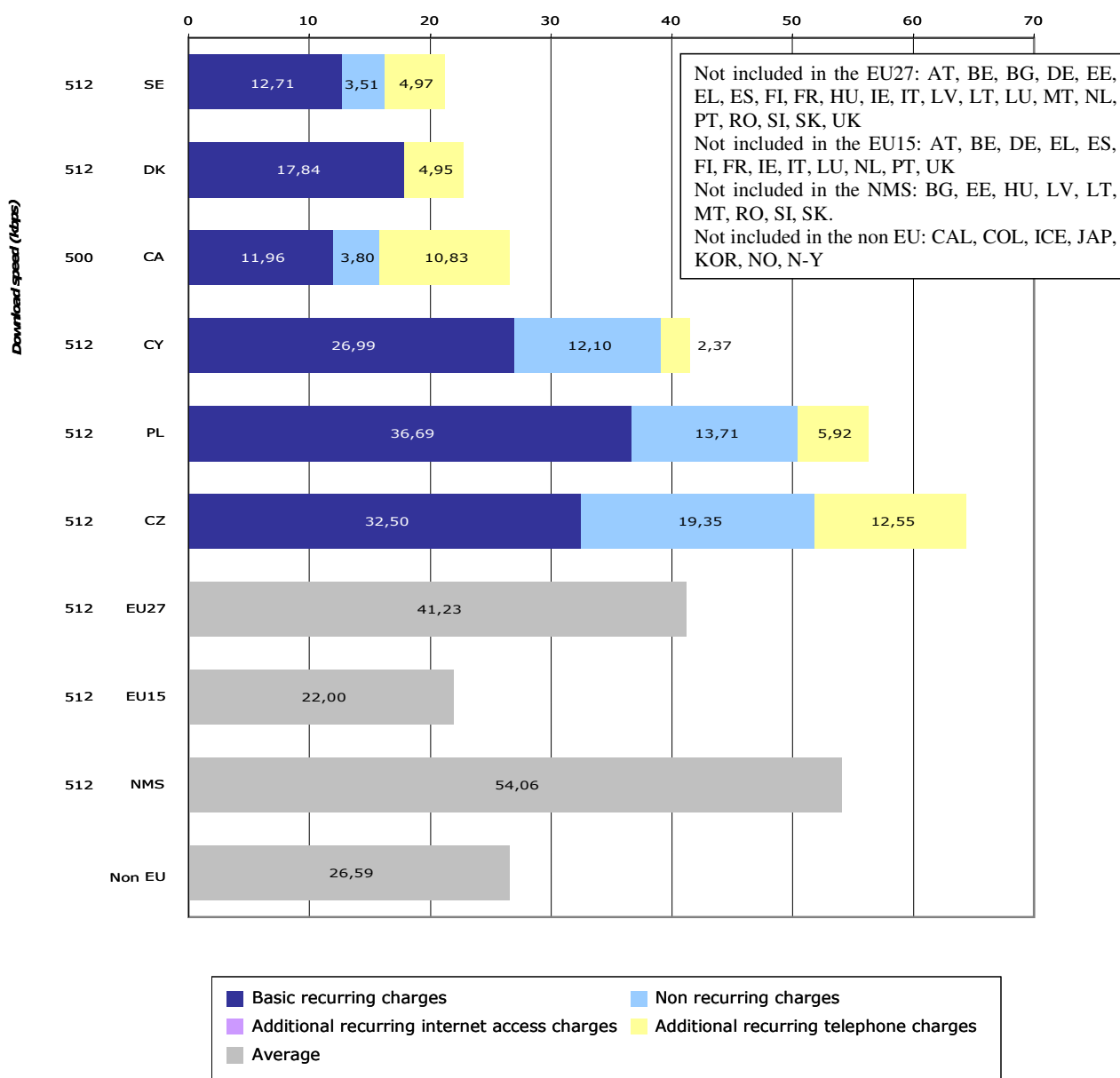
- A graph that presents the cost results for the "Internet access+Tel" bundles in EUR/PPP VAT incl. (total cost and breakdown in a recurring and non-recurring fee, as well as the additional cost that is added when normalisation took place). The focus is on the least expensive offers. The average of the selected least expensive offers is represented as well.
- A list with the detailed characteristics of the offers that are selected. Characteristics of the fixed telephone service include telephone technology, unlimited night and weekend calls (yes/no), number of minutes to fixed and mobile lines included, and option for mobile telephone (yes/no).
- A graph that compares the Broadband Internet Access Cost (in EUR/PPP VAT incl.) of the October 2008 and October 2009 cost comparison exercise. The graph shows the least expensive offers and the median offers.
- Remarks and conclusions on the data in the graphs are presented for each basket in paragraph c.

### **5.1.1 BASKET "144KBPS-512KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### **5.1.1.a LEAST EXPENSIVE OFFER**

The "Internet+Tel" bundle with a download speed corresponding to this basket was offered in six countries. In the following countries, no offer was available: *Austria, Belgium, Bulgaria, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)

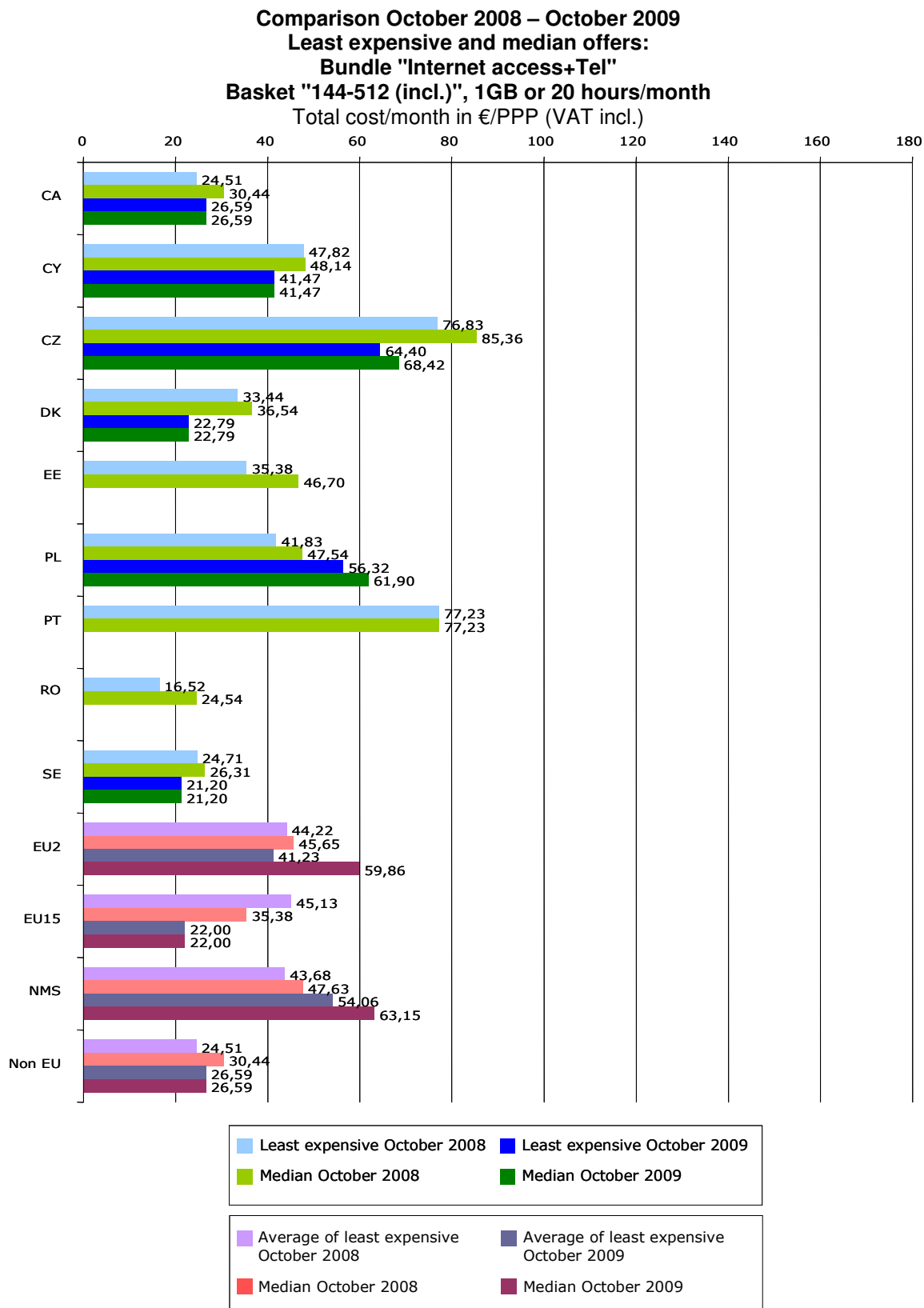


### 5.1.1.b BASKET "144KBPS-512KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Addreses per mailbox (***)	Webspace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
<b>Canada</b>	<b>Bell Canada</b>	Bell Internet essential (QC)	xDSL	-	500	1	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	32,86	26,59
<b>Cyprus</b>	<b>Cytanet</b>	NetRunner Home 512 (with DSL Access Home512)	xDSL	-	512	unlimited	unlimited	4	N.D.	20	AV+AS+PC+PM	VoIP	No	660	0	No	40,64	41,47
<b>Czech Republic</b>	Ceské Radiokomunikace	Angel Efekt 2006	Plug&Play	12	512	unlimited	unlimited	1	N.D.	0	AV+AS	VoIP	No	0	0	No	44,88	64,40
<b>Denmark</b>	Dansk Kabel TV	Lav hastighed 512 kbit / 256 kbit	Cable	-	512	unlimited	unlimited	1	5	250	-	VoIP	Yes	unlimited	0	No	34,01	22,79
<b>Poland</b>	<b>TP sa</b>	Internet 512kbps i neofon	xDSL	12	512	unlimited	unlimited	1	N.D.	20	AV+AS+ASW	VoIP	No	0	0	No	32,78	56,32
<b>Sweden</b>	Tele2 Sverige	Bredband 0.5/0.5 Mbit/s+Broadband Tel	FTTx	-	512	unlimited	unlimited	5	1	40	-	VoIP	No	0	0	No	24,10	21,20
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line																		
(**) Duration = '-' indicates that 12 months was assumed																		
(***) N.D. Indicates information is not provided by ISP																		
ISPs in <i>italic &amp; bold</i> are incumbent operators																		

Table 18: Detailed information on least expensive offer per country (144kbps-512kbps (incl.)) ; "Internet + Tel"

**5.1.1.c BASKET "144KBPS-512KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**5.1.1.d Conclusions on bundle "Internet+Tel" for "basket 144kbps-512kbps (incl.)"**

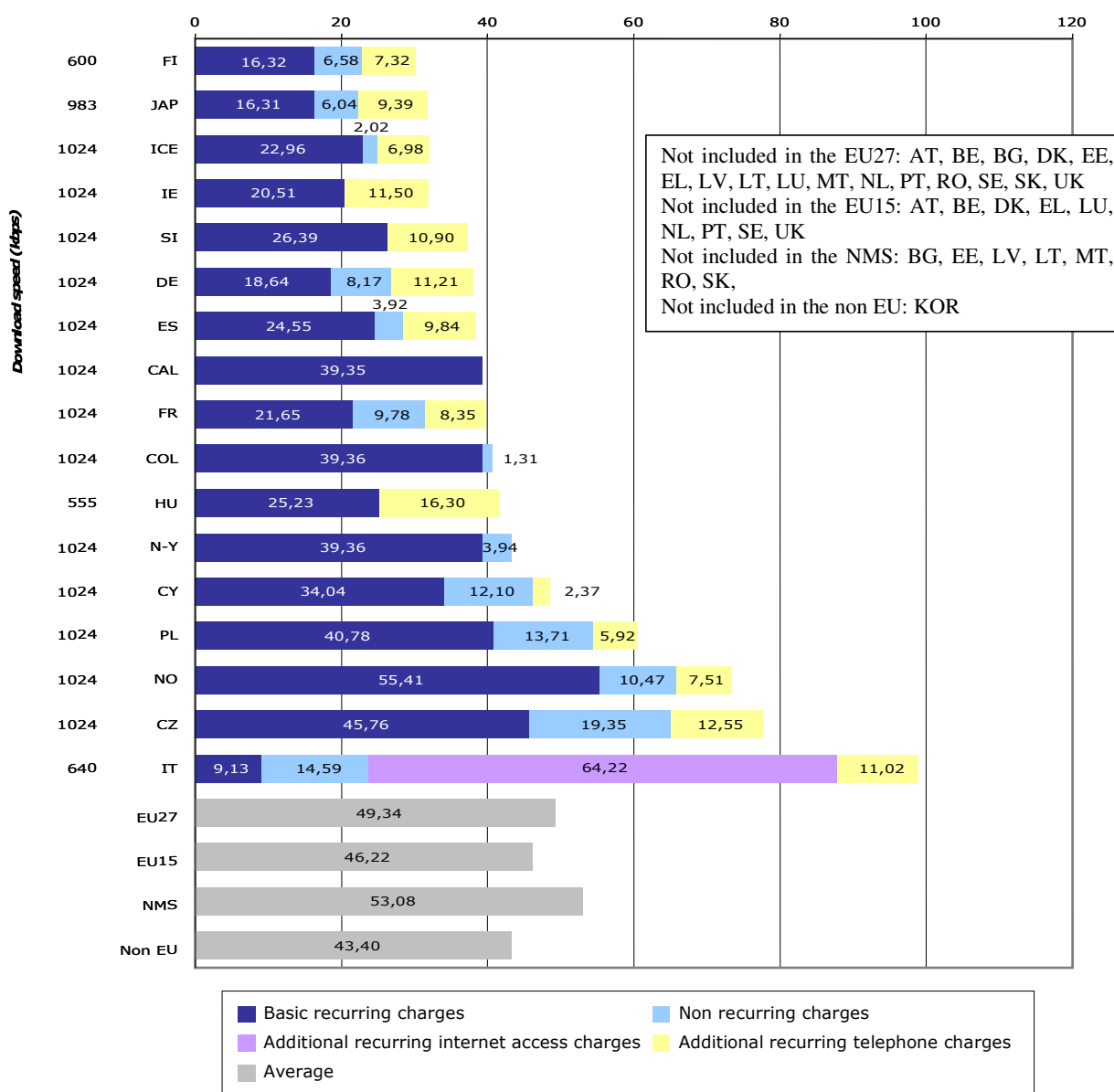
- In six countries one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Austria, Belgium, Bulgaria, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Canada, Cyprus, Denmark* and *Sweden*. There are two offers from the same ISP in *Czech Republic* and five offers from two different ISPs in *Poland*.
- There is only one metered offer for this basket (i.e. offer for *Canada* including 1GB), but no normalisation was required.
- The omission of non-recurring charges in *Denmark* influenced its place in the overall ranking. Non-recurring charges in the *Czech Republic* had a significant impact on its ranking.
- All offers needed normalisation of telephone charges.
- The comparison between October 2008 and October 2009 is difficult as only six countries had offers in this basket for both periods.

## 5.1.2 **BASKET "512KBPS-1024KBPS (INCL.)", IN €/PPP (VAT INCL.)**

### 5.1.2.a **LEAST EXPENSIVE OFFER**

From the ISPs selected, no offer was available in the following countries: *Austria, Belgium, Bulgaria, Canada, Denmark, Estonia, Greece, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia, Sweden and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "512-1024 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



### 5.1.2.b BASKET "512KBPS – 1024KBPS (INCL.)", LIST OF SELECTED OFFERS

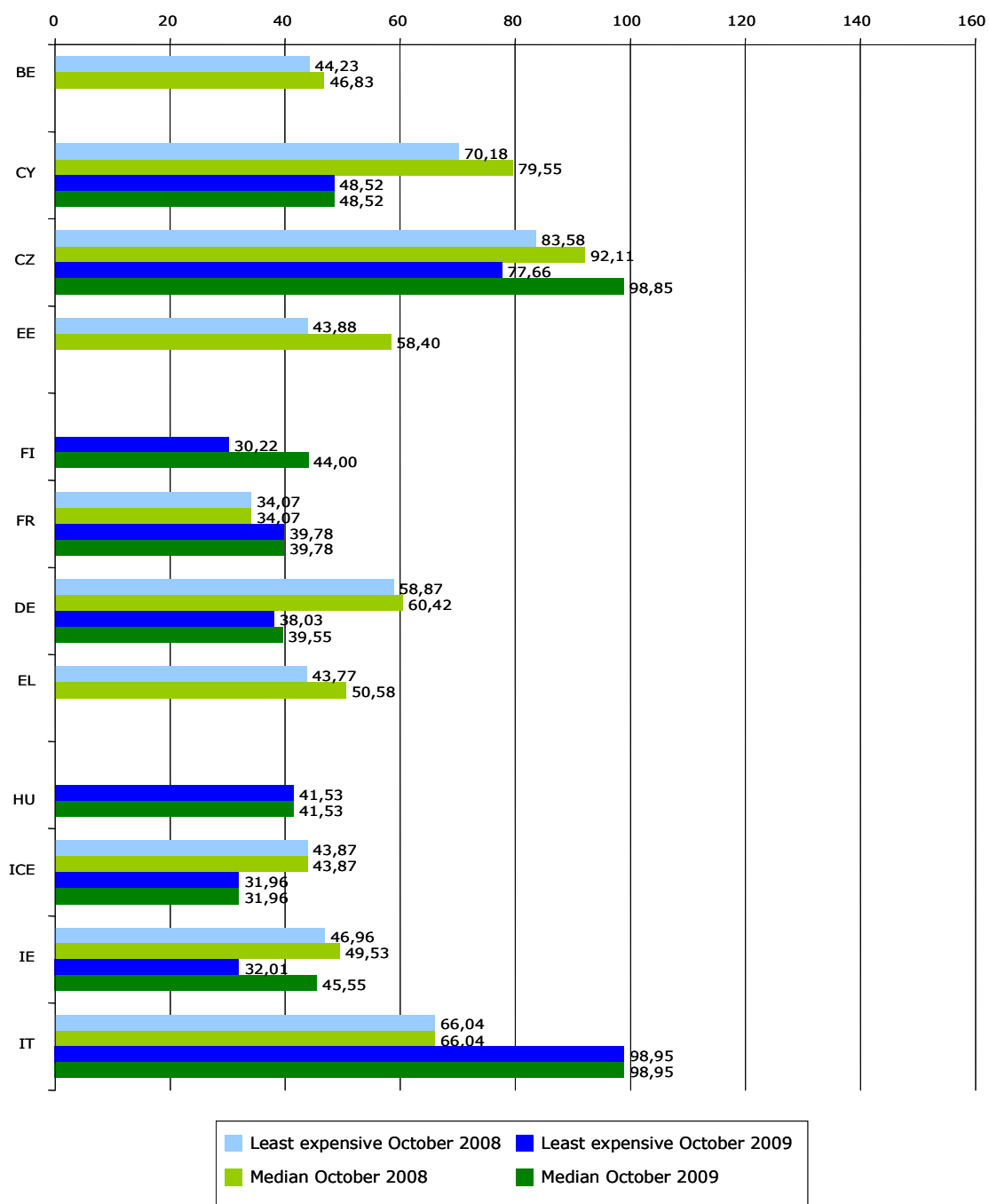
Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
<b>Cyprus</b>	<b>Cytanet</b>	NetRunner Home 1000 (with DSL Access)	xDSL	-	1024	unlimited	unlimited	4	N.D.	20	AV+AS+PC+PM	VoIP	No	660	0	No	47,55	48,52
<b>Czech Republic</b>	Ceské Radiokomunikace	Angel Efekt 2006	Plug&Play	12	1024	unlimited	unlimited	1	N.D.	0	AV+AS	VoIP	No	0	0	No	54,13	77,66
<b>Finland</b>	<b>Elisa</b>	Elisa Laajakaista Heti (Tampere)+ Phone	Cable	18	600	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	37,77	30,22
<b>France</b>	<b>Orange France</b>	Découverte internet 1 mégamax+Tel	xDSL	-	1024	unlimited	unlimited	5	N.D.	100	AS+PC	VoIP	Yes	unlimited	0	No	45,75	39,78
<b>Germany</b>	Vodafone/Arcor	Komplettanschluss DSL 1000	xDSL	24	1024	unlimited	unlimited	N.D.	N.D.	N.D.	-	Switched	No	0	0	No	40,69	38,03
<b>Hungary</b>	GTS-Datanet	YO! Alap + YO! Telefon	xDSL	12	555	unlimited	unlimited	1	N.D.	15	AV+AS	VoIP	No	0	0	No	27,66	41,53
<b>Iceland</b>	<b>Siminn</b>	Grunnaskrift+Heimasimi	xDSL	6	1024	1	-	0	N.D.	0	AS+ASW+FW+PC	VoIP	No	0	0	Yes	19,11	31,96
<b>Ireland</b>	UPC Ireland	1 Mb Broadband Basic & Phone, Bargain Deal	Cable	12	1024	10	-	1	15	300	-	Switched	No	0	0	No	37,45	32,01
<b>Italy</b>	<b>Telecom Italia</b>	Alice Voce Night & Weekend	xDSL	-	640	-	0	1	N.D.	300	AV+AS	VoIP	Yes	0	0	No	107,86	98,95
<b>Japan</b>	Yahoo Japan	Yahoo! BB Reach DSL (NTT East area)+	xDSL	-	983.04	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	35,05	31,73
<b>Norway</b>	Ventelo	Bredbaand - 1024/1024 kbps , Bluephone	xDSL	12	1024	unlimited	unlimited	1	5	30	AS+FW	VoIP	No	0	0	No	95,01	73,39
<b>Poland</b>	<b>TP sa</b>	Internet 1024kbps i neofon	xDSL	12	1024	unlimited	unlimited	1	N.D.	50	AV+AS+ASW	VoIP	No	0	0	No	35,15	60,41
<b>Slovenia</b>	Amis	dvójka tel junior	xDSL	-	1024	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	30,95	37,29
<b>Spain</b>	<b>Telefonica</b>	duo Kit ADSL Mini	xDSL	12	1024	2	-	5	N.D.	25	-	Switched	Yes	unlimited	0	No	36,01	38,31
<b>State of California</b>	Charter Communications	Bundle with Lite internet and telephone	Cable	-	1024	unlimited	unlimited	10	N.D.	20	AV+AS+ASW+FW	VoIP	Yes	unlimited	unlimited	No	33,77	39,35
<b>State of Colorado</b>	<b>Verizon</b>	Good double play	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	34,90	40,67
<b>State of New York</b>	<b>Verizon</b>	Verizon double freedom	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	37,15	43,30
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line (**) Duration = "-" indicates that 12 months was assumed (***) N.D. Indicates information is not provided by ISP <b>ISPs in italic &amp; bold</b> are Incumbent operators																		

Table 19: Detailed information on least expensive offer per country (512kbps-1024kbps (incl.)) ; "Internet + Tel"

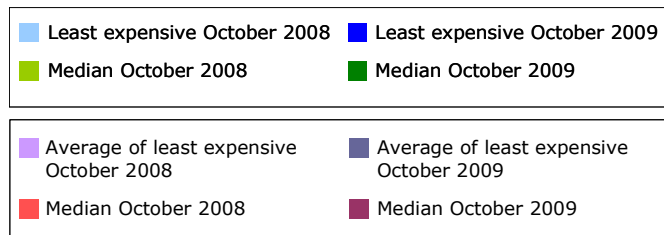
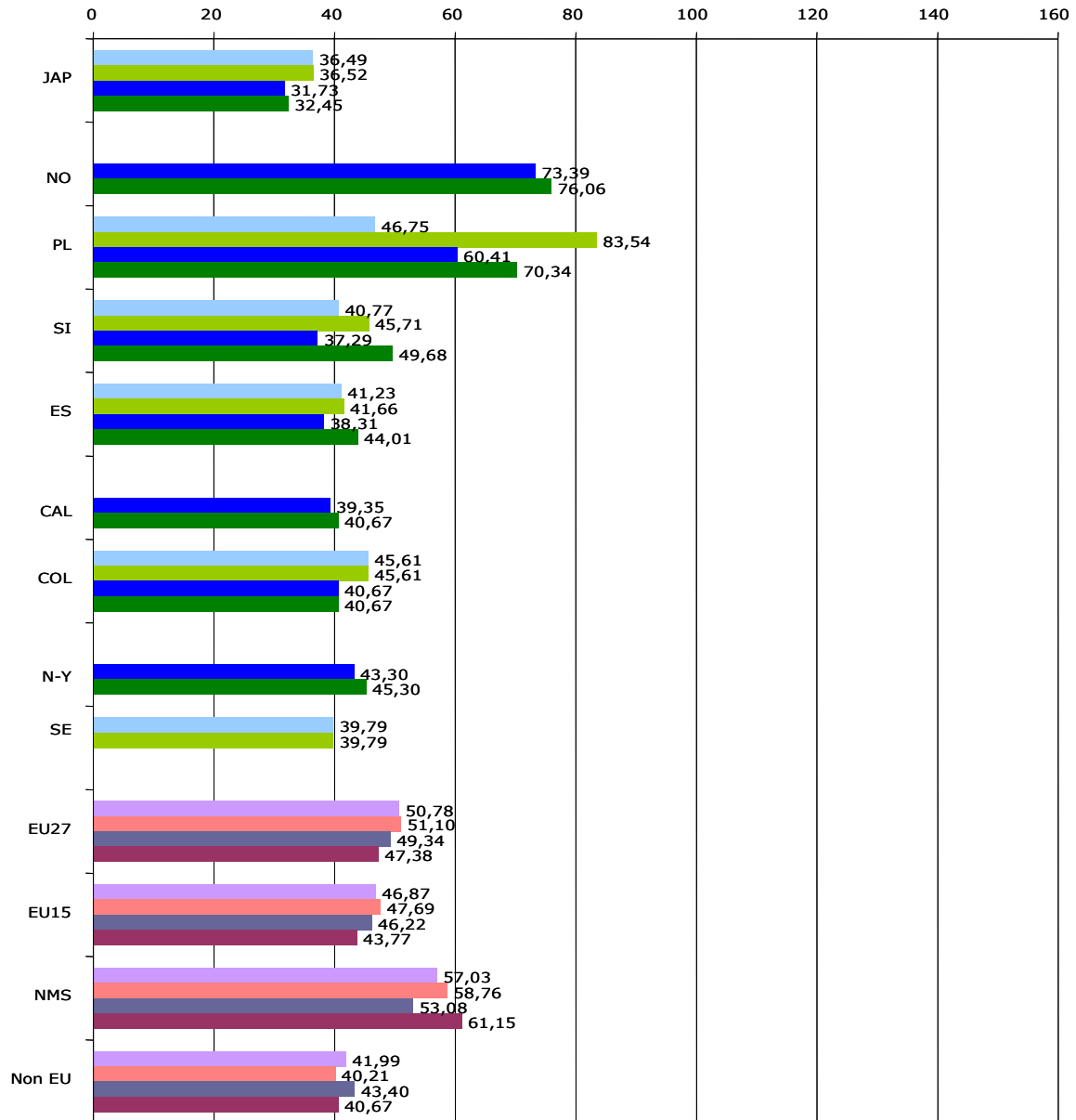


**5.1.2.c BASKET "512KBPS-1024KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
Least expensive and median offers:  
Bundle "Internet access+Tel"  
Basket "512-1024 (incl.)", 1GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "512-1024 (incl.)", 1GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.1.2.d Conclusions on bundle "Internet+Tel" for "basket 512kbps-1024kbps (incl.)"**

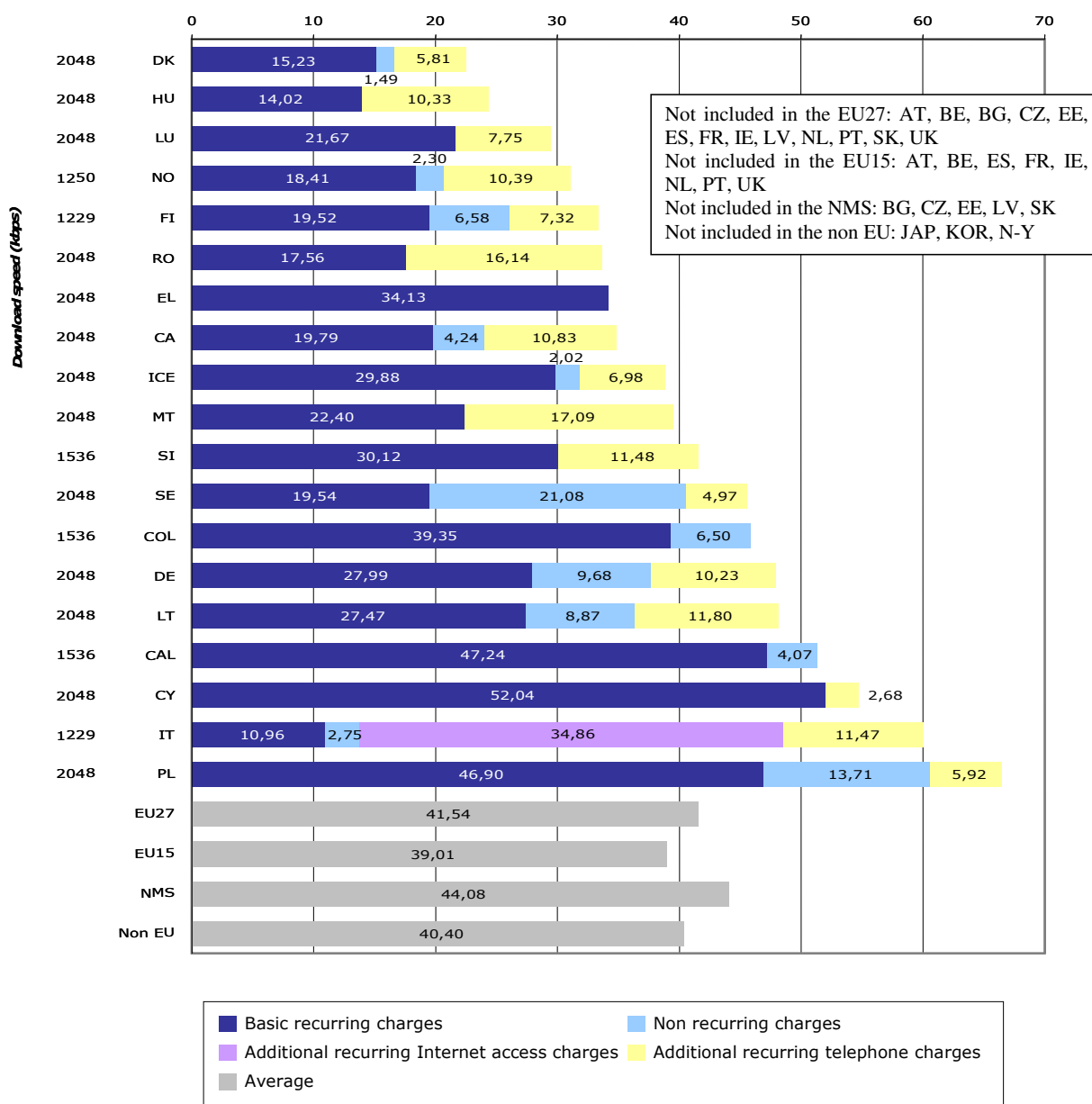
- In seventeen countries, one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Austria, Belgium, Bulgaria, Canada, Denmark, Estonia, Greece, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia, Sweden and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Cyprus, France, Hungary, Iceland, Italy and the State of Colorado.*
- There were four metered Internet access offers for this basket (*Iceland, Ireland, Italy and Spain*), of which only *Italy* needed normalisation.
- For *Hungary, Ireland, Slovenia and the State of California*, the omission of non-recurring charges influenced their place in the overall ranking. Non-recurring charges had a significant impact on the ranking of the *Czech Republic*.
- Fourteen out of the seventeen offers in this basket needed normalisation of telephone charges. Additional recurring telephone charges had a major influence on the ranking of *Hungary*.
- Twelve countries had offers in the sample of both October 2008 and October 2009. For nine of these countries, the cost of the least expensive offer decreased.

### 5.1.3 **BASKET "1024KBPS-2048KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### 5.1.3.a **LEAST EXPENSIVE OFFER**

No offer was available in the sample for *Austria, Belgium, Bulgaria, Czech Republic, Estonia, France, Ireland, Japan, Korea, Latvia, the Netherlands, Portugal, Slovakia, Spain, the State of New York* and the United Kingdom.

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "1024-2048 (incl.)", 2GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



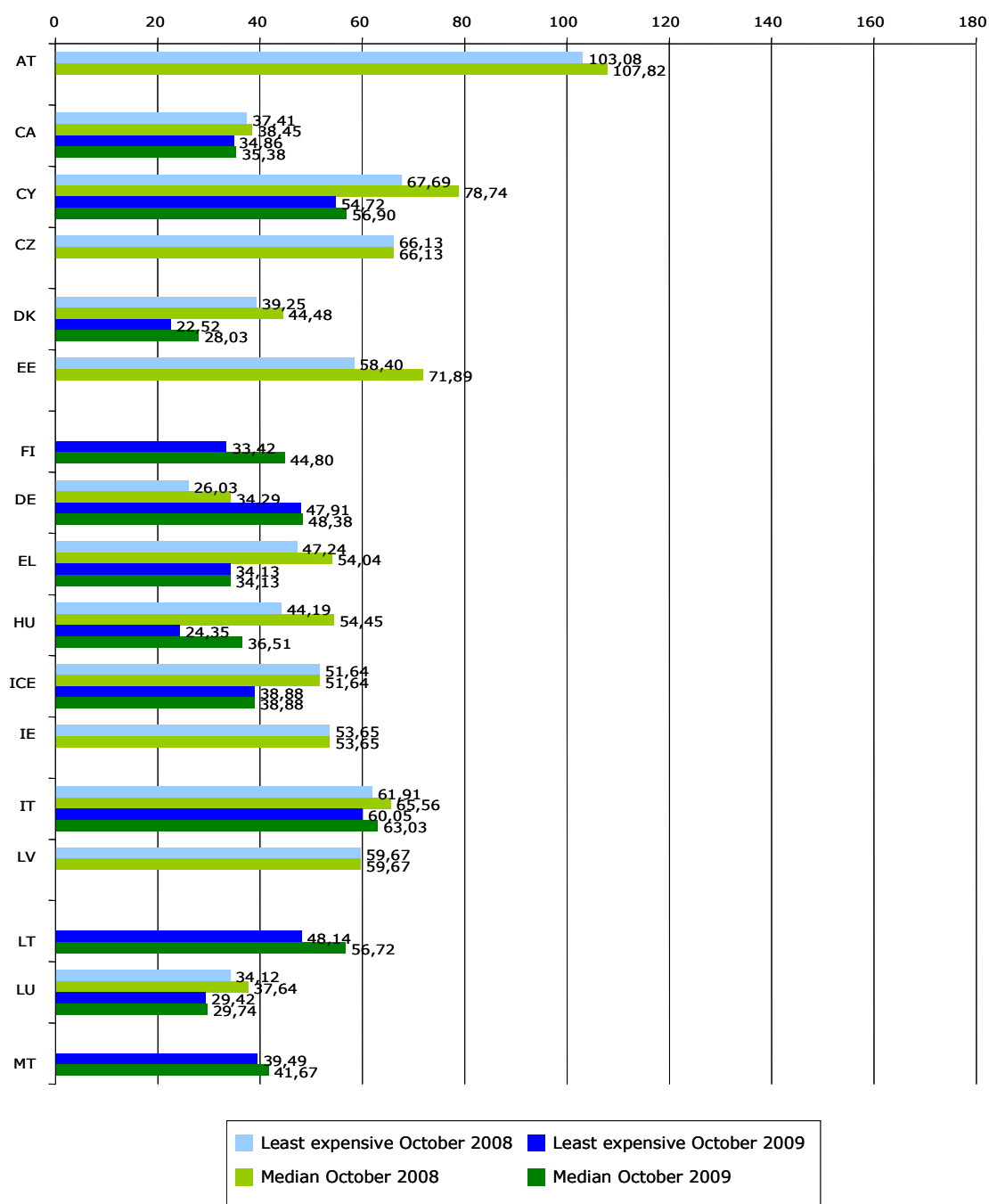
### 5.1.3.B BASKET "1024KBPS-2048KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Addresses per mailbox (***)	Webspace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
Canada	<b>Bell Canada</b>	Bell Internet Essentiel Plus (Ontario)	xDSL	-	2048	2	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	43,07	34,86
Cyprus	Otenet Telecommunications	OnDSL Fast Plus	xDSL	-	2048	unlimited	unlimited	1	N.D.	0	AV+AS	Switched	No	0	0	No	53,63	54,72
Denmark	Fullrate	Fullrate Bredbaand 2 Mbit / 512 kbit bredbåndsforbindelse med fast telefon	xDSL	6	2048	unlimited	unlimited	0	0	0	-	VoIP	No	0	0	No	33,60	22,52
Finland	<b>Elisa</b>	Elisa Laajakaista Heti (Tampere) 1,2M+ Phone	Cable	18	1228,8	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	41,77	33,42
Germany	<b>Deutsche Telekom</b>	Call & Surf Basic with internet flat Standard	xDSL	12	2048	unlimited	unlimited	25	10	1024	-	Switched	No	0	0	No	51,26	47,91
Greece	<b>OTE</b>	Conn-x TALK 2mbps+24/7+60 mobile	xDSL	12	2048	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	60	No	31,40	34,13
Hungary	Digi	RITMO + Digifon	Cable	-	2048	unlimited	unlimited	1	N.D.	0	-	VoIP	No	0	0	No	16,22	24,35
Iceland	<b>Siminn</b>	Leið 1+Heimasimi	xDSL	6	2048	10	-	5	N.D.	0	AS+ASW+FW+PC+PM	VoIP	No	0	0	Yes	23,24	38,88
Italy	Libero	Super Happy Italy	xDSL	-	1228,8	-	0	3	N.D.	150	AV+AS	VoIP	Yes	0	0	No	65,45	60,05
Lithuania	Balticum TV	Wimax in Kaunas	Plug&Play	12	2048	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	No	0	0	No	32,49	48,14
Lithuania	Balticum TV	Wimax in Vilnius	Plug&Play	12	2048	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	No	0	0	No	32,49	48,14
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 2 Mbits/s +tel	xDSL	24	2048	unlimited	unlimited	5	N.D.	100	-	Switched	Yes	unlimited	0	Yes	35,30	29,42
Malta	<b>GO</b>	GO Talk Anytime Phone Line & Internet 2Mbps	xDSL	24	2048	25	-	4	N.D.	N.D.	AV+AS	VoIP	No	0	0	No	28,83	39,49
Norway	Get	Bredbaand - Small + Zero	Cable	12	1250	unlimited	unlimited	1	1	5	AV+FW	VoIP	No	0	0	No	40,27	31,10
Poland	<b>TP sa</b>	Internet 2048kbps i neofon	xDSL	12	2048	unlimited	unlimited	1	N.D.	50	AV+AS+ASW	VoIP	No	0	0	No	38,71	66,52
Romania	<b>Romtelecom</b>	Clicknet 2 Mbps + tel VoIP	xDSL	-	2048	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	Yes	0	0	No	18,27	33,70
Slovenia	Amis	Amis internet+tel 1536/256	Cable	-	1536	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	0	0	No	34,53	41,60
State of California	<b>AT&amp;T</b>	AT&T Double Pack	xDSL	-	1536	unlimited	unlimited	11	11	N.D.	AV+ASW+FW	Switched	Yes	unlimited	unlimited	No	44,03	51,32
State of Colorado	Owest	Fast+home phone	xDSL	12	1536	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	Switched	Yes	unlimited	unlimited	No	39,34	45,85
Sweden	<b>TeliaSonera</b>	Telia Bredband 1,5-2 Mbit/s + Telia Bas	xDSL	-	2048	unlimited	unlimited	5	1	50	AV+FW+BU	Switched	No	0	0	No	51,83	45,60
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line																		
(**) Duration = '-' indicates that 12 months was assumed																		
(***) N.D. Indicates information is not provided by ISP																		
ISPs in <b>italic &amp; bold</b> are Incumbent operators																		

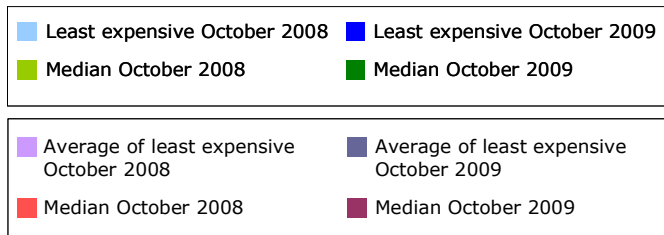
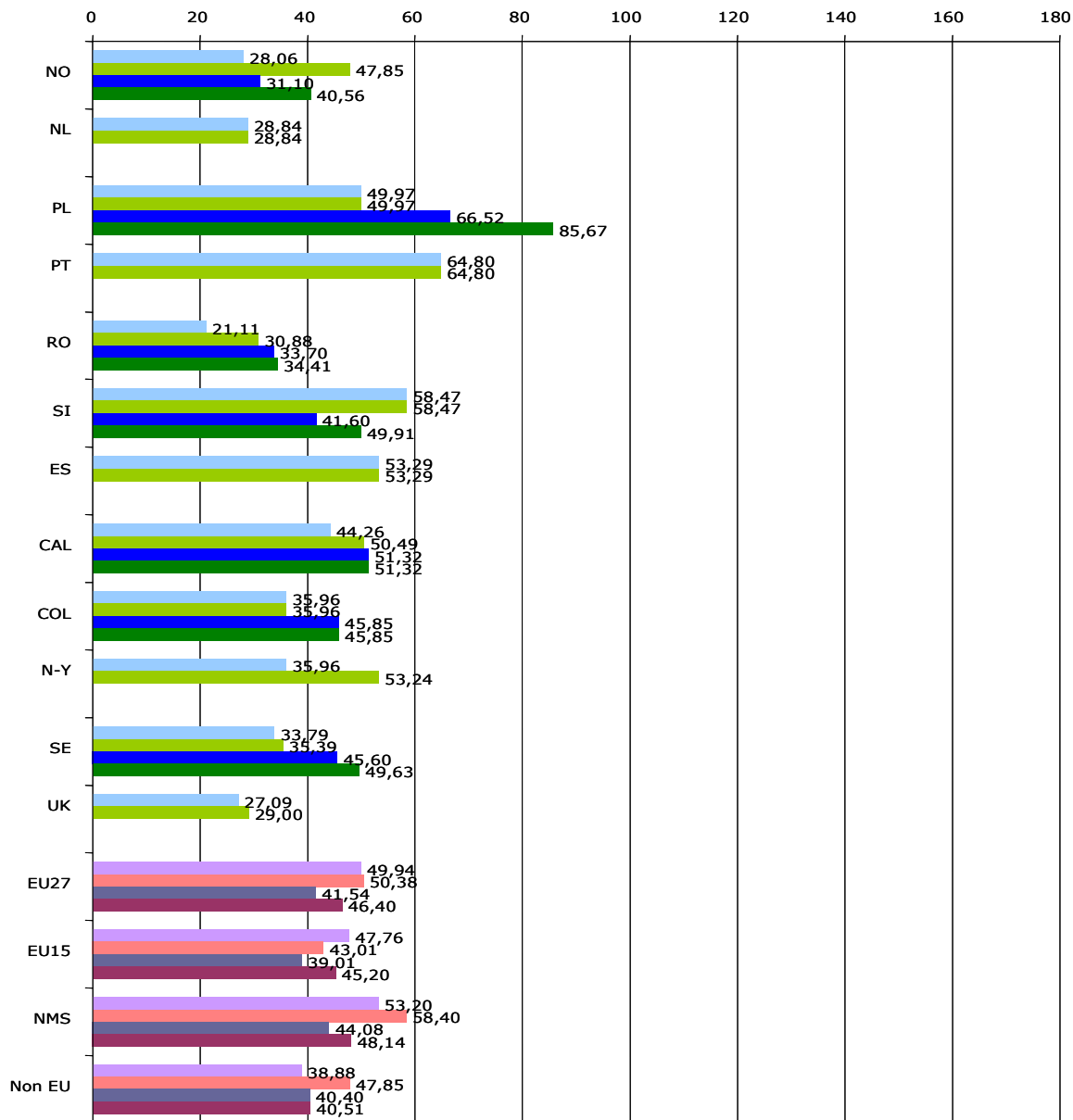
Table 20: Detailed information on least expensive offer per country (1024kbps-2048kbps (incl.)) ; "Internet + Tel"

### 5.1.3.c BASKET "1024KBPS-2048KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009

Comparison October 2008 – October 2009  
Least expensive and median offers:  
Bundle "Internet access+Tel"  
Basket "1024-2048 (incl.)", 2GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "1024-2048 (incl.)", 2GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.1.3.d Conclusions on bundle "Internet+Tel" for "basket 1024kbps-2048kbps (incl.)"**

- In the following fifteen countries, no offer was available for this basket: *Austria, Belgium, Bulgaria, Czech Republic, Estonia, France, Ireland, Japan, Korea, Latvia, the Netherlands, Portugal, Slovakia, Spain, the State of New York* and the United Kingdom.
- From the ISPs in the following countries, only one offer was available for this basket: *Greece, Iceland, the State of California* and *the State of Colorado*.
- In *Lithuania*, two offers are the least expensive; they are both from the same ISP and are available at the same price in two different area of the country (Vilnius and Kaunas).
- There were four metered Internet access offers for this basket (*Canada, Iceland, Italy* and *Malta*) of which only *Italy* needed normalisation. This had a determining effect on its total charges and ranking.
- No clear relationship could be observed between the omission of non-recurring charges in some countries (*Cyprus, Hungary* and *Malta*) and their place in the overall ranking. The omission of non-recurring charges had however an impact on the ranking of *Greece, Luxembourg, Romania* and *Slovenia*. The inclusion of non-recurring charges in total charges strongly affected the position of *Sweden* in the ranking, and to a lesser extent the position of *Poland*.
- For most offers normalisation of telephone charges was needed. In three countries (*Greece, the State of California* and *the State of Colorado*), telephone charges were included in the offer. Additional recurring telephone charges had a major influence on the overall ranking of *Malta* and *Romania*.
- When comparing the situation in October 2009 with that in October 2008, sixteen countries had offers in both periods.
- In the EU27, the average of the least expensive offers and the median decreased. In non-EU countries, while the median is also decreasing between October 2008 and October 2009, the average of the least expensive offers is slightly increasing.

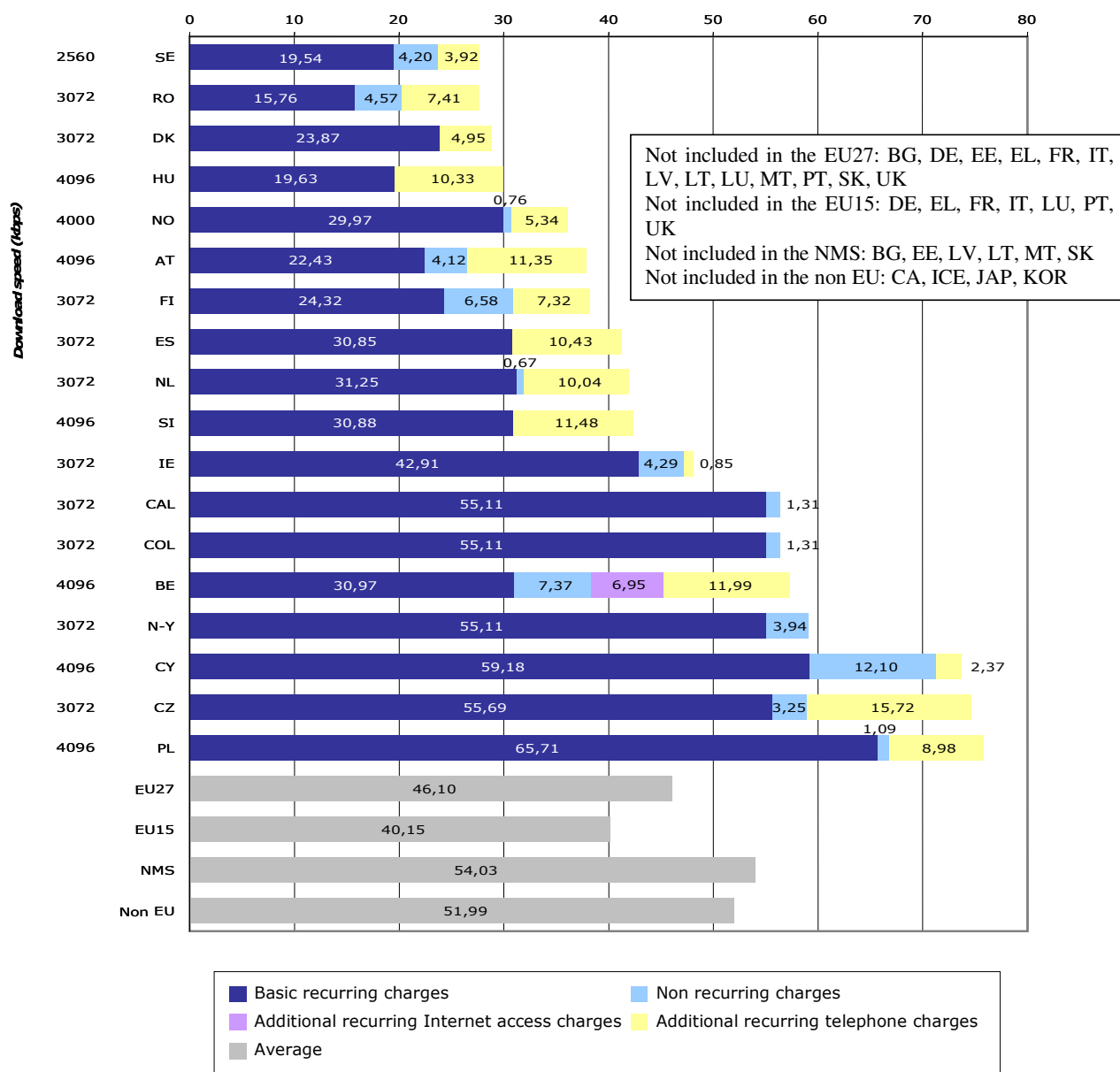


### **5.1.4 BASKET "2048KBPS-4096KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### **5.1.4.a LEAST EXPENSIVE OFFER**

For the selected ISPs, no offer corresponding to this basket was available in the following countries: *Bulgaria, Canada, Estonia, France, Germany, Greece, Iceland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, Portugal, Slovakia and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "2048-4096 (incl.)", 10GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



### 5.1.4.b BASKET "2048KBPS-4096KBPS (INCL.)", LIST OF SELECTED OFFERS

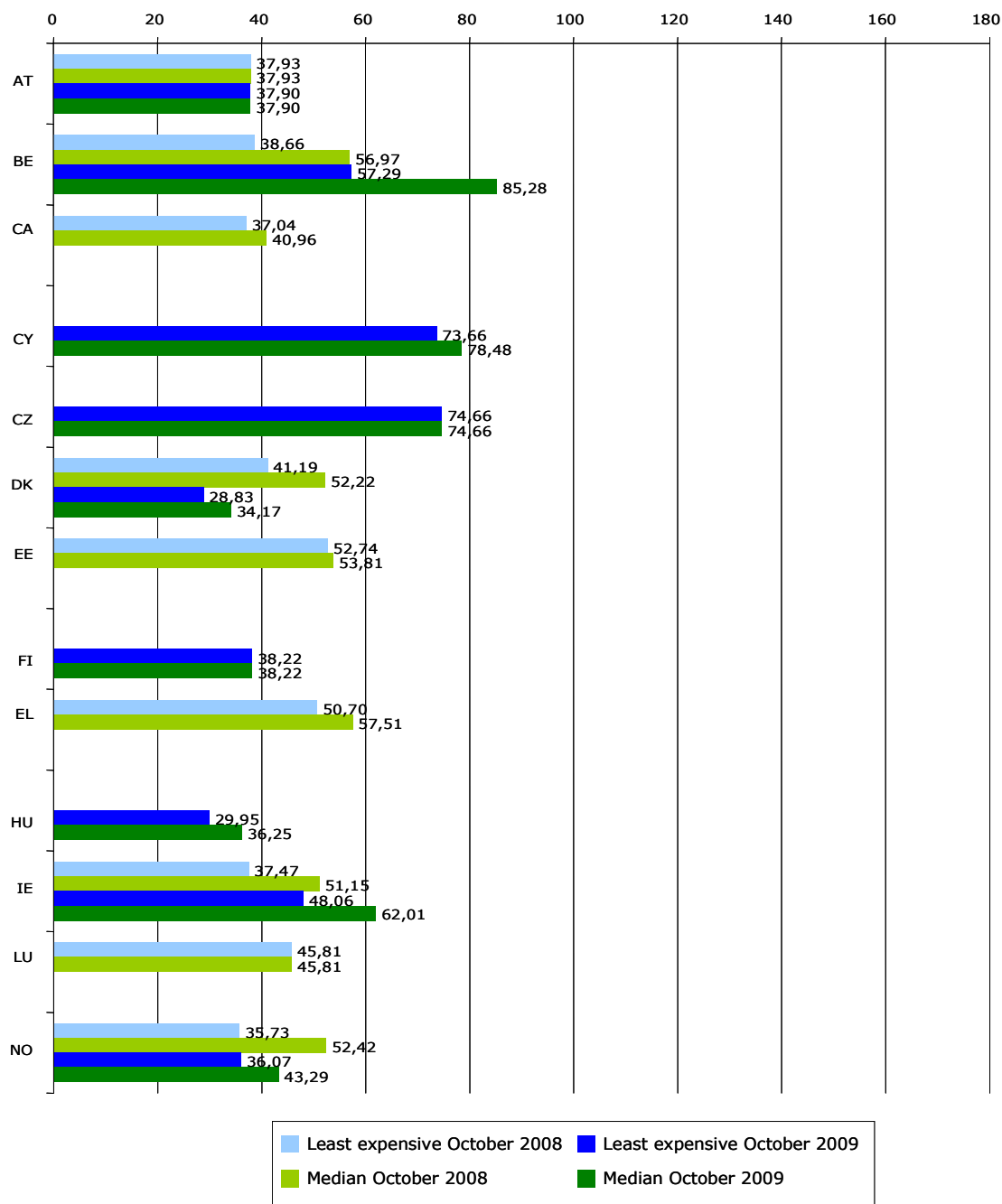
Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (****)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
<b>Austria</b>	Tele2 Austria	Volles Rohr! M	xDSL	12	4096	unlimited	unlimited	1	5	10	-	VoIP	No	0	0	No	42,07	37,90
<b>Belgium</b>	Telenet	Shake+ Internet & Téléphonie à 35€	Cable	12	4096	5	-	1	N.D.	0	AV+AS	VoIP	Yes	0	0	Yes	64,73	57,29
<b>Cyprus</b>	<b>Cytanet</b>	NetRunner Home 4000 (with DSL Access Home4000)	xDSL	-	4096	unlimited	unlimited	4	N.D.	20	AV+AS+PC+PM	VoIP	No	660	0	No	72,19	73,66
<b>Czech Republic</b>	Ceské Radiokomunikace	Premium WiMAX	Plug&Play	12	3072	unlimited	unlimited	1	N.D.	0	AV+AS	VoIP	No	0	0	No	52,03	74,66
<b>Denmark</b>	Dansk Kabel TV	Lav hastighed 3 Mbit / 512 kbit	Cable	-	3072	unlimited	unlimited	1	5	250	-	VoIP	Yes	unlimited	0	No	43,01	28,83
<b>Finland</b>	<b>Elisa</b>	Elisa Laajakaista Heti ( Tampere) 3M+ Phone	Cable	18	3072	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	47,77	38,22
<b>Hungary</b>	Digi	STRADA + Digifon	Cable	-	4096	unlimited	unlimited	3	N.D.	0	-	VoIP	No	0	0	No	19,95	29,95
<b>Ireland</b>	Access Telecom	Bundle Imagine Up to 3 Mb Anytime	xDSL	12	3072	20	-	1	5	25	-	Switched	Yes	unlimited	0	No	56,23	48,06
<b>Norway</b>	NextGenTel	Next2 Mini + Next Phone Classic	xDSL	12	4000	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	VoIP	No	0	0	No	46,70	36,07
<b>The Netherlands</b>	<b>KPN</b>	InternetPlusBellen Basis	xDSL	12	3072	unlimited	unlimited	5	5	50	AV+AS	VoIP	Yes	0	0	No	47,00	41,96
<b>Poland</b>	Aster Group	TwojDom+Twoj Czas	Cable	-	4096	unlimited	unlimited	5	10	300	AS	Switched	No	60	0	Yes	44,10	75,78
<b>Romania</b>	RCS & RDS	Cable Link 28 LEI	Cable	-	3072	unlimited	unlimited	2	N.D.	N.D.	-	VoIP	Yes	0	0	Yes	15,04	27,74
<b>Slovenia</b>	Amis	Amis internet+tel 4096/768	Cable	-	4096	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	0	0	No	35,16	42,36
<b>Spain</b>	Orange Spain	ADSL 3 Mb + llamadas nacionales (Futurible)	xDSL	18	3072	unlimited	unlimited	15	N.D.	100	-	Switched	Yes	unlimited	0	No	38,80	41,28
<b>State of California</b>	<b>Verizon</b>	Better double play	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	48,42	56,42
<b>State of Colorado</b>	<b>Verizon</b>	Better double play	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	48,42	56,42
<b>State of New York</b>	<b>Verizon</b>	Verizon double freedom	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	50,67	59,05
<b>Sweden</b>	Telenor Sverige	Smart	FTTx	12	2560	unlimited	unlimited	5	1	100	AV+FW+BU	VoIP	No	0	0	No	31,44	27,66

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*) Duration = '-' indicates that 12 months was assumed  
(\*\*\*) N.D. Indicates information is not provided by ISP  
**ISPs in *italic & bold* are Incumbent operators**

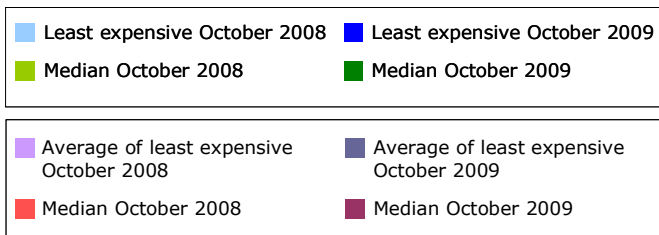
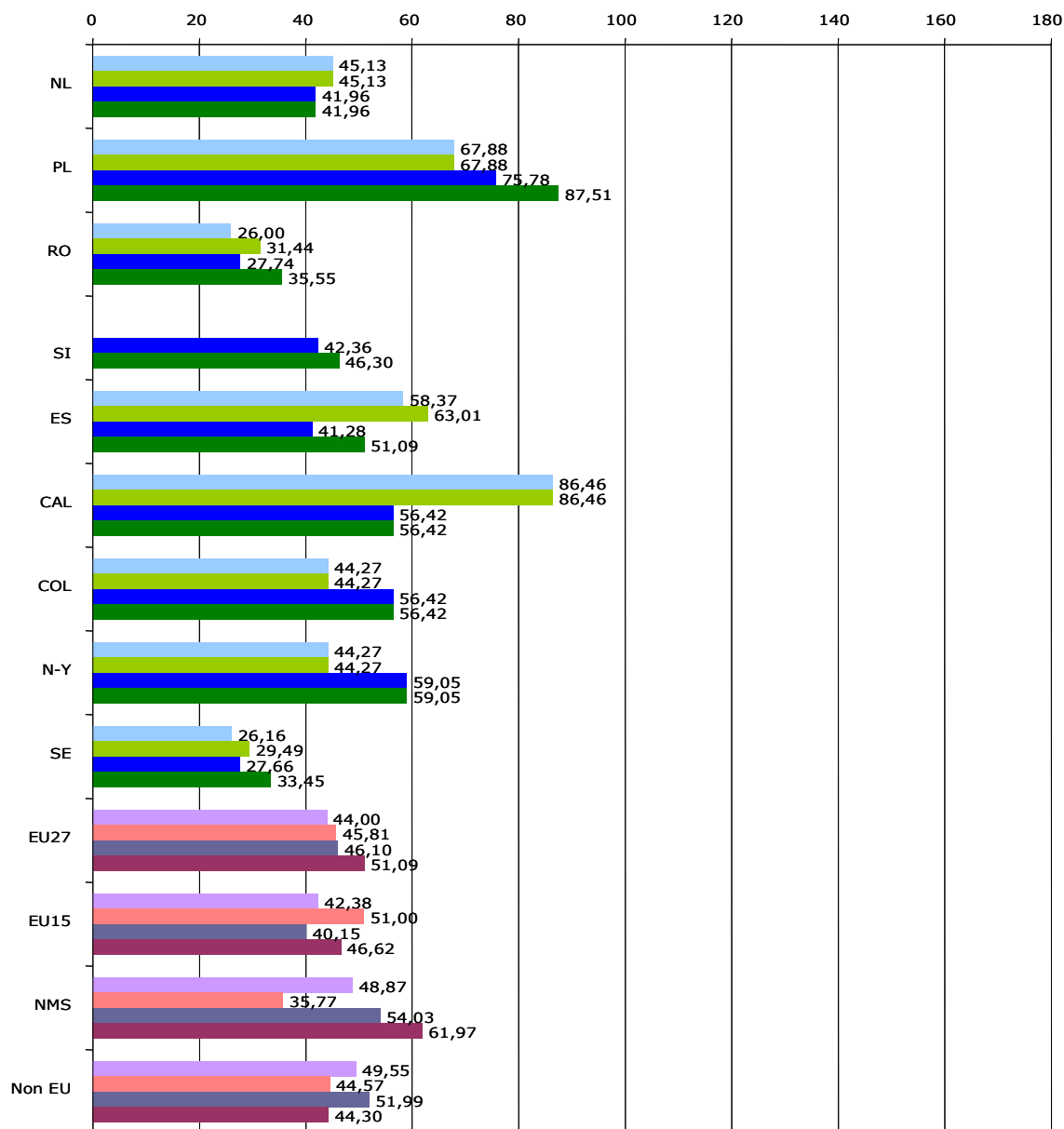
Table 21: Detailed information on least expensive offer per country (2048kbps-4096kbps (incl.)) ; "Internet + Tel"

**5.1.4.c BASKET "2048KBPS-4096KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
Least expensive and median offers:  
Bundle "Internet access+Tel"  
Basket "2048-4096 (incl.)", 10GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "2048-4096 (incl.)", 10GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.1.4.d Conclusions on bundle "Internet+Tel" for "basket 2048kbps-4096kbps (incl.)"**

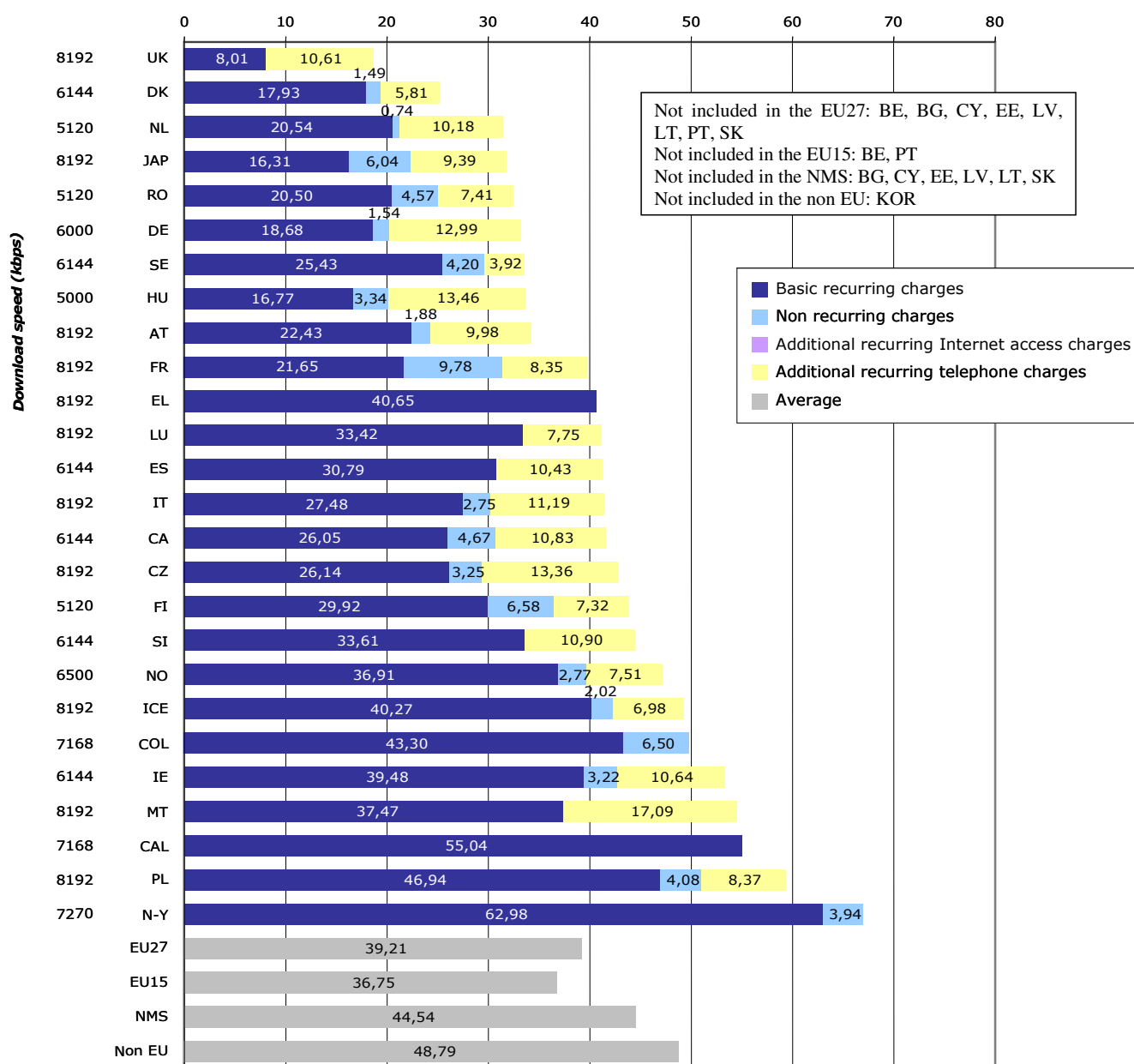
- In eighteen countries one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Bulgaria, Canada, Estonia, France, Germany, Greece, Iceland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, Portugal, Slovakia and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Austria, Czech Republic, Finland, the Netherlands, the State of California, the State of Colorado, and the State of New-York.*
- There were two metered offers for this basket, of which the one for *Belgium* needed normalisation.
- The omission of non-recurring charges in *Denmark, Hungary, Slovenia and Spain* has no influence on their place in the overall ranking.
- Only three offers (*the State of California, the State of Colorado and the State of New York*) did not need normalisation of telephone charges.
- The comparison between October 2008 and October 2009 indicates a slight increase in the average of the least expensive costs in the EU27 as well as in the non-EU countries. The median offer for the NMS sharply increased between the two periods while the average of the least expensive offers also increased although to a lesser extent.

### **5.1.5 BASKET "4096KBPS-8192KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### **5.1.5.a LEAST EXPENSIVE OFFER**

No offer was available in the sample for *Belgium, Bulgaria, Cyprus, Estonia, Korea, Latvia Lithuania, Portugal and Slovakia.*

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "4096-8192 (incl.)", 30GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



### 5.1.5.b BASKET "4096KBPS-8192KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (**)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
Austria	UPC Austria	inode Privat Take I.T. easy	Cable	12	8192	unlimited	unlimited	10	10	20	-	VoIP	No	0	0	No	38,06	34,29
Canada	<b>Bell Canada</b>	Bell Internet Performance (QC)	xDSL	-	6144	75	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	51,35	41,56
Czech Republic	Ceské Radiokomunikace	Premium ADSL+ Volani 8	xDSL	12	8192	unlimited	unlimited	1	N.D.	0	AV+AS	Switched	No	0	0	No	29,79	42,75
Denmark	Fullrate	bredbåndsforbindelse med fast telefon	xDSL	6	6144	unlimited	unlimited	0	0	0	-	VoIP	No	0	0	No	37,63	25,23
Finland	<b>Elisa</b>	Elisa Laajakaista Heti (Tampere) 5M+ Phone	Cable	18	5120	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	54,77	43,82
France	<b>Orange France</b>	Découverte internet 8 mégamax+Tel	xDSL	-	8192	unlimited	unlimited	5	N.D.	100	AS+PC	VoIP	Yes	unlimited	0	No	45,75	39,78
Germany	United Internet	1&1/Web.de/GMX Surf & Phone-Surf Flat 6000	xDSL	24	6000	unlimited	unlimited	50	1	10240	AV+AS	VoIP	No	0	0	No	35,54	33,21
Greece	<b>OTE</b>	Conn-x TALK 8 mbps+24/7+60 mobile	xDSL	12	8192	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	60	No	37,40	40,65
Hungary	Externet	Othoni Prepaid Golf + Megafone Home	xDSL	12	5000	unlimited	unlimited	3	N.D.	100	AV+AS	VoIP	No	0	0	No	22,36	33,57
Iceland	<b>Síminn</b>	Leið 2+Heimasími	xDSL	6	8192	60	-	5	N.D.	0	AS+ASW+FW+PC+PM	VoIP	No	0	0	Yes	29,45	49,27
Ireland	BT Ireland	Broadband and Talk (option 2)	xDSL	12	6144	30	-	1	N.D.	N.D.	-	N.D.	No	0	0	No	62,41	53,34
Italy	Liberio	Absolute ADSL	xDSL	-	8192	unlimited	unlimited	3	N.D.	150	AV+AS	VoIP	Yes	0	0	No	45,15	41,42
Japan	Yahoo Japan	Yahoo! BB 8 M (NTT East area)+ BB Phone	xDSL	-	8192	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	35,05	31,73
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 8 Mb/s + tel	xDSL	24	8192	unlimited	unlimited	5	N.D.	100	-	Switched	Yes	unlimited	0	Yes	49,40	41,17
Malta	<b>GO</b>	GO Talk Anytime Phone Line & Internet 8Mbps	xDSL	24	8192	100	-	4	N.D.	N.D.	AV+AS	VoIP	No	0	0	No	39,83	54,56
Norway	Ventelo	Bredbaand - Extra Large, Bluephone	xDSL	12	6500	unlimited	unlimited	1	5	30	AS+FW	VoIP	No	0	0	No	61,09	47,18
Norway	Ventelo	Bredbaand - Large, Bluephone	xDSL	12	4500	unlimited	unlimited	1	5	30	AS+FW	VoIP	No	0	0	No	61,09	47,18
The Netherlands	UPC Nederland	Internet 5 en beilen standaard	Cable	12	5120	unlimited	unlimited	5	12	25	AV+AS	VoIP	No	0	0	No	35,23	31,45
Poland	UPC Polska	Internet Fiber Power 8Mbps +Rozmowy 60	Cable	-	8192	unlimited	unlimited	1	5	10	-	VoIP	No	60	0	No	34,56	59,39
Romania	RCS & RDS	Cable Link 39 LEI	Cable	-	5120	unlimited	unlimited	2	N.D.	N.D.	-	VoIP	Yes	0	0	Yes	17,61	32,48
Slovenia	Amis	Amis internet+tel 6144/768	Cable	-	6144	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	36,95	44,52
Spain	Orange Spain	adsl 6 Mb + llamadas nacionales	xDSL	18	6144	unlimited	unlimited	15	N.D.	100	-	Switched	Yes	unlimited	0	No	38,74	41,21
State of California	Bright House	Road Runner Standard with Home Phone	Cable	-	7168	unlimited	unlimited	10	N.D.	N.D.	AV+AS+ASW+FW+PC+PU	VoIP	Yes	unlimited	unlimited	No	47,23	55,04
State of Colorado	Qwest	Faster+home phone	xDSL	12	7168	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	Switched	Yes	unlimited	unlimited	No	42,73	49,79
State of New York	<b>Verizon</b>	Verizon double freedom	xDSL	12	7270,4	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	57,43	66,92
Sweden	Telenor Sverige	Bredbandsbolaget Bredband 2 + Telefoni Bas	FTTx	12	6144	unlimited	unlimited	5	1	100	AV+FW+BU	VoIP	No	0	0	No	38,13	33,55
The UK	TalkTalk/AOL	Essentials	xDSL	18	8192	40	-	N.D.	N.D.	N.D.	-	Switched	Yes	0	0	No	16,40	18,62

(\*) AV = antivirus, AS = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

(\*\*) Duration = "-" indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

ISPs in *italic & bold* are incumbent operators

Table 22: Detailed information on least expensive offer per country (4096kbps-8192kbps (incl.)) ; "Internet + Tel"

**5.1.5.c BASKET "4096KBPS-8192KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

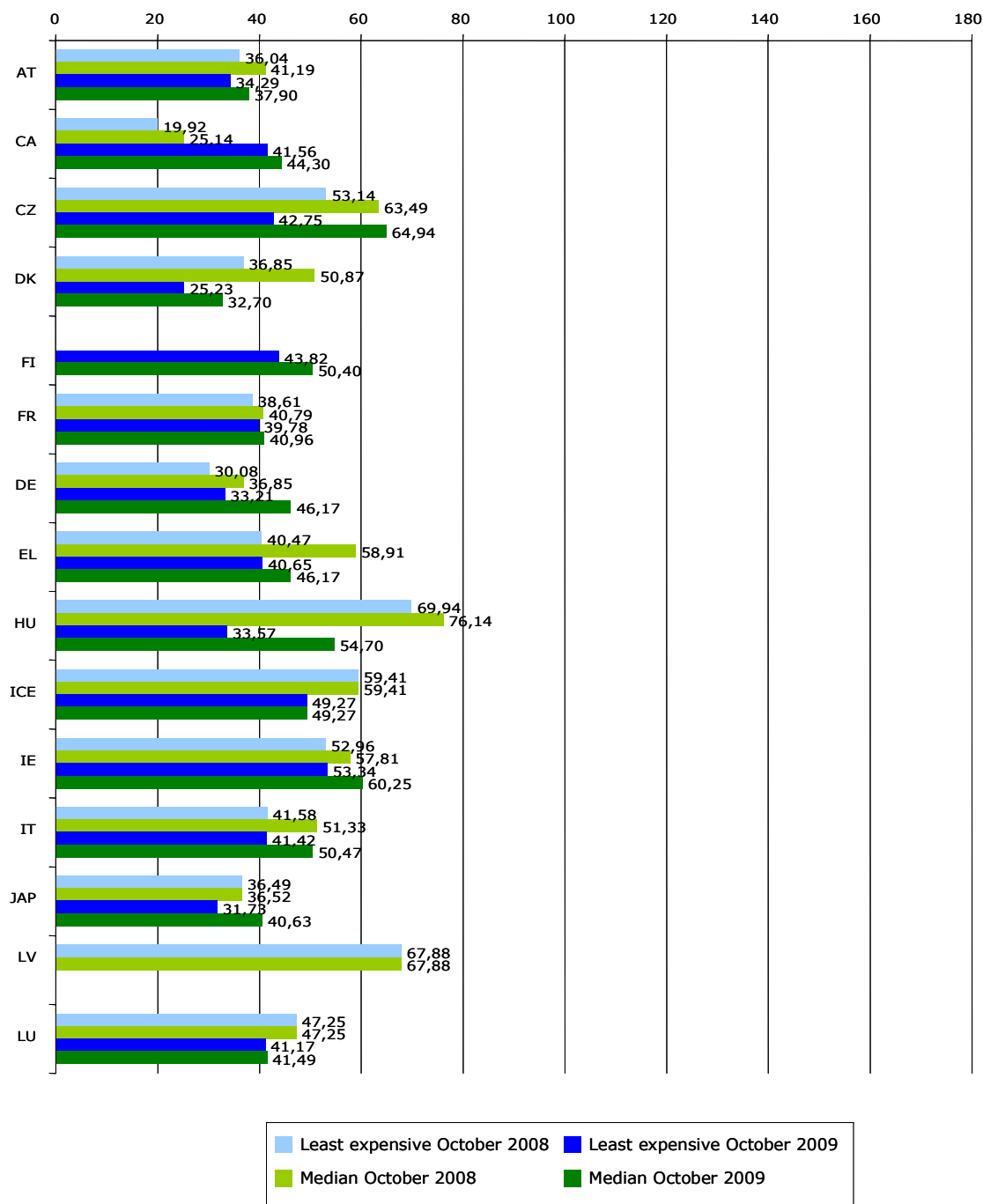
Comparison October 2008 – October 2009

Least expensive and median offers:

Bundle "Internet access+Tel"

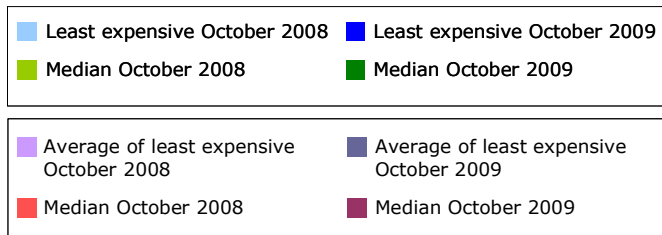
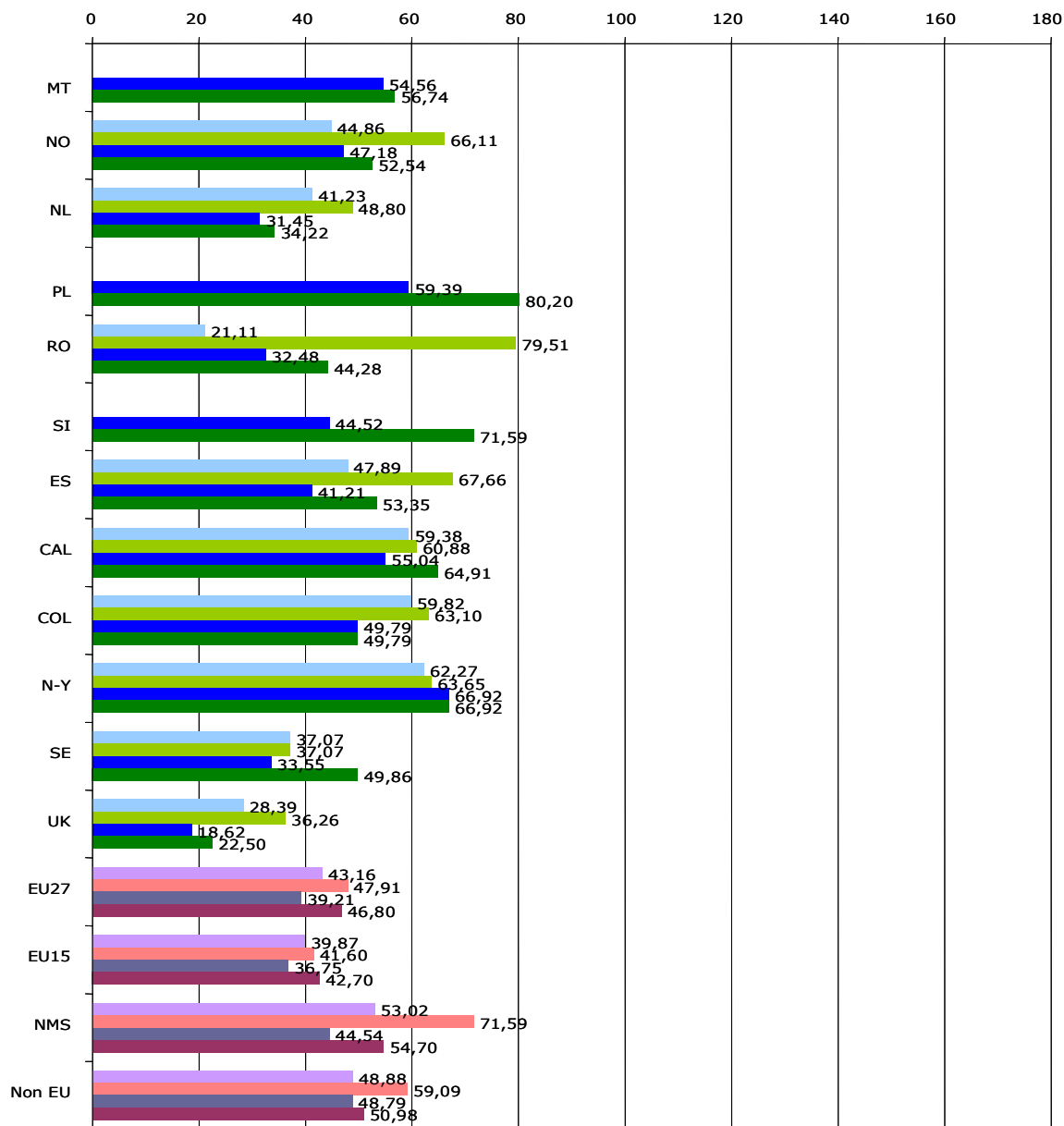
Basket "4096-8192 (incl.)", 30GB or 20 hours/month

Total cost/month in €/PPP (VAT incl.)





**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "4096-8192 (incl.)", 30GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.1.5.d Conclusions on bundle "Internet+Tel" for "basket 4096kbps-8192kbps (incl.)"**

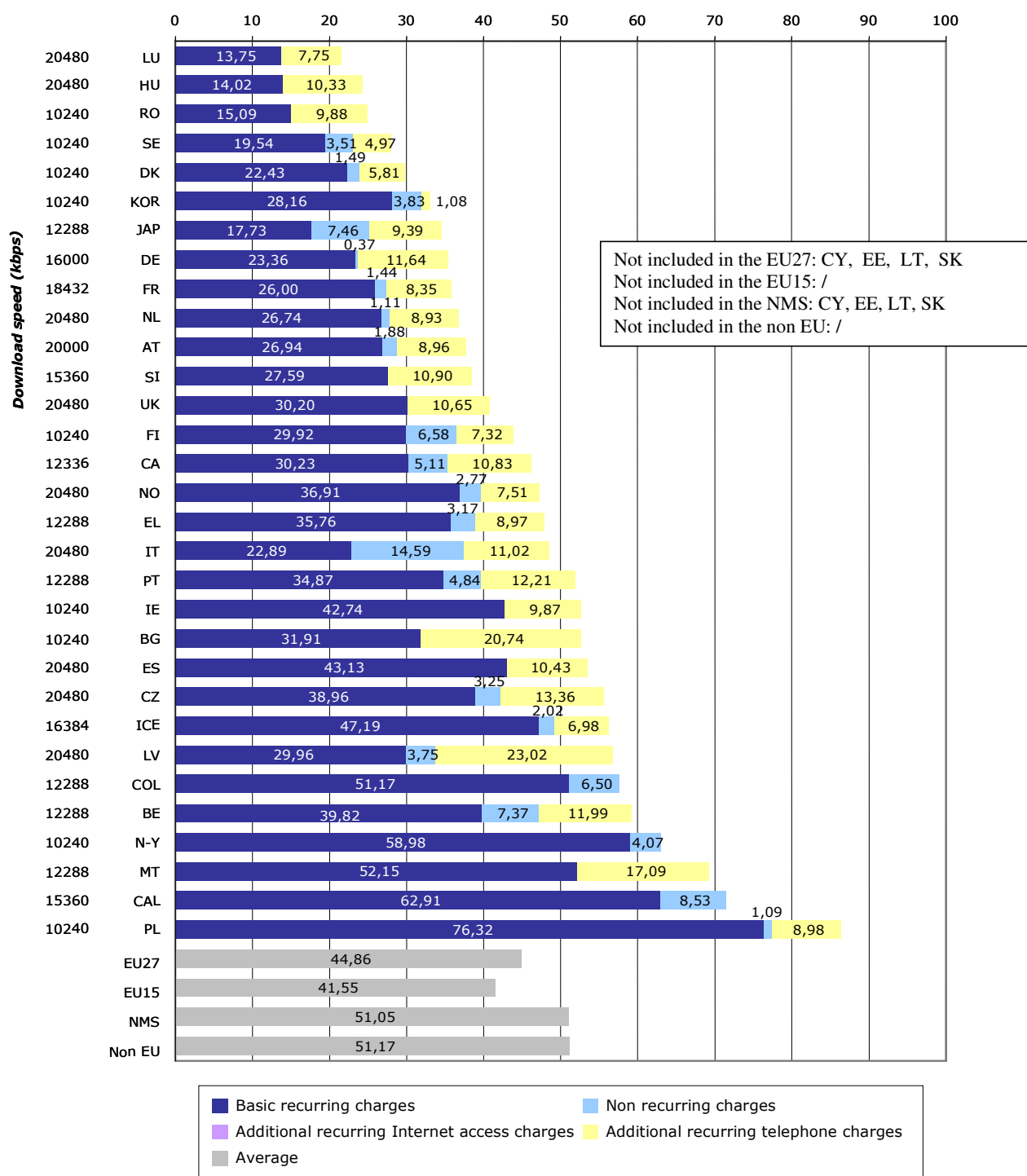
- For twenty-six countries, an offer was available for this basket. For the following countries, no offer was available: *Belgium, Bulgaria, Cyprus, Estonia, Korea, Latvia, Lithuania, Portugal and Slovakia*.
- From the ISPs in the following countries, only one offer was available for this basket: *Iceland, the State of Colorado and the State of New York*.
- For *Norway*, there are two least expensive offers from the same provider.
- There were five metered offers for this basket (*Canada, Iceland, Ireland, Malta and the United Kingdom*), of which none needed normalisation.
- The omission of non-recurring charges in *Greece, Luxembourg and Spain* had an influence on their place in the overall ranking. In the other countries (*Malta, Slovenia, the State of California and the United Kingdom*) there was no clear relationship between the two.
- All but four offers needed normalisation of telephone charges. No additional recurring telephone charges were needed for *Greece, the State of California, the State of Colorado and the State of New York*.
- Four countries with offers in October 2009 did not have offers in the October 2008 sample: *Finland, Malta, Poland and Slovenia*.
- In the EU27, the average of the least expensive offers has decreased significantly. The decrease is smaller for the EU15 than for the NMS. The downwards trend seems to be confirmed by the decreasing median values for all regions.

## 5.1.6 BASKET "8192KBPS-20MBPS (INCL.)", IN €/PPP (VAT INCL.)

### 5.1.6.a LEAST EXPENSIVE OFFER

In the following countries, ISPs selected did not offer bundles for this basket: *Cyprus, Estonia, Lithuania and Slovakia.*

Least expensive offer:  
Bundle "Internet access+Tel"  
Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



### 5.1.6.b BASKET "8192KBPS-20MBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webspace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.	
																		Euro	EUR/PPP
Austria	UPC Austria	inode Privat Take I.T. max	Cable	12	20000	unlimited	unlimited	10	10	20	-	VoIP	Yes	unlimited	0	No	41,93	37,78	
Belgium	Telenet	SmartShake	Cable	12	12288	30	-	4	N.D.	0	AV+AS	VoIP	Yes	0	0	Yes	66,88	59,19	
Bulgaria	Vivacom (BTC)	Vivacom Home	xDSL	12	10240	unlimited	unlimited	1	1	5	-	VoIP	No	3600	0	Yes	25,31	52,66	
Canada	Bell Canada	Bell Internet Max 12 (Ontario)	xDSL	-	12336	50	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	57,05	46,17	
Czech Republic	Ceské Radiokomunikace	Premium ADSL+ Volani 20	xDSL	12	20480	unlimited	unlimited	1	N.D.	0	AV+AS	Switched	No	0	0	No	38,73	55,57	
Denmark	Fullrate	Fullrate Bredbaand Op til 10 Mbit / 1Mbit	xDSL	6	10240	unlimited	unlimited	0	0	0	-	VoIP	No	0	0	No	44,35	29,73	
Finland	Elisa	Elisa Laajakaista Heti (Tampere) 10M+ Phone	Cable	18	10240	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	54,77	43,82	
France	Orange France	Surf internet	xDSL	12	18432	unlimited	unlimited	5	N.D.	100	AS+PC	VoIP	Yes	unlimited	0	No	41,16	35,79	
Germany	United Internet	1&1/Web.de/GMX Surf & Phone-Doppel Flat 16000	xDSL	24	16000	unlimited	unlimited	50	1	10240	AV+AS	VoIP	Yes	unlimited	0	Yes	37,84	35,36	
Greece	Tellas	Tella Double Play No Limit	xDSL	12	12288	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	0	No	44,07	47,90	
Hungary	Digi	StartNET + Digifon	Cable	-	20480	unlimited	unlimited	1	N.D.	30	-	VoIP	No	0	0	No	16,22	24,35	
Iceland	Siminn	Leið 3+Heimasími	xDSL	6	16384	120	-	5	N.D.	0	AS+ASW+FW+PC+PM	VoIP	No	0	0	Yes	33,59	56,19	
Ireland	UPC Ireland	Broadband Deal, Home Phone Anytime World & 10Mb broadband	Cable	12	10240	unlimited	unlimited	1	15	300	-	Switched	No	unlimited	0	No	61,55	52,60	
Italy	Telecom Italia	Alice Voce 20 Mega	xDSL	-	20480	unlimited	unlimited	1	N.D.	300	AV+AS	VoIP	Yes	0	0	No	52,86	48,50	
Japan	Yahoo Japan	Yahoo! BB 12 M (NTT East aera)+ BB Phone	xDSL	-	12288	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	38,20	34,59	
Korea	LG Powercomm	Xspeed Bundle PREMIUM+ TEL	xDSL	12	10240	unlimited	unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	22,43	33,06	
Latvia	Lattelecom	Home Package 1 Optic	FTTx	-	20480	unlimited	unlimited	5	1	0	-	Switched	Yes	0	0	No	40,80	56,74	
Luxembourg	Tango fixed (Tele 2)	Tango ADSL Complet 20 Mbits/s + tel	xDSL	24	20480	unlimited	unlimited	5	N.D.	100	-	Switched	Yes	unlimited	0	Yes	25,80	21,50	
Malta	GO	GO Talk Anytime Phone Line & Internet 12Mbps	xDSL	24	12288	150	-	4	N.D.	N.D.	AV+AS	VoIP	No	0	0	No	50,54	69,24	
Norway	Ventelo	Bredbaand - ADSL 2+, Bluephone	xDSL	12	20480	unlimited	unlimited	1	5	30	AS+FW	VoIP	No	0	0	No	61,09	47,18	
The Netherlands	Tele2 Nederland	Internet ADSL Super en bellen	xDSL	12	20480	unlimited	unlimited	1	N.D.	20	AV+AS	Switched	No	0	0	No	41,20	36,78	
Poland	Aster Group	TwojSwiat+TwojCzas	Cable	-	10240	unlimited	unlimited	5	10	300	AS	Switched	No	60	0	Yes	50,27	86,39	
Portugal	PT Comunicações	SAPO Adsl 12Mb	xDSL	12	12288	unlimited	unlimited	5	N.D.	N.D.	AV	Switched	Yes	0	0	No	44,66	51,93	
Romania	NewCom Telecomunicatii	INJOY Dublu Internet + fixtel esential	Cable	-	10240	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	Yes	50	0	No	13,53	24,97	
Slovenia	Amis	dvojka TEL	FTTx	-	15360	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	31,95	38,49	
Spain	Orange Spain	línea + adsl maxima velocidad + llamadas	xDSL	18	20480	unlimited	unlimited	17	N.D.	102	-	Switched	Yes	unlimited	0	No	50,34	53,56	
State of California	Verizon	Good double play FIOS	FTTx	12	15360	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	61,31	71,44	
State of Colorado	Owest	Fastest+home phone	xDSL	12	12288	unlimited	unlimited	11	N.D.	25	AV+ASW+PC+PU	Switched	Yes	unlimited	unlimited	No	49,49	57,67	
State of New York	Time Warner Cable	Surf and talk (Road Runner Standard, Buffalo)	Cable	12	10240	unlimited	unlimited	5	N.D.	5	AV+AS+FW+PC	VoIP	Yes	unlimited	unlimited	No	54,10	63,04	
Sweden	Tele2 Sverige	Bredband 10/10 Mbit/s+Broadband Tel	FTTx	-	10240	unlimited	unlimited	5	1	40	-	VoIP	No	0	0	No	31,86	28,03	
The UK	BT	Total Broadband - option 3 Unlimited	xDSL	18	20480	unlimited	unlimited	N.D.	N.D.	5120	AS+ASW+FW+PM+PU	VoIP	Yes	0	0	No	35,96	40,85	
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line																			
(**) Duration = '-' indicates that 12 months was assumed																			
(***) N.D. Indicates information is not provided by ISP																			
ISPs in <i>italic &amp; bold</i> are Incumbent operators																			

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

(\*\*) Duration = '-' indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

ISPs in **italic** & **bold** are Incumbent operators

Table 23: Detailed information on least expensive offer per country (8192kbps-20Mbps (incl.)) ; "Internet + Tel"

**5.1.6.c BASKET "8192KBPS-20MBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

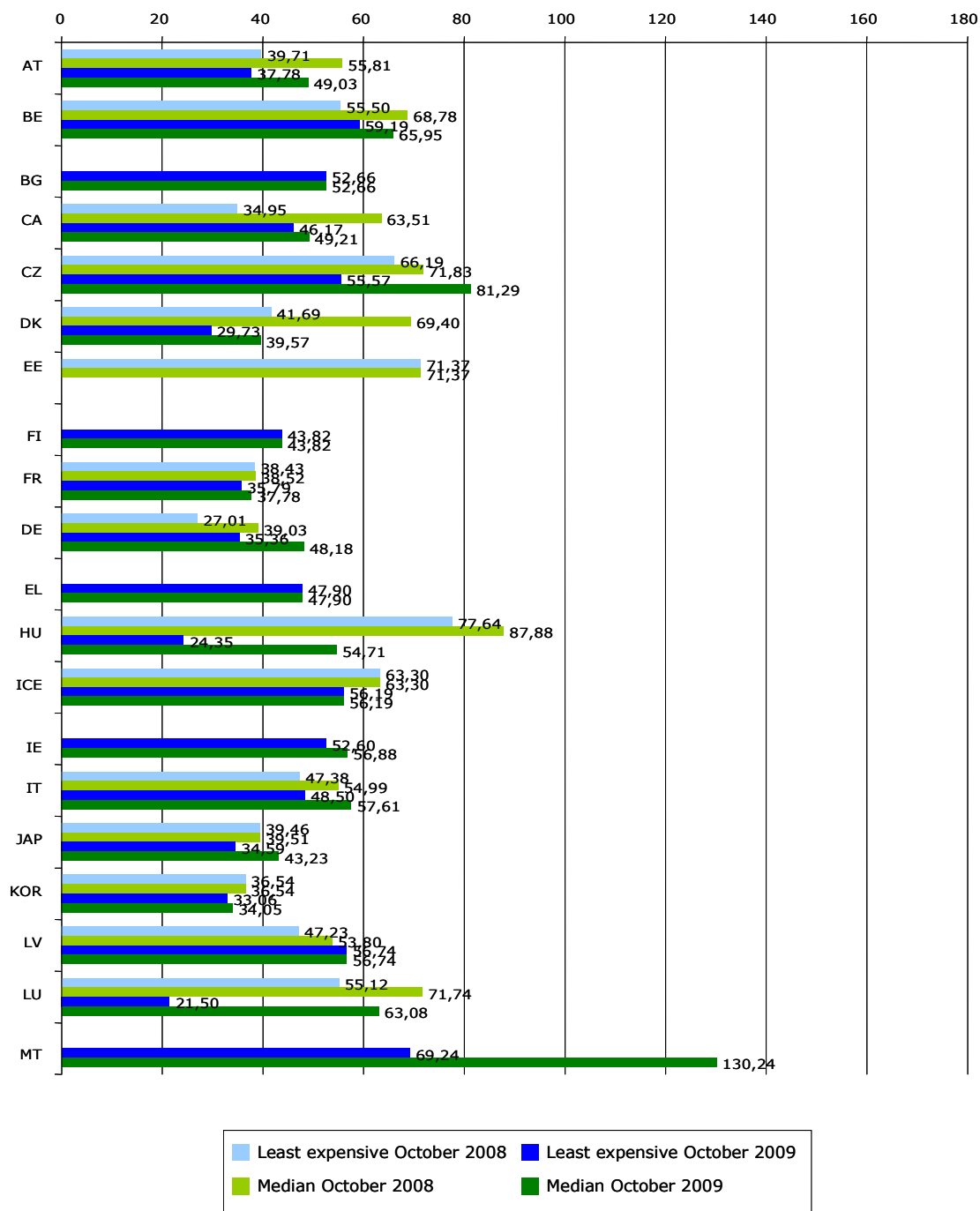
Comparison October 2008 – October 2009

Least expensive and median offers:

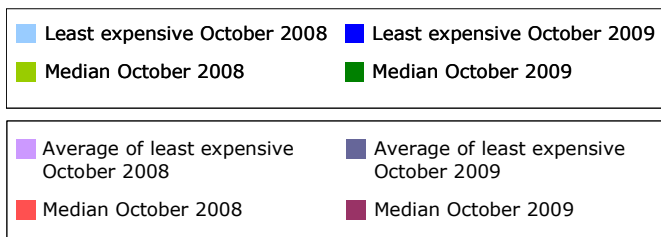
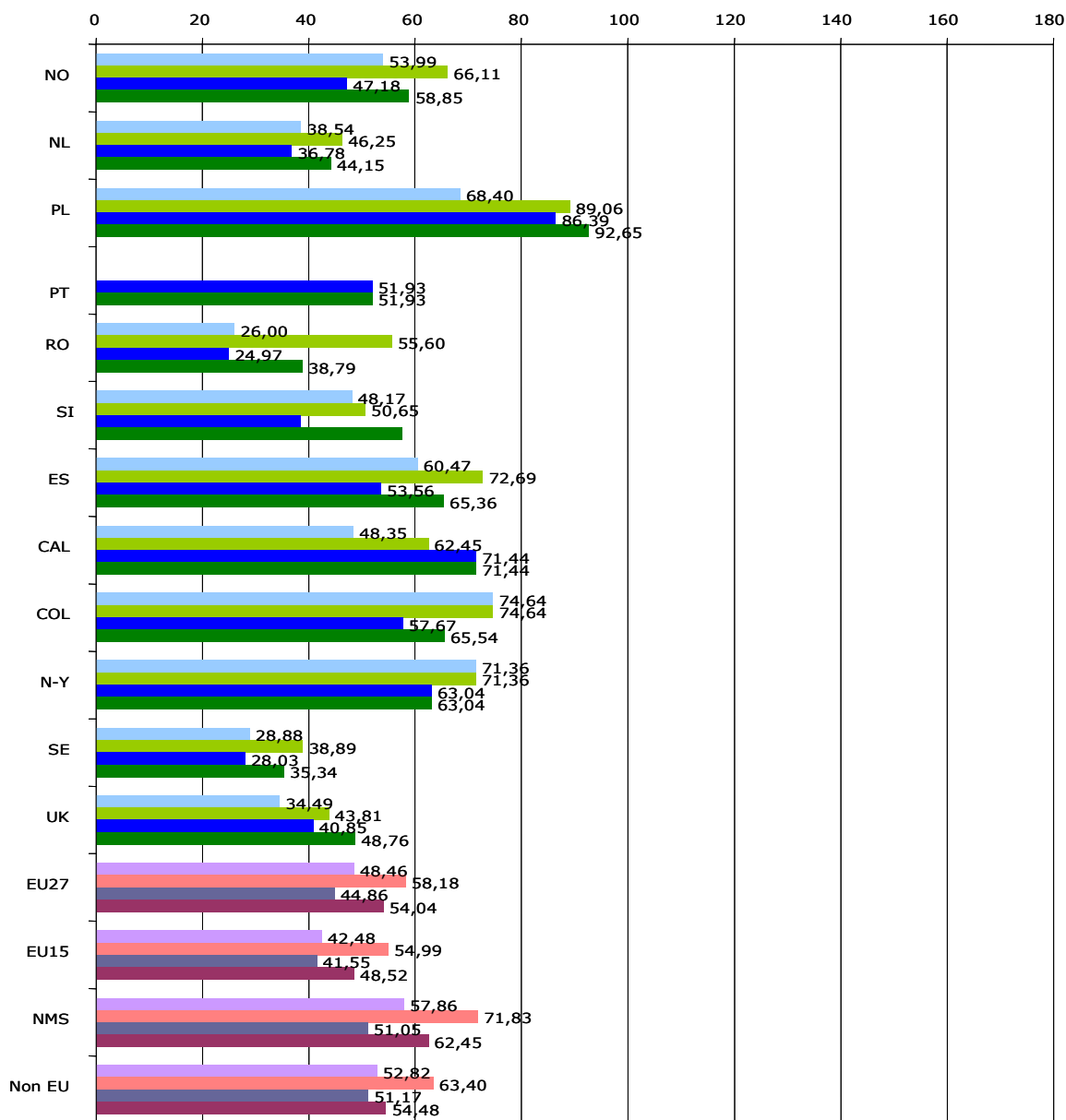
Bundle "Internet access+Tel"

Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month

Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "8192-20Mbps (incl.)", 30GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.1.6.d Conclusions on bundle "Internet+Tel" for "basket 8192kbps-20Mbps (incl.)"**

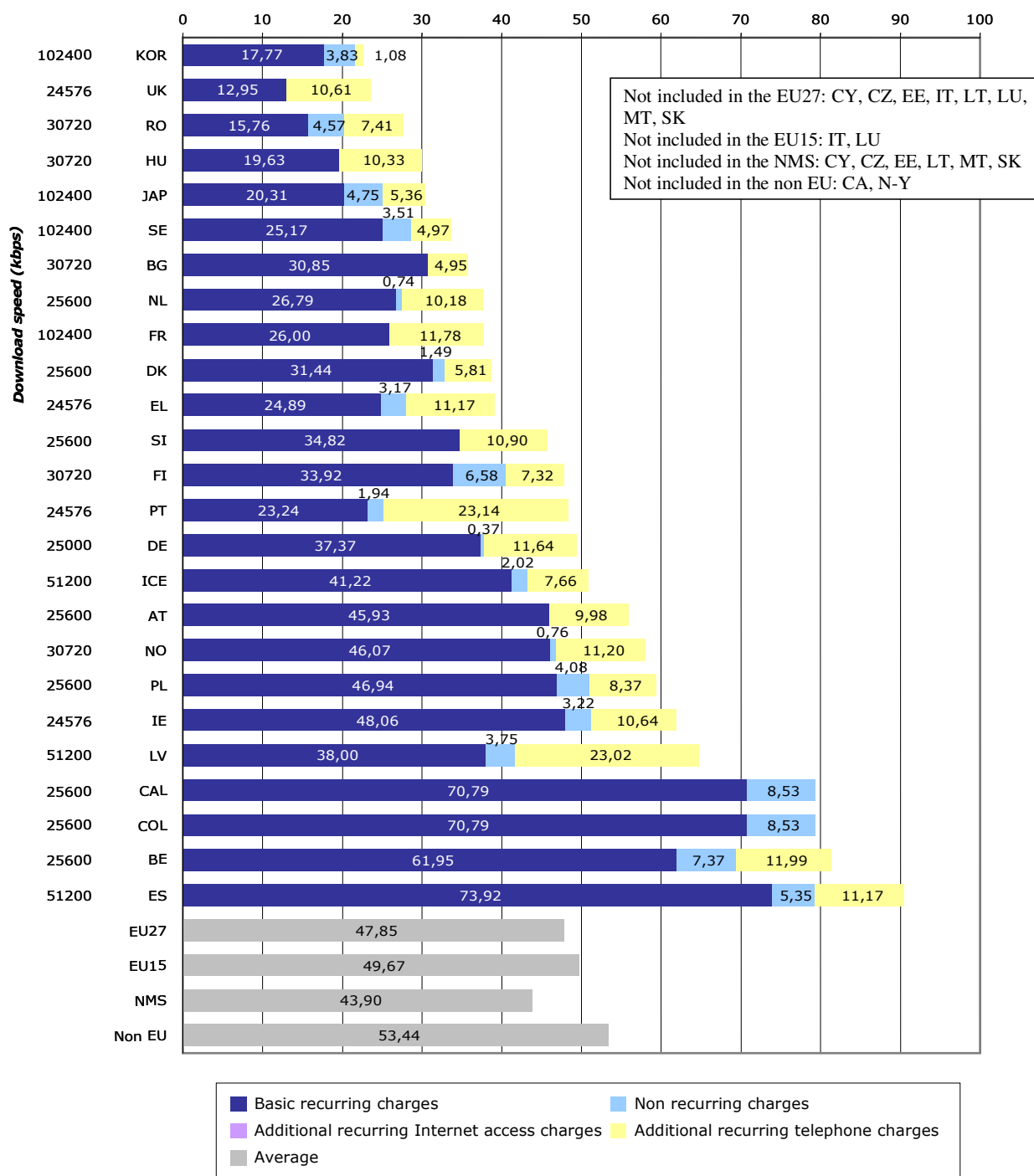
- For thirty-one countries, an offer was available for this basket. For the following countries, no offer was available: *Cyprus, Estonia, Lithuania* and *Slovakia*.
- From the ISPs in the following countries, only one offer was available for this basket: *Bulgaria, Finland, Greece, Iceland, Latvia, Portugal, the State of California*, and *the State of New York*.
- There were four metered offers for this basket (*Belgium, Canada, Iceland* and *Malta*), of which none needed normalisation.
- For most countries, no clear relationship could be observed between the omission of non-recurring charges and their place in the overall ranking. For *Malta* and *Spain*, the omission of non-recurring charges influenced their position. Non-recurring charges are significant in *Italy*, which greatly impacts its overall ranking.
- All but three offers needed normalisation of telephone charges. No additional recurring telephone charges were needed for *the State of California, the State of Colorado* and *the State of New York*.
- Six countries which had no offer for this basket in October 2008, had offers in the sample of October 2009.
- For all regions, the average of the least expensive offers, as well as the median, decreased between October 2008 and October 2009. The decrease of the median is however more significant than these of the least expensive offers in EU and non-EU countries.

### 5.1.7 **BASKET "20+Mbps", IN €/PPP (VAT INCL.)**

#### 5.1.7.a **LEAST EXPENSIVE OFFER**

No offer was available in the sample for the following countries: *Canada, Cyprus, Czech Republic, Estonia, Italy, Lithuania, Luxembourg, Malta, Slovakia and the State of New York.*

**Least expensive offer:**  
**Bundle "Internet access+Tel"**  
**Basket "20+Mbps", 30GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)





### 5.1.7.b BASKET "20+Mbps", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB							Euro	EUR/PPP
Austria	UPC Austria	chello classic + tel	Cable	12	25600	unlimited	unlimited	5	25	20	AV+AS	VoIP	No	0	0	Yes	62,06	55,91
Belgium	Telenet	Internet & Téléphonie à 70€	Cable	12	25600	100	-	8	N.D.	50	AV+ASW+FW+PC	VoIP	Yes	0	0	Yes	91,88	81,31
Bulgaria	Speedy Net	Speedy Net Package 29	Cable	12	30720	unlimited	unlimited	1	1	0	-	VoIP	No	0	0	No	17,21	35,80
Denmark	Fullrate	Fullrate Bredbaand Op til 25 Mbit / 2Mbit bredbåndsforbindelse	FTTx	6	25600	unlimited	unlimited	0	0	0	-	VoIP	No	0	0	No	57,80	38,74
Finland	Elisa	Elisa Laajakaista Heti ( Tampere) 30M+ Phone	Cable	18	30720	unlimited	unlimited	5	N.D.	500	-	N.D.	No	0	0	Yes	59,77	47,82
France	NeufCegetel (SFR)	neufbox fibre optique+Tel	FTTx	-	102400	unlimited	unlimited	10	N.D.	1024	AV+AS+PC	VoIP	Yes	unlimited	0	No	43,45	37,78
Germany	United Internet	1 & 1/Web.de/GMX Surf & Phone-Doppel Flat 25000	FTTx	24	25000	unlimited	unlimited	50	1	10240	AV+AS	VoIP	Yes	unlimited	0	Yes	52,84	49,38
Greece	Tellias	Tellia Double Play Best price	xDSL	12	24576	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	0	0	No	36,09	39,23
Hungary	Digi	BaseNET + DigiFon	Cable	-	30720	unlimited	unlimited	2	N.D.	30	-	VoIP	No	0	0	No	19,95	29,95
Iceland	Vodafone	Flotta netið - meiri hraði +Tel	FTTx	6	51200	30	-	1	0	0	-	VoIP	No	0	0	Yes	30,42	50,90
Ireland	BT Ireland	Broadband and Talk (option 3)	xDSL	12	24576	unlimited	unlimited	1	N.D.	N.D.	-	N.D.	No	0	0	No	72,45	61,92
Japan	NTT West	Flet's Hikari Next Mansion Type Plan 2 + Hikari Denwa Basic Plan	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	33,60	30,42
Korea	LG Powercomm	Xspeed Bundle X-LITE+ TEL	FTTx	12	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	15,38	22,68
Latvia	Latttelecom	Home Package 2 Optic	FTTx	-	51200	unlimited	unlimited	5	1	0	-	Switched	Yes	0	0	No	46,58	64,78
Norway	NextGenTel	Next3 Mini + Next Phone Basic	FTTx	12	30720	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	VoIP	No	0	0	No	75,13	58,03
The Netherlands	UPC Nederland	Internet 25 en bellen standaard	Cable	-	25600	unlimited	unlimited	5	12	50	AV+AS	VoIP	No	0	0	No	42,23	37,70
Poland	UPC Polska	Internet Fiber Power 25Mbps +Rozmowy 60	Cable	-	25600	unlimited	unlimited	3	15	25	-	VoIP	No	60	0	No	34,56	59,39
Portugal	Sonaeom (Clix)	Net+Tel	xDSL	12	24576	60	-	30	N.D.	N.D.	AV+AS	Switched	No	0	0	No	41,56	48,32
Romania	RCS & RDS	Fiber Link 28 LEI	FTTx	-	30720	unlimited	unlimited	2	N.D.	N.D.	-	VoIP	Yes	0	0	Yes	15,04	27,74
Slovenia	Amis	dvojka TEL	FTTx	-	25600	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	37,95	45,72
Spain	ONO	Teléfono TI + Internet 50Mb	Cable	18	51200	unlimited	unlimited	N.D.	unlimited	5	AV+AS+FW	Switched	Yes	unlimited	0	No	85,01	90,44
State of California	Verizon	Better double play FIOS	FTTx	12	25600	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	68,06	79,32
State of Colorado	Verizon	Better double play FIOS	FTTx	12	25600	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	68,06	79,32
Sweden	Tele2 Sverige	Bredband 100/10 Mbit/s+Broadband Tel	FTTx	-	102400	unlimited	unlimited	5	1	40	-	VoIP	No	0	0	No	38,26	33,66
The UK	TalkTalk/AOL	Essentials+Turbo	xDSL	18	24576	40	-	N.D.	N.D.	N.D.	-	Switched	Yes	0	0	No	20,74	23,56

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

(\*\*) Duration = '-' indicates that 12 months was assumed

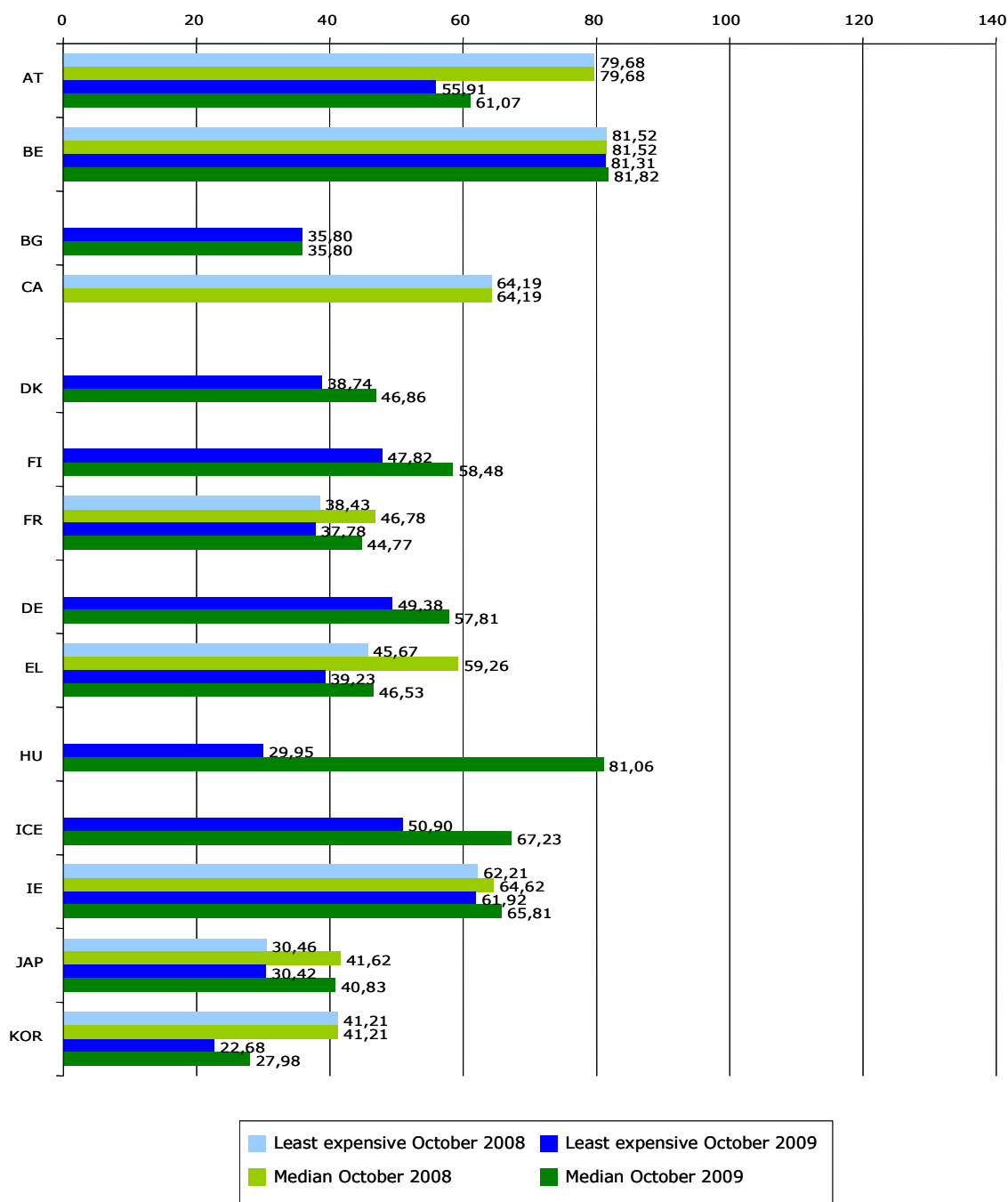
(\*\*\*) N.D. Indicates information is not provided by ISP

ISPs in **italic** and **bold** are incumbent operators

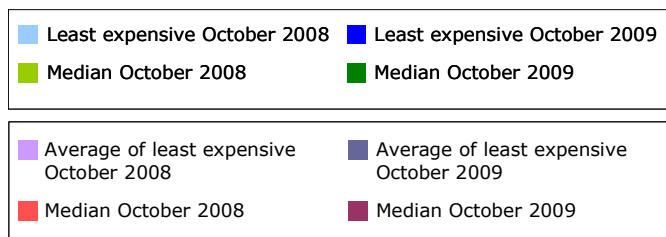
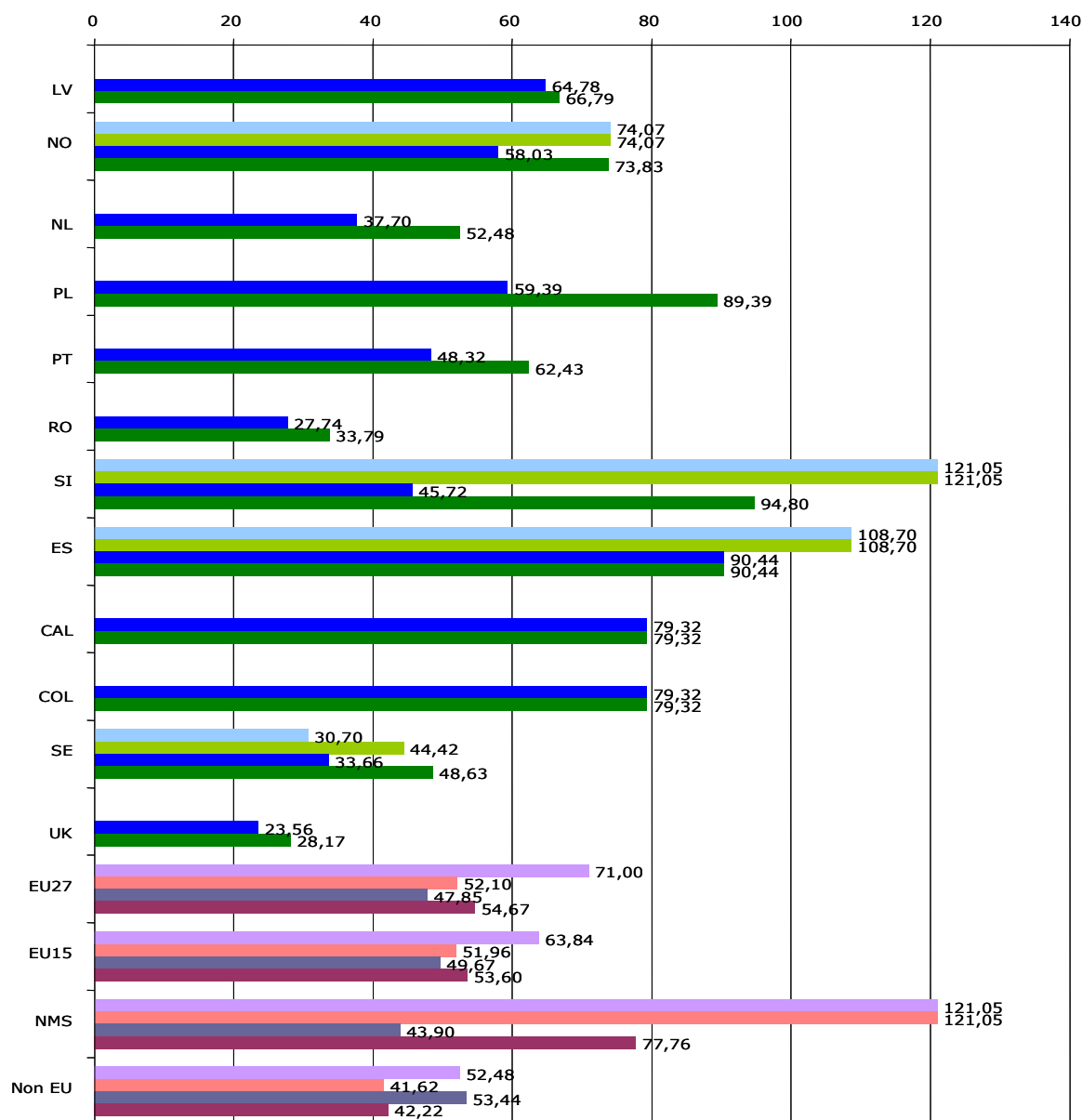
Table 24: Detailed information on least expensive offer per country (20+Mbps) ; "Internet + Tel"

**5.1.7.c BASKET "20+Mbps", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
Least expensive and median offers:  
Bundle "Internet access+Tel"  
Basket "20+Mbps", 30GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel"**  
**Basket "20+Mbps", 30GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



#### **5.1.7.d Conclusions on bundle "Internet+Tel" for "basket 20+Mbps"**

- In twenty-five countries one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Canada, Cyprus, Czech Republic, Estonia, Italy, Lithuania, Luxembourg, Malta, Slovakia and the State of New York.*
- From the ISPs in the following countries, only one offer was available for this basket: *Bulgaria, Spain, the State of California and the State of Colorado.*
- The offer for *Belgium, Iceland, Portugal and the United Kingdom* were metered, though no normalisation was required.
- No clear relationship could be observed between the omission of non-recurring charges in *Austria, Bulgaria, Slovenia and the United Kingdom*, and their place in the overall ranking. In *France and Hungary*, the omission of non-recurring charges had an impact on their ranking.
- All offers except two (*States of California and Colorado*) needed normalisation of telephone charges.
- Eleven countries had offers for this basket both in October 2008 and October 2009. These are: *Austria, Belgium, France, Greece, Ireland, Japan, Korea, Norway, Slovenia, Spain and Sweden.* One country (*Canada*) stopped providing offers in this basket between October 2008 and October 2009.
- In the EU27, the average of the least expensive offers sharply decreased. This is mainly due to the combination of a huge decrease in the average in the NMS and a smaller decrease in the EU15.

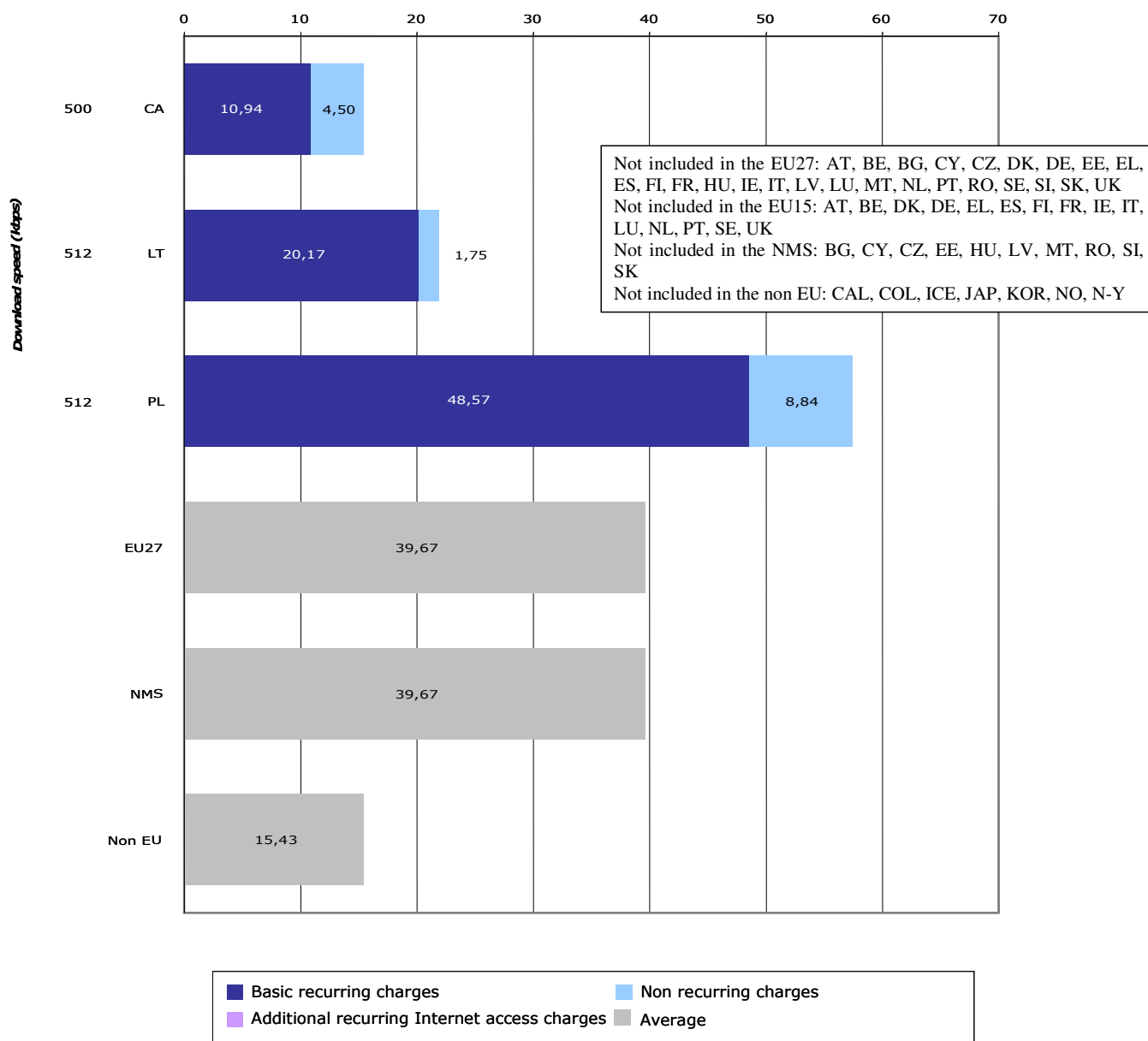
## 5.2. LEAST EXPENSIVE OFFER PER COUNTRY AND PER BASKET FOR BUNDLES INCLUDING INTERNET ACCESS AND TELEVISION SERVICE

### 5.2.1 BASKET "144KBPS-512KBPS (INCL.)", IN €/PPP (VAT INCL.)

#### 5.2.1.a LEAST EXPENSIVE OFFER

For the following countries, no offer corresponding to this bundle was available: *Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia, Spain, the State of California, the State of Colorado, the State of New York, Sweden and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+TV"**  
**Basket "144-512 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



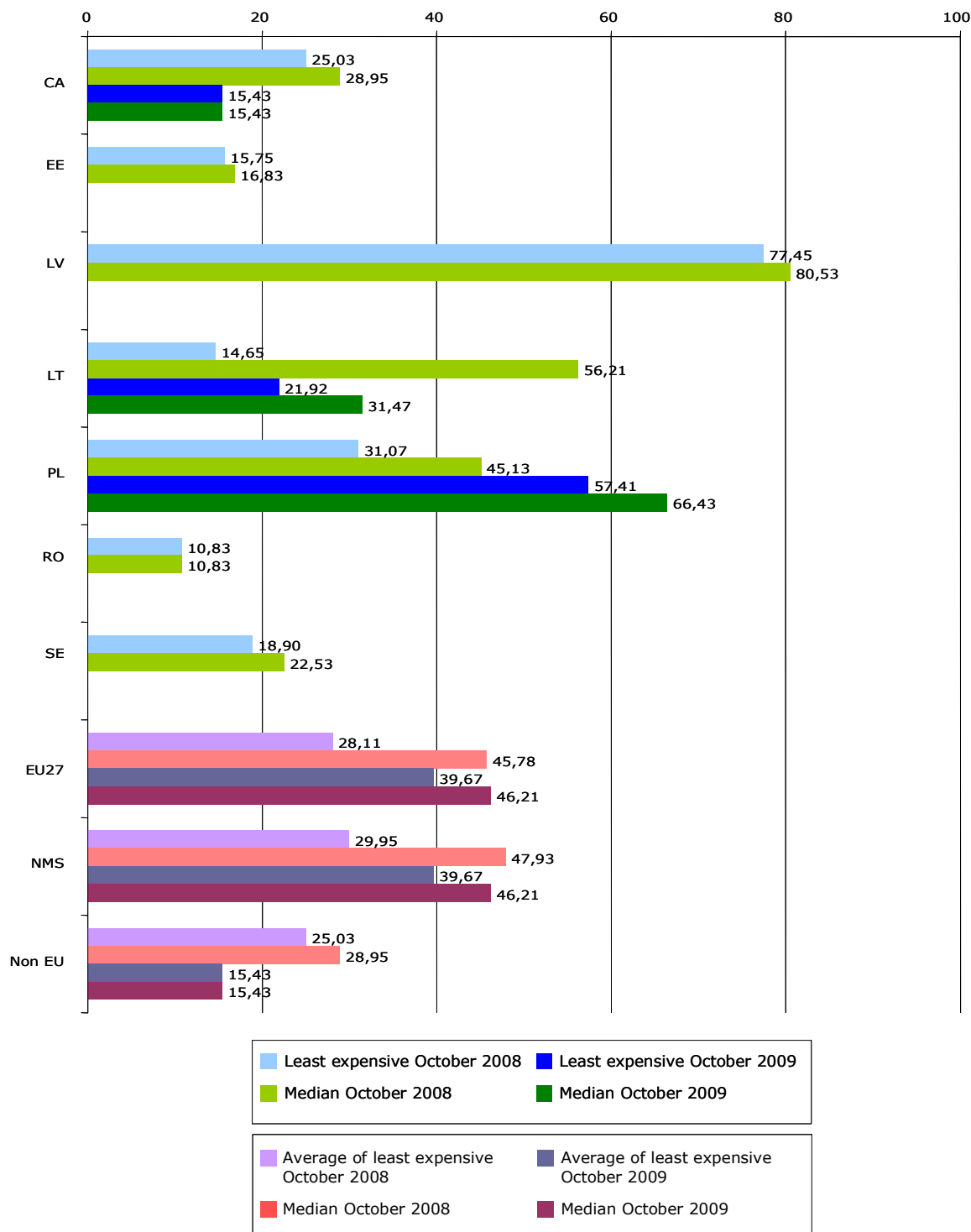
### 5.2.1.b BASKET "144KBPS-512KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (****)	Webspace (****)	Level of protection (*)	Television technology	Nb channels (****)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB				Euro	EUR/PPP
<b>Canada</b>	<b>Bell Canada</b>	Bell Internet essential (QC)	xDSL	-	500	1	-	1	11	5	AV+AS+PC+PU	Digital	500	19,07	15,43
<b>Lithuania</b>	Balticum TV	Pagrindinis	FTTx	12	512	unlimited	unlimited	1	N.D.	N.D.	-	Analog	58	14,79	21,92
<b>Poland</b>	Aster Group	TwojNet + Pakiet Basic Plus	Cable	-	512	unlimited	unlimited	1	2	100	AS	Digital	53	33,41	57,41
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line (**) Duration = '-' indicates that 12 months was assumed (****) N.D. Indicates information is not provided by ISP <b>ISPs in italic &amp; bold</b> are Incumbent operators															

Table 25: Detailed information on least expensive offer per country (144kbps-512kbps (incl.)) ; "Internet + TV"

**5.2.1.c BASKET "144KBPS-512KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
 Least expensive and median offers:  
 Bundle "Internet access+TV"  
 Basket "144-512 (incl.)", 1GB or 20 hours/month  
 Total cost/month in €/PPP (VAT incl.)



**5.2.1.d Conclusions on bundle "Internet+TV" for "basket 144kbps-512kbps (incl.)"**

- For three countries an offer was available for this basket. For the following countries, no offer was available: *Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia, Spain, the State of California, the State of Colorado, the State of New York, Sweden and the United Kingdom.*
- For *Canada*, only one offer was available for this basket.
- There was one metered offer for this basket (*Canada*), but no normalisation was required.
- For all the offers in this basket (*Canada, Lithuania and Poland*), the inclusion of non-recurring charges did not impact their place in the overall ranking.
- The comparison of costs between October 2008 and October 2009 is distorted by the fact that very few countries have offers for this basket. By consequence, the EU averages are very variable and not representative given the low number of values used.
- Also for countries that had offers for both periods for this basket, no trend in the evolution of the costs could be determined.

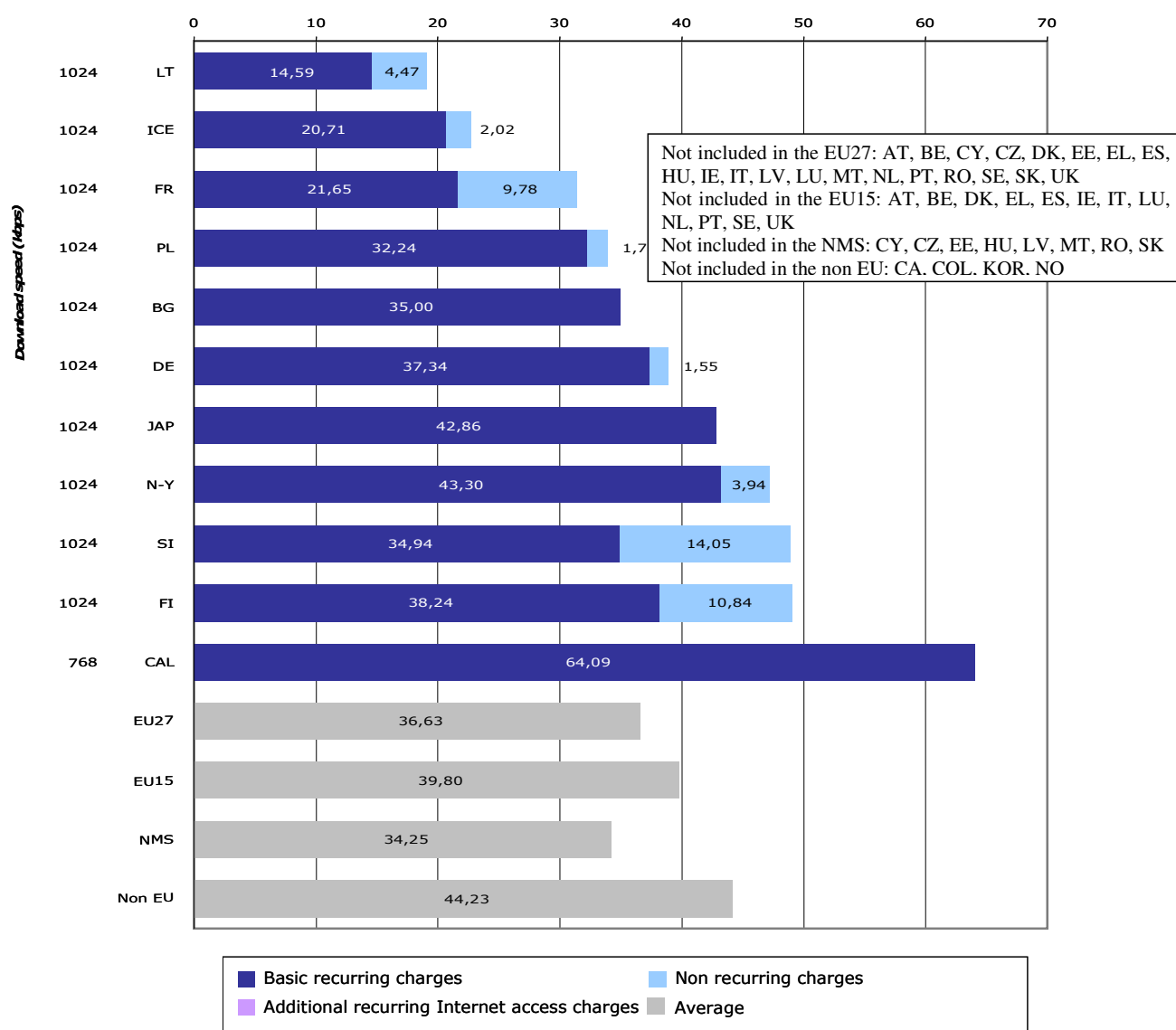


## 5.2.2 **BASKET "512KBPS-1024KBPS (INCL.)", IN €/PPP (VAT INCL.)**

### 5.2.2.a **LEAST EXPENSIVE OFFER**

From the selected ISPs, no offer was available in the following countries: *Austria, Belgium, Canada, Cyprus, Czech Republic, Denmark, Estonia, Greece, Hungary, Ireland, Italy, Korea, Latvia, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, the State of Colorado, Sweden and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+TV"**  
**Basket "(512-1024 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



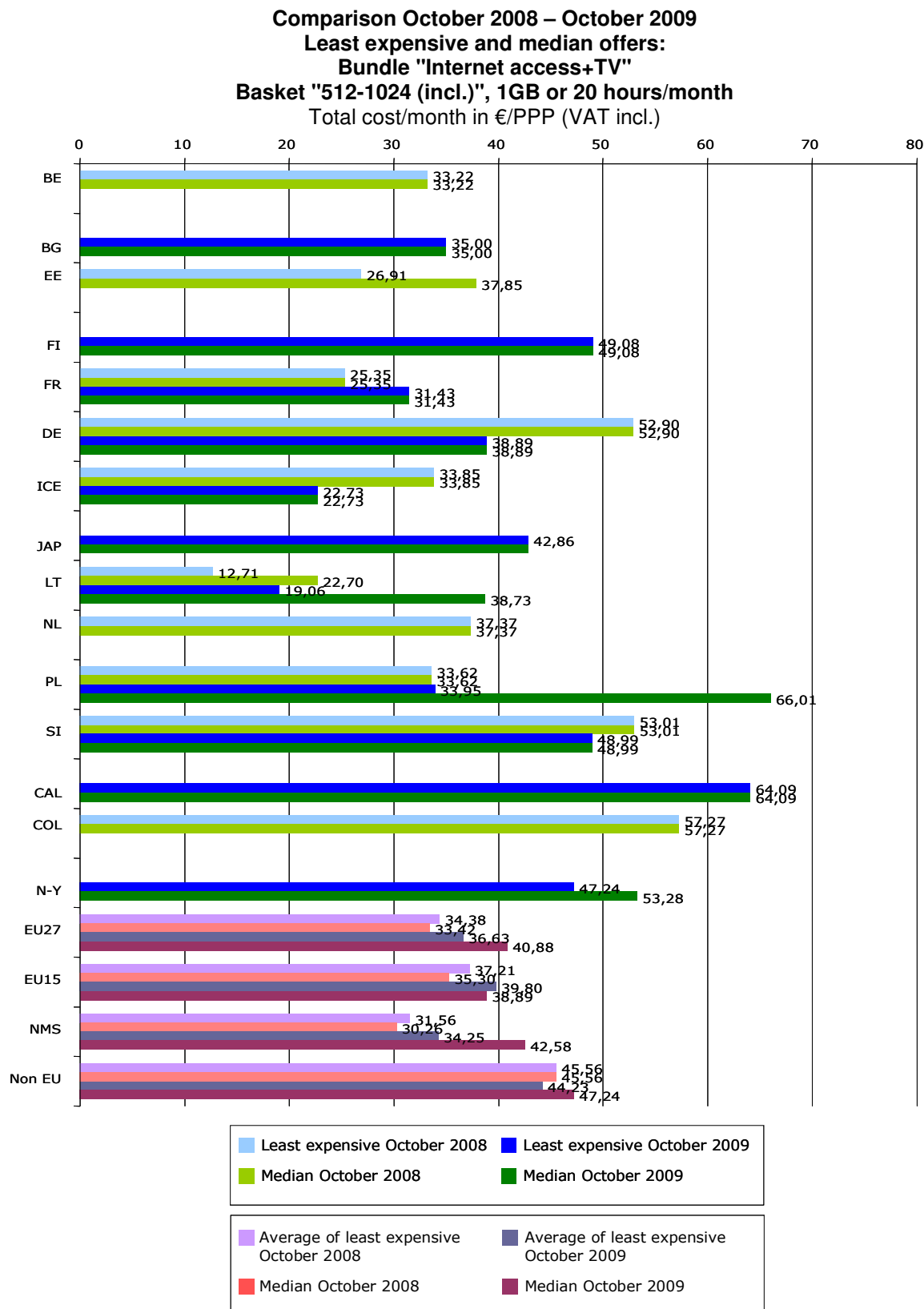
### 5.2.2.b BASKET "512KBPS-1024KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB				Euro	EUR/PPP
Bulgaria	Cable Tel	CableTEL Double Play Home Region 3	Cable	12	1024	unlimited	unlimited	1	1	0	-	Analog	68	16,82	35,00
Finland	<b>Sonera</b>	Sonera Laajakaista Extra (Helsinki) 1M + Broadband TV Easu	FTTx	18	1024	unlimited	unlimited	5	5	125	-	Digital	23	61,36	49,08
France	<b>Orange France</b>	Découverte Internet 1 mégamax+TV	xDSL	-	1024	unlimited	unlimited	5	N.D.	100	AS+PC	Digital	75	36,15	31,43
Germany	<b>Deutsche Telekom</b>	DSL via Satellit+TV	Satellite	-	1024	unlimited	unlimited	25	10	1024	AV+AS	Digital	60+	41,61	38,89
Iceland	<b>Siminn</b>	Grunnaskrift + Grunnpakki Sjóvarp Símans	xDSL	6	1024	1	-	0	N.D.	0	S+ASW+FW+PC+P	Digital	7	13,59	22,73
Japan	Jupiter Telecommunications	J.COM NET Ultra 1M Cours + J.COM TV Digital Compact	FTTx	-	1024	unlimited	unlimited	1	5	100	AS+ASW	Digital	61	47,33	42,86
Lithuania	Mikrovisata	Smart SL	Cable	12	1024	unlimited	unlimited	1	N.D.	25	-	Digital	12	12,86	19,06
Poland	Vectra	Internet 1Mbps+Srebrny	Cable	12	1024	unlimited	unlimited	1	N.D.	400	-	Analog	30	19,75	33,95
Slovenia	<b>Telekom Slovenije</b>	Siol internet in Siol TV	FTTx	-	1024	unlimited	unlimited	4	8	10	AV+AS+FW+PC+BU	Digital	42	40,66	48,99
Slovenia	<b>Telekom Slovenije</b>	Siol internet in Siol TV	xDSL	-	1024	unlimited	unlimited	4	8	10	AV+AS+FW+PC+BU	Digital	42	40,66	48,99
State of California	Bright House	Road Runner Lite with Advantage Cable	Cable	-	768	unlimited	unlimited	5	N.D.	N.D.	AS+ASW+FW+PC	Digital	240	55,00	64,09
State of New York	<b>Verizon</b>	Verizon double play	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Digital	150	40,53	47,24

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*) Duration = '-' indicates that 12 months was assumed  
(\*\*\*) N.D. Indicates information is not provided by ISP  
**ISPs in italic & bold** are Incumbent operators

Table 26: Detailed information on least expensive offer per country (512kbps-1024kbps (incl.)) ; "Internet + TV"

**5.2.2.c BASKET "512KBPS-1024KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**5.2.2.d Conclusions on bundle "Internet+TV" for "basket 512kbps-1024kbps (incl.)"**

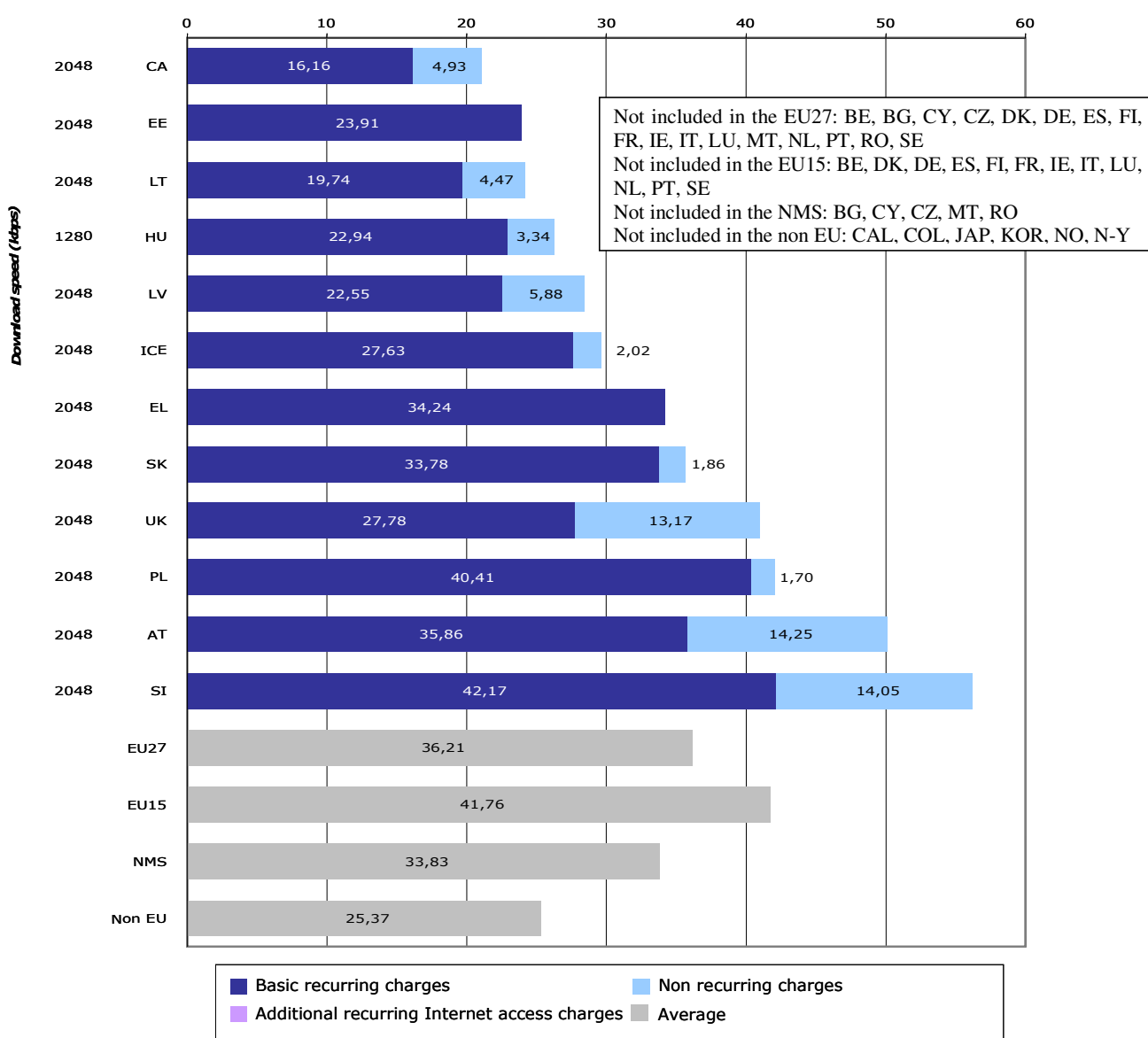
- For eleven countries an offer was available for this basket. For the following countries, no offer was available: *Austria, Belgium, Canada, Cyprus, Czech Republic, Denmark, Estonia, Greece, Hungary, Ireland, Italy, Korea, Latvia, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, the State of Colorado, Sweden and the United Kingdom.*
- From the ISPs in most of the countries, only one offer was available for this basket: *Bulgaria, Finland, France, Germany, Iceland, Japan and the State of California.*
- In *Slovenia*, there were two offers in this basket. They were both from the same ISP and had the same price, but the internet technology was different (xDSL for the first one and FTTx for the other one).
- There was only one metered Internet access offer for this basket (in *Iceland*), which did not need normalisation.
- No relationship could be observed between the omission of non-recurring charges in *Bulgaria, Japan and the State of California*, and their place in the overall ranking. However, the inclusion of non-recurring charges strongly affected the ranking of *Finland and Slovenia*.
- As for the first basket, the comparison between October 2008 and October 2009 mainly points out that more countries have started providing offers for this basket.
- No conclusions could be drawn on the trend in the evolution of the costs.

### 5.2.3 **BASKET "1024KBPS-2048KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### 5.2.3.a **LEAST EXPENSIVE OFFER**

In the following countries, no offer was available for this basket: *Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Japan, Korea, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Spain, the State of California, the State of Colorado, the State of New York and Sweden.*

**Least expensive offer:**  
**Bundle "Internet access+TV"**  
**Basket "1024-2048 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



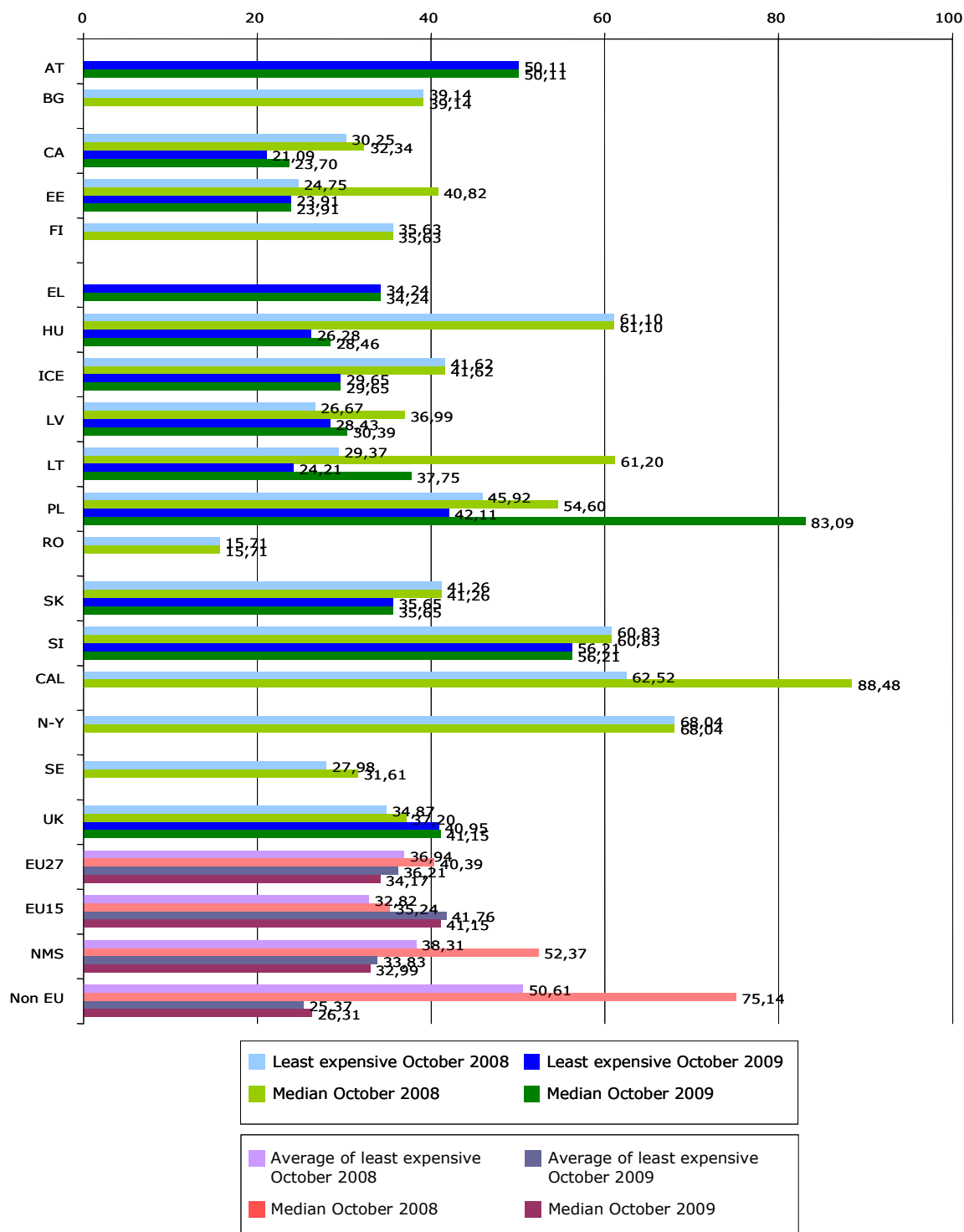
### 5.2.3.b BASKET "1024KBPS-2048KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox	Adresses per mailbox (***)	Webpace (***)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps						MB			Euro	EUR/PPP
<b>Austria</b>	<b>Telekom Austria</b>	aonBlizz light	FTTx	12	2048	unlimited	unlimited	1	5	20	AV+AS	Digital	86	55,62	50,11
<b>Canada</b>	<b>Bell Canada</b>	Bell Internet essential plus (QC)	xDSL	-	2048	25	-	1	11	5	AV+AS+PC+PU	Digital	500	26,06	21,09
<b>Estonia</b>	STV	Duo Mini (Internet, KTV Kodu)	Cable	-	2048	unlimited	unlimited	1	1	100	-	Analog	70	17,58	23,91
<b>Greece</b>	<b>OTE</b>	Conn-x 2 mbps+TV	xDSL	12	2048	unlimited	unlimited	1	N.D.	0	-	Digital	35	31,50	34,24
<b>Hungary</b>	Externet	Otthoni Prepaid Traffic Alfa + Univerzum	xDSL	12	1280	2	-	3	N.D.	100	AV+AS	digital	28	17,50	26,28
<b>Iceland</b>	<b>Siminn</b>	Leið 1 + Grunnpakki Sjórvarp Símans	xDSL	6	2048	10	-	5	N.D.	0	S+ASW+FW+PC+PM	Digital	7	17,72	29,65
<b>Latvia</b>	Livas Net	Comfort	Cable	12	2048	unlimited	unlimited	1	1	2048	-	Analog	67	20,44	28,43
<b>Lithuania</b>	Mikrovisata	Extreme M	Cable	12	2048	unlimited	unlimited	1	N.D.	50	-	Digital	12	16,34	24,21
<b>Poland</b>	Vectra	Internet 2Mbps+Zloty	Cable	12	2048	unlimited	unlimited	2	N.D.	400	-	Analog	60	24,51	42,11
<b>Slovakia</b>	UPC Slovakia	Double Play Analog 1	Cable	12	2048	unlimited	unlimited	3	15	25	AV+AS	Analog	38	26,38	35,65
<b>Slovenia</b>	<b>Telekom Slovenije</b>	Siol internet in Siol TV	xDSL	-	2048	unlimited	unlimited	4	8	10	AV+AS+FW+PC+BU	Digital	42	46,66	56,21
<b>The UK</b>	BSkyB	Broadband Base + Sky plus Variety Pack	xDSL	12	2048	2	-	10	N.D.	N.D.	AV+AS+ASW+PC	Digital	20	36,05	40,95
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line (**) Duration = '-' indicates that 12 months was assumed (***) N.D. Indicates information is not provided by ISP <b>ISPs in italic &amp; bold</b> are Incumbent operators															

Table 27: Detailed information on least expensive offer per country (1024kbps-2048kbps (incl.)) ; "Internet + TV"

**5.2.3.c BASKET "1024KBPS-2048KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
 Least expensive and median offers:  
 Bundle "Internet access+TV"  
 Basket "1024-2048 (incl.)", 1GB or 20 hours/month  
 Total cost/month in €/PPP (VAT incl.)



**5.2.3.d Conclusions on bundle "Internet+TV" for "basket 1024kbps-2048kbps (incl.)"**

- For twelve countries an offer was available for this basket. For the following countries, no offer was available: *Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Japan, Korea, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Spain, the State of California, the State of Colorado, the State of New York and Sweden.*
- From the ISPs in the following countries, only one offer was available for this basket: *Austria, Estonia, Greece, Iceland, Slovakia and Slovenia.*
- There were three metered Internet access offers for this basket (*Canada, Iceland and the United Kingdom*), of which none needed normalisation.
- The omission of non-recurring charges in *Estonia* and *Greece* influences their place in the overall ranking. Non-recurring charges have an impact on the ranking of *Austria* and the *United Kingdom*.
- The number of countries for which this bundle is available for this basket decreased between October 2008 and October 2009.
- The general trend shows a decrease both for the median and for the average of the least expensive offers in the EU27 and the non-EU countries. This decrease is however stronger for the non-EU area. An increase of the median and the least expensive offers was observed in the EU15, but this is compensated for by the decrease for the NMS countries.

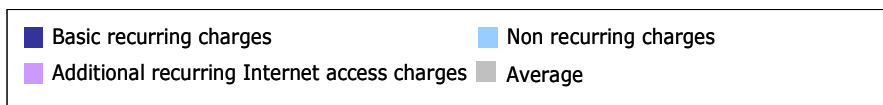
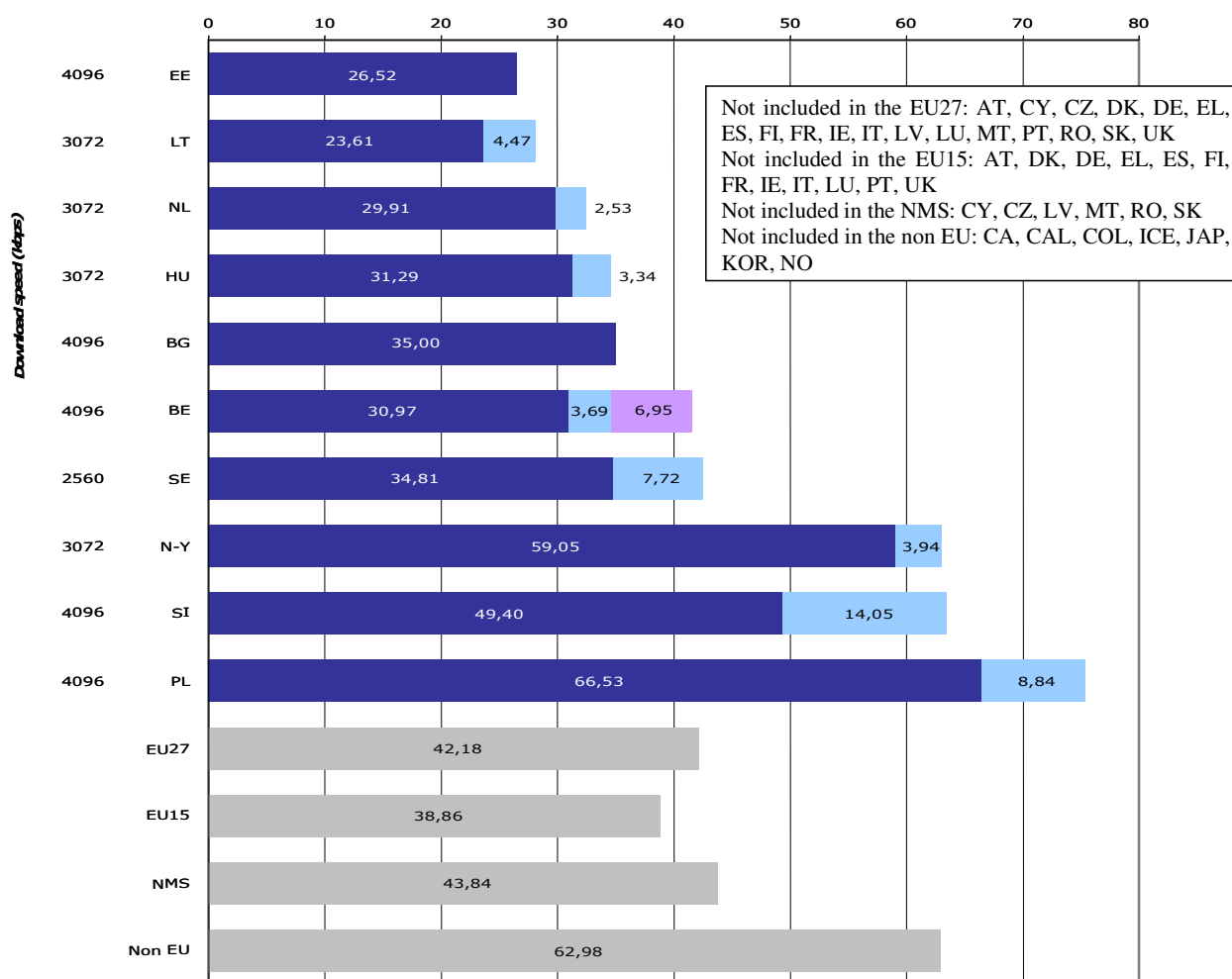


## 5.2.4 BASKET "2048KBPS-4096KBPS (INCL.)", IN €/PPP (VAT INCL.)

### 5.2.4.a LEAST EXPENSIVE OFFER

No offer was available for this basket in the following countries: *Austria, Canada, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Japan, Korea, Latvia, Luxembourg, Malta, Norway, Portugal, Romania, Slovakia, Spain, the State of California, the State of Colorado and the United Kingdom.*

Least expensive offer:  
Bundle "Internet access+TV"  
Basket "2048-4096 (incl.)", 10GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



### 5.2.4.b BASKET "2048KBPS-4096KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webspace (***)	Level of protection (*)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB				Euro	EUR/PPP
<b>Belgium</b>	Telenet	Shake+ Internet & Digital TV à 35€	Cable	12	4096	5	-	1	N.D.	0	AV+AS	Digital	68	47,02	41,61
<b>Bulgaria</b>	Cable Tel	CableTEL. Double Play Home Region 2	Cable	12	4096	unlimited	unlimited	1	1	0	-	Analog	68	16,82	35,00
<b>Estonia</b>	STV	Duo Saturn Mini (Internet, KTV Kodu)	FTTx	-	4096	unlimited	unlimited	1	1	100	-	Analog	70	19,49	26,52
<b>Hungary</b>	Externet	Xpress Prepaid Alfa + Univerzum	xDSL	12	3072	unlimited	unlimited	3	N.D.	100	AV+AS	Digital	28	23,07	34,63
<b>Lithuania</b>	Mikrovisata	Extreme L	Cable	12	3072	unlimited	unlimited	1	N.D.	50	-	Digital	12	18,95	28,08
<b>The Netherlands</b>	<b>KPN</b>	Internet Basis en digitenne TV	xDSL	12	3072	unlimited	unlimited	5	5	50	AV+AS	Digital	23	36,33	32,44
<b>Poland</b>	Aster Group	TwojDom+ Pakiet Basic Plus	Cable	-	4096	unlimited	unlimited	5	10	300	AS	Digital	53	43,86	75,37
<b>Slovenia</b>	<b>Telekom Slovenije</b>	Siol internet in Siol TV	xDSL	-	4096	unlimited	unlimited	4	8	10	AV+AS+FW+PC+BU	Digital	42	52,66	63,44
<b>State of New York</b>	<b>Verizon</b>	Verizon double play	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Digital	150	54,05	62,98
<b>Sweden</b>	Telenor Sverige	Bredbandsbolaget Bredband 2	FTTx	12	2560	unlimited	unlimited	5	1	100	AV+FW+BU	Digital	31	48,35	42,53
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line															
(**) Duration = '-' indicates that 12 months was assumed															
(***) N.D. Indicates information is not provided by ISP															
<b>ISPs in italic &amp; bold</b> are Incumbent operators															

Table 28: Detailed information on least expensive offer per country (2048kbps-4096kbps (incl.)) ; "Internet + TV"

**5.2.4.c BASKET "2048KBPS-4096KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

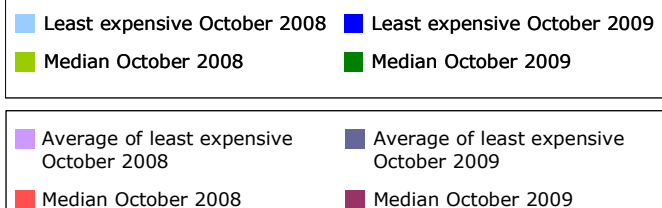
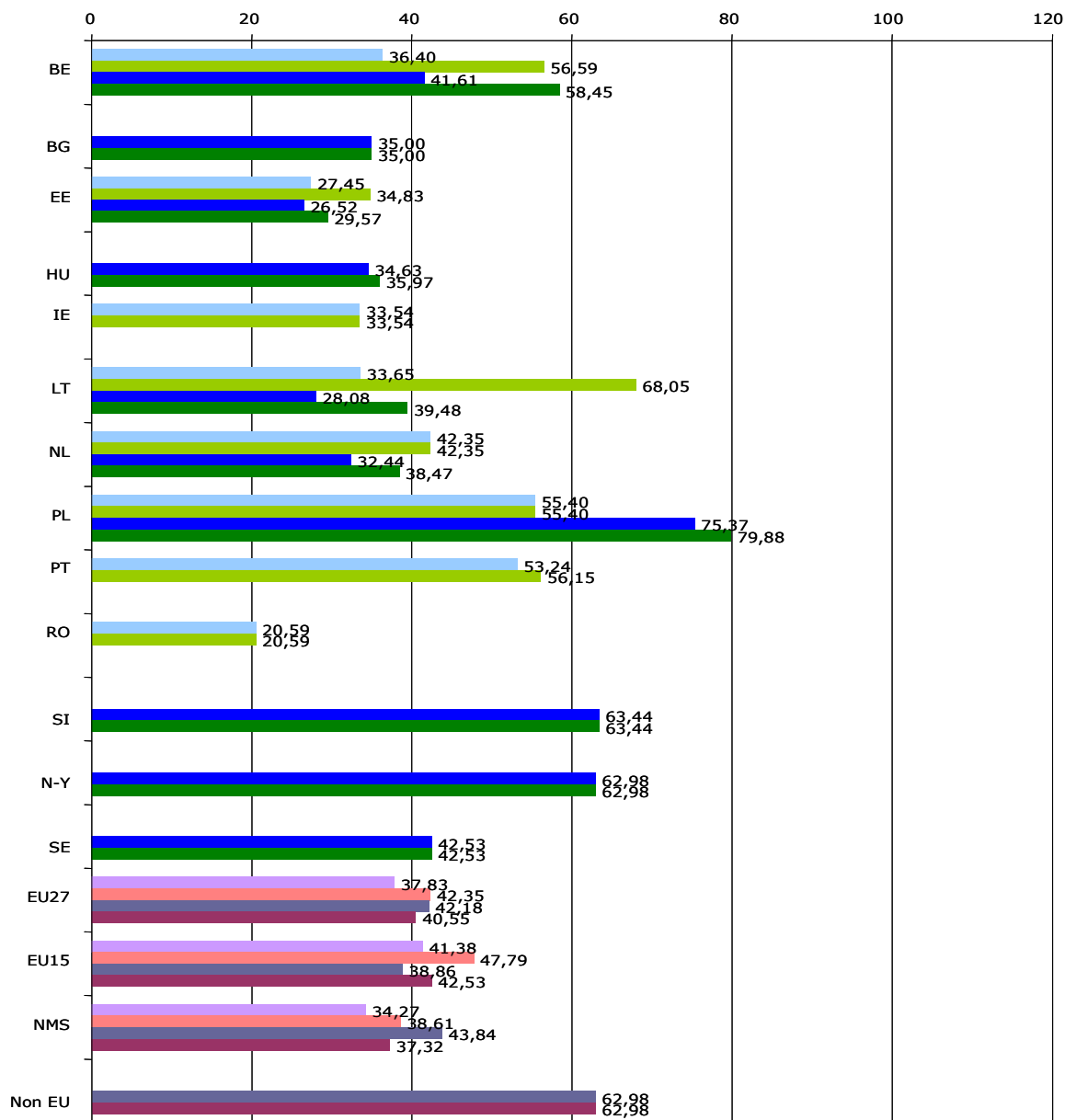
Comparison October 2008 – October 2009

Least expensive and median offers:

Bundle "Internet access+TV"

Basket "2048-4096 (incl.)", 10GB or 20 hours/month

Total cost/month in €/PPP (VAT incl.)



**5.2.4.d Conclusions on bundle "Internet+TV" for "basket 2048kbps-4096kbps (incl.)"**

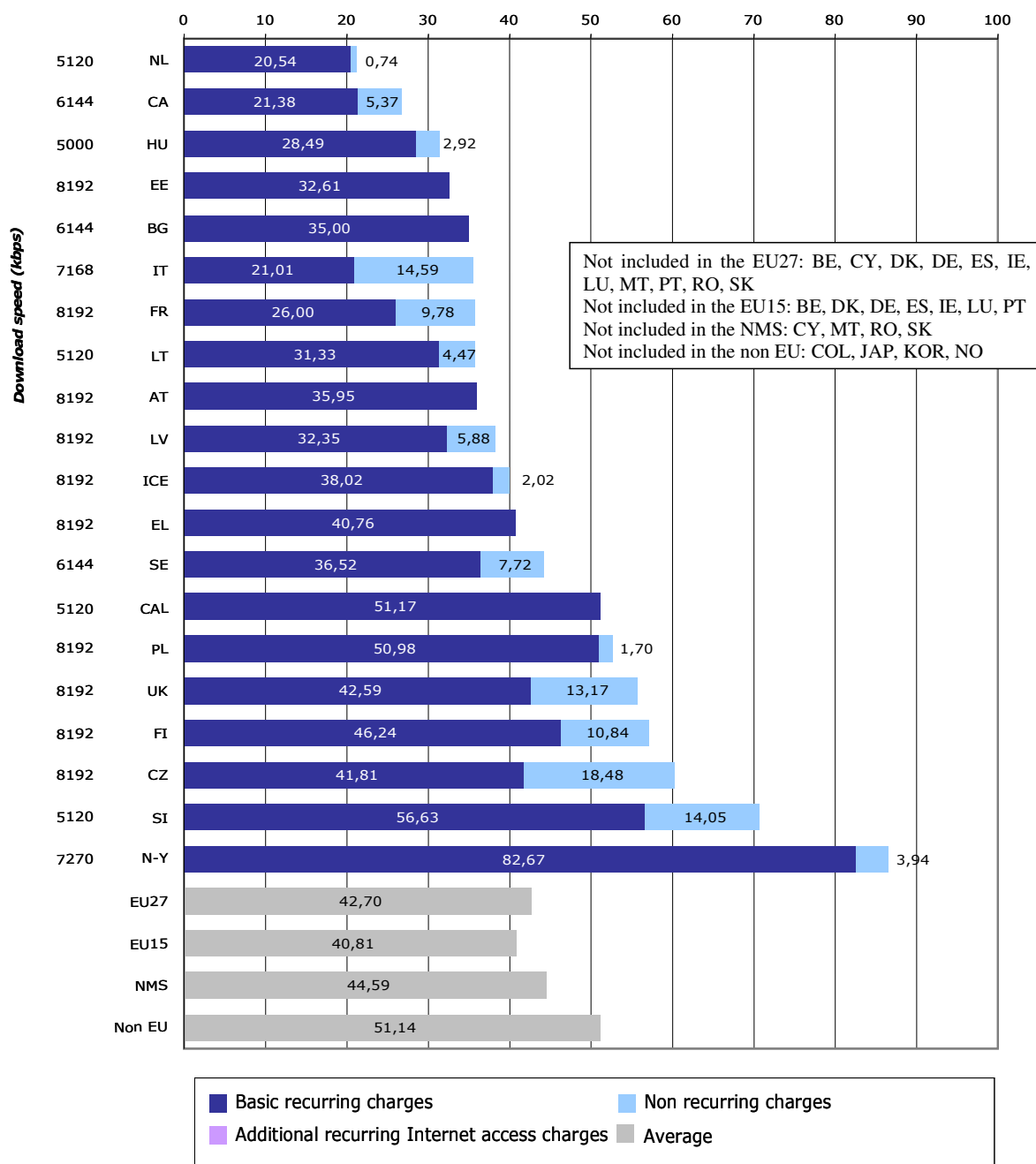
- In ten countries one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Austria, Canada, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Japan, Korea, Latvia, Luxembourg, Malta, Norway, Portugal, Romania, Slovakia, Spain, the State of California, the State of Colorado, and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Bulgaria, the State of New York and Sweden.*
- There was only one metered Internet access offer for this basket (in *Belgium*) which needed normalisation. Additional recurring Internet access charges had no significant impact on its ranking.
- The omission of non recurring charges in *Estonia* had an influence on its position in the overall ranking while this omission had no impact on the ranking of *Bulgaria*.
- The comparison between October 2008 and October 2009 at the individual country level is only possible for five countries: *Belgium, Estonia, Lithuania, the Netherlands and Poland.* Other countries only had offers in October 2008 (*Ireland, Portugal and Romania*) or only in October 2009 (*Bulgaria, Hungary, Slovenia, the State of New York and Sweden*).
- Overall, least expensive offers in the new sample of offers for the EU27 in October 2009 are on average available at a higher cost. This results from a sharp increase of the least expensive offers for the NMS and a slight decrease in the EU15. Median values are decreasing in both cases. As these averages are based on a limited number of values, the conclusions based on these have to be considered with caution.

## 5.2.5 **BASKET "4096KBPS-8192KBPS (INCL.)", IN €/PPP (VAT INCL.)**

### 5.2.5.a **LEAST EXPENSIVE OFFER**

No offer corresponding to this basket was available from the ISPs of the following countries: *Belgium, Cyprus, Denmark, Germany, Ireland, Japan, Korea, Luxembourg, Malta, Norway, Portugal, Romania, Slovakia, Spain and the State of Colorado.*

**Least expensive offer:**  
**bundle "Internet access+TV"**  
**Basket "4096-8192 (incl.)", 30GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



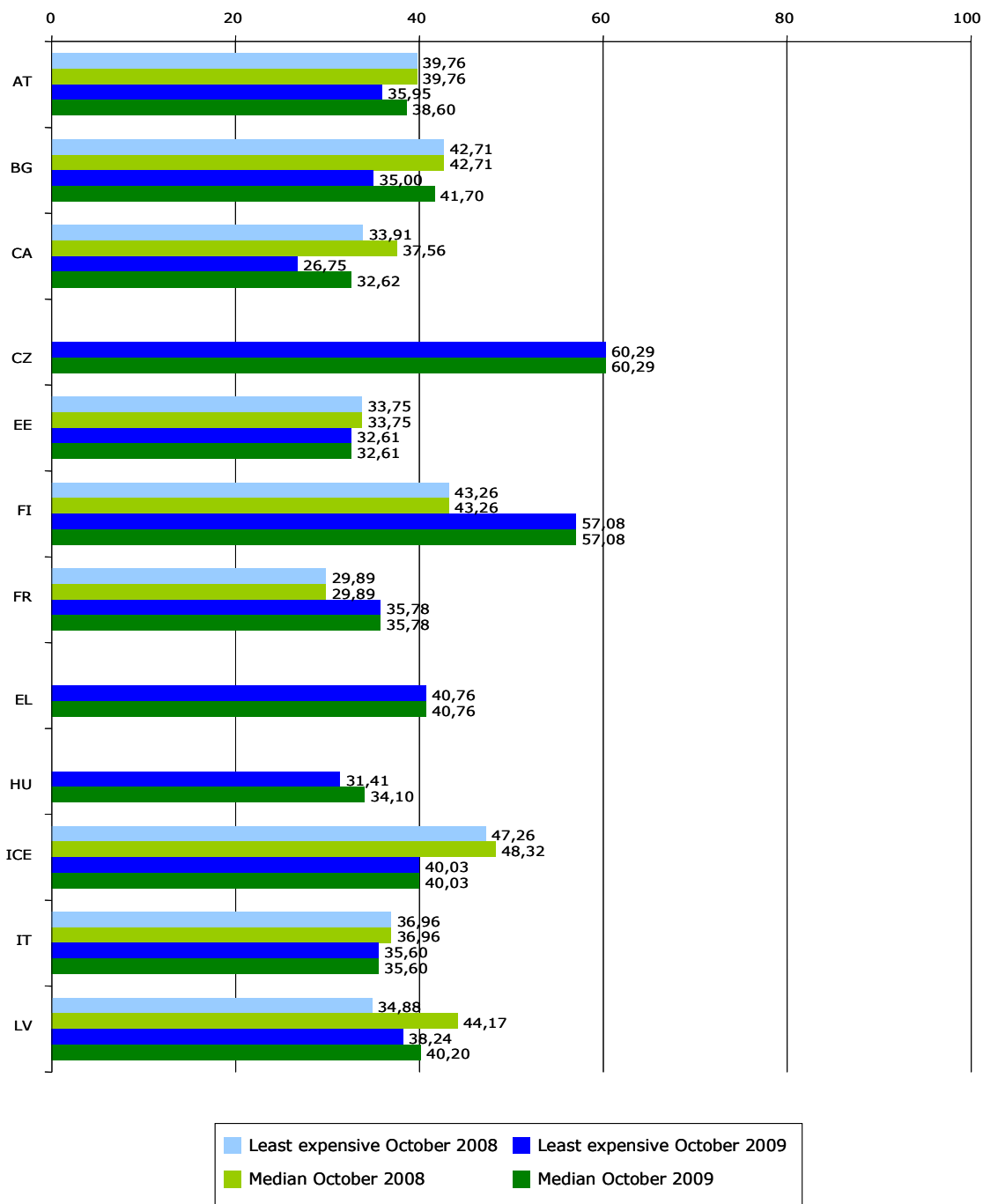
### 5.2.5.b BASKET "4096KBPS-8192KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps						MB				
Austria	UPC Austria	chello fun + cable TV	Cable	12	8192	unlimited	unlimited	3	15	10	AV+AS	Analog	40	39,90	35,95
Bulgaria	Cable Tel	CableTEL. Double Play Home Region 1	Cable	12	6144	unlimited	unlimited	1	1	0	-	Analog	68	16,82	35,00
Canada	<b>Bell Canada</b>	Bell Internet Performance (QC)	xDSL	-	6144	75	-	1	11	5	AV+AS+PC+PU	Digital	500	33,05	26,75
Czech Republic	<b>Telefónica O2</b>	O2 Internet+TV start	xDSL	-	8192	unlimited	unlimited	1	5	30	AV	Digital	N.D.	42,02	60,29
Estonia	STV	Duo Saturn Kodu (Internet, KTV Kodu)	FTTx	-	8192	unlimited	unlimited	1	1	100	-	Analog	70	23,97	32,61
Finland	<b>Sonera</b>	Sonera Laajakaista Extra (Helsinki) 10M + Broadband TV Easy	xDSL	18	8192	unlimited	unlimited	5	5	125	-	Digital	23	71,36	57,08
France	<b>Orange France</b>	Découverte internet 8 mégamax+TV	xDSL	-	8192	unlimited	unlimited	5	N.D.	100	AS+PC	Digital	75	41,15	35,78
Greece	<b>OTE</b>	Conn-x 8 mbps+TV	xDSL	12	8192	unlimited	unlimited	1	N.D.	0	-	Digital	35	37,50	40,76
Hungary	EnterNet	EnterNet 5 Mbps prepaid Csomag + Start	xDSL	12	5000	unlimited	unlimited	3	N.D.	100	AV+AS	Digital	24	20,92	31,41
Iceland	<b>Siminn</b>	Leið 2 + Grunnpakki Sjónvarp Símans	xDSL	6	8192	60	-	5	N.D.	0	AS+ASW+FW+PC+PM	Digital	7	23,93	40,03
Italy	<b>Telecom Italia</b>	Alice 7 Mega + Home TV	xDSL	-	7168	unlimited	unlimited	1	N.D.	300	AV+AS	Digital	200+	38,80	35,60
Latvia	Livas Net	Dinamic	Cable	12	8192	unlimited	unlimited	1	1	2048	-	Analog	67	27,49	38,24
Lithuania	Mikrovisata	Extreme XXL	Cable	12	5120	unlimited	unlimited	1	N.D.	50	-	Digital	12	24,16	35,80
The Netherlands	UPC Nederland	Internet 5 en TV	Cable	12	5120	unlimited	unlimited	5	12	25	AV+AS	Digital	50	23,83	21,28
Poland	Vectra	Internet 8Mbps+Platynowy	Cable	12	8192	unlimited	unlimited	2	N.D.	400	-	Digital	80	30,66	52,68
Slovenia	<b>Telekom Slovenije</b>	Siol internet in Siol TV	FTTx	-	5120	unlimited	unlimited	4	8	10	AV+AS+FW+PC+BU	Digital	42	58,66	70,67
State of California	Charter Communications	Bundle with Express internet and cable TV	Cable	-	5120	unlimited	unlimited	10	N.D.	20	AV+AS+ASW+FW+PC+PM+PU	Analog	N.D.	43,91	51,17
State of New York	<b>Verizon</b>	Verizon double play	xDSL	12	7270,4	unlimited	unlimited	9	N.D.	10	-	Digital	200	74,32	86,61
Sweden	Telenor Sverige	Bas+Tvsilver	FTTx	12	6144	unlimited	unlimited	5	1	100	AV+FW+BU	Digital	31	50,29	44,24
The UK	BSkyB	Sky Broadband Connect + Sky plus Variety Pack TV	xDSL	12	8192	40	-	10	N.D.	N.D.	AV+AS+ASW+PC	Digital	20	49,09	55,76
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line (**) Duration = '-' indicates that 12 months was assumed (***) N.D. Indicates information is not provided by ISP <b>ISPs in italic &amp; bold</b> are Incumbent operators															

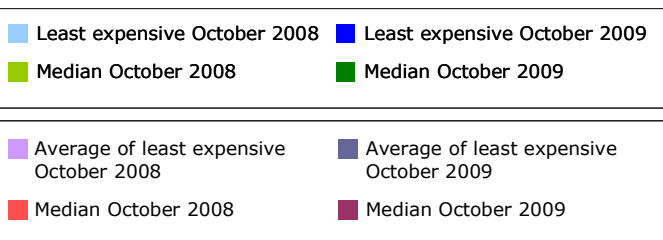
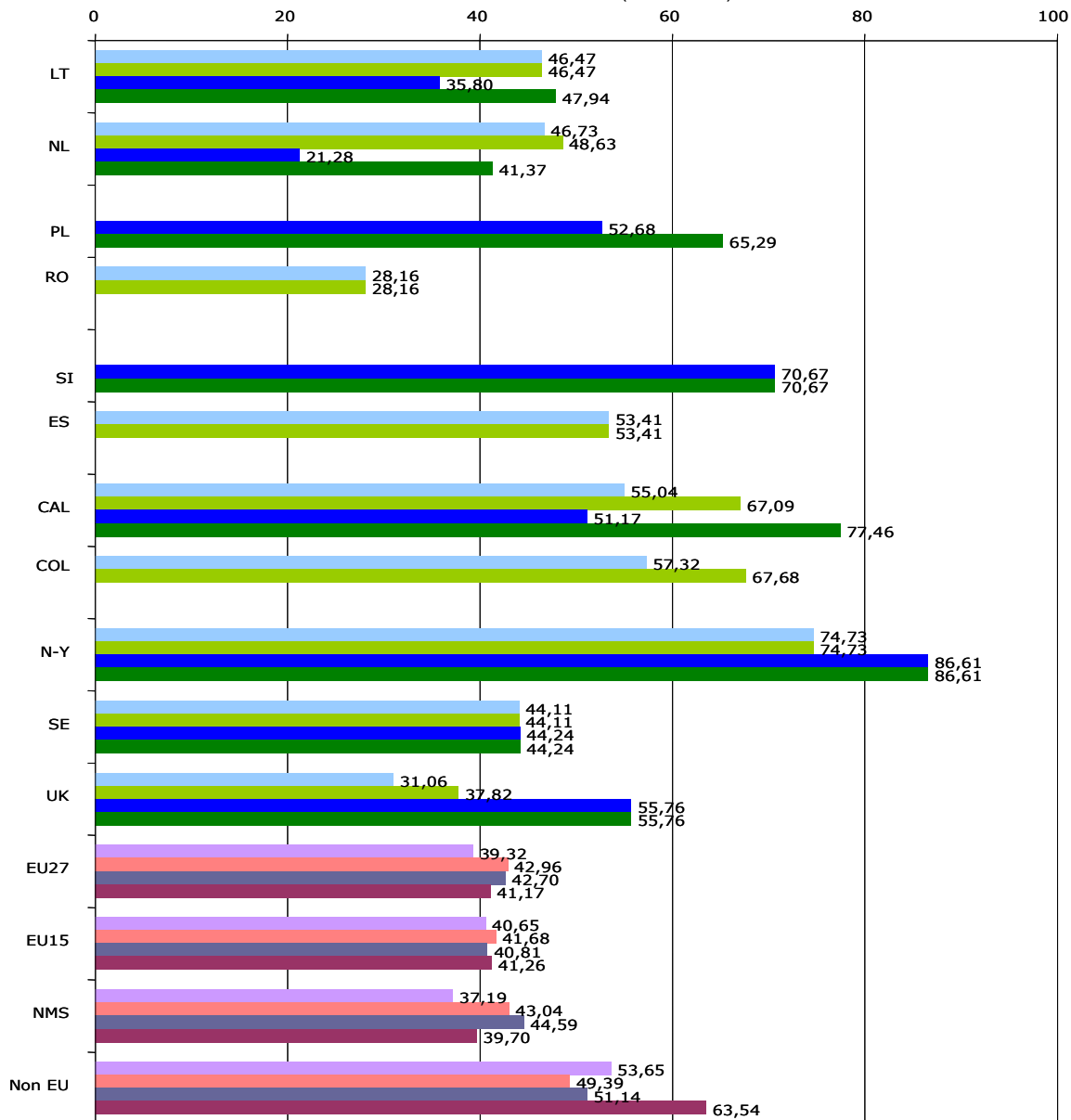
Table 29: Detailed information on least expensive offer per country (4096kbps-8192kbps (incl.)) ; "Internet + TV"

**5.2.5.c BASKET "4096KBPS-8192KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
 Least expensive and median offers:  
 Bundle "Internet access+TV"  
 Basket "'4096-8192 (incl.)", 30GB or 20 hours/month  
 Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+TV"**  
**Basket "'4096-8192 (incl.)", 30GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**





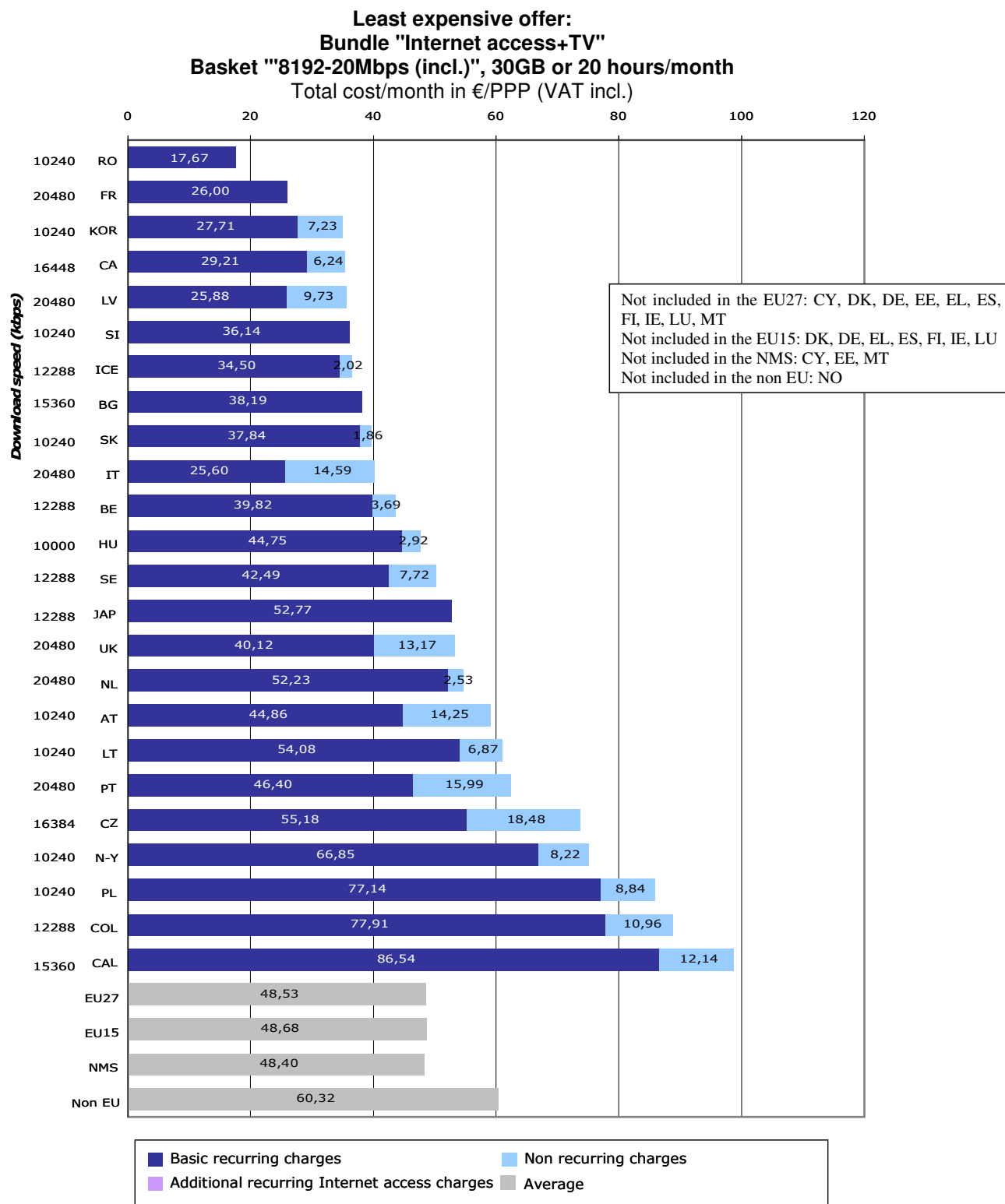
**5.2.5.d Conclusions on bundle "Internet+TV" for "basket 4096kbps-8192kbps (incl.)"**

- In twenty countries one or more ISPs had an offer corresponding to this basket. For the following countries, no offer was available: *Belgium, Cyprus, Denmark, Germany, Ireland, Japan, Korea, Luxembourg, Malta, Norway, Portugal, Romania, Slovakia, Spain and the State of Colorado.*
- From the ISPs in the following countries, only one offer was available for this basket: *Czech Republic, Estonia, Finland, France, Greece, Iceland, Italy, Slovenia, the State of New York, Sweden and the United Kingdom.*
- There were three metered Internet access offers for this basket (*Canada, Iceland and the United Kingdom*), of which none needed normalisation.
- The omission of non-recurring charges in *Austria, Bulgaria, Estonia, Greece and the State of California* had an influence on their place in the overall ranking.
- The comparison between October 2008 and October 2009 is possible for fifteen countries. These are: *Austria, Bulgaria, Canada, Estonia, Finland, France, Iceland, Italy, Latvia, Lithuania, the Netherlands, the State of California, the State of New York, Sweden and the United Kingdom.*
- In the EU27, the median value decreased slightly, while the average of the least expensive offers increased. This situation is completely reversed in the non-EU countries (slight decrease of the least expensive offers and strong increase of the median).

## 5.2.6 **BASKET "8192KBPS-20MBPS (INCL.)", IN €/PPP (VAT INCL.)**

### 5.2.6.a **LEAST EXPENSIVE OFFER**

No offer was available for this basket in the following countries: *Cyprus, Denmark, Estonia, Finland, Germany, Greece, Ireland, Luxembourg, Malta, Norway and Spain.*



### 5.2.6.b BASKET "8192KBPS-20MBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB				Euro	EUR/PPP
<b>Austria</b>	<b>Telekom Austria</b>	aonBlizz pro	FTTx	12	10240	unlimited	unlimited	5	25	20	AV+AS	Digital	86	65,62	59,11
<b>Belgium</b>	Telenet	FunkyShake	Cable	12	12288	30	-	4	N.D.	0	AV+AS	Digital	68	49,17	43,51
<b>Bulgaria</b>	Cable Tel	CableTEL Double Play Home Sofia	Cable	12	15360	unlimited	unlimited	1	1	0	-	Analog	68	18,36	38,19
<b>Canada</b>	<b>Bell Canada</b>	Bell Internet MAX16 (QC)	xDSL	-	16448	50	-	1	11	5	AV+AS+PC+PU	Digital	500	43,80	35,45
<b>Czech Republic</b>	<b>Telefónica O2</b>	O2 Internet PLUS+TV start	xDSL	-	16384	unlimited	unlimited	1	5	30	AV	Digital	N.D.	51,34	73,67
<b>France</b>	NeufCegetel (SFR)	neufbox de SFR 20M+TV	xDSL	-	20480	unlimited	unlimited	10	N.D.	1024	PC	Digital	140	29,90	26,00
<b>Hungary</b>	EnterNet	EnterNet 10 Mbps Csomag + Start	xDSL	12	10000	unlimited	unlimited	5	N.D.	100	AV+AS	Digital	24	31,75	47,67
<b>Iceland</b>	Vodafone	Flotta netið +TV	xDSL	6	12288	30	-	1	0	0	-	Digital	72	21,83	36,52
<b>Italy</b>	<b>Telecom Italia</b>	Alice 20 Mega + Home TV	xDSL	-	20480	unlimited	unlimited	1	N.D.	300	AV+AS	Digital	200+	43,80	40,18
<b>Japan</b>	Jupiter Telecommunications	J:COM NET Ultra 12M Cours + J:COM TV Digital Compact	FTTx	-	12288	unlimited	unlimited	1	5	100	AS+ASW	Digital	61	58,28	52,77
<b>Korea</b>	SK Broadband	Broad & Set ( Speed+TV)	xDSL	12	10240	unlimited	unlimited	N.D.	N.D.	N.D.	-	Digital	N.D.	23,70	34,93
<b>Latvia</b>	BALTKOM TV	Duo Bronze	Cable	-	20480	unlimited	unlimited	3	1	0	-	Analog	57	25,60	35,61
<b>Lithuania</b>	enkiu kontinentu komunikacijos centras	Platinum 3	FTTx	12	10240	unlimited	unlimited	5	N.D.	40	AV	Digital	80	41,13	60,94
<b>The Netherlands</b>	<b>KPN</b>	Internet Premium en Digifenne TV	xDSL	12	20480	unlimited	unlimited	5	5	50	AV+AS	Digital	23	61,33	54,76
<b>Poland</b>	Aster Group	TwoSwiat + Pakiet Basic Plus	Cable	-	10240	unlimited	unlimited	5	10	300	AS	Digital	53	50,04	85,99
<b>Portugal</b>	<b>PT Comunicações</b>	MEO Tv + Net	xDSL	12	20480	unlimited	unlimited	5	N.D.	N.D.	-	Digital	100	53,65	62,38
<b>Romania</b>	NewCom Telecomunicatii	INJOY Dublu TV + Internet esential	Cable	-	10240	unlimited	unlimited	1	N.D.	N.D.	-	Analog	55	9,58	17,67
<b>Slovakia</b>	UPC Slovakia	Double Play Analog 2	Cable	12	10240	unlimited	unlimited	5	25	50	AV+AS	Analog	38	29,38	39,70
<b>Slovenia</b>	T-2	Brezcasna optika 10M / 10M	FTTx	-	10240	unlimited	unlimited	1+	1	100	AV+AS+FW	Digital	160	30,00	36,14
<b>State of California</b>	Comcast	Digital Starter Performance	Cable	12	15360	unlimited	unlimited	7	N.D.	N.D.	AV+FW+PC+PM	Digital	80	84,67	98,67
<b>State of Colorado</b>	Comcast	Digital Starter Performance	Cable	12	12288	unlimited	unlimited	7	N.D.	N.D.	AV+FW+PC+PM	Digital	80	76,25	88,86
<b>State of New York</b>	Time Warner Cable	Watch and surf (Road runner standard, Buffalo)	Cable	12	10240	unlimited	unlimited	5	N.D.	5	AV+AS+FW+PC	Digital	200+	64,41	75,07
<b>Sweden</b>	Telenor Sverige	Smart +Tvsilver	FTTx	12	12288	unlimited	unlimited	5	1	100	AV+FW+BU	Digital	31	57,08	50,21
<b>The UK</b>	BSkyB	Sky Broadband Unlimited + Sky plus Variety Pack TV	xDSL	12	20480	unlimited	unlimited	10	N.D.	N.D.	AV+AS+ASW+PC	Digital	20	46,92	53,29

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

(\*\*) Duration = '-' indicates that 12 months was assumed

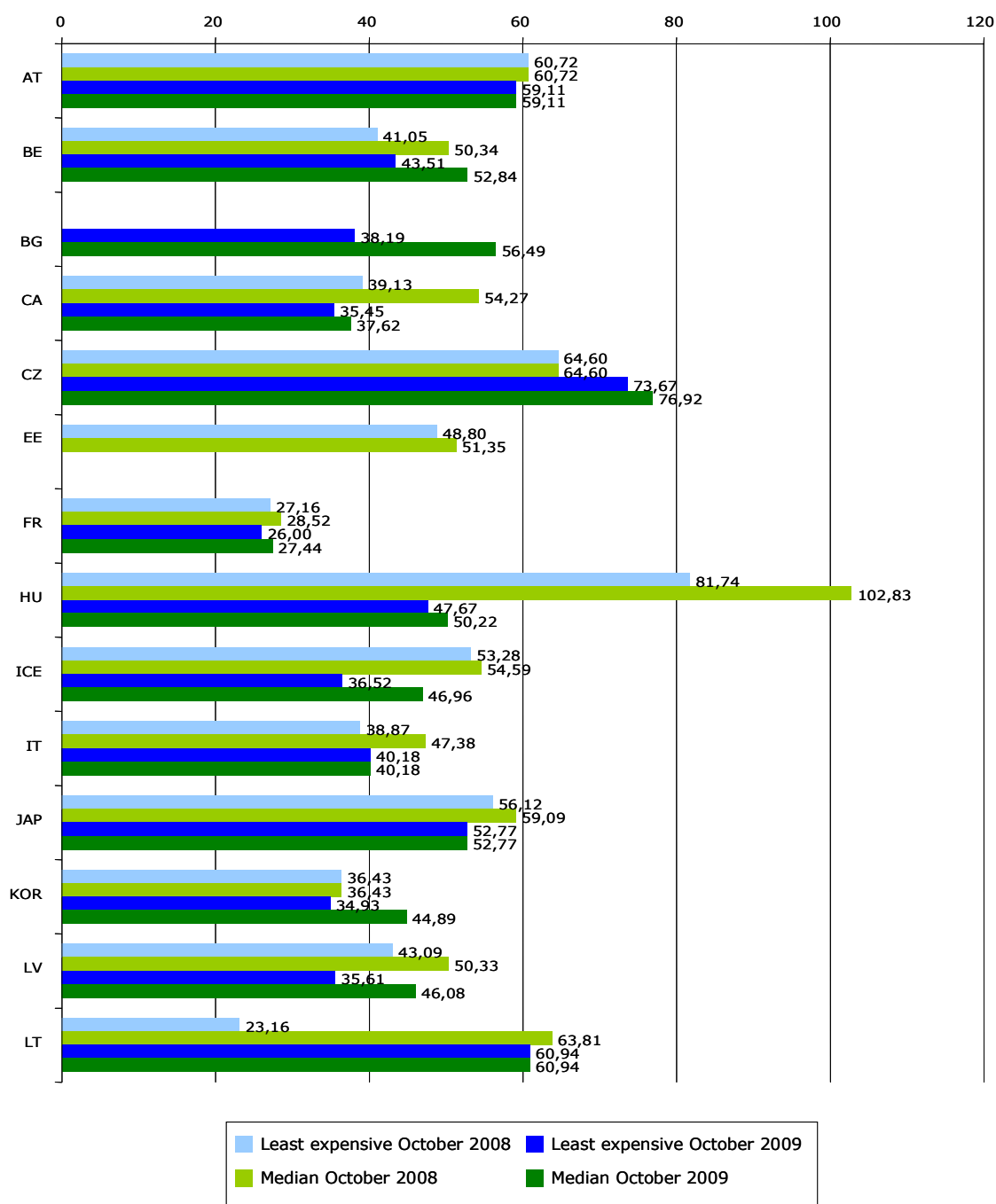
(\*\*\*) N.D. Indicates information is not provided by ISP

ISPs in **italic & bold** are Incumbent operators

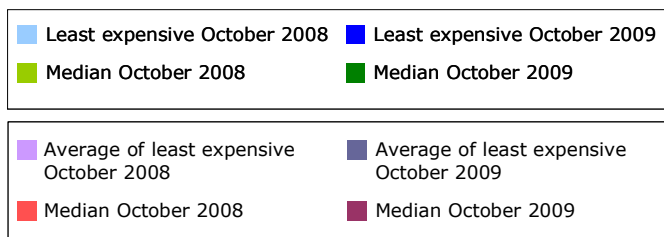
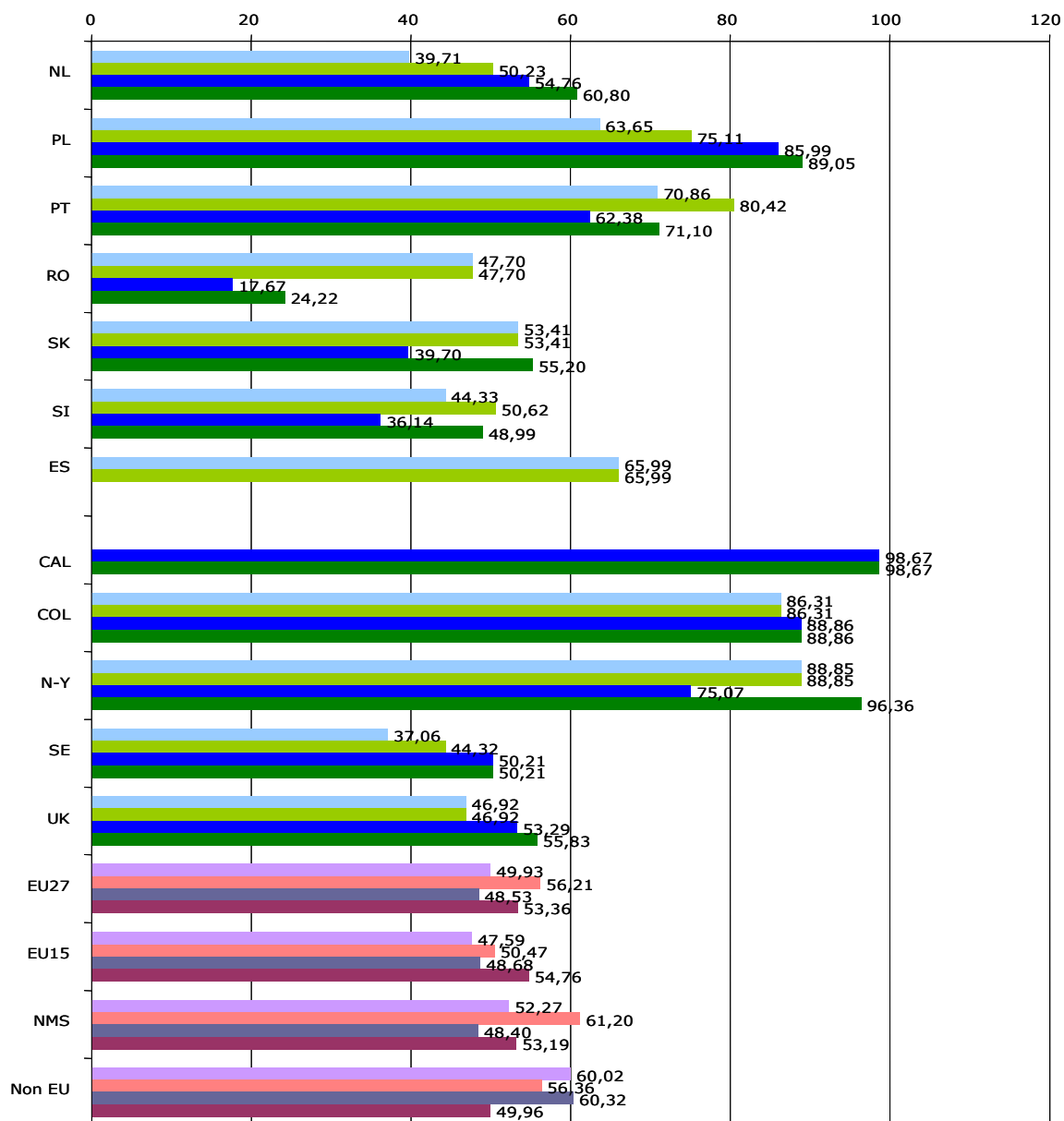
Table 30: Detailed information on least expensive offer per country (8192kbps-20Mbps (incl.)) ; "Internet + TV"

**5.2.6.c BASKET "8192KBPS-20MBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
Least expensive and median offers:  
Bundle "Internet access+TV"  
Basket "'8192-20Mbps (incl.)", 30GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+TV"**  
**Basket "'8192-20Mbps (incl.)", 30GB or 20 hours/month (followed)**  
**Total cost/month in €/PPP (VAT incl.)**



**5.2.6.d Conclusions on bundle "Internet+TV" for "basket 8192kbps-20Mbps (incl.)"**

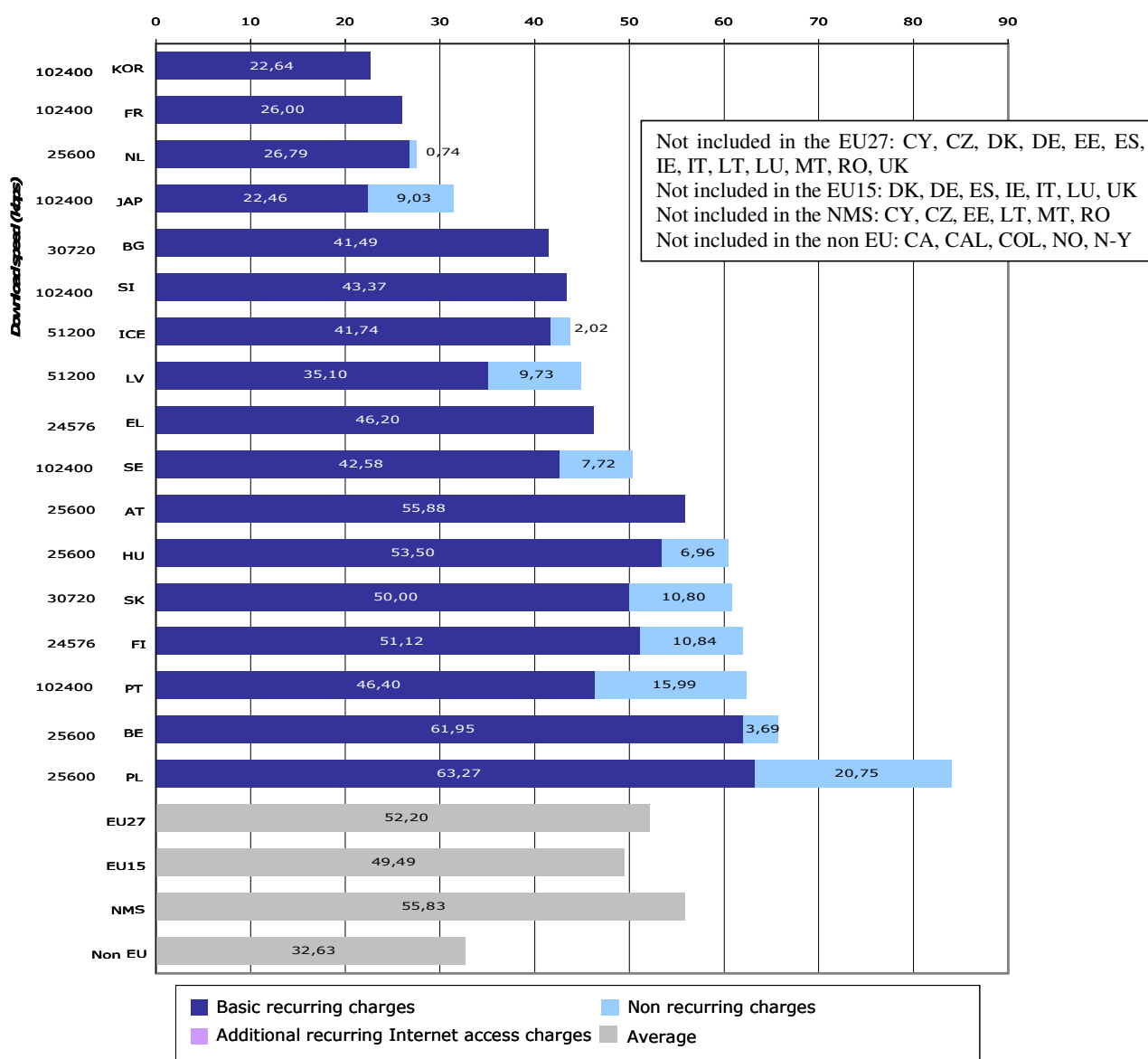
- For twenty-four countries an offer was available for this basket. For the following countries, no offer was available: *Cyprus, Denmark, Estonia, Finland, Germany, Greece, Ireland, Luxembourg, Malta, Norway* and *Spain*.
- From the ISPs in the following countries, only one offer was available for this basket: *Austria, Italy, Japan, Lithuania, the State of California, the State of Colorado* and *Sweden*.
- There were three metered *Internet* access offers for this basket (*Belgium, Canada* and *Iceland*), of which none needed normalisation.
- The omission of non-recurring charges had an impact on the place of *Bulgaria, Japan* and *Slovenia* in the overall ranking; but in *France* and *Romania*, no relationship could be observed between the omission of non-recurring charges and their place in the ranking.
- In twenty-two countries, at least one offer is available in the samples of October 2008 and October 2009.
- In EU15, a slight increase of the least expensive offers and the median was observed; while they were both decreasing in NMS. The situation in non-EU countries was different: slight increase of the least expensive offers but decrease of the median value.

## **5.2.7 BASKET "20+MBPS", IN €/PPP (VAT INCL.)**

### **5.2.7.a LEAST EXPENSIVE OFFER**

There were no offers in the sample for the following countries: *Canada, Cyprus, Czech Republic, Denmark, Estonia, Germany, Ireland, Italy, Lithuania, Luxembourg, Malta, Norway, Romania, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+TV"**  
**Basket "20+Mbps", 30GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



### 5.2.7.b BASKET "20+Mbps", LIST OF SELECTED OFFERS

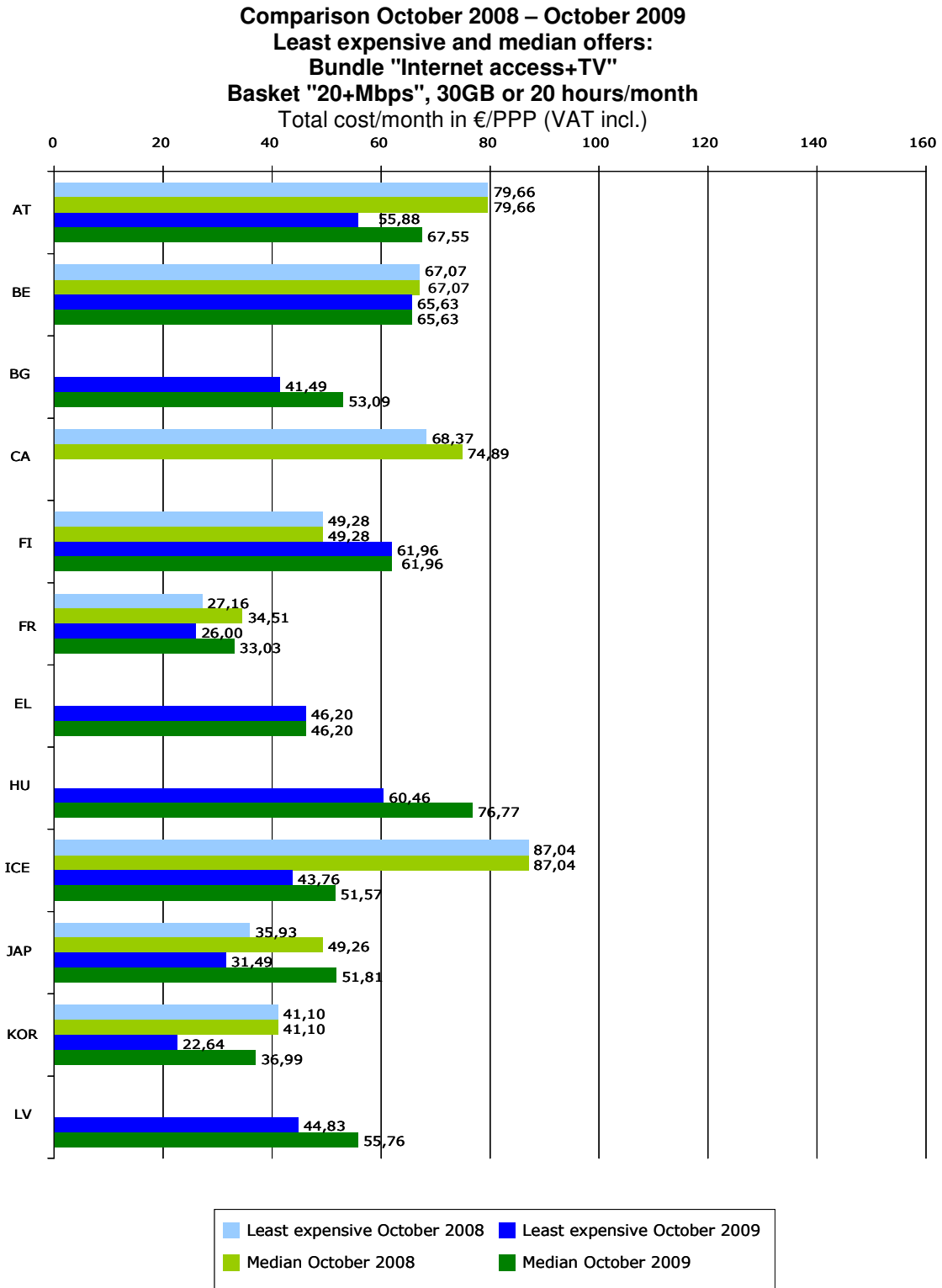
Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webspace (***)	Level of protection (*)	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB				Euro	EUR/PPP
Austria	Speedy Net	Speedy Net Package 39	Cable	12	30720	unlimited	unlimited	1	1	0	-	Digital	77	19,94	41,49
Belgium	Telenet	Shake+ Internet & Digital TV à 70€	Cable	12	25600	100	-	8	N.D.	50	AV+ASW+FW+PC	Digital	68	74,17	65,63
Bulgaria	Speedy Net	Speedy Net Package 39	Cable	12	30720	unlimited	unlimited	1	1	0	-	Digital	77	19,94	41,49
Bulgaria	Megalan Network	Megalan Network "Basic Economic"	FTTx	12	30720	unlimited	unlimited	1	1	0	-	Digital	61	19,94	41,49
Finland	<b>Sonera</b>	Sonera Laajakaista Extra (Helsinki) 24M + Broadband TV Easy	xDSL	18	24576	unlimited	unlimited	5	5	125	-	Digital	23	77,46	61,96
France	NeufCegetel (SFR)	neufbox fibre optique+TV	FTTx	-	102400	unlimited	unlimited	10	N.D.	1024	AV+AS+PC	Digital	140	29,90	26,00
Greece	<b>OTE</b>	Conn-x 24 mbps+TV	xDSL	12	24576	unlimited	unlimited	1	N.D.	0	-	Digital	35	42,50	46,20
Hungary	<b>Magyar Telekom</b>	Optinet Extra + IPTV Kotel	FTTx	12	25600	unlimited	unlimited	5	N.D.	50	-	Digital	5	40,27	60,46
Hungary	<b>Magyar Telekom</b>	DSL Extra + IPTV Kotel	FTTx	12	25600	unlimited	unlimited	5	N.D.	50	-	Digital	5	40,27	60,46
Hungary	<b>Magyar Telekom</b>	Kábelnet Extra + IPTV Kotel	Cable	12	25600	unlimited	unlimited	5	N.D.	50	-	Digital	5	40,27	60,46
Iceland	Vodafone	Flotta netið - meiri hraði + TV	FTTx	6	51200	30	-	1	0	0	-	Digital	72	26,16	43,76
Japan	<b>NTT East</b>	B Flet's Mansion type Plan 2 Hyper + Flet's TV	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	Digital	31	34,78	31,49
Japan	<b>NTT East</b>	Flet's Hikari Next Mansion Type Plan 2 + Flet's TV	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	Digital	30	34,78	31,49
Korea	LG Powercomm	MyLGTV (TV+ Internet XPEED PRIME)	FTTx	12	102400	Unlimited	Unlimited	N.D.	N.D.	N.D.	-	Digital	N.D.	15,36	22,64
Latvia	BALTKOM TV	Duo Gold	Cable	-	51200	unlimited	unlimited	3	1	0	-	Analog+Digital	57-97	32,23	44,83
The Netherlands	UPC Nederland	Internet 25 en TV starter	Cable	12	25600	unlimited	unlimited	5	12	50	AV+AS	Digital	50	30,83	27,53
Poland	UPC Polska	Internet Fiber Power 25Mbps+Select standard	Cable	-	25600	unlimited	unlimited	3	15	25	-	Digital	80	48,89	84,01
Portugal	<b>PT Comunicações</b>	SURF 100	FTTx	12	102400	unlimited	unlimited	5	N.D.	N.D.	AV+FW	Digital	70	53,65	62,38
Slovakia	UPC Slovakia	Double Play Digital 2	Cable	12	30720	unlimited	unlimited	5	25	50	AV+AS	Digital	63	44,99	60,80
Slovenia	T-2	Brezcasna optika 100M / 10M	FTTx	-	102400	unlimited	unlimited	1+	1	100	AV+AS+FW	Digital	160	36,00	43,37
Sweden	Telenor Sverige	Bredbandsbolaget Bredband 100	FTTx	12	102400	unlimited	unlimited	5	1	100	AV+FW+BU	Digital	31	57,18	50,30

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line  
(\*\*) Duration = '-' indicates that 12 months was assumed  
(\*\*\*) N.D. Indicates information is not provided by ISP  
**ISPs in *italic & bold* are Incumbent operators**

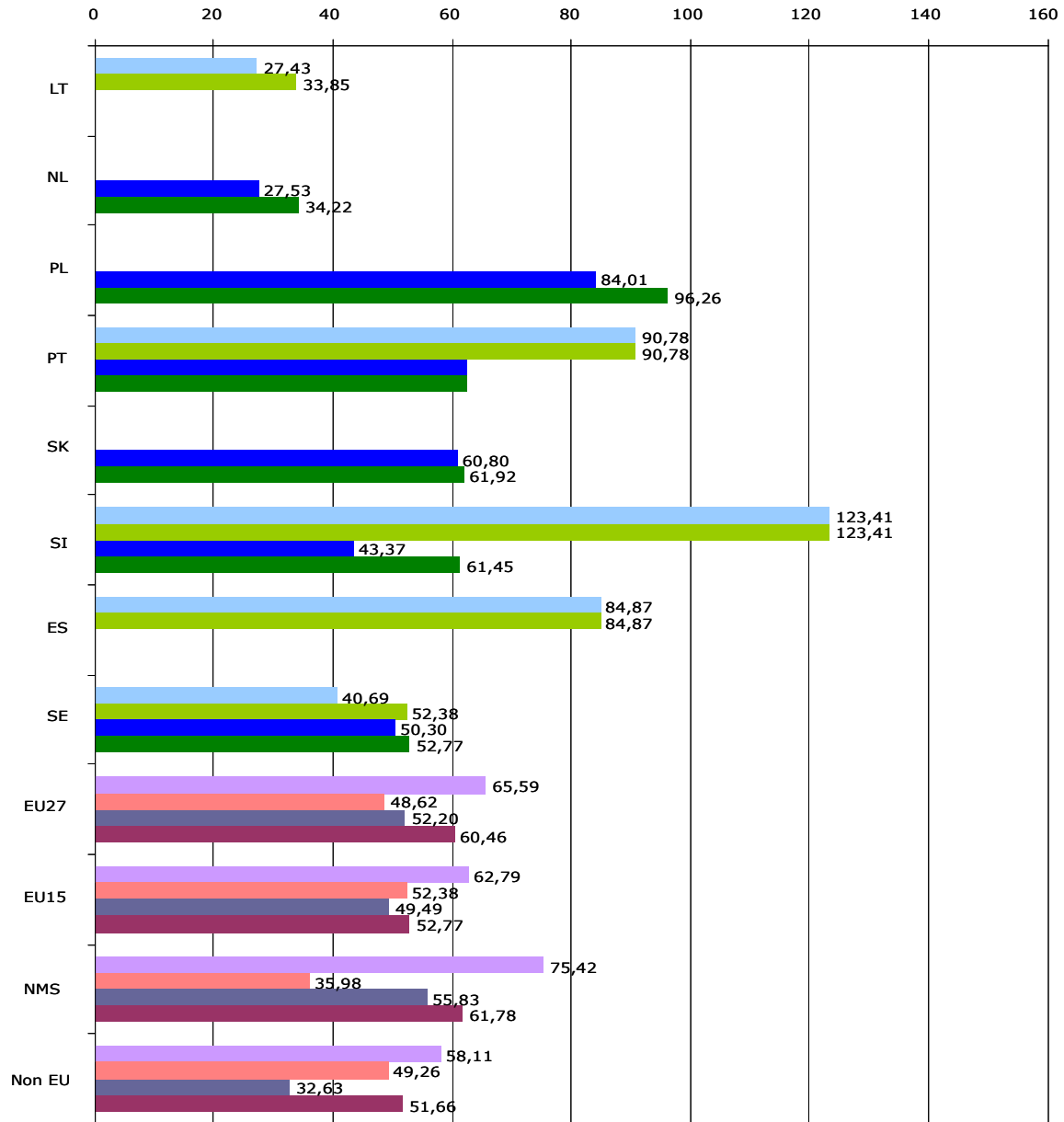
Table 31: Detailed information on least expensive offer per country (20+Mbps) ; "Internet + TV"



**5.2.7.c BASKET "20+Mbps", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+TV"**  
**Basket "20+Mbps", 30GB or 20 hours/month (followed)**  
 Total cost/month in €/PPP (VAT incl.)



Light blue: Least expensive October 2008    Dark blue: Least expensive October 2009  
 Yellow-green: Median October 2008    Dark green: Median October 2009

Light purple: Average of least expensive October 2008    Dark purple: Average of least expensive October 2009  
 Red: Median October 2008    Maroon: Median October 2009

#### **5.2.7.d Conclusions on bundle "Internet+TV" for "basket 20+Mbps"**

- For seventeen countries an offer corresponded to this basket. For the following countries, no offer was available: *Canada, Cyprus, Czech Republic, Denmark, Estonia, Germany, Ireland, Italy, Lithuania, Luxembourg, Malta, Norway, Romania, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*
- For some countries, only one offer was available for this basket. These countries were: *Belgium, Finland, Greece and Poland.*
- In some countries there were several "least expensive offers". In the first case, the ISP proposed the same offer but different technologies according to the location (*Hungary*). In another case (*Japan*), the ISP provided two different offers at the same price. In the last case (*Bulgaria*), they are two offers from two different ISPs which use different technologies.
- There were two metered *Internet* access offers for this basket (*Belgium and Iceland*), but none of these needed normalisation.
- The omission of non-recurring charges had an impact on the overall ranking of *Austria, Bulgaria, Greece and Slovenia* but not on the ranking of *France and Korea*.
- In all regions, the average of the least expensive offers decreased between October 2008 and October 2009, but the median value of the offers increased. The increase of the median is however stronger in the NMS than in the other regions.

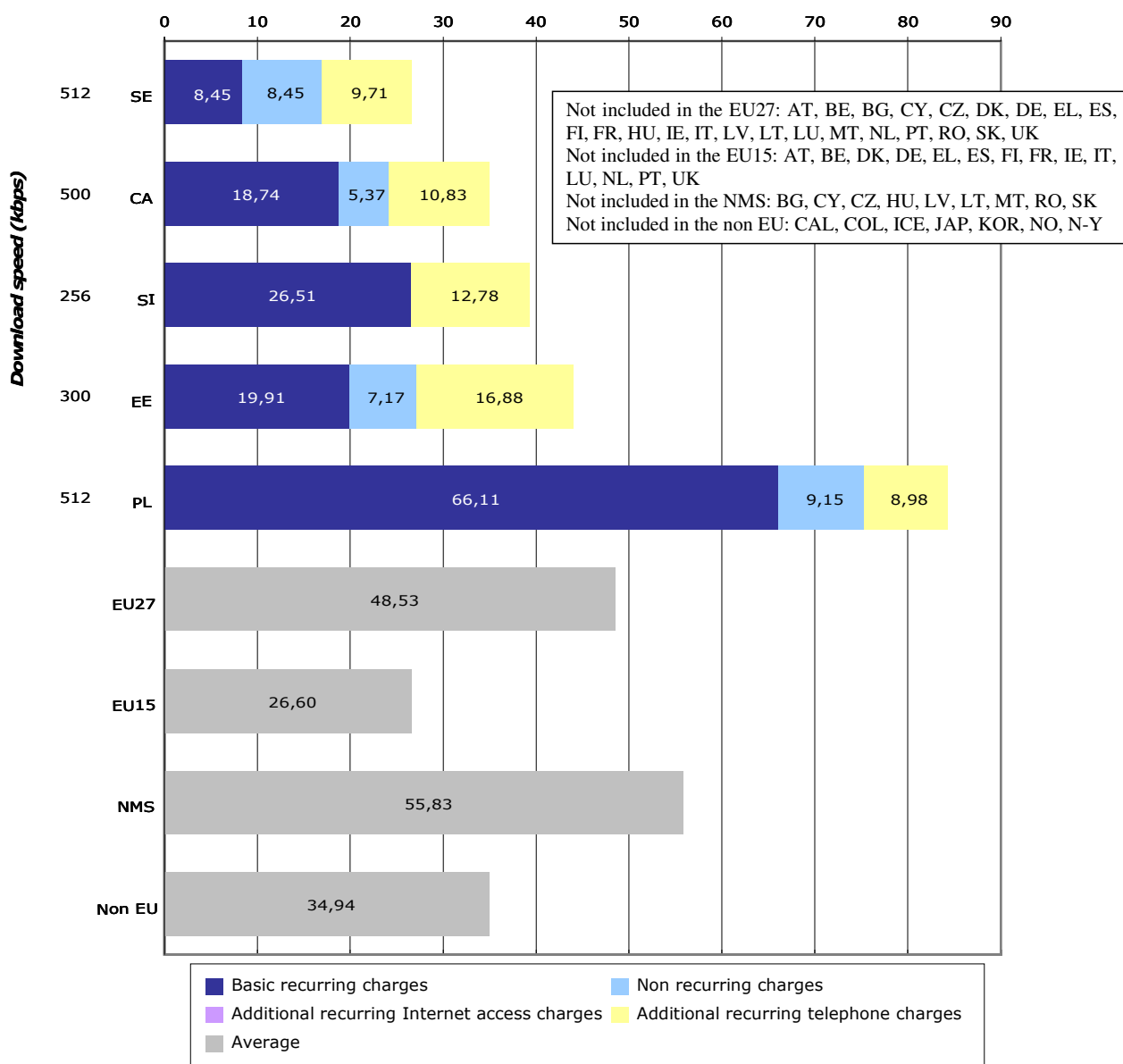
### 5.3. LEAST EXPENSIVE OFFER PER COUNTRY AND PER BASKET FOR BUNDLES INCLUDING INTERNET ACCESS, FIXED TELEPHONE AND TELEVISION SERVICE

#### 5.3.1 BASKET "144KBPS-512KBPS (INCL.)", IN €/PPP (VAT INCL.)

##### 5.3.1.a LEAST EXPENSIVE OFFER

In the following countries, no offer was available from the ISPs selected: *Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*

Least expensive offer:  
Bundle "Internet access+Tel+TV"  
Basket "'144-512 (incl.)", 1GB or 20 hours/month  
Total cost/month in €/PPP (VAT incl.)

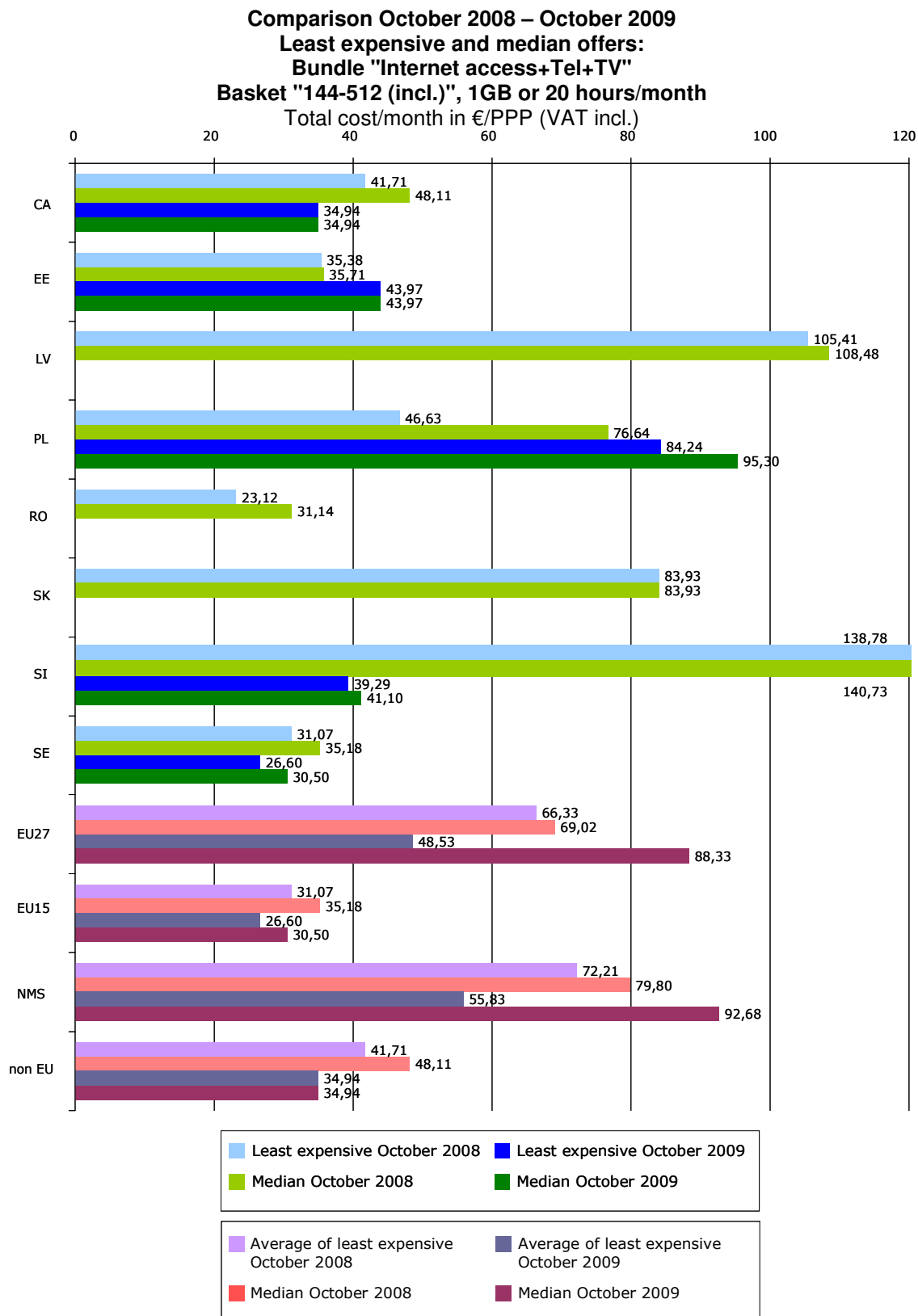


### 5.3.1.b BASKET "144KBPS-512KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webspace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
<b>Canada</b>	<b>Bell Canada</b>	Bell Internet essential (QC)	xDSL	-	500	1	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	Digital	500	43.18	34.94
<b>Estonia</b>	Starman	Mikro kolmikpakett	Cable	-	300	unlimited	unlimited	1	1	0	-	VoIP	No	0	0	No	Analog	70	32.31	43.97
<b>Poland</b>	Aster Group	TwoNet+BasicPlus+TwoCzas	Cable	-	512	unlimited	unlimited	1	2	100	AS	Switched	No	60	0	Yes	Digital	53	49.03	84.24
<b>Slovenia</b>	<b>UPC Telemach</b>	paket Trojcek S	Cable	12	256	unlimited	unlimited	5	N.D.	-	-	Switched	No	0	0	No	Analog	58	32.61	39.29
<b>Sweden</b>	ComHem	Com Bo (Bredband XSmall 0.50 + Telefoni S + Digital-Iv S)	Cable	12	512	unlimited	unlimited	5	1	50	-	VoIP	No	0	0	No	Digital	9	30.24	26.60
(*) AV = antivirus, AS = antispam, ASW = anti-spyware, FW = firewall, PC = Parent Control, PM = Privacy Manager, PU = Pop-Up Blocker, BU = Back-up on-line (**) Duration = '-' indicates that 12 months was assumed (***) N.D. Indicates information is not provided by ISP <b>ISPs in italic &amp; bold</b> are incumbent operators																				

Table 32: Detailed information on least expensive offer per country (144kbps-512kbps (incl.)) ; "Internet + Tel + TV"

**5.3.1.c BASKET "144KBPS-512KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



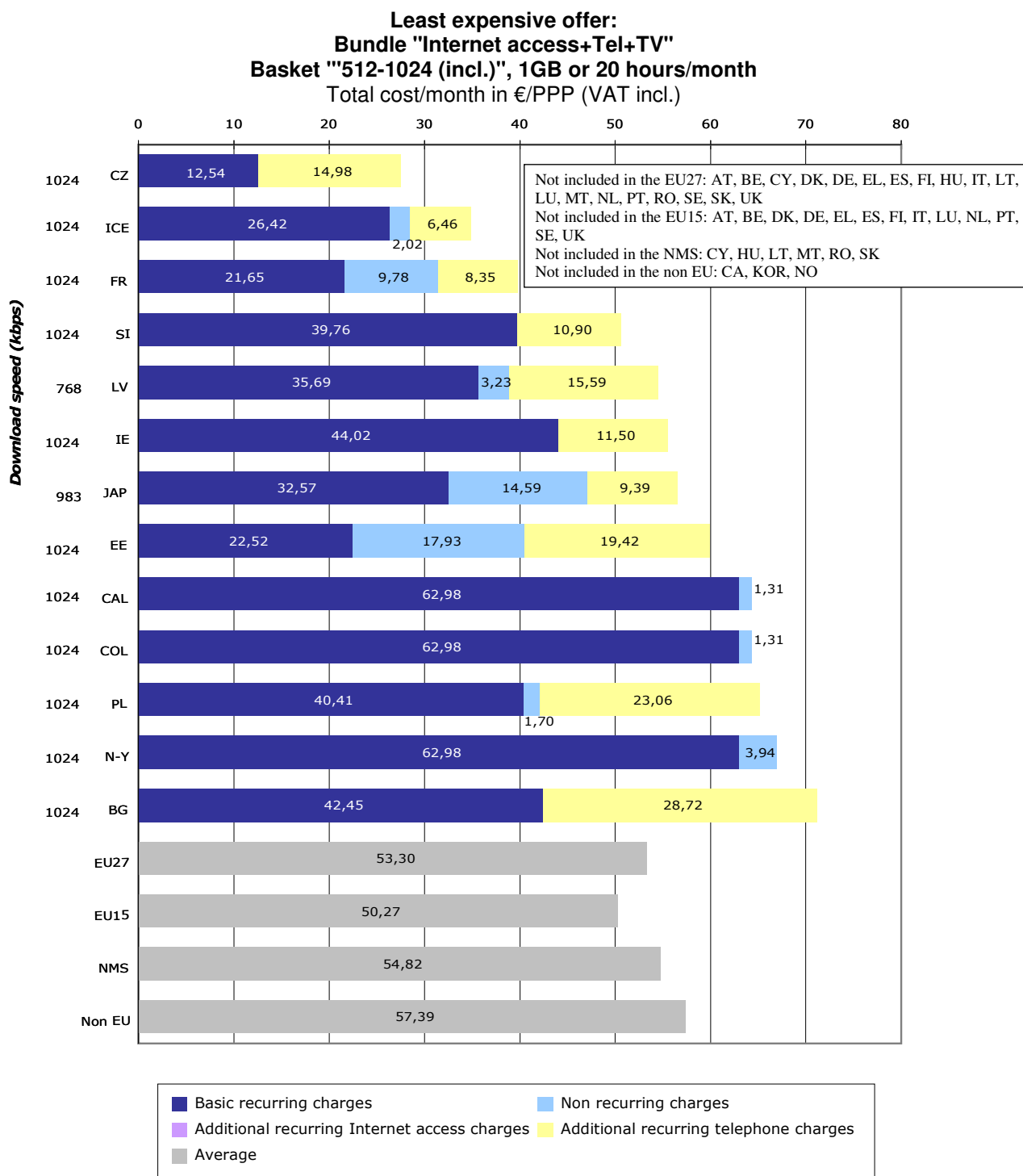
**5.3.1.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 144KBPS-512KBPS (incl.)"**

- In five countries, at least one offer was available for this basket. For the following countries, no offer was available: *Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Canada and Estonia.*
- There was one metered offer for this basket (*Canada*), but it did not require normalisation.
- The omission of non-recurring charges in *Slovenia* has an impact on its place in the overall ranking.
- All offers needed normalisation of telephone charges, and additional recurring telephone charges had no determining influence on the ranking of the countries for this basket.
- Five countries had offers both in October 2008 and October 2009; these countries were *Canada, Estonia, Poland, Slovenia* and *Sweden*.
- The new sample of offers for October 2009 gives on average lower least expensive offers for the EU27 and non-EU countries. The median value in the EU27 increased between October 2008 and October 2009 due to a significant increase in the NMS. The median decreased in the non-EU countries but there is only one offer for this region, i.e. from *Canada*.

### 5.3.2 **BASKET "512KBPS-1024KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### 5.3.2.a **LEAST EXPENSIVE OFFER**

For the following countries, no offer of the selected ISPs was available in this basket: *Austria, Belgium, Canada, Cyprus, Denmark, Finland, Germany, Greece, Hungary, Italy, Korea, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, Sweden and the United Kingdom.*





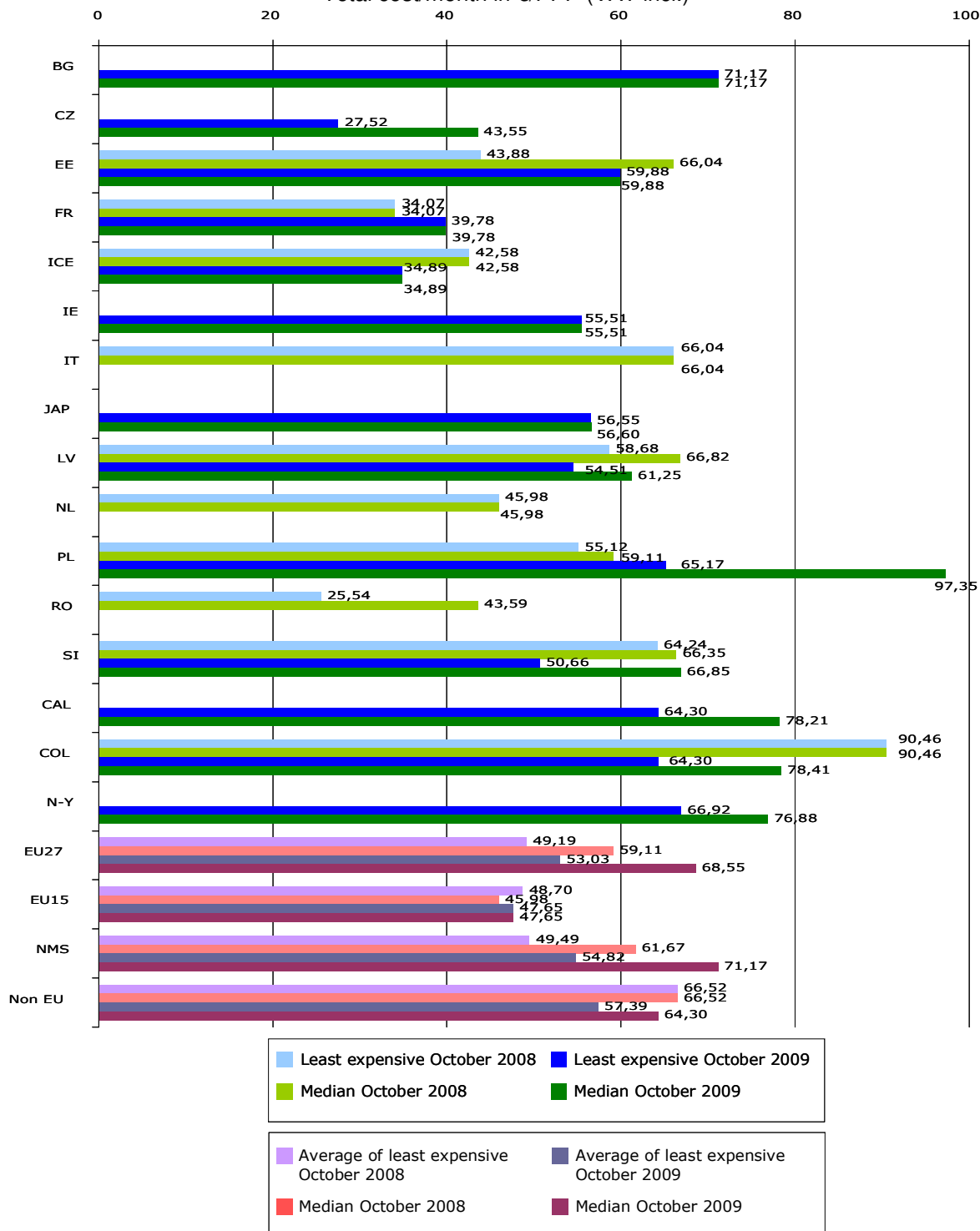
### 5.3.2.b BASKET "512KBPS-1024KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
Bulgaria	Cable Tel	CableTEL. Net Alfa Tripple play home Region 3	Cable	12	1024	unlimited	unlimited	1	1	0	-	VoIP	No	150	0	No	Analog	68	34.21	71.17
Bulgaria	Cable Tel	CableTEL. Net Alfa Tripple play without borders Region 3	Cable	12	1024	unlimited	unlimited	1	1	0	-	VoIP	No	75	0	No	Analog	68	34.21	71.17
Bulgaria	Cable Tel	CableTEL. Net Alfa Tripple play world Region 3	Cable	12	1024	unlimited	unlimited	1	1	0	-	VoIP	No	50	0	No	Analog	68	34.21	71.17
Czech Republic	RIO media	RIO Kontakt	Cable	12	1024	unlimited	unlimited	1	1	N.D.	-	VoIP	No	0	0	No	Digital	12	19.18	27.52
Estonia	<b>Elion</b>	Stardipakett 1 Mbit/s / 1 Mbit/s Internet, telefon ja DigiTV (Start bundle)	xDSL	-	1024	unlimited	unlimited	1	1	N.D.	-	Switched	No	0	0	No	Digital	16	44.01	59.88
France	<b>Orange France</b>	Découverte internet 1 mégamax+Tel+TV	xDSL	-	1024	unlimited	unlimited	5	N.D.	100	AS+PC	VoIP	No	unlimited	0	No	Digital	75	45.75	39.78
Iceland	<b>Siminn</b>	Grunnaskrift + Grunnpakki Sjónvarp	xDSL	6	1024	1	-	0	N.D.	0	AS+ASW+FW+PC+	VoIP	No	0	0	Yes	Digital	7	20.86	34.89
Ireland	UPC Ireland	Bargain Deal, Digital Value Pack Digital +HD, Home Phone& 1Mo broadband	Cable	12	1024	10	-	1	15	300	-	Switched	No	0	0	No	Digital	60	64.95	55.51
Japan	Yahoo Japan	Yahoo! BB Reach DSL (NTT East aera)+ BB Phone	xDSL	-	983.04	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	Digital	34	62.45	56.55
Latvia	BALTKOM TV	Trio Optic. Social+	Cable	24	768	unlimited	unlimited	3	1	0	-	Switched	No	0	0	Yes	Analog	55	39.19	54.51
Poland	Vectra	Prosty+Internet 1Mbps+Srebmny	Cable	12	1024	unlimited	unlimited	1	N.D.	400	-	Switched	No	0	0	No	Analog	30	37.93	65.17
Slovenia	Amis	trojka junior	xDSL	-	1024	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	Digital	90	42.05	50.66
State of California	<b>Verizon</b>	Good triple play	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	150	55.17	64.30
State of Colorado	<b>Verizon</b>	Good triple play	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	150	55.17	64.30
State of New York	<b>Verizon</b>	Verizon Triple Freedom	xDSL	12	1024	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	150	57.43	66.92
(*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line (**) Duration = "-" indicates that 12 months was assumed (***) N.D. Indicates information is not provided by ISP <b>ISPs in <i>italic &amp; bold</i> are Incumbent operators</b>																				

Table 33: Detailed information on least expensive offer per country (512kbps-1024kbps (incl.)) ; "Internet + Tel + TV"

**5.3.2.c BASKET "512KBPS-1024KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**

Comparison October 2008 – October 2009  
 Least expensive and median offers:  
 Bundle "Internet access+Tel+TV"  
 Basket "'512-1024 (incl.)", 1GB or 20 hours/month  
 Total cost/month in €/PPP (VAT incl.)



#### **5.3.2.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 512KBPS-1024KBPS (incl.)"**

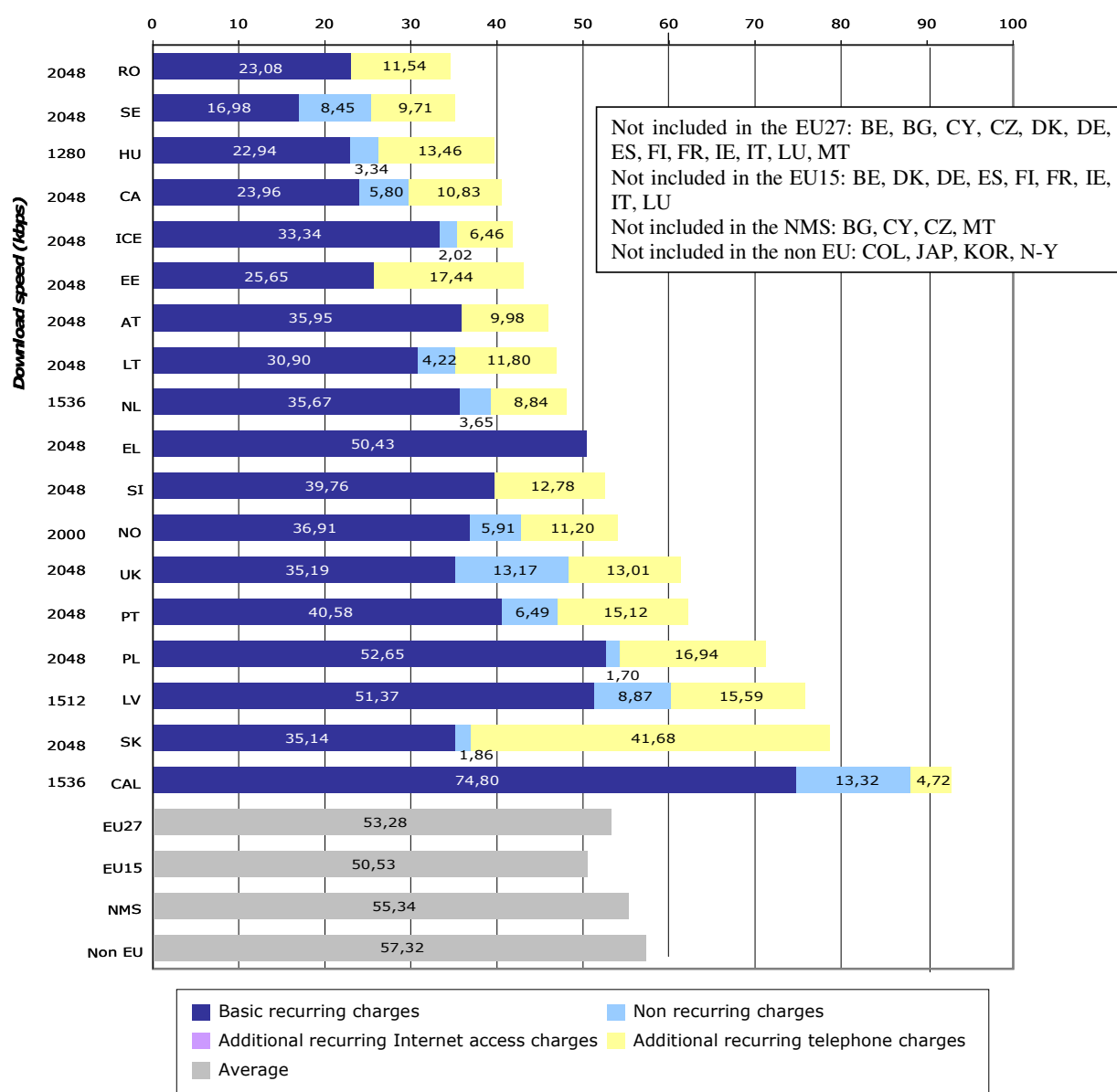
- In thirteen countries, at least one offer was available for this basket. For the following countries, no offer was available: *Austria, Belgium, Canada, Cyprus, Denmark, Finland, Germany, Greece, Hungary, Italy, Korea, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Portugal, Romania, Slovakia, Spain, Sweden and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Estonia, France, Iceland and Ireland.*
- In *Bulgaria*, there were three offers from the same ISP and with the same total charges: these offers are differentiated by a different telephone plan included in the offer.
- There were two metered *Internet* access offers for this basket (*Iceland and Ireland*), of which none required normalisation.
- No relationship could be observed between the omission of non-recurring charges in *Bulgaria, Czech Republic and Slovenia* and their place in the overall ranking. It had an impact on the ranking of *Ireland*. Non-recurring charges are significant in *Estonia and Japan*, which influenced their overall ranking.
- All offers, except *the State of California, the State of Colorado and the State of New-York* needed normalisation of telephone charges. Additional recurring telephone charges had however an influence on the overall ranking, especially for *Bulgaria, Estonia and Poland.*
- Only seven countries had offers in both periods. In October 2009 compared to October 2008, the average least expensive offers and the median decreased in the EU 15 countries and in the non-EU countries. In the NMS, both increased.

### 5.3.3 **BASKET "1024KBPS-2048KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### 5.3.3.a **LEAST EXPENSIVE OFFER**

No offer corresponding to this basket was available in the following countries: *Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Spain, the State of Colorado and the State of New York.*

**Least expensive offer:**  
**Bundle "Internet access+Tel+TV"**  
**Basket "'1024-2048 (incl.)", 1GB or 20 hours/month**  
Total cost/month in €/PPP (VAT incl.)



### 5.3.3.b BASKET "1024KBPS-2048KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webspace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
Austria	UPC Austria	UPC FIT Digital TV	Cable	12	2048	unlimited	unlimited	3	15	10	AV+AS	VoIP	No	0	0	Yes	Digital	63	50,98	45,92
Austria	UPC Austria	UPC FIT Telekabel TV	Cable	12	2048	unlimited	unlimited	N.D.	N.D.	N.D.	AV+AS	VoIP	no	0	0	yes	analog	31	50,98	45,92
Canada	<b>Bell Canada</b>	Bell Internet essential plus (QC)	xDSL	-	2048	25	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	Digital	500	50,17	40,60
Estonia	STV	Trio Mini (Internet, KTV Kodu, Telefon Basic)	Cable	-	2048	unlimited	unlimited	1	1	100	-	VoIP	No	0	0	No	Analog	70	31,67	43,10
Greece	<b>OTE</b>	Conn-x TALK 2mbps+24/7+60 mobile+TV	xDSL	12	2048	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	60	No	Digital	35	46,40	50,43
Hungary	Externet	Othoni Prepaid Traffic Alfa + Megafone Home + Univerzum	xDSL	12	1280	2	-	3	N.D.	100	AV+AS	VoIP	No	0	0	No	Digital	28	26,47	39,73
Iceland	<b>Siminn</b>	Leið 1 + Grunnpakki Sjónvarp Simans+Heimasími	xDSL	6	2048	10	-	5	N.D.	0	AS+ASW+FW+PC+PM	VoIP	No	0	0	Yes	Digital	7	25,00	41,82
Latvia	BALTKOM TV	Trio Optic, Start+	Cable	24	1512	unlimited	unlimited	3	1	0	-	Switched	No	0	0	Yes	Analog+Digital	55+90+	54,52	75,83
Lithuania	Balticum TV	Pagrindinis	FTTx	12	2048	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	No	0	0	No	Analog	58	31,67	46,92
Norway	NextGenTel	Trippel - Next1 Mini, Viasat Start - 16 kanaler, NextPhone Basic	xDSL	12	2000	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	VoIP	No	0	0	No	Digital	16	69,93	54,02
The Netherlands	Ziggo	Alles-in-1 Basis	Cable	-	1536	unlimited	unlimited	2	N.D.	25	AV+AS	VoIP	No	0	0	No	Analog+Digital	60	53,93	48,15
Poland	Vectra	Funkcjonalny+Internet 2Mbps+Zloty	Cable	12	2048	unlimited	unlimited	2	N.D.	400	-	Switched	No	150	0	No	Analog	60	41,49	71,29
Portugal	ZON / TV Cabo	ZON Classic	Cable	12	2048	unlimited	unlimited	30	N.D.	N.D.	N.D.	Switched	Yes	0	0	No	Digital	65	53,48	62,19
Romania	UPC romania	UPC 3PLAY SMALL	Cable	-	2048	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	No	0	0	No	Analog	64	18,77	34,62
Slovakia	UPC Slovakia	Triple Play Analog 1	Cable	12	2048	unlimited	unlimited	3	15	25	AV+AS	VoIP	Yes	0	0	No	Analog	38	58,22	78,68
Slovenia	<b>UPC Telemach</b>	paket Trojcek M	Cable	12	2048	unlimited	unlimited	5	N.D.	-	-	Switched	No	0	0	No	Analog	58	43,61	52,54
State of California	Cox Communications	Basic Bundle	Cable	-	1536	unlimited	unlimited	7	N.D.	10	AV+ASW+FW+PC+PM	Switched	No	0	0	No	Digital	300	79,66	92,84
Sweden	ComHem	Com Bo (Broadband Small 2 + Telefoni S + Digital-tv S)	Cable	12	2048	unlimited	unlimited	5	1	125	-	VoIP	No	0	0	No	Digital	9	39,94	35,14
The UK	BSkyB	Sky Broadband Base + Free Time Talk + Sky plus Variety Pack TV	xDSL	12	2048	2	-	10	N.D.	N.D.	AV+AS+ASW+PC	VoIP	Yes	0	0	No	Digital	20	54,03	61,37

(\*) AV = antivirus, AS = antispyware, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

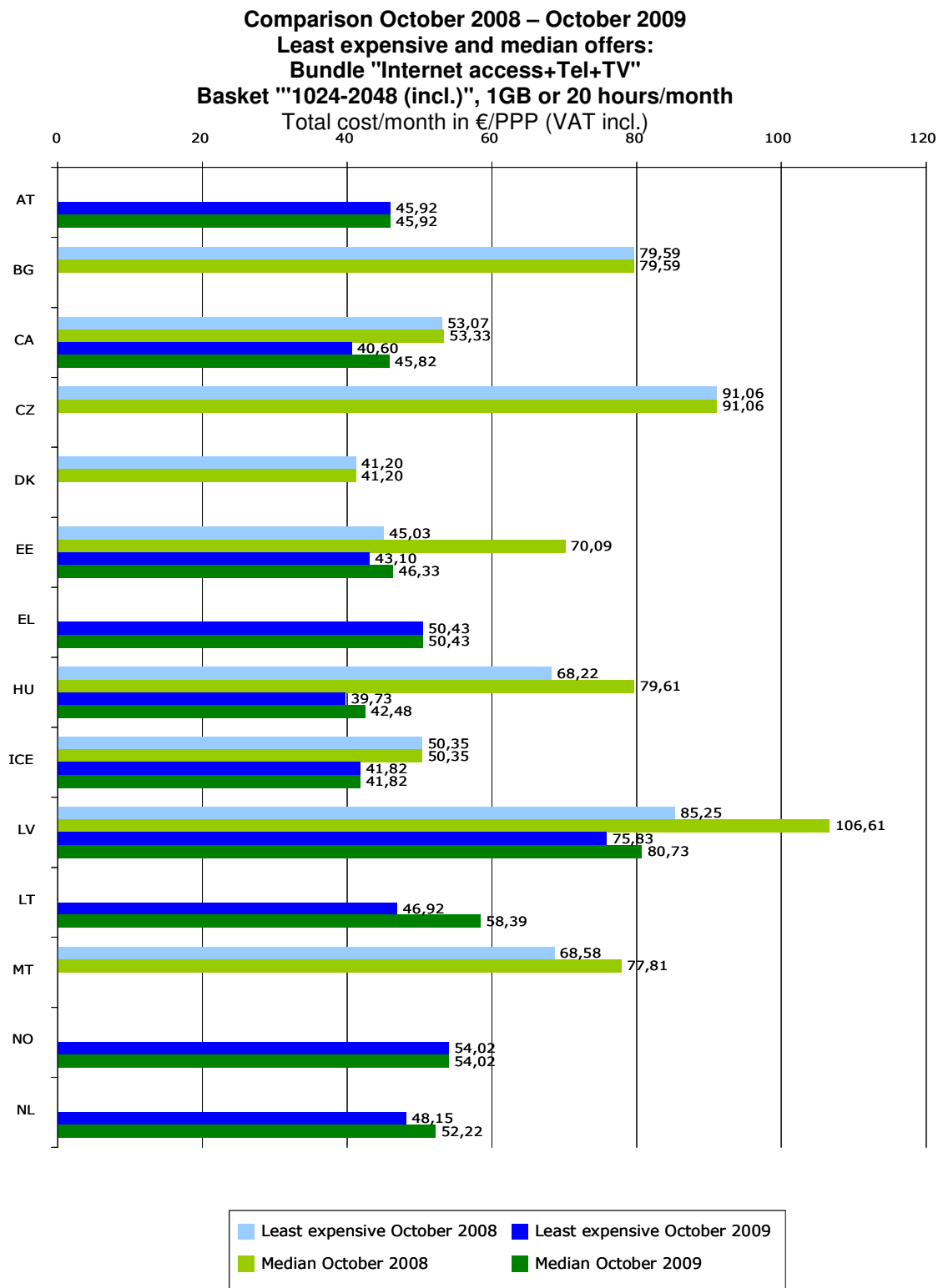
(\*\*) Duration = "-" indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

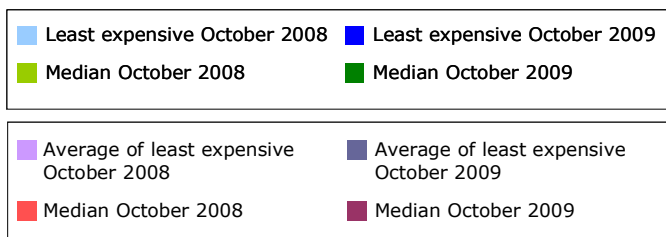
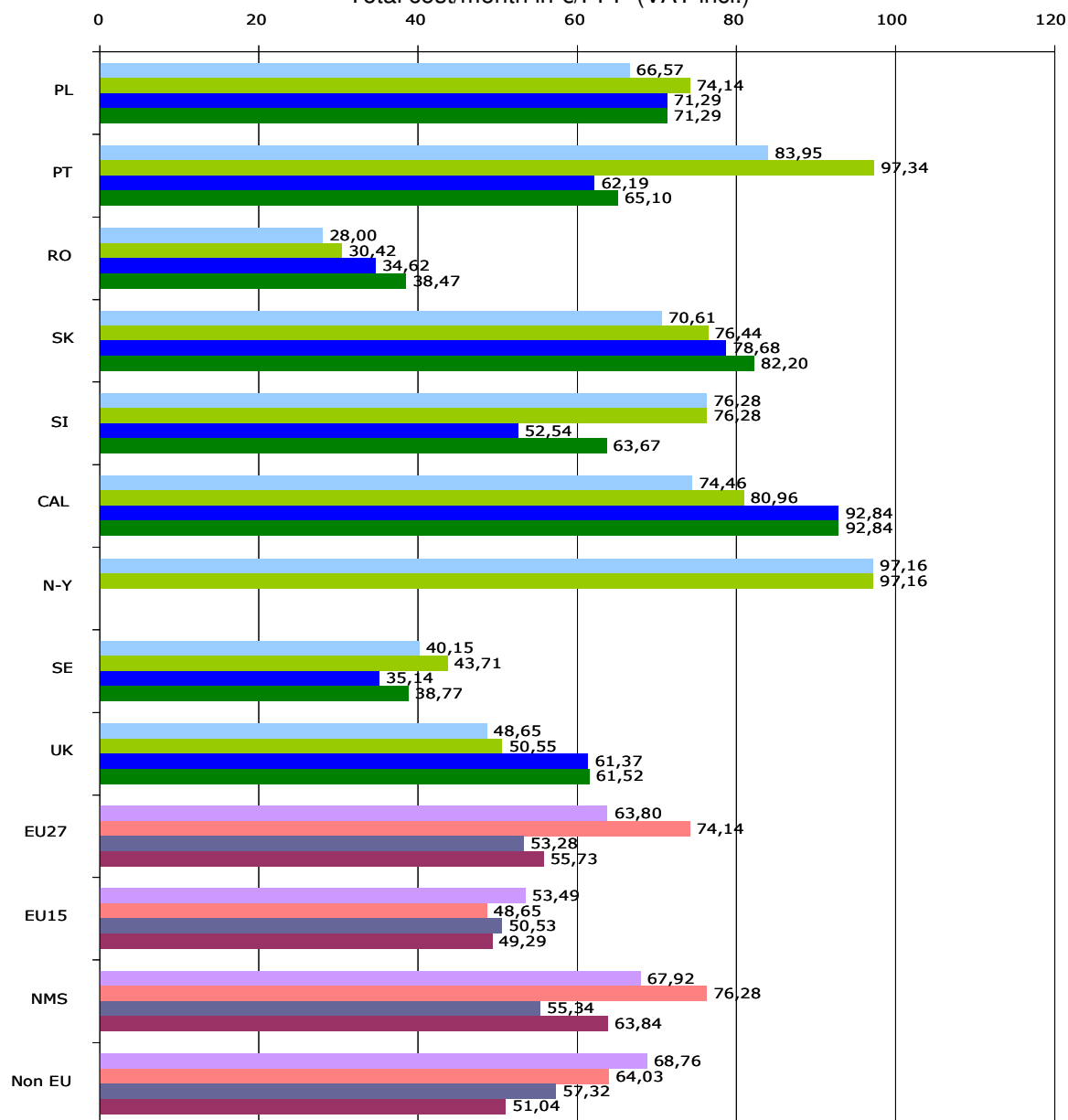
ISPs in *italic & bold* are incumbent operators

Table 34: Detailed information on least expensive offer per country (1024kbps-2048kbps (incl.)) ; "Internet + Tel + TV"

**5.3.3.c BASKET "1024KBPS-2048KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel+TV"**  
**Basket "'1024-2048 (incl.)", 1GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



**5.3.3.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 1024KBPS-2048KBPS (incl.)"**

- In eighteen countries, at least one offer was available for this basket. For the following countries, no offer was available: *Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Spain, the State of Colorado and the State of New York.*
- From the ISPs in the following countries, only one offer was available for this basket: *Greece, Iceland, Norway, Poland and the State of California.*
- In *Austria*, only two offers were provided by the same ISP and they have the same total charge: they only differ from each other by the television technology (digital or analog).
- There were four metered offers for this basket (*Canada, Hungary, Iceland and the United Kingdom*) of which none required normalisation.
- The omission of non-recurring charges influenced the place of all countries in the overall ranking, i.e. for *Austria, Estonia, Greece, Romania and Slovenia.*
- All offers except for *Greece* needed normalisation of telephone charges, though additional recurring telephone charges had generally little influence on the ranking except for *Slovakia* where more than half of the total charges are charges for telephone normalisation.
- The average of the least expensive offers, as well as the median value, for the EU15 and NMS countries decreased in October 2009 compared to October 2008. For the non EU countries, the same trend is observed.

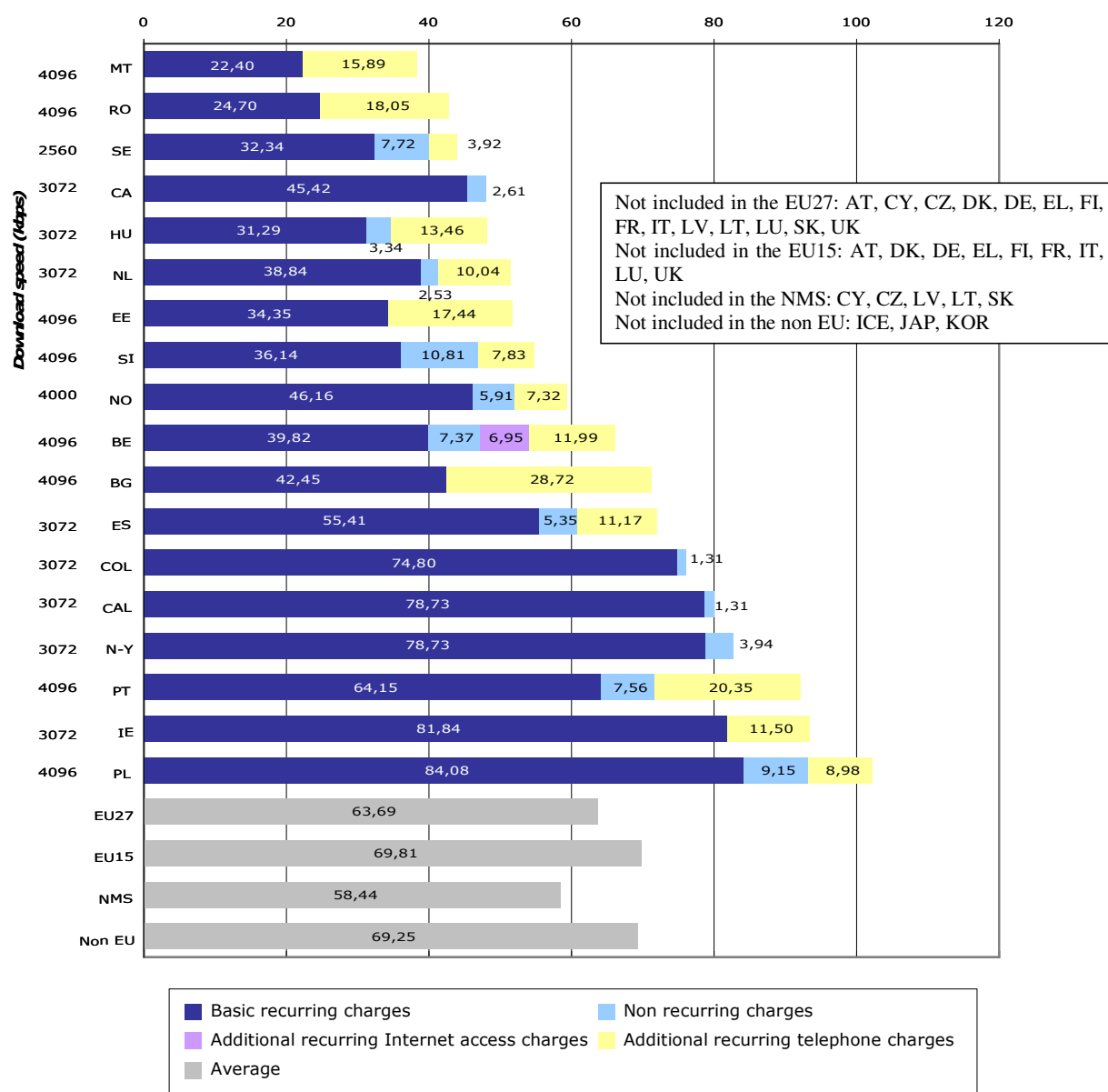


### **5.3.4 BASKET "2048KBPS-4096KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### **5.3.4.a LEAST EXPENSIVE OFFER**

No offer for this basket was available from selected ISPs in the following countries: *Austria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Iceland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Slovakia and the United Kingdom.*

**Least expensive offer:**  
**Bundle "Internet access+Tel+TV"**  
**Basket "'2048-4096 (incl.)", 10GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



### 5.3.4.b BASKET "2048KBPS-4096KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Addresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
Belgium	Telenet	Silvershake+	Cable	12	4096	5	-	1	N.D.	0	AV+AS	VoIP	Yes	0	0	Yes	Digital	68	74,73	66,14
Bulgaria	Cable Tel	CableTEL Net Alfa Tripple play home Region 2	Cable	12	4096	unlimited	unlimited	1	1	0	-	VoIP	No	150	0	No	Analog	68	34,21	71,17
		CableTEL Net Alfa Tripple play without borders Region 2	Cable	12	4096	unlimited	unlimited	1	1	0	-	VoIP	No	150	0	No	Analog	68	34,21	71,17
Bulgaria	Cable Tel	CableTEL Net Alfa Tripple play world Region 2	Cable	12	4096	unlimited	unlimited	1	1	0	-	VoIP	No	75	0	No	Analog	68	34,21	71,17
Canada	Telus	High Speed Bundle1 (British Columbia)	xDSL	12	3072	60	-	N.D.	10	100	AV+ASW+FW+PC	VoIP	No	50	100	No	Digital	76	59,35	48,03
Estonia	STV	Trio Kodu (Internet, KTV Kodu, Telefon Basic)	Cable	-	4096	unlimited	unlimited	1	1	100	-	VoIP	No	0	0	No	Analog	70	38,07	51,79
		Xpress Prepaid Alfa + Megafone Home + Univerzum	xDSL	12	3072	unlimited	unlimited	3	N.D.	100	AV+AS	VoIP	No	0	0	No	Digital	28	32,03	48,09
Ireland	UPC Ireland	TV Deal, Digital Select Pack, Digital +HD, Sky Sports Pack, Multiroom viewing, Home Phone & 3Mb broadband	Cable	12	3072	30	-	1	15	300	-	Switched	No	0	0	No	Digital	75	109,20	93,33
Malta	GO	Home Pack 42 € monthly	xDSL	24	4096	25	-	4	N.D.	N.D.	AV+AS	VoIP	No	60	0	Yes	Digital	54	27,95	38,29
Norway	NextGenTel	Trippel Large - Next2 mini, Viasat start 16 kanaler, Next Phone Cool	xDSL	12	4000	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	VoIP	No	0	0	No	Digital	16	76,88	59,38
The Netherlands	KPN	InternetPlusBellen Basis met Digitenne TV	xDSL	12	3072	unlimited	unlimited	5	5	50	AV+AS	VoIP	Yes	0	0	No	Digital	23	57,58	51,41
Poland	Aster Group	TwojDom+BasicPlus+TwoCzas	Cable	-	4096	unlimited	unlimited	5	10	300	AS	Switched	No	60	0	Yes	Digital	53	59,48	102,21
Portugal	PT Comunicações	MEO Satellite TV+Internet+Telefone	Satellite	24	4096	unlimited	unlimited	N.D.	N.D.	N.D.	N.D.	VoIP	Yes	0	0	No	Digital	57	79,17	92,06
Romania	Romtelecom	PRACTIC	xDSL	-	4096	unlimited	unlimited	1	N.D.	N.D.	VoIP	Yes	0	0	0	No	Digital	57	23,18	42,75
Slovenia	Tus Telekom	Tustetekom 30	xDSL	-	4096	unlimited	unlimited	7	N.D.	100	AV+AS	VoIP	No	120	0	No	Digital	100	45,47	54,78
Spain	ONO	Teléfono TI + Internet 3Mb + TV Esencial	Cable	18	3072	unlimited	unlimited	N.D.	unlimited	5	AV+AS+FW	Switched	Yes	unlimited	0	No	Digital	40	67,62	71,93
State of California	Verizon	Better triple play	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	200	68,69	80,04
State of Colorado	Verizon	Better triple play	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	200	65,31	76,11
State of New York	Verizon	Verizon Triple Freedom	xDSL	12	3072	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	0	No	Digital	200	70,94	82,67
Sweden	Telenor Sverige	Bredbandsbolaget Bredband 2 + Telefoni Smart	FTTx	12	2560	unlimited	unlimited	5	1	100	AV+FW+BU	VoIP	No	0	0	No	Digital	31	49,99	43,98

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

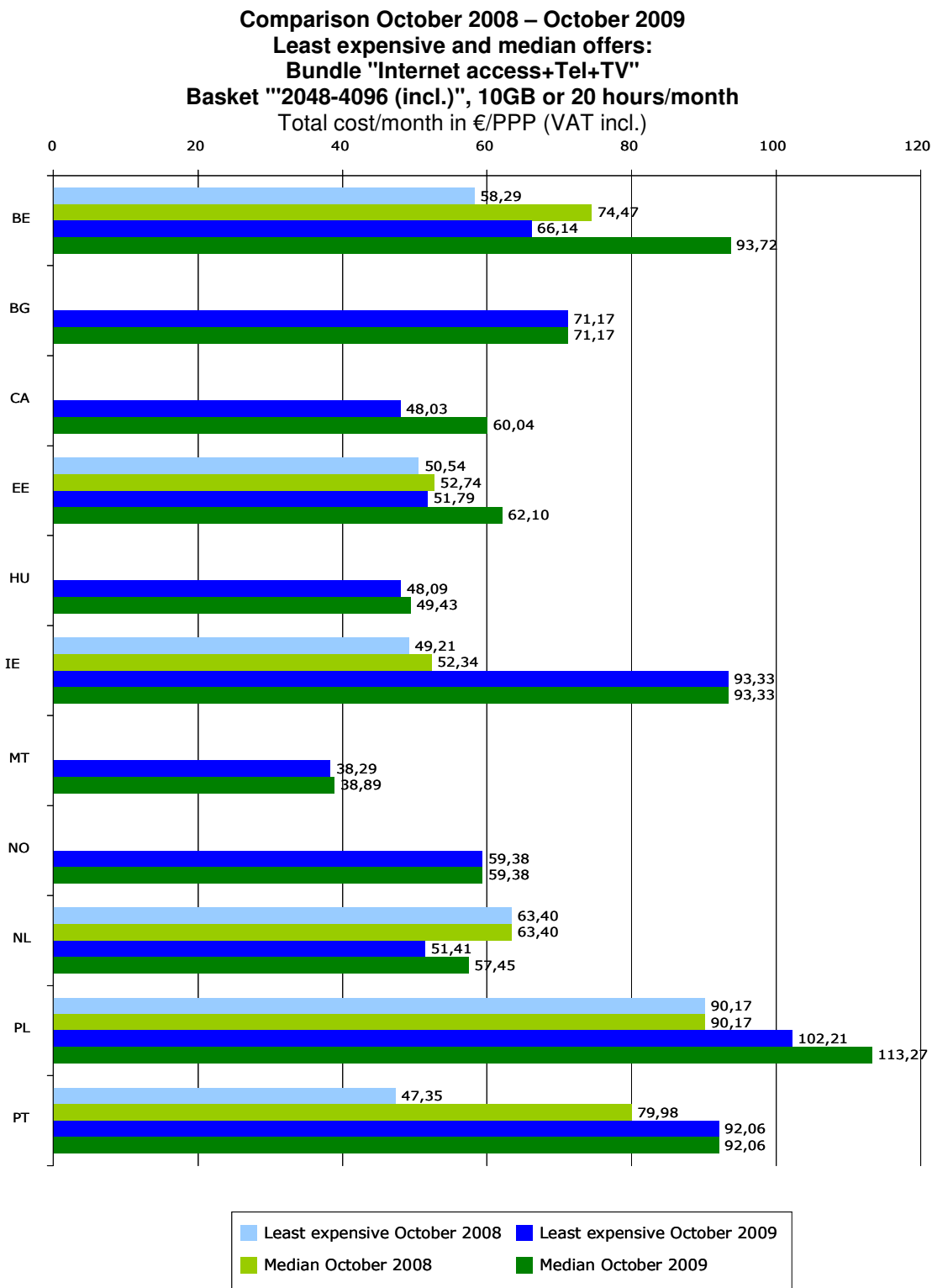
(\*\*) Duration = "-" indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

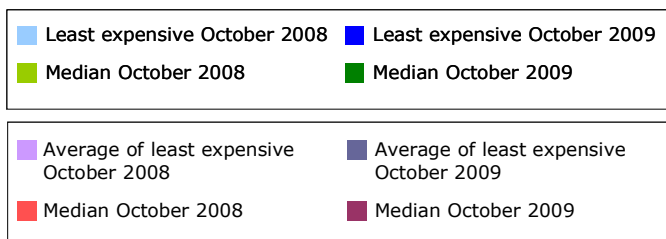
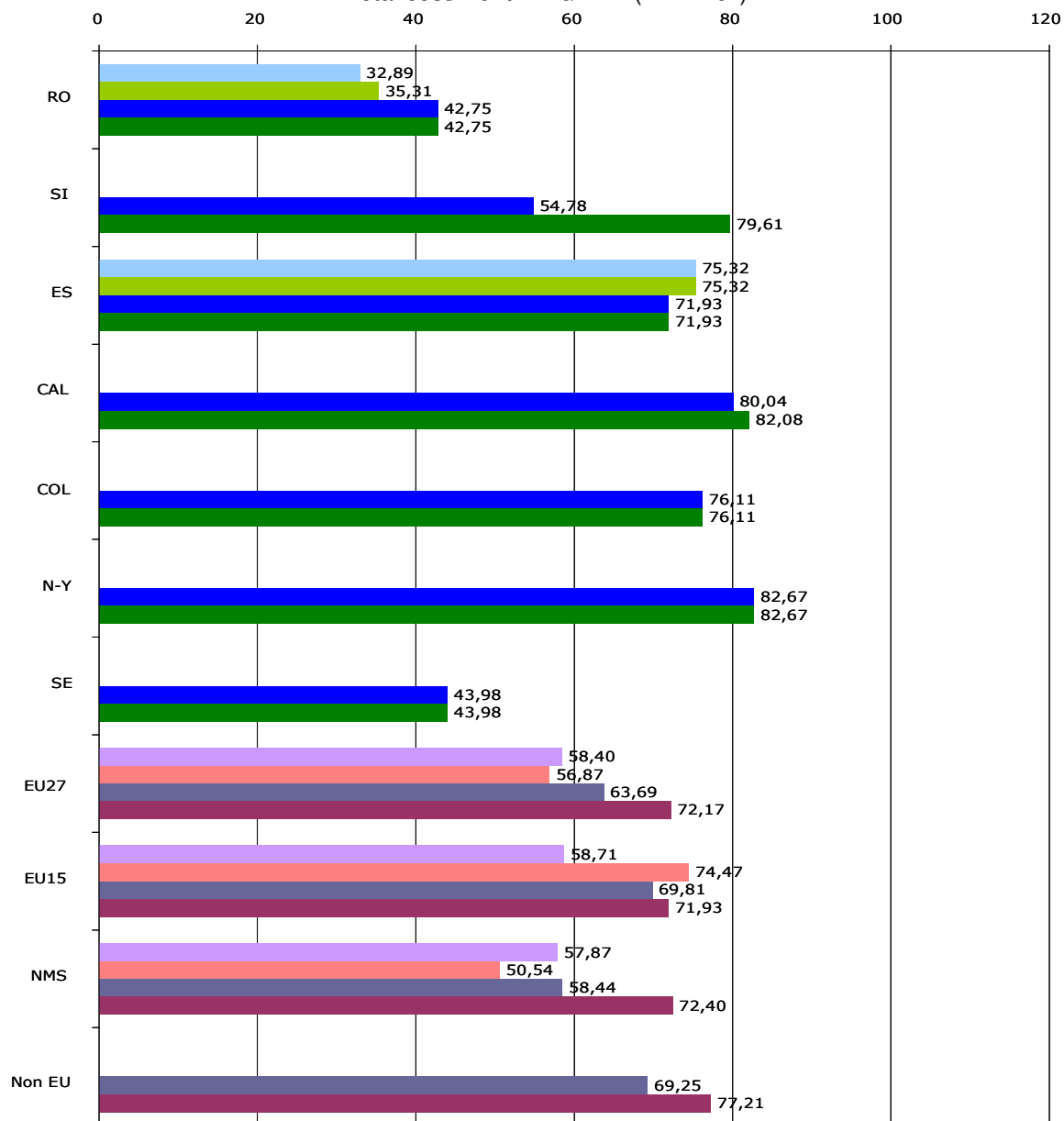
**ISPs in *italic* & bold** are incumbent operators

Table 35: Detailed information on least expensive offer per country (2048kbps-4096kbps (incl.)) ; "Internet + Tel + TV"

**5.3.4.c BASKET "2048KBPS-4096KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel+TV"**  
**Basket ""2048-4096 (incl.)", 10GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



**5.3.4.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 2048KBPS-4096KBPS (incl.)"**

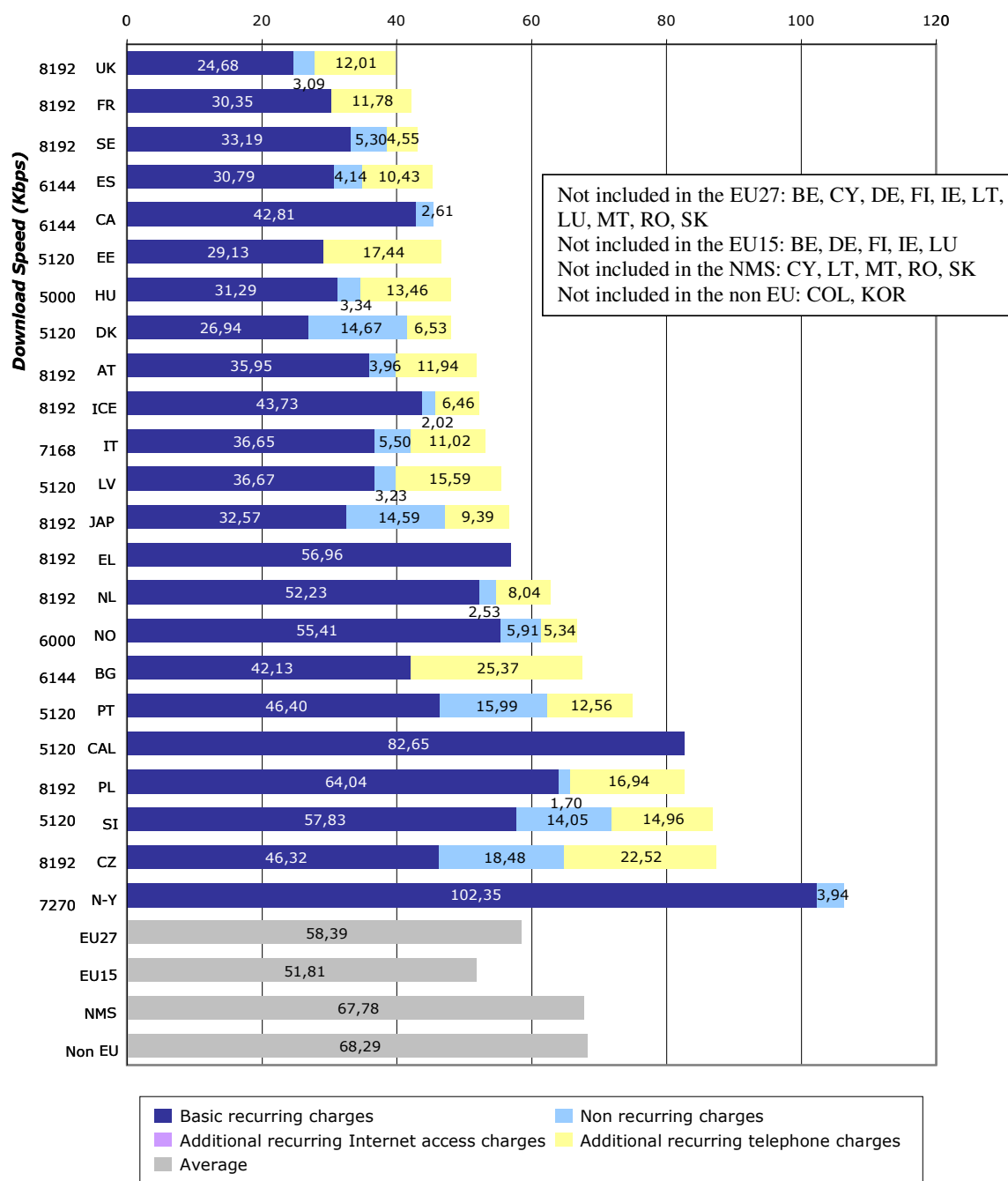
- For eighteen countries, an offer was available for this basket. For the following countries, no offer was available: *Austria, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Iceland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Slovakia and the United Kingdom.*
- From the ISPs in the following countries, only one offer was available for this basket: *Ireland, Norway, Portugal, Romania, Spain, the State of Colorado, the State of New York and Sweden.*
- In *Bulgaria*, there were three offers from the same ISP with the same total charges: these offers are differentiated by a different telephone plan included.
- There were four metered offers for this basket (*Belgium, Canada, Ireland and Malta*), of which only *Belgium* required normalisation. Additional recurring *Internet* access charges had little impact on its ranking.
- The omission of non-recurring charges affected the overall ranking of three countries (*Bulgaria, Estonia and Romania*). In two other countries, *Ireland and Malta*, the omission of non-recurring charges did not influence their position.
- All offers, except for *Canada, the State of California, the State of Colorado and the State of New York*, needed normalisation of telephone charges. This had a significant impact on the ranking of *Bulgaria*.
- Out of the eighteen countries providing offers for this basket in October 2009, only eight countries already had offers in the sample of October 2008. These countries are *Belgium, Estonia, Ireland, the Netherlands, Poland, Portugal, Romania and Spain*.
- The average of the least expensive offers has remained stable for NMS countries but has significantly increased for the EU15 countries. The median has increased due to a small decrease in the EU15 and a sharp increase in NMS.

### **5.3.5 BASKET "4096KBPS-8192KBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### **5.3.5.a LEAST EXPENSIVE OFFER**

In the following countries, no offer in our sample was available for this basket: *Belgium, Cyprus, Finland, Germany, Ireland, Korea, Lithuania, Luxembourg, Malta, Romania, Slovakia and the State of Colorado.*

**Least expensive offer:**  
**Bundle "Internet access+Tel+TV"**  
**Basket "'4096-8192 (incl.)", 30GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



### 5.3.5.b BASKET "4096KBPS-8192KBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
<b>Austria</b>	<b>Telekom Austria</b>	aonSuperkombi	xDSL	12	8192	unlimited	unlimited	5	N.D.	20	AV+AS	Switched	No	0	0	Yes	Digital	>70	57.55	51.85
<b>Bulgaria</b>	Eurocom Cable	Eurocom Intro - Triple	Cable	12	6144	unlimited	unlimited	1	1	N.D.	-	VoIP	No	75	0	No	Analog	65	32.44	67.50
<b>Canada</b>	Telus	Telus HOME Bundle1 (BC)	xDSL	12	6144	60	-	N.D.	10	100	AV+ASW+FW+PC	VoIP	No	100	100	No	Digital	180	56.13	45.42
<b>Czech Republic</b>	<b>Telefonica O2</b>	O2 Internet+TV start+O2 Mini	xDSL	-	8192	unlimited	unlimited	1	5	30	AV	Switched	No	0	0	No	Digital	N.D.	60.86	87.32
<b>Denmark</b>	<b>TDC</b>	TDC HOMETRIO BASIC TV+Bredband+Telefoni	xDSL	6	5120	unlimited	unlimited	1	5	250	-	VoIP	No	0	0	No	Digital	13	71.82	48.14
<b>Estonia</b>	STV	Trio Saturn Mini (Internet, KTV Kodu, Telefon Basic)	FTTx	-	5120	unlimited	unlimited	1	1	100	-	VoIP	No	0	0	No	Analog	70	34.23	46.57
<b>France</b>	NeufCegedel (SFR)	neufbox de SFR 8M+Tel+TV	xDSL	-	8192	unlimited	unlimited	10	N.D.	1024	PC	VoIP	Yes	unlimited	0	No	Digital	20	48.45	42.13
<b>Greece</b>	<b>OTE</b>	Conn-x TALK 8 mbps+24/7+60 mobile+TV	xDSL	12	8192	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	60	No	Digital	35	52.40	56.96
<b>Hungary</b>	Externet	Othoni Prepaid Golf + Megafone Home + Univerzum	xDSL	12	5000	unlimited	unlimited	3	N.D.	100	AV+AS	VoIP	No	0	0	No	Digital	28	32.03	48.09
<b>Iceland</b>	<b>Siminn</b>	Leið 2 + Grunnpakki Sjónvarp Simans+Heimasími	xDSL	6	8192	60	-	5	N.D.	0	AS+ASW+FW+PC+PM	VoIP	No	0	0	Yes	Digital	7	31.20	52.20
<b>Italy</b>	<b>Telecom Italia</b>	Altos Casa Internet + Home TV	xDSL	-	7168	unlimited	unlimited	1	N.D.	300	AV+AS	VoIP	Yes	0	0	No	Digital	200+	57.96	53.17
<b>Japan</b>	Yahoo Japan	Yahoo! BB 8 M (NTT East aera)+ BB Phone + BB TV	xDSL	-	8192	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	Digital	34	62.45	56.55
<b>Latvia</b>	BALTKOM TV	Trio Earthnet with cable TV	Cable	24	5120	unlimited	unlimited	3	1	0	-	Switched	No	0	0	Yes	Analog	55	39.90	55.49
<b>Norway</b>	NextGenTel	Trippel Xlarge - Next1, Plenty - 37 kanaler, Next Phone Classic	xDSL	12	6000	unlimited	unlimited	1	50	500	AV+AS+ASW+FW	VoIP	No	0	0	No	Digital	37	86.29	66.65
<b>The Netherlands</b>	<b>KPN</b>	InternetPlusBellen Extra met Digitenne TV	xDSL	12	8192	unlimited	unlimited	5	5	50	AV+AS	VoIP	Yes	unlimited	0	No	Digital	23	70.33	62.79
<b>Poland</b>	Vectra	Aktynny+Internet@Mbps+Platynowy	Cable	12	8192	unlimited	unlimited	2	N.D.	400	-	Switched	No	500	0	No	Digital	80	48.12	82.68
<b>Portugal</b>	<b>PT Comunicações</b>	MEO TV + Internet + Telefone	xDSL	12	5120	unlimited	unlimited	5	N.D.	N.D.	-	Switched	Yes	0	0	No	Digital	100	64.45	74.94
<b>Slovenia</b>	<b>Telekom Slovenije</b>	Trio	FTTx	-	5120	unlimited	unlimited	4	9	10	AV+AS+FW+PC+BU	Switched	No	0	0	No	Digital	42	72.08	86.84
<b>Spain</b>	Orange Spain	adsl 6 mb + TV + llamadas nacionales	xDSL	18	6144	unlimited	unlimited	15	N.D.	100	AV+AS+ASW+FW+PC+PM+PU	Switched	Yes	unlimited	0	No	Digital	32	42.63	45.35
<b>State of California</b>	Charter Communications	Bundle with Express internet, Telephone and cable TV	Cable	-	5120	unlimited	unlimited	10	N.D.	20	AV+AS+ASW+FW+PC+PM+PU	VoIP	Yes	unlimited	unlimited	No	Analog	N.D.	70.93	82.65
<b>State of New York</b>	<b>Verizon</b>	Verizon Triple Freedom	xDSL	12	7270.4	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	0	No	Digital	200	91.21	106.29
<b>Sweden</b>	<b>TeliaSonera</b>	Telia Bredband 6-8 Mbit/s + Telia	xDSL	12	8192	unlimited	unlimited	5	1	50	AV+FW+BU	VoIP	No	0	0	No	Digital	6	48.92	43.04
<b>The UK</b>	Tiscali UK	TV, broadband & weekend calls	xDSL	12	8192	unlimited	unlimited	N.D.	N.D.	N.D.	AV+AS	VoIP	Yes	0	0	No	Digital	70	35.02	39.77

(\*) AV = antivirus, AS = antispyware, ASW = anti-spyware, FW = firewall, PC = Parent Control, PM = Privacy Manager, PU = Pop-Up Blocker, BU = Back-up on-line

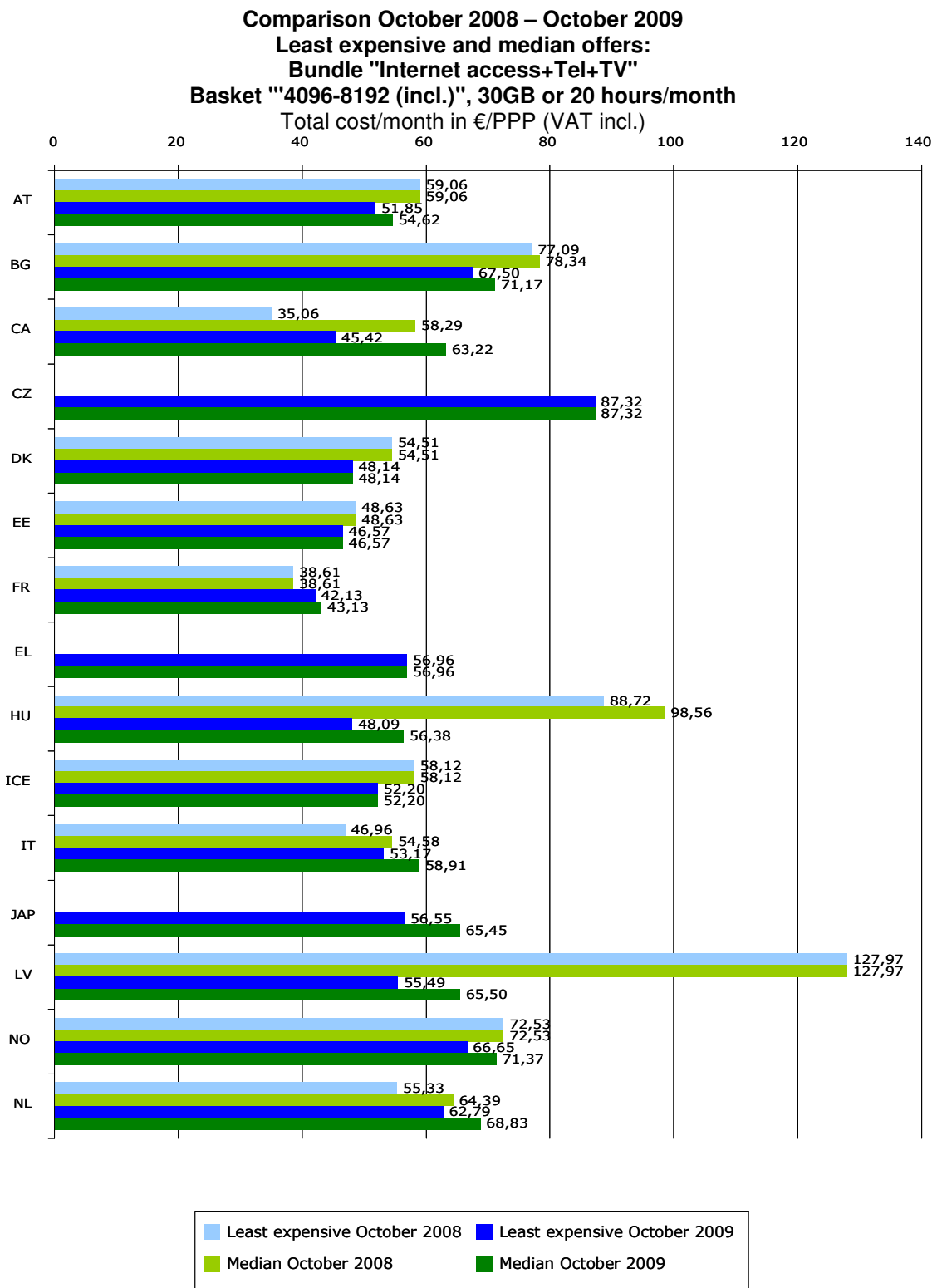
(\*\*) Duration = "-" indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

ISPs in **italics** and **bold** are Incumbent operators

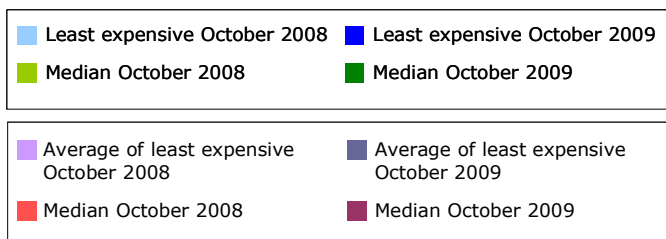
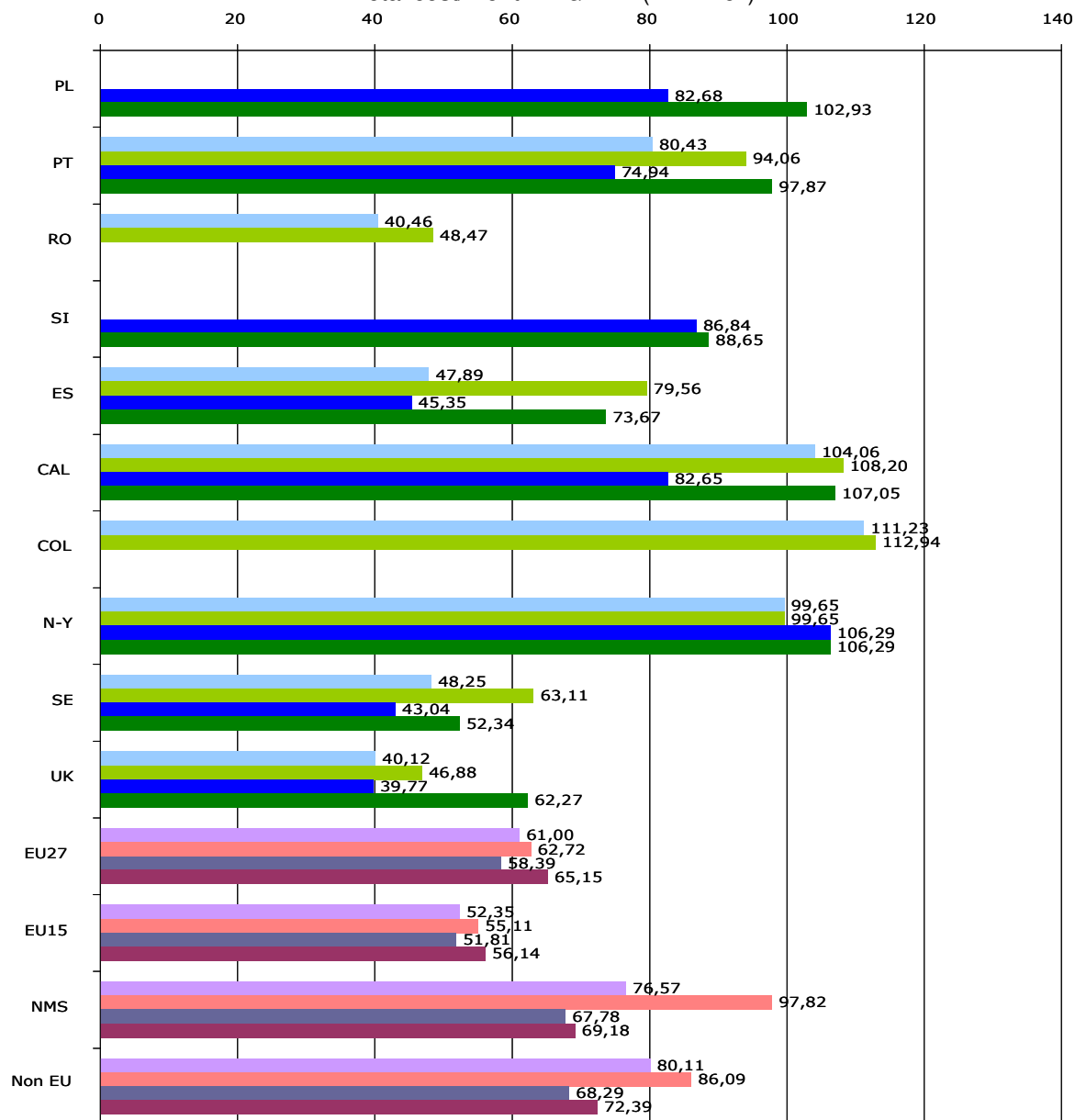
Table 36: Detailed information on least expensive offer per country (4096kbps-8192kbps (incl.)) ; "Internet + Tel + TV"

**5.3.5.c BASKET "4096KBPS-8192KBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**





**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel+TV"**  
**Basket ""4096-8192 (incl.)", 30GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



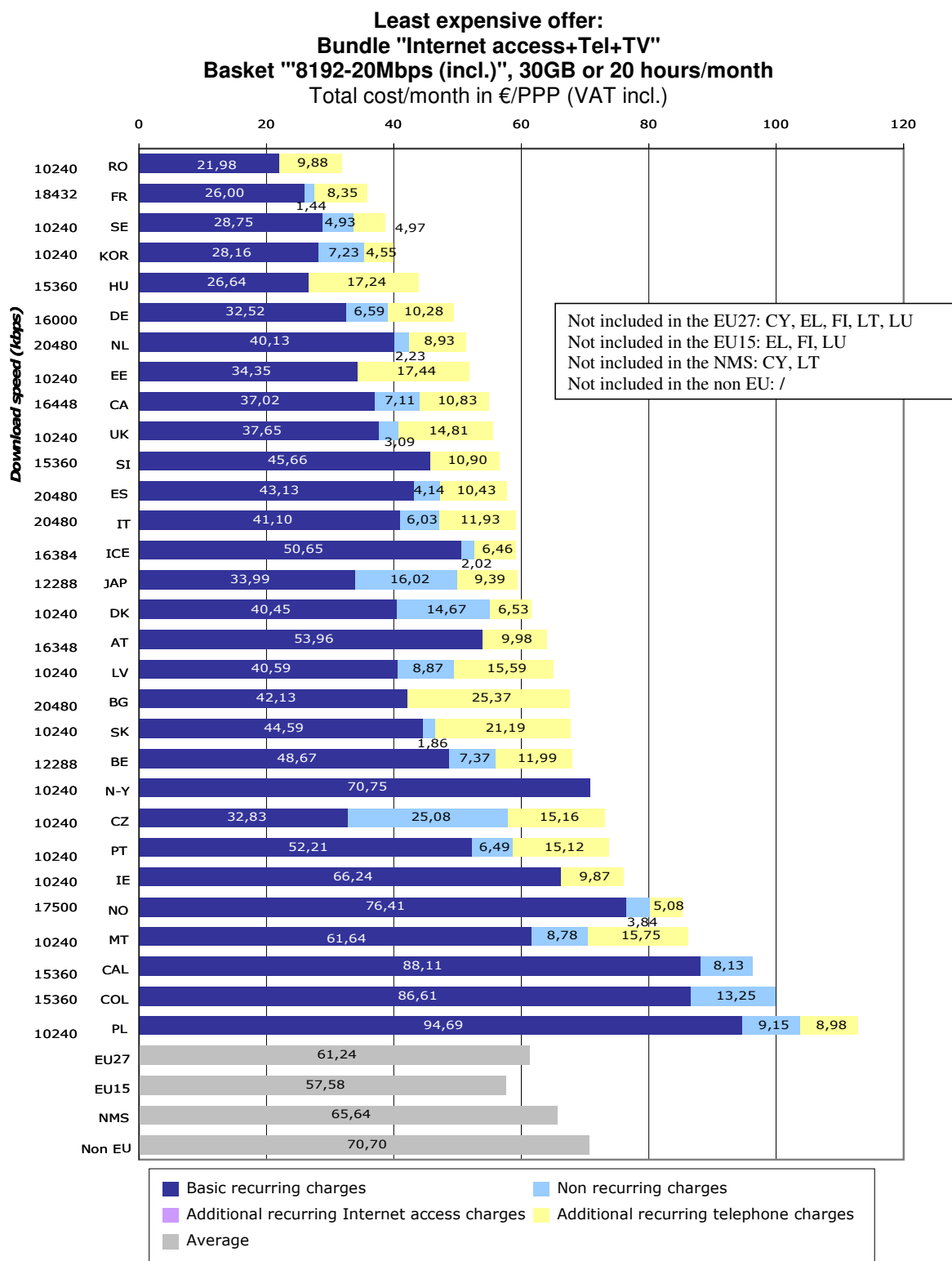
**5.3.5.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 4096KBPS-8192KBPS (incl.)"**

- An offer corresponded to this basket for twenty-three countries. For the following countries, no offer was available: *Belgium, Cyprus, Finland, Germany, Ireland, Korea, Lithuania, Luxembourg, Malta, Romania, Slovakia* and *the State of Colorado*.
- From the ISPs in the following countries, only one offer was available for this basket: *Czech Republic, Denmark, Estonia, France, Greece, Iceland, Korea* and *Norway*.
- There were two metered offers for this basket (*Canada* and *Iceland*) of which none required normalisation.
- The omission of non-recurring charges in most countries (*Bulgaria, Estonia, France, and the State of California*) influenced their place in the overall ranking. It had no influence on the ranking of *Greece*.
- All but four offers needed normalisation of telephone charges. No additional recurring telephone charges were needed for *Canada, Greece, the State of California* and *the State of New York*.
- The average of the least expensive offers of the EU27 and the non-EU countries decreased in October 2009 compared to October 2008. The median value decreased significantly in the NMS and in the non-EU countries but remained stable in the EU15.

### 5.3.6 **BASKET "8192KBPS-20MBPS (INCL.)", IN €/PPP (VAT INCL.)**

#### 5.3.6.a **LEAST EXPENSIVE OFFER**

For the following countries, no offer was available from the ISPs selected: *Cyprus, Finland, Greece, Lithuania and Luxembourg.*



### 5.3.6.b BASKET "8192KBPS-20MBPS (INCL.)", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (****)	Total cost/month VAT incl.	Total cost/month EUR/PPP
				Months	Kbps					MB									Euro	EUR/PPP
<b>Austria</b>	UPC Austria	UPC SUPER FIT with premium option	Cable	12	16348	unlimited	unlimited	3	15	10	AV+AS	VoIP	No	0	0	Yes	Digital	97	70.98	63.94
<b>Belgium</b>	Telenet	GoldShake	Cable	12	12288	30	-	4	N.D.	0	AV+AS	VoIP	Yes	0	0	Yes	Digital	68	76.88	68.04
<b>Bulgaria</b>	Eurocom Cable	Eurocom Lan Basic Tripple	FTTx	12	20480	unlimited	unlimited	1	1	N.D.	-	VoIP	No	75	0	No	Analog	65	32.44	67.50
<b>Canada</b>	<i>Bell Canada</i>	Bell Internet MAX16 (OC)	xDSL	-	16448	50	-	1	11	5	AV+AS+PC+PU	Switched	No	0	0	Yes	Digital	500	67.91	54.96
<b>Czech Republic</b>	UPC Česká republika	FIBER POWER 10 + DTV STARTER+ TEL BASIC	Cable	6	10240	unlimited	unlimited	3	1	20	-	VoIP	No	0	0	No	Digital	25	50.93	73.08
<b>Denmark</b>	TDC	TDC HOMETRIO TV+Bredbånd+Telefoni 10 Mbit	xDSL	6	10240	unlimited	unlimited	1	5	250	-	VoIP	No	0	0	No	Digital	28	91.98	61.65
<b>Estonia</b>	STV	Trio Saturn Kodu (Internet, KTV Kodu, Telefon Basic)	FTTx	-	10240	unlimited	unlimited	1	1	100	-	VoIP	No	0	0	No	Analog	70	38.07	51.79
<b>France</b>	<i>Orange France</i>	Surf internet	xDSL	12	18432	unlimited	unlimited	5	N.D.	100	AS+PC	VoIP	Yes	unlimited	0	No	Digital	33	41.16	35.79
<b>Germany</b>	HanseNet/Alice	Alice Fun Die Flatrate+Tel+TV	xDSL	-	16000	unlimited	unlimited	5	N.D.	300	-	Switched	Yes	unlimited	0	Yes	Digital	65	52.85	49.39
<b>Hungary</b>	UPC Hungary	Fiber Power 15 + bronze csomag + telefon gold	Cable	15	15360	unlimited	unlimited	1	5	50	-	VoIP	Yes	0	0	No	Digital	36	29.23	43.88
<b>Iceland</b>	<i>Síminn</i>	Leið 3 + Grunnpakki Sjónvarp Símans+Heimasími	xDSL	6	16384	120	-	5	N.D.	0	AS+ASW+FW+PC+P M	VoIP	No	0	0	Yes	Digital	7	35.34	59.12
<b>Ireland</b>	UPC Ireland	Broadband Deal, Digital Value Pack, Digital +HD, Home Phone with anytime world & 10Mb broadband	Cable	12	10240	unlimited	unlimited	1	15	300	-	Switched	Yes	unlimited	0	No	Digital	60	89.05	76.11
<b>Italy</b>	Fastweb	NavigaCasa + FASTWEBTV	xDSL	-	20480	unlimited	unlimited	4	N.D.	N.D.	-	Switched	Yes	0	0	No	Digital	88	64.38	59.06
<b>Italy</b>	Fastweb	NavigaCasa + FASTWEBTV	FTTx	-	20480	unlimited	unlimited	4	N.D.	N.D.	-	Switched	Yes	0	0	No	Digital	88	64.38	59.06
<b>Japan</b>	Yahoo Japan	Yahoo! BB 12 M (NTT East aera)+ BB Phone + BB TV	xDSL	-	12288	unlimited	unlimited	1	10	300	-	VoIP	No	0	0	No	Digital	34	65.60	59.40
<b>Korea</b>	SK Broadband	Broad & Set ( Speed+ tel + TV )	xDSL	12	10240	Unlimited	Unlimited	N.D.	N.D.	N.D.	-	VoIP	No	30	0	No	Digital	N.D.	27.09	39.94
<b>Latvia</b>	BALTKOM TV	Trio Earthnet, Internet up to 10 Mbit/s	Cable	24	10240	unlimited	unlimited	3	1	0	-	Switched	No	0	0	Yes	Analog+Digital	55+90+	46.77	65.05
<b>Malta</b>	Melita	Big Savers Large	Cable	15	10240	80	-	5	N.D.	10	AV+AS	VoIP	No	100	0	Yes	Digital	65	62.91	86.18
<b>Norway</b>	Get	Trippel - Bredbaand L, Freetime, Digital-tv start	Cable	12	17500	unlimited	unlimited	1	10	50	AV+FW	VoIP	No	0	0	No	Digital	35	110.47	85.33
<b>The Netherlands</b>	Tele2 Nederland	Internet ADSL Super, TV en bellen	xDSL	12	20480	unlimited	unlimited	1	N.D.	20	AV+AS	Switched	No	0	0	No	Digital	41	57.45	51.29
<b>Poland</b>	Aster Group	TwoSwiat+BasicPlus+TwoCzas	Cable	-	10240	unlimited	unlimited	5	10	300	AS	Switched	No	60	0	Yes	Digital	53	65.65	112.82
<b>Portugal</b>	ZON/TV Cabo	ZON Enjoy	Cable	12	10240	unlimited	unlimited	30	N.D.	N.D.	N.D.	Switched	Yes	0	0	No	Digital	110	63.48	73.82
<b>Romania</b>	NewCom Telecomunicatii	INJOY Tripla	Cable	-	10240	unlimited	unlimited	1	N.D.	N.D.	-	VoIP	Yes	50	0	No	Analog	55	17.27	31.86
<b>Slovakia</b>	UPC Slovakia	Triple Play Analog 2	Cable	12	10240	unlimited	unlimited	5	25	50	AV+AS	VoIP	Yes	0	0	No	Analog	38	50.06	67.65
<b>Slovenia</b>	Amis	trojka amis TV	FTTx	-	15360	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	Digital	105	46.95	56.58
<b>Spain</b>	Orange Spain	linea + adsl máxima velocidad + TV + llamadas	xDSL	18	20480	unlimited	unlimited	16	N.D.	101	-	Switched	Yes	unlimited	0	No	Digital	32	54.23	57.69
<b>State of California</b>	Time Warner Cable	Super charged double	Cable	24	10240	unlimited	unlimited	5	N.D.	5	AV+AS+ASW+FW+P C	VoIP	No	unlimited	unlimited	No	Digital	327	82.58	96.24
<b>State of Colorado</b>	<i>Verizon</i>	Good triple play FIOS	FTTx	12	15360	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	250	85.68	99.85
<b>State of New York</b>	CableVision	Optimum Triple Play	Cable	-	15360	unlimited	unlimited	5	N.D.	0	-	VoIP	Yes	unlimited	unlimited	No	Digital	250	60.71	70.75
<b>Sweden</b>	Tele2 Sverige	3play Bredband 10/10 Mbit/s+TV+Tel	FTTx	-	10240	unlimited	unlimited	5	1	40	-	VoIP	No	0	0	No	Digital	8	43.94	38.66
<b>The UK</b>	Virgin Media	Broadband Size L+ TV +Phone M	Cable	12	10240	unlimited	unlimited	15	N.D.	5120	AV+ASW+FW+PC+P M+PU	N.D.	Yes	0	0	Yes	Digital	65	48.91	55.55
<b>The UK</b>	Virgin Media	Broadband Value Bundle	Cable	12	10240	unlimited	unlimited	15	N.D.	10240	AV+ASW+FW+PC+P M+PU	N.D.	Yes	0	0	Yes	Digital	65	48.91	55.55

(\*) AV = antivirus, AS = antisipam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

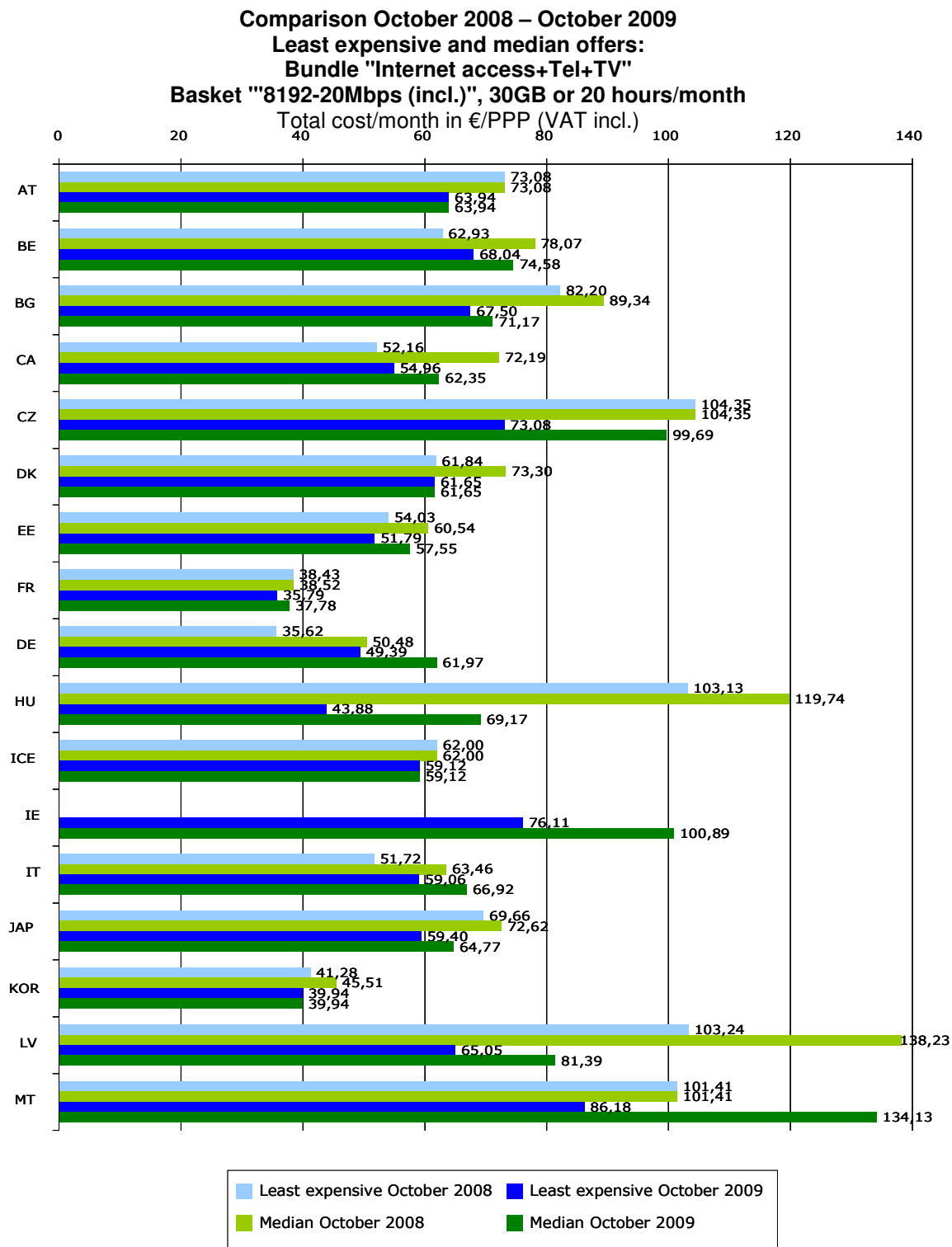
(\*\*) Duration = '-' indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

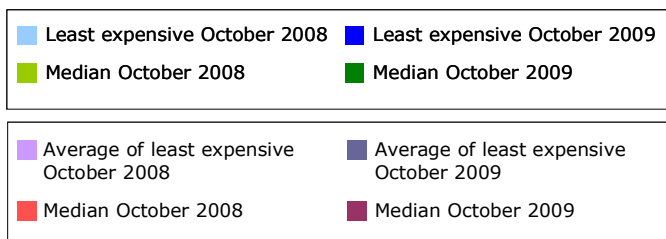
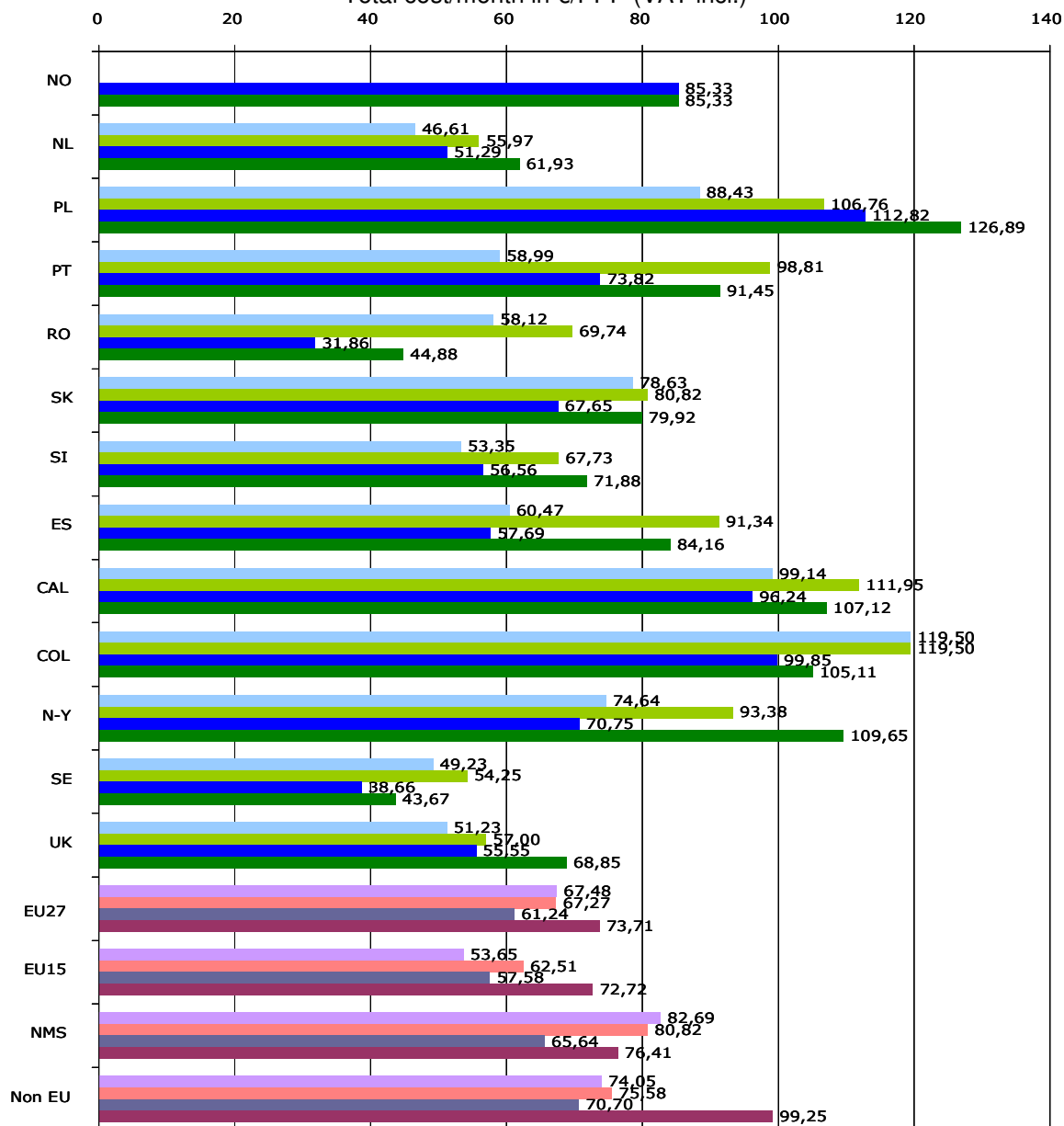
ISPs in *italic & bold* are incumbent operators

Table 37: Detailed information on least expensive offer per country (8192kbps-20Mbps (incl.) ) ; "Internet + Tel + TV"

**5.3.6.c BASKET "8192KBPS-20MBPS (INCL.)", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel+TV"**  
**Basket ""8192-20Mbps (incl.)", 30GB or 20 hours/month**  
**Total cost/month in €/PPP (VAT incl.)**



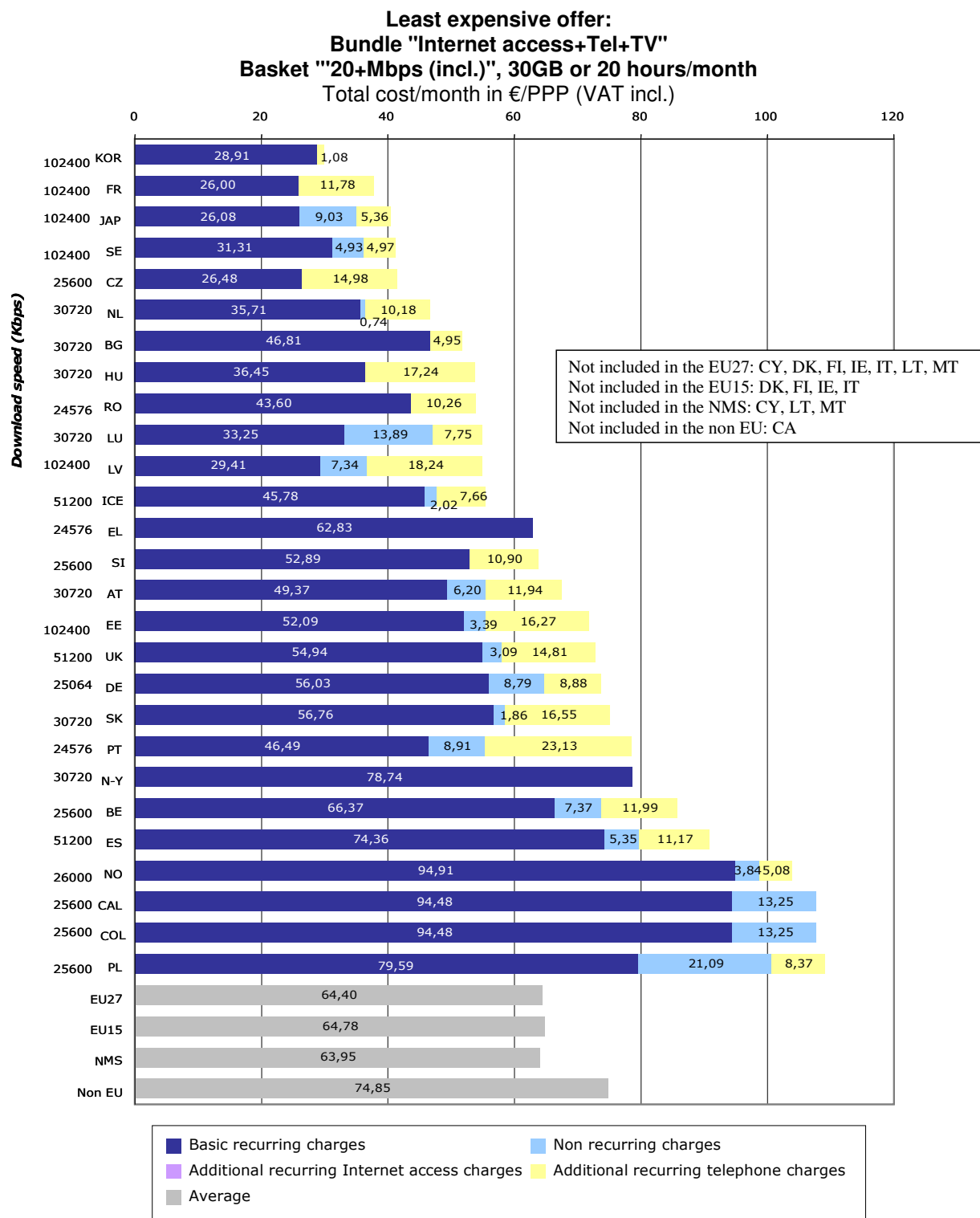
**5.3.6.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 8192KBPS-20MBPS (incl.)"**

- For thirty countries an offer was available for this basket. For the following countries, no offer was available: *Cyprus, Finland, Greece, Lithuania and Luxembourg*.
- From the ISPs in *Austria, Denmark, Iceland, Korea and Norway*, only one offer was available for this basket.
- In *Italy* and the *United Kingdom*, there were two least expensive offers.
- There were four metered offers for this basket (*Belgium, Canada, Iceland and Malta*), of which none required normalisation.
- No clear relationship could be observed between the omission of non-recurring charges in *Bulgaria, Hungary, Ireland and Romania* and their place in the overall ranking. It however affected the ranking of *Austria, Estonia, Slovenia and the State of New York*. The inclusion of non-recurring charges strongly impacted the place of the *Czech Republic* in the overall ranking.
- All but three offers needed normalisation of telephone charges. No additional recurring telephone charges were needed for *the State of California, the State of Colorado* and *the State of New York*. This had little influence on their ranking, except for the *State of New York*.
- The average of the least expensive offers of the EU27 and the non-EU countries all decreased in October 2009 compared to October 2008, though a slight increase is observed in the EU15. The median value has increased in the non-EU and the EU15 countries while a small decrease is observed in the NMS.

### 5.3.7 **BASKET "20+Mbps", IN €/PPP (VAT INCL.)**

#### 5.3.7.a **LEAST EXPENSIVE OFFER**

No offer was available for this basket for the following countries: *Canada, Cyprus, Denmark, Finland, Ireland, Italy, Lithuania and Malta.*





### 5.3.7.b BASKET "20+Mbps", LIST OF SELECTED OFFERS

Country	ISP	Offer	Technology	Contract duration (**)	Bitrate down	GB included per month	Hours included per month	E-mail boxes (***)	Adresses per mailbox (***)	Webpace (***)	Level of protection (*)	Telephone technology	Unlimited nights and weekends	Minutes to fixed line included	Minutes to mobile included	Option for mobile	Television technology	Nb channels (***)	Total cost/month VAT incl.	Total cost/month VAT incl.
				Months	Kbps					MB									Euro	EUR/PPP
<b>Austria</b>	<b>Telekom Austria</b>	aonSuperkombi with GigaBooster 30	xDSL	12	30720	unlimited	unlimited	5	N.D.	20	AV+AS	Switched	No	0	0	Yes	Digital	>70	74,94	67,51
<b>Belgium</b>	<b>Telenet</b>	Internet & Digital TV & Téléphonie à 75€	Cable	12	25600	100	-	8	N.D.	50	AV+ASW+FW+PC	VoIP	Yes	0	0	Yes	Digital	68	96,88	85,74
<b>Bulgaria</b>	<b>Speedy Net</b>	Speedy Net Package 44	Cable	12	30720	unlimited	unlimited	1	1	0	-	VoIP	no	0	0	No	Digital	77	24,87	51,76
<b>Czech Republic</b>	<b>RIO media</b>	RIO Data	Cable	12	25600	unlimited	unlimited	1	1	N.D.	-	VoIP	No	0	0	No	Digital	12	28,89	41,46
<b>Estonia</b>	<b>Starman</b>	Super kolmikpakett	Cable	-	102400	unlimited	unlimited	1	1	0	-	VoIP	No	0	0	No	Digital	77	52,73	71,75
<b>France</b>	<b>NeufCegétel (SFR)</b>	neufbox fibre optique+Tel+TV	FTTx	-	102400	unlimited	unlimited	10	N.D.	1024	AV+AS+PC	VoIP	Yes	unlimited	0	No	Digital	140	43,45	37,78
<b>Germany</b>	<b>Deutsche Telekom</b>	Entertain Comfort with VDSL 25 Standard	FTTx	24	25064	unlimited	unlimited	25	10	1024	AV+AS	Switched	Yes	unlimited	0	No	Digital	70	78,86	73,70
<b>Greece</b>	<b>OTE</b>	Conn-x TALK 24 mbps+24/7+60 mobile+TV	xDSL	12	24576	unlimited	unlimited	1	N.D.	0	-	Switched	Yes	unlimited	60	No	Digital	35	57,80	62,83
<b>Hungary</b>	<b>UPC Hungary</b>	Fiber Power 30 + bronze csomag + telefon gold	Cable	15	30720	unlimited	unlimited	6	5	100	-	VoIP	Yes	0	0	No	Digital	36	35,76	53,69
<b>Iceland</b>	<b>Vodafone</b>	Flotta netið - meiri hraði + Tel + TV	FTTx	6	51200	30	-	1	0	0	-	VoIP	No	0	0	Yes	Digital	72	33,15	55,45
<b>Japan</b>	<b>NTT East</b>	B Flet's Mansion Type Plan 2 Hyper + Basic Plan + Flet's TV	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	Digital	31	44,70	40,48
<b>Japan</b>	<b>NTT East</b>	Flet's Hikari Next Mansion Type Plan 2	FTTx	-	102400	unlimited	unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	Digital	31	44,70	40,48
<b>Korea</b>	<b>Korea Telecom</b>	QOOK Internet & SHOW ( Tel+ TV )	FTTx	12	102400	Unlimited	Unlimited	N.D.	N.D.	N.D.	-	VoIP	No	0	0	No	Digital	N.D.	20,34	29,99
<b>Latvia</b>	<b>IZZI</b>	Premium Package	Cable	24	102400	unlimited	unlimited	5	1	5	-	Switched	Yes	0	0	No	Digital	28	39,53	54,98
<b>Luxembourg</b>	<b>Numerical</b>	Pack Triple Play	Cable	12	30720	unlimited	unlimited	5	5	50	AV+AS	VoIP	Yes	unlimited	0	No	Analog	95	65,87	54,89
<b>Norway</b>	<b>Get</b>	Trippel - Bredbaand Extreme, Freetime, Digital-tv start	Cable	12	26000	unlimited	unlimited	1	10	50	AV+FW	VoIP	No	0	0	No	Digital	35	134,42	103,83
<b>The Netherlands</b>	<b>UPC Nederland</b>	Internet 30 en bellen standaard en TV starter	Cable	12	30720	unlimited	unlimited	5	12	50	AV+AS	VoIP	No	0	0	No	Digital	50	52,23	46,63
<b>Poland</b>	<b>UPC Polska</b>	Internet Fiber Power 25Mbps+ Select standard+Rozmowy 60	Cable	-	25600	unlimited	unlimited	3	15	25	-	VoIP	No	60	0	No	Digital	80	63,46	109,05
<b>Portugal</b>	<b>Sonaeom (Clix)</b>	TV Best Of/Total+Net+Tel w/no subscription	xDSL	24	24576	60	-	30	N.D.	N.D.	AV+AS	Switched	No	0	0	No	Digital	60	67,54	78,53
<b>Romania</b>	<b>UPC romania</b>	UPC 3PLAY LARGE	Cable	-	24576	unlimited	unlimited	3	N.D.	N.D.	-	VoIP	Yes	0	0	No	Analog	64	29,19	53,86
<b>Slovakia</b>	<b>UPC Slovakia</b>	Triple Play Analog 3	Cable	12	30720	unlimited	unlimited	5	25	50	AV+AS	VoIP	Yes	unlimited	0	No	Analog	38	55,63	75,18
<b>Slovenia</b>	<b>Amis</b>	trojka amis TV	FTTx	-	25600	unlimited	unlimited	6	6	50	AV+AS+FW+PC	Switched	No	700	0	No	Digital	105	52,95	63,79
<b>Spain</b>	<b>ONO</b>	Teléfono TI + Internet 50Mb + TV Esencial	Cable	18	51200	unlimited	unlimited	N.D.	unlimited	5	AV+AS+FW	Switched	Yes	unlimited	0	No	Digital	40	85,43	90,88
<b>State of California</b>	<b>Verizon</b>	Better triple play FIOS	FTTx	12	25600	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	320	92,44	107,73
<b>State of Colorado</b>	<b>Verizon</b>	Better triple play FIOS	FTTx	12	25600	unlimited	unlimited	9	N.D.	10	-	Switched	Yes	unlimited	unlimited	No	Digital	320	92,44	107,73
<b>State of New York</b>	<b>CableVision</b>	Optimum Triple Play upgrade	Cable	-	30720	250	-	15	N.D.	12288	FW	VoIP	Yes	unlimited	unlimited	No	Digital	250	67,57	78,74
<b>Sweden</b>	<b>Tele2 Sverige</b>	3play Broadband 100/10 Mbit/s+TV+Tel	FTTx	-	102400	unlimited	unlimited	5	1	40	-	VoIP	No	0	0	No	Digital	8	46,85	41,22
<b>The UK</b>	<b>Virgin Media</b>	Broadband Size XXL+TV+Phone M	Cable	12	51200	unlimited	unlimited	15	N.D.	unlimited	+ASW+FW+PC+PM+	N.D.	Yes	0	0	Yes	Digital	65	64,13	72,84

(\*) AV = antivirus, AS = antispam, ASW = anti-spyware; FW = firewall, PC = Parent Control, PM = Privacy Manager; PU = Pop-Up Blocker; BU = Back-up on-line

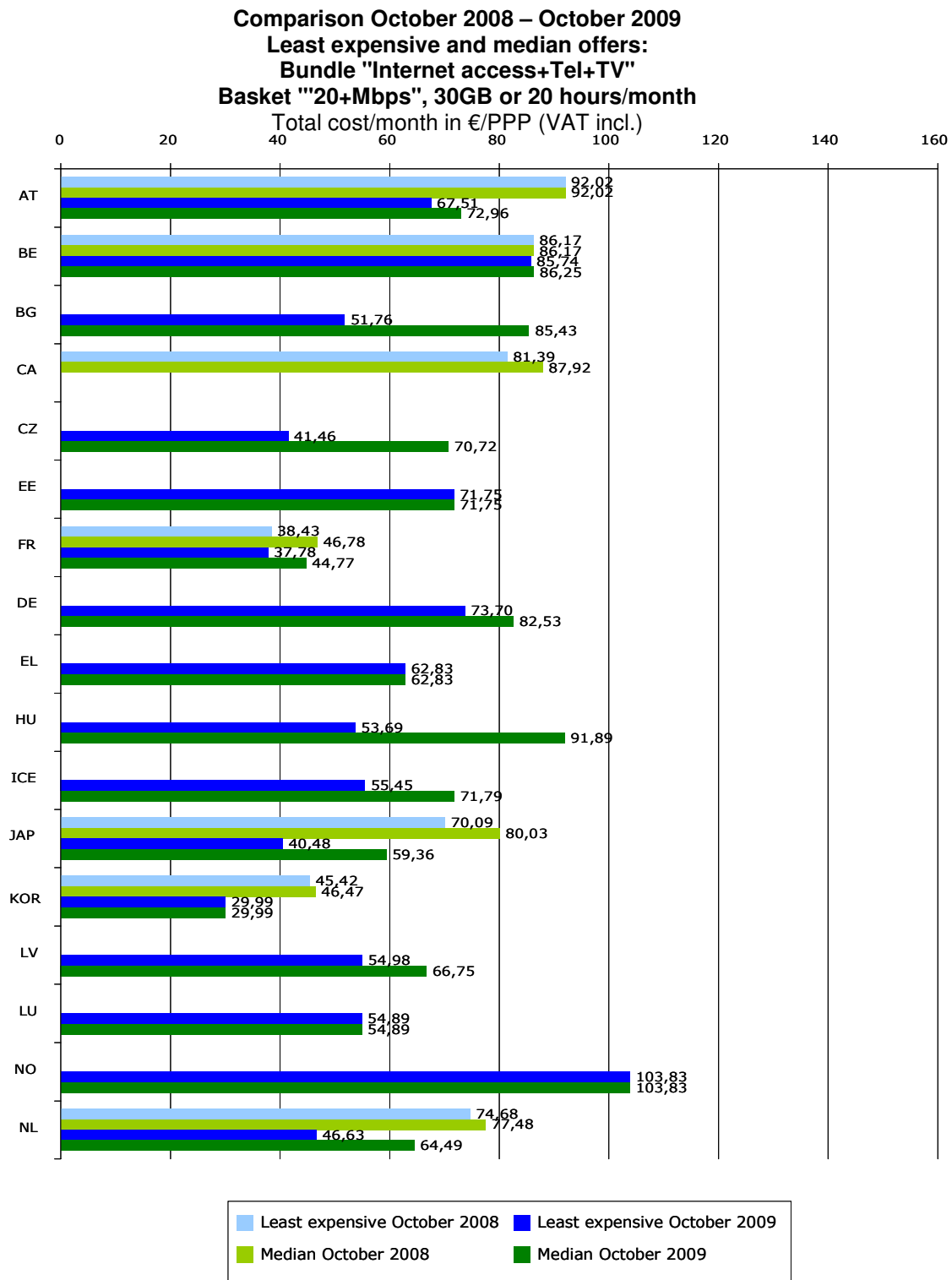
(\*\*) Duration = '-' indicates that 12 months was assumed

(\*\*\*) N.D. Indicates information is not provided by ISP

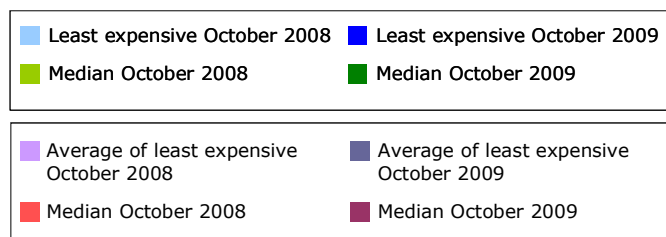
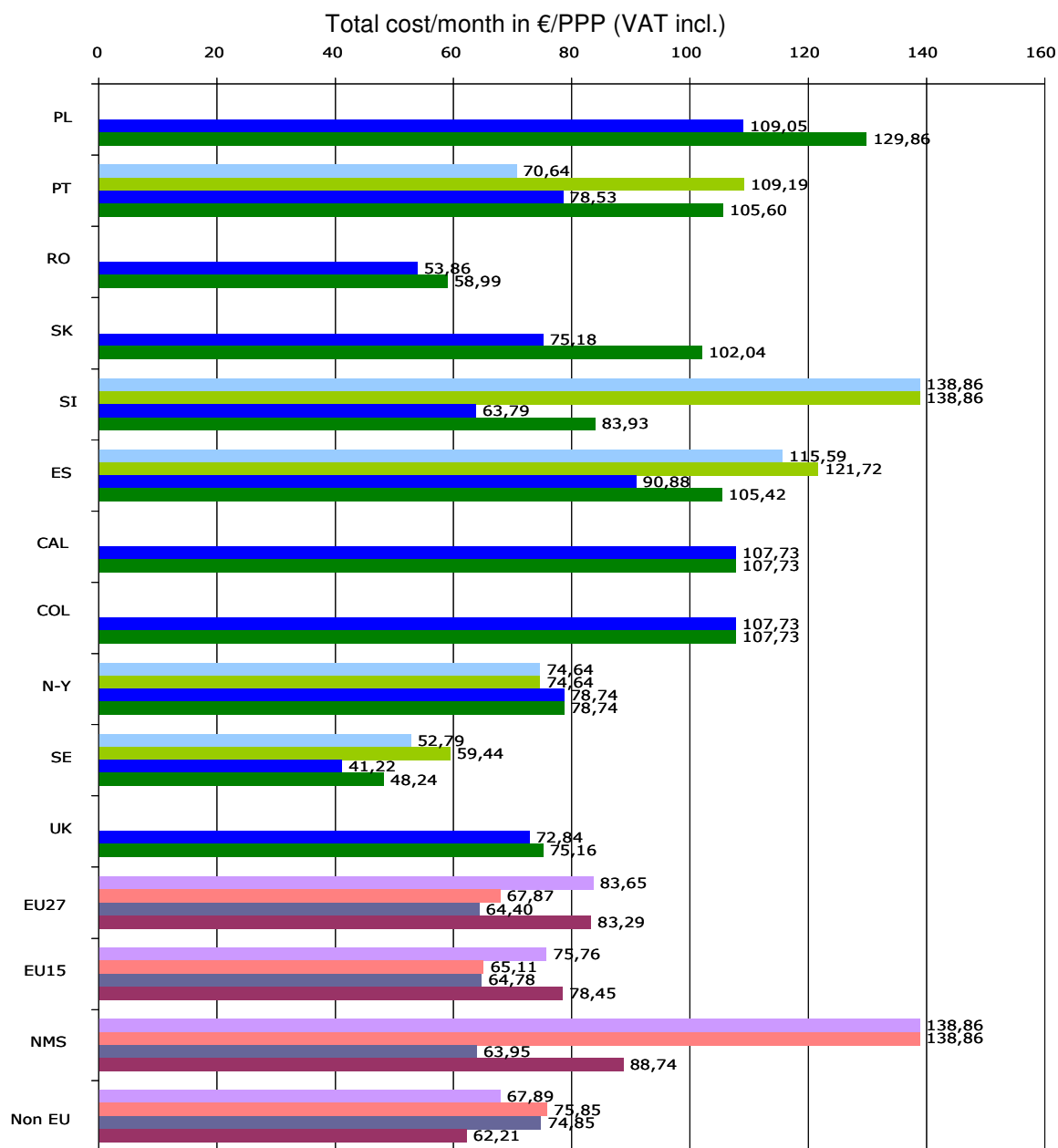
ISPs in *italic & bold* are Incumbent operators

Table 38: Detailed information on least expensive offer per country (20+Mbps) ; "Internet + Tel + TV"

**5.3.7.c BASKET "20+Mbps", COMPARISON OF LEAST EXPENSIVE AND MEDIAN OFFERS IN OCTOBER 2008 AND OCTOBER 2009**



**Comparison October 2008 – October 2009**  
**Least expensive and median offers:**  
**Bundle "Internet access+Tel+TV"**  
**Basket "'20+Mbps", 30GB or 20 hours/month**



#### **5.3.7.d CONCLUSIONS ON BUNDLE "INTERNET+TEL+TV" FOR "BASKET 20+MBPS"**

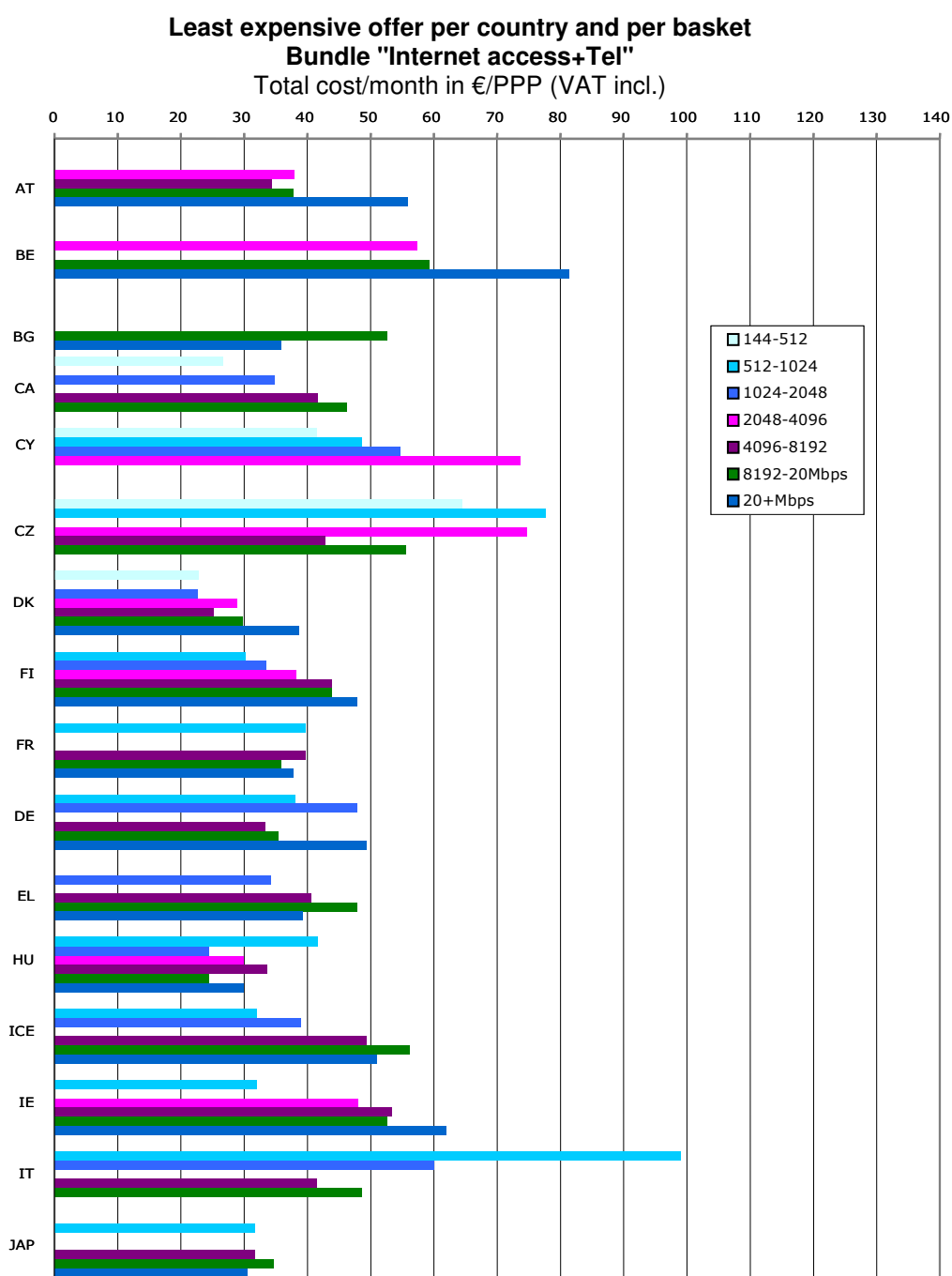
- For twenty-seven countries an offer corresponded to this basket. For the following countries, no offer was available: *Canada, Cyprus, Denmark, Finland, Ireland, Italy, Lithuania* and *Malta*.
- From the ISPs in the following countries, only one offer was available for this basket: *Estonia, Greece, Korea, Luxembourg, Norway, the State of California, the State of Colorado* and *the State of New York*.
- In Japan, there were two least expensive offers, both provided by the same ISP.
- There were four metered offers for this basket (*Belgium, Iceland, Portugal* and *the State of New York*), which did not require normalisation.
- The omission of non-recurring charges in *Bulgaria, Czech Republic, France, Greece, Hungary, Romania, Slovenia* and the *State of New-York* affected their place in the overall ranking. No clear relationship could be observed for the *Czech Republic, Korea* and the *State of New York*. Non-recurring charges are significant for *Poland*, but it does not influence its ranking.
- All offers, except in *Greece, the State of California, the State of Colorado* and *the State of New York*, needed normalisation of telephone charges. The inclusion of normalisation of telephone charges had a significant impact on the ranking of *Portugal*.
- The average of the least expensive offers decreased for both the EU15 and the NMS. The median value of the offers increased in EU15 but decreased in NMS. For the non-EU countries, the average of the least expensive offer has increased; the median value of the non-EU offers however decreased.

## 5.4. LEAST EXPENSIVE OFFER PER COUNTRY AND PER BUNDLE TYPE FOR EACH OF THE 7 BASKETS

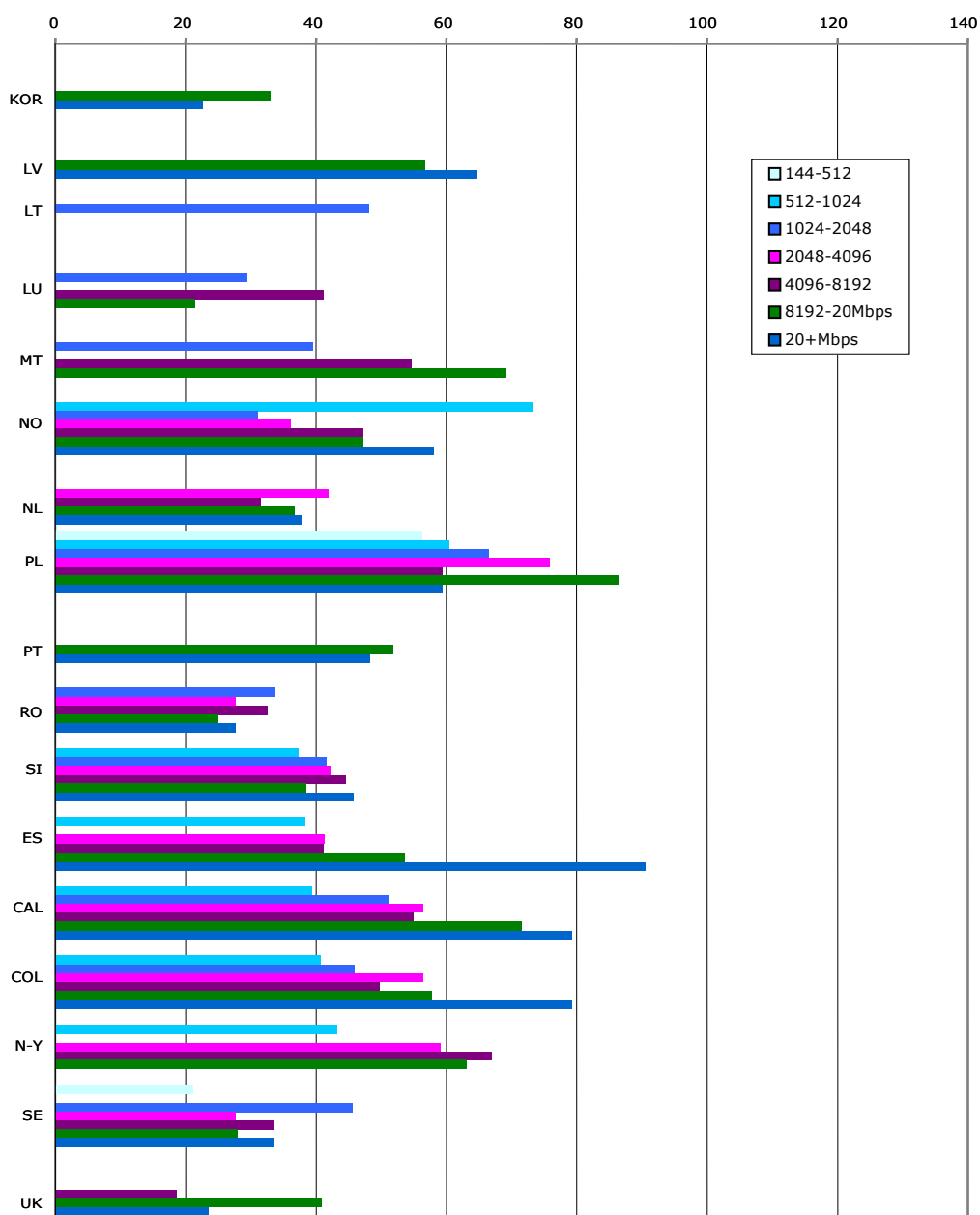
Based on the analysis in the previous sections, a summary per bundle type for all baskets per country can be presented.

### 5.4.1 BUNDLE "INTERNET ACCESS+TEL", IN €/PPP (VAT INCL.)

For the following two countries, no packages bundling Internet access and Fixed Telephony Services were available in the sample: *Estonia* and *Slovakia*.



**Least expensive offer per country and per basket**  
**Bundle "Internet access+Tel" (followed)**  
 Total cost/month in €/PPP (VAT incl.)



### **Conclusions on the least expensive offer per country for each of the seven baskets – bundle “Internet access+Tel”**

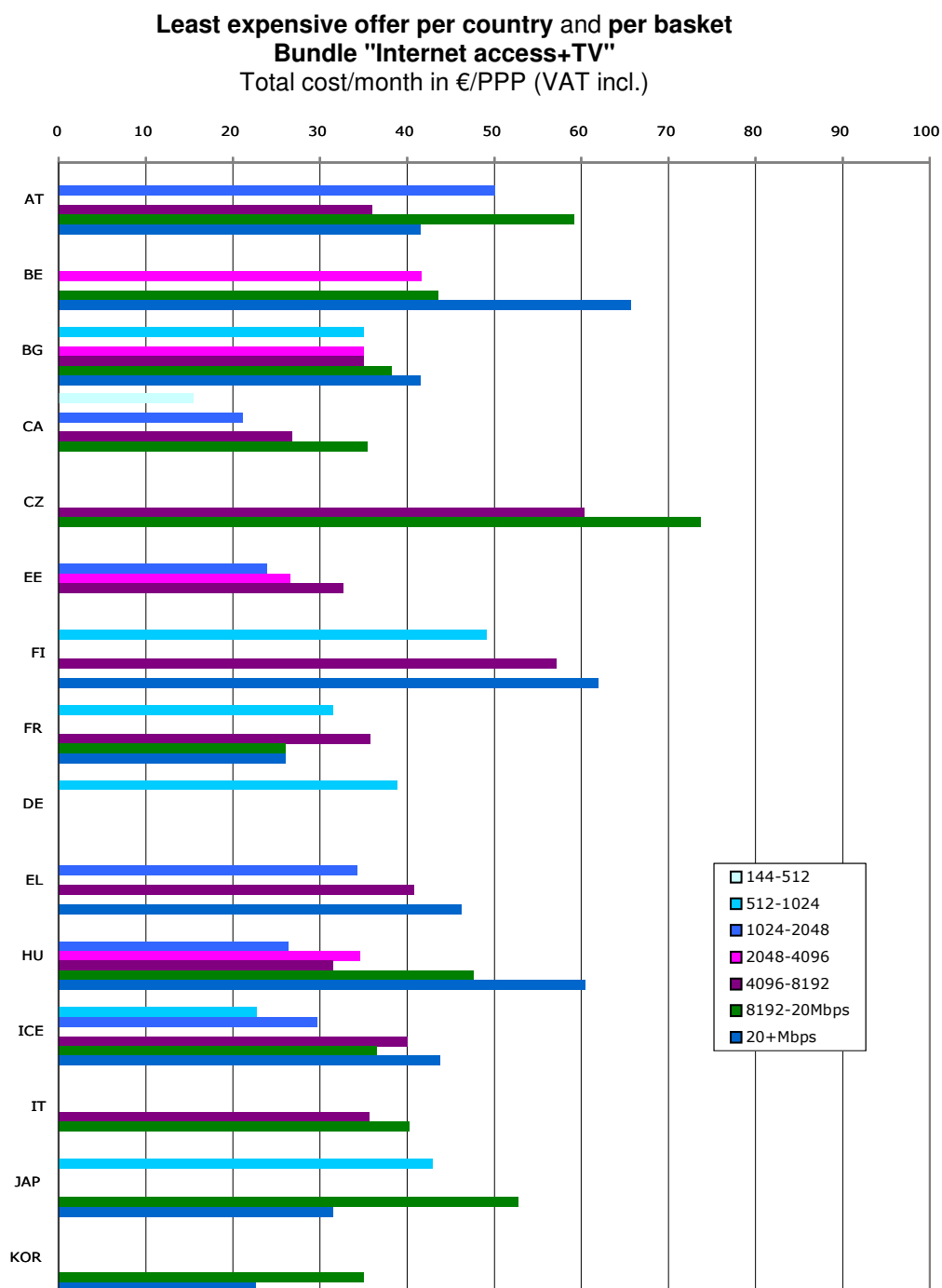
In the following countries, no packages bundling Internet access and Fixed Telephony Services were available in the sample: *Estonia* and *Slovakia*. It is also interesting to note that *Poland* is the only country to have at least one offer including Internet access and fixed telephony for each basket.

Within a single country, the offers with higher bit-rates tend to be more expensive. This however was not always the case.

- In the following countries, offers with higher download speeds were systematically more expensive: *Austria, Belgium, Canada, Cyprus, Finland, Malta* and *Spain*.
- In some countries charges tended to follow the above-mentioned pattern with exception of one basket. This was the case for the following countries: *Denmark, Greece, Iceland, Ireland, Japan, Luxembourg, Norway, Slovenia, the State of California, the State of Colorado, the State of New York* and the United Kingdom.
- In *Bulgaria, Korea, Latvia, Lithuania* and *Portugal*, there were not enough represented baskets (maximum 2) in the sample to draw conclusions on the above-mentioned pattern. It is however interesting to underline that in these countries, with the exception of Lithuania, the ISP is only providing this bundle for the upper baskets (sixth and seventh baskets).
- In other countries, there did not seem to be a specific pattern and no conclusion could be drawn as to the relationship between the speed and the level of the charges for these countries.

### 5.4.2 **BUNDLE "INTERNET ACCESS+TV", IN €/PPP (VAT INCL.)**

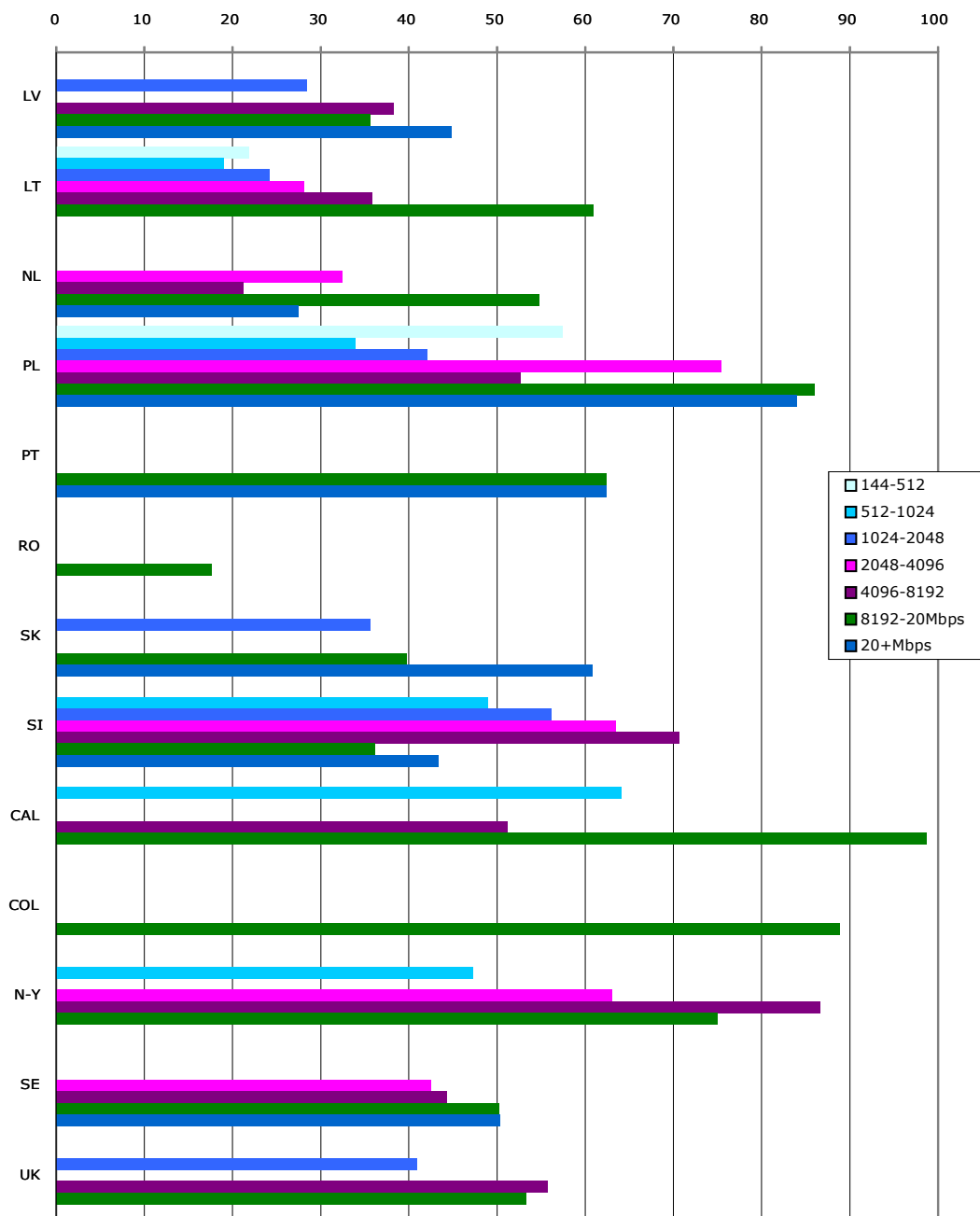
In the following countries, no packages bundling Internet Access and television were available in the sample: *Cyprus, Denmark, Ireland, Luxembourg, Malta, Norway and Spain.*





**Least expensive offer per country and per basket**  
**Bundle "Internet access+TV"**

Total cost/month in €/PPP (VAT incl.)



### **Conclusions on the least expensive offer per country for each of the seven baskets – bundle “Internet access+TV”**

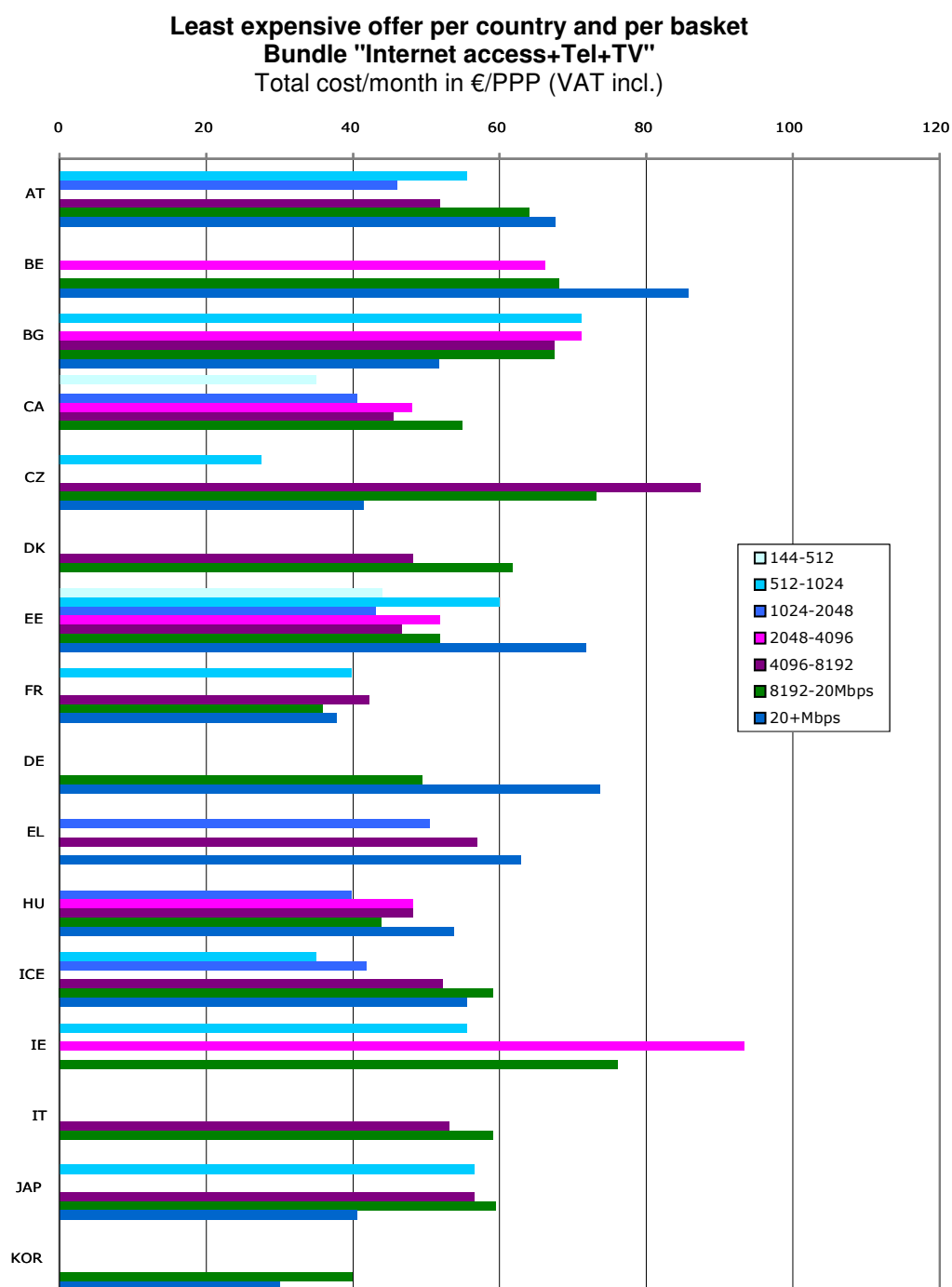
In seven countries, no packages bundling internet access and television were available in the sample: *Cyprus, Denmark, Ireland, Luxembourg, Malta, Norway and Spain*.

Within a single country, the offers with higher bit-rates tended to be more expensive offers. This however was not always the case.

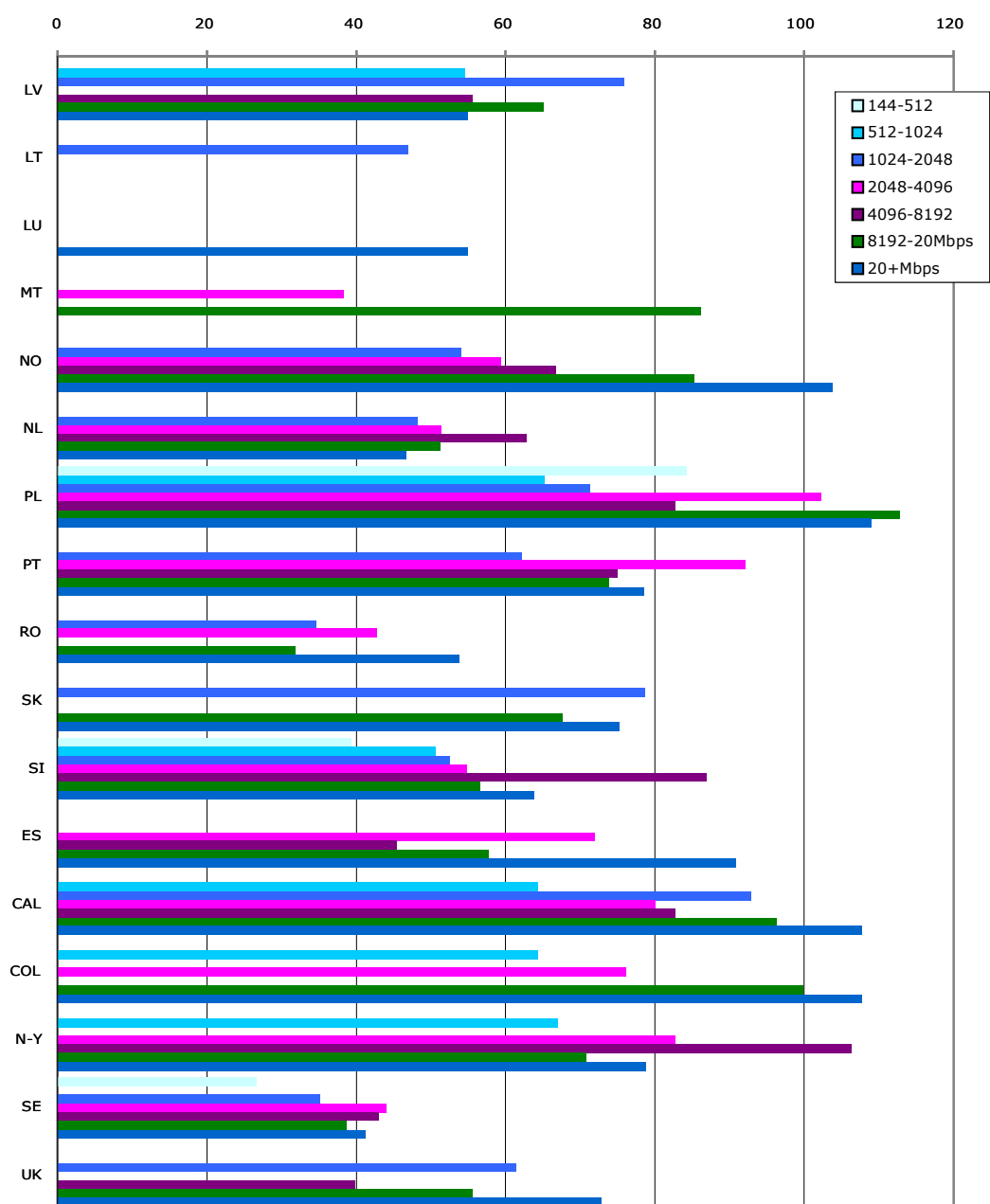
- In some countries, bundled offers with *Internet* access and television were only available for a single basket. These countries are: *Germany, Romania* and *the State of Colorado*. Conversely, *Poland* is the only country where this bundle including internet access and television is available for all seven baskets.
- In the following countries, offers with higher download speeds were systematically more expensive: *Belgium, Bulgaria, Canada, Czech Republic, Estonia, Finland, Greece, Italy, Slovakia* and *Sweden*.
- In some countries charges tended to follow the above-mentioned pattern with the exception of one basket. This was the case for countries like *Hungary, Iceland, Japan, Latvia, Lithuania, the State of California, the State of New-York* and *the United Kingdom*.
- In the other countries there did not seem to be a specific pattern and no conclusion could be drawn as to the relationship between the speed and the level of the charges for these countries.

### 5.4.3 **BUNDLE "INTERNET ACCESS+TEL+TV", IN €/PPP (VAT INCL.)**

For the following two countries, no triple-play bundled offer was available in the sample:  
*Cyprus and Finland.*



**Least expensive offer per country and per basket**  
**Bundle "Internet access+Tel+TV" (followed)**  
 Total cost/month in €/PPP (VAT incl.)



### **Conclusions on the least expensive offer per country for each of the seven baskets – bundle “Internet access+Tel+TV”**

In the following two countries, no triple-play bundled offer was available: *Cyprus* and *Finland*.

Within a single country, the offers with higher bit-rates tended to be more expensive offers. This however was not always the case.

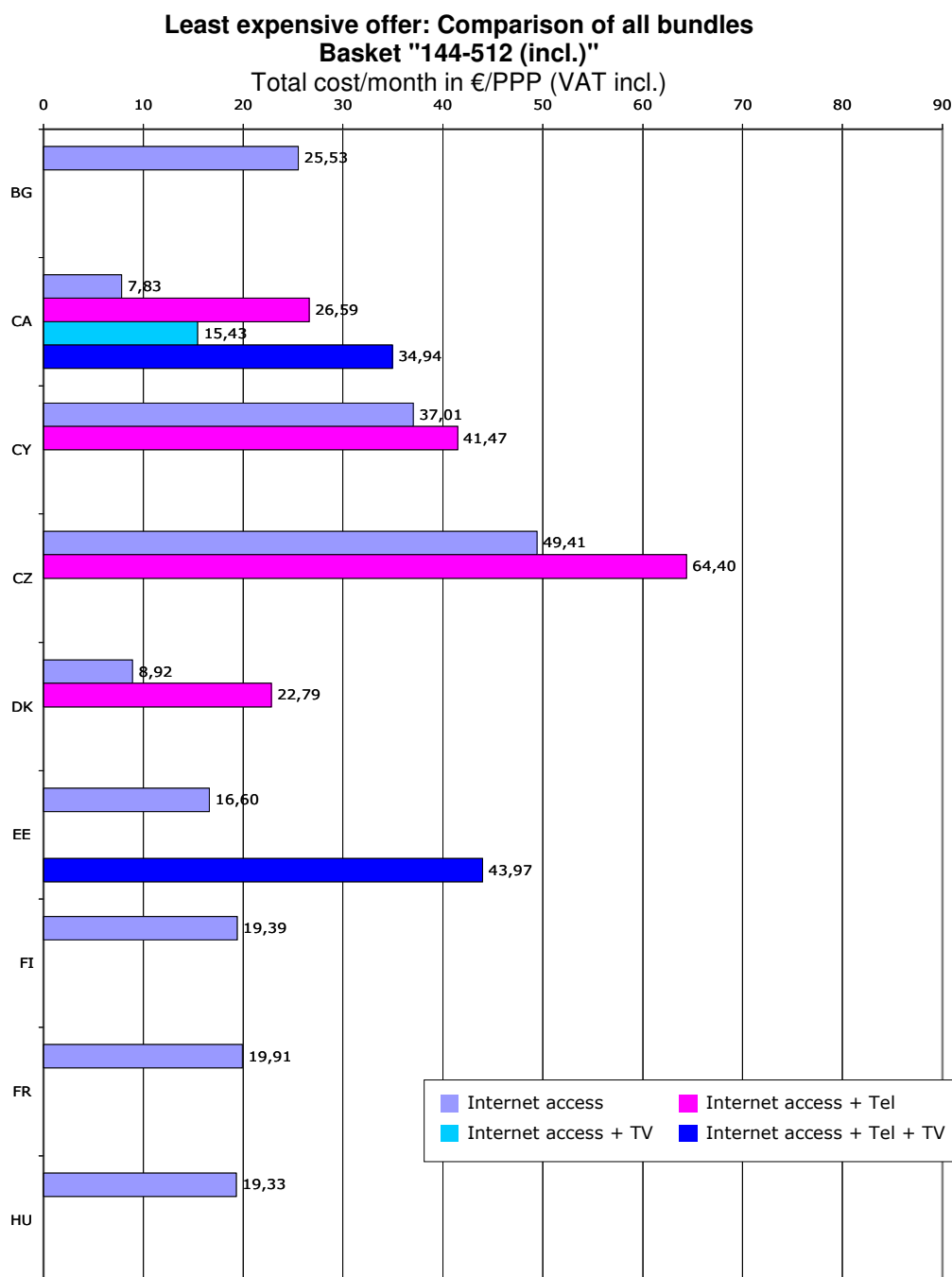
- In *Lithuania* and *Luxembourg*, bundled offers with Internet Access, Fixed Telephony Services and television, were only available for a single basket. Conversely, triple-play bundles are available for each of the seven baskets in *Estonia*, *Poland*, and *Slovenia*.
- In the following countries, offers with higher download speeds were systematically more expensive: *Austria*, *Belgium*, *Denmark*, *Germany*, *Greece*, *Italy*, *Malta*, *Norway* and *the State of Colorado*.
- In some countries charges tended to follow the above-mentioned pattern with the exception of one basket. This was the case for countries like *Canada*, *Hungary*, *Iceland*, *Ireland*, *Slovakia*, *Slovenia*, *Spain*, *the State of California* and *the United Kingdom*.
- The least expensive offers of the other countries demonstrated that higher download speeds did not necessarily lead to more expensive offers.

## 5.5. LEAST EXPENSIVE OFFER PER COUNTRY AND PER BASKET FOR EACH BUNDLE TYPE

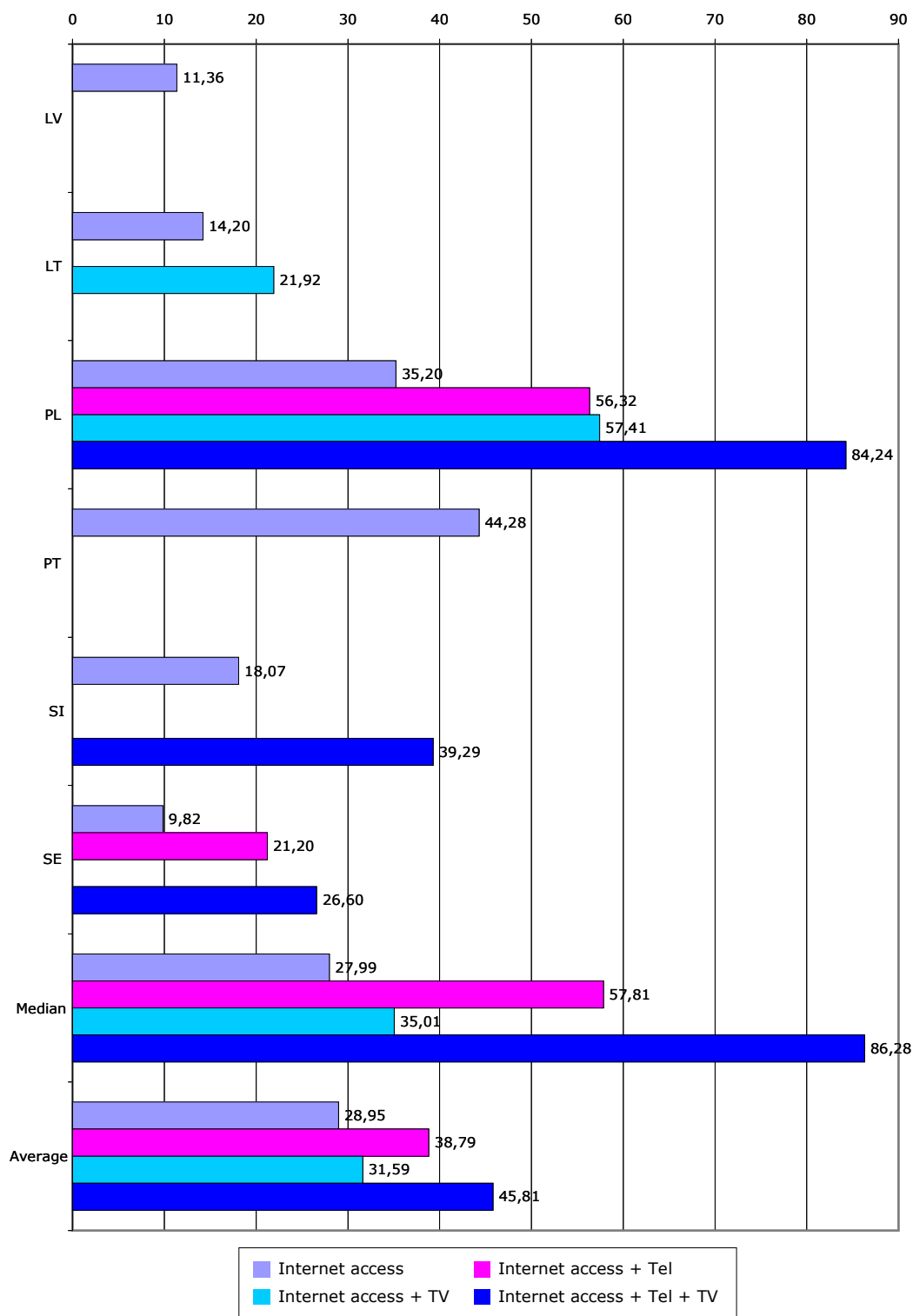
Based on the analysis in the previous paragraphs, a summary per basket for "Internet only" and all bundle types for each country can be presented.

### 5.5.1 BASKET "144KBPS-512KBPS (INCL.)", IN €/PPP (VAT INCL.)

For the following countries, no offer corresponding to this basket was available in the sample: *Austria, Belgium, Germany, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Norway, the Netherlands, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.*



**Least expensive offer:  
Comparison of all bundles  
Basket "144-512 (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “144-512”**

For the following countries, no offer corresponding to this basket was available: *Austria, Belgium, Germany, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Malta, Norway, the Netherlands, Romania, Slovakia, Spain, the State of California, the State of Colorado, the State of New York and the United Kingdom.* .

Within a single country, bundled offers were all more expensive than “Internet only” offers. Moreover, bundles including fixed telephony services tended to be more expensive than bundles including television, while triple play offers were usually the most expensive offers. This however was not always the case.

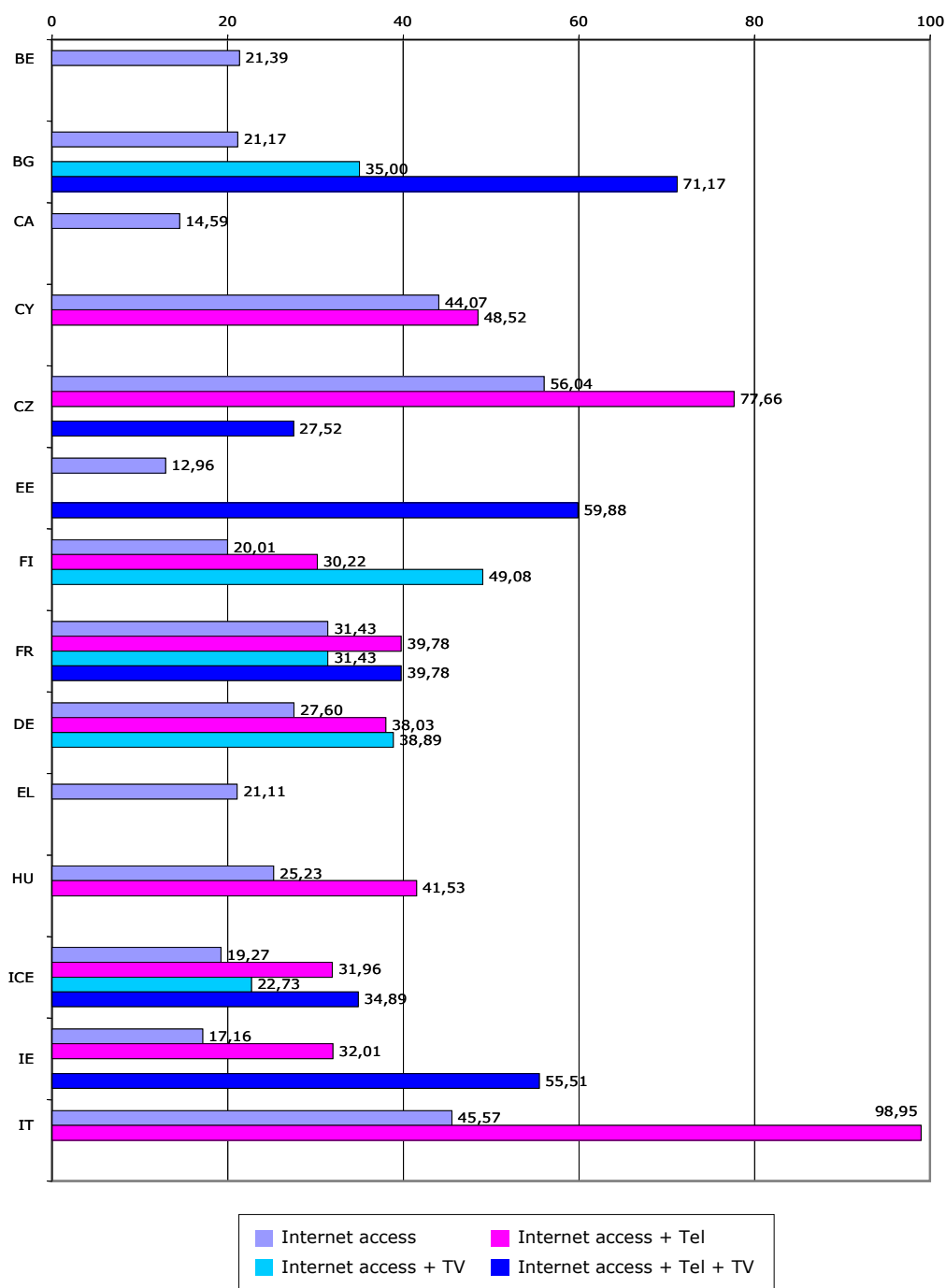
- In the following countries, only “Internet only” offers were available: *Bulgaria, Finland, France, Greece, Hungary, Latvia and Portugal.*
- In two countries, *Canada and Poland*, all types of bundles were offered and followed the above pattern with the exception of Poland where the Internet+Tel bundle was more expensive than Internet + TV bundle.
- All other countries did not offer all types of bundles, though the available offers followed the above pattern, i.e. triple play offers were more expensive than double play offers, which were more expensive than “Internet only” offers.



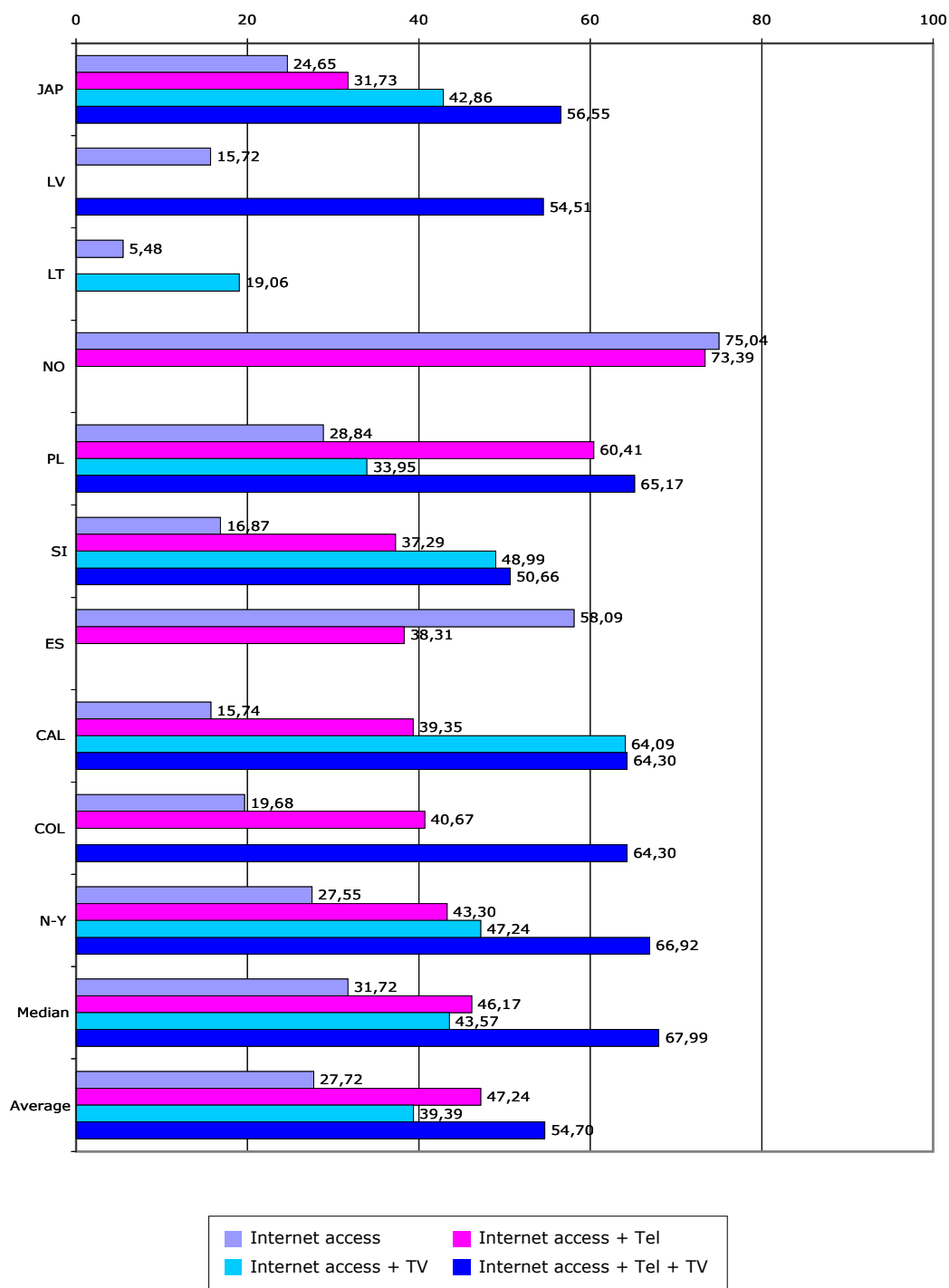
### 5.5.2 **BASKET "512KBPS-1024KBPS (INCL.)", IN €/PPP (VAT INCL.)**

For the following countries, no offer corresponding to this basket was available: Austria, Denmark, Korea, Luxembourg, Malta, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom.

**Least expensive offer:  
Comparison of all bundles  
Basket "'512-1024 (incl.)"**  
Total cost/month in €/PPP (VAT incl.)



**Least expensive offer:  
Comparison of all bundles  
Basket "'512-1024 (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “512-1024”**

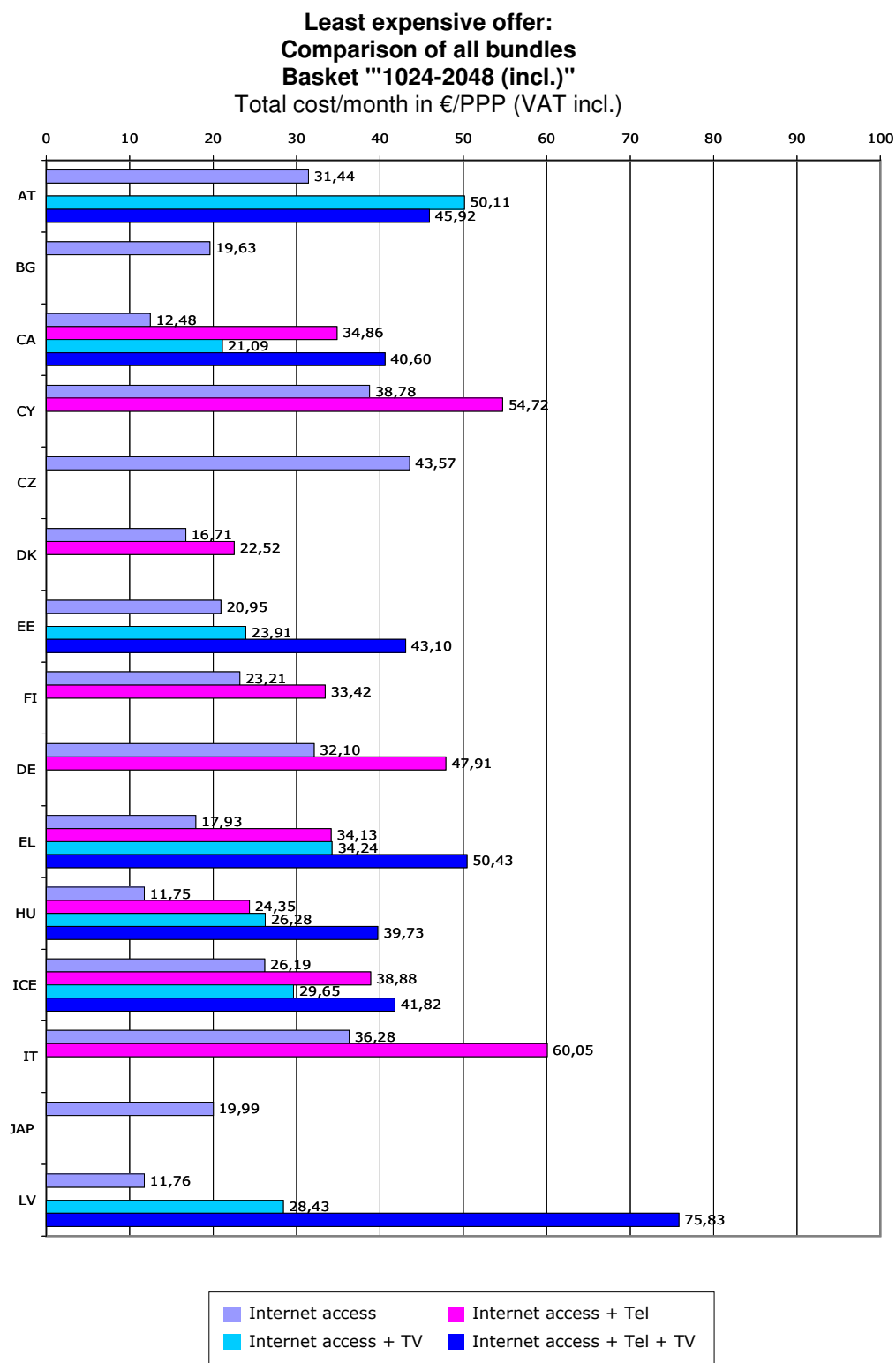
For the following countries, no offer corresponding to this basket was available: *Austria, Denmark, Korea, Luxembourg, Malta, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom.*

Within a single country, bundled offers were all more expensive than “Internet only” offers. Moreover, bundles including fixed telephone tended to be more expensive than bundles including television, while triple play offers were usually the most expensive offers. The median also followed this pattern, though the average of triple play offers was slightly below the average of Internet and fixed telephone bundles.

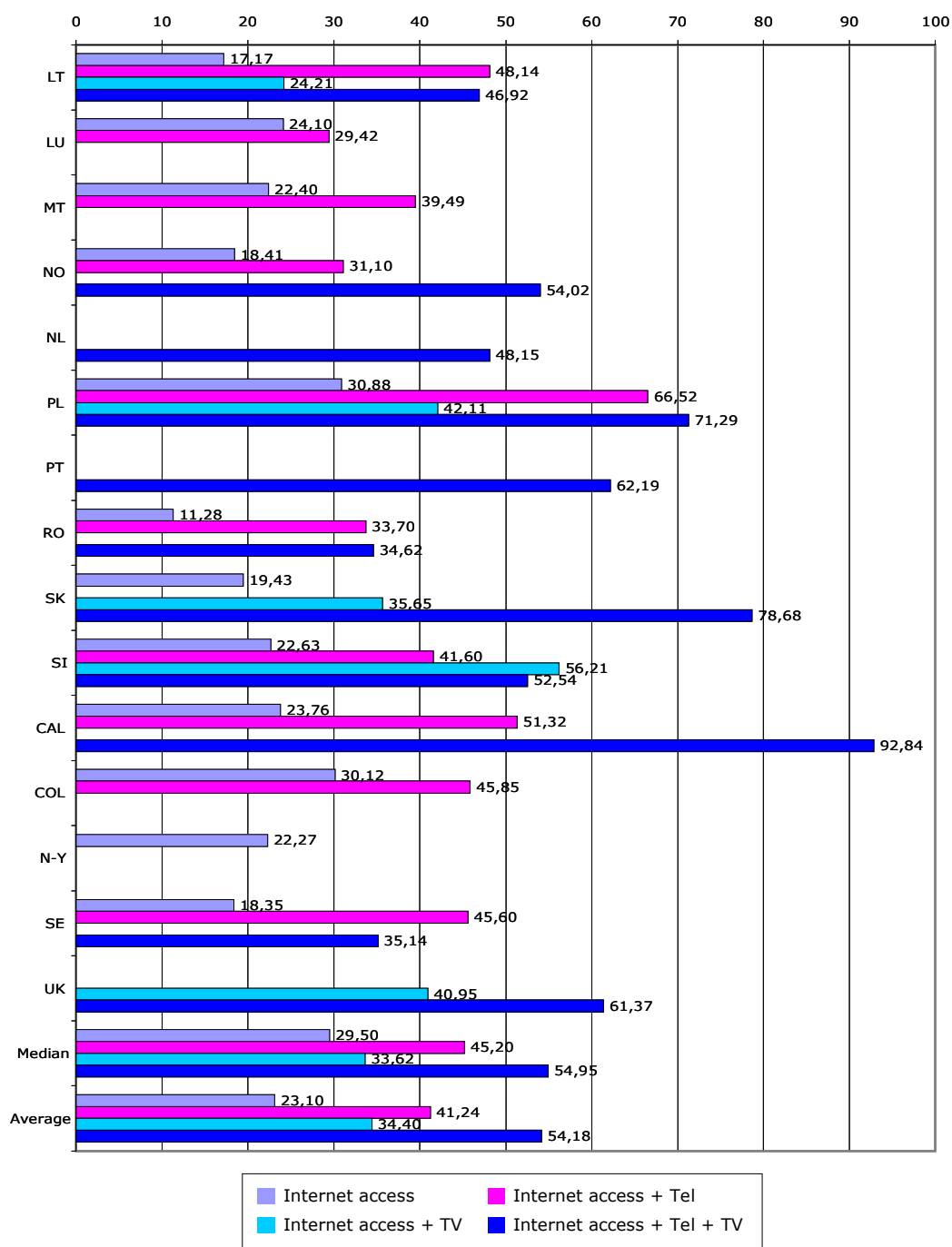
- In the following countries, only “Internet only” offers were available: *Belgium, Canada and Greece.*
- Out of the seven countries where all types of bundles were offered, only three (*France, Iceland and Poland*) followed the above-mentioned pattern. In the other countries (*Japan, Slovenia, the State of California and the State of New York*), bundles including Internet access and television were more expensive than those including Internet access and fixed telephony.
- The least expensive offers for some countries demonstrated that offers that included more services did not necessarily lead to more expensive offers. In *France*, triple play offers have the same price than offers that included Internet access and fixed telephone. In *Norway*, the Internet access offers are more expensive than Internet access + Tel bundle.

### 5.5.3 **BASKET "1024KBPS-2048KBPS (INCL.)", IN €/PPP (VAT INCL.)**

For *Belgium, France, Ireland, Korea, and Spain*, no offer corresponding to this basket was available in the sample.



**Least expensive offer:  
Comparison of all bundles  
Basket "'1024-2048 (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “1024-2048”**

For *Belgium, France, Ireland, Korea, and Spain*, no offer corresponding to this basket was available in the sample.

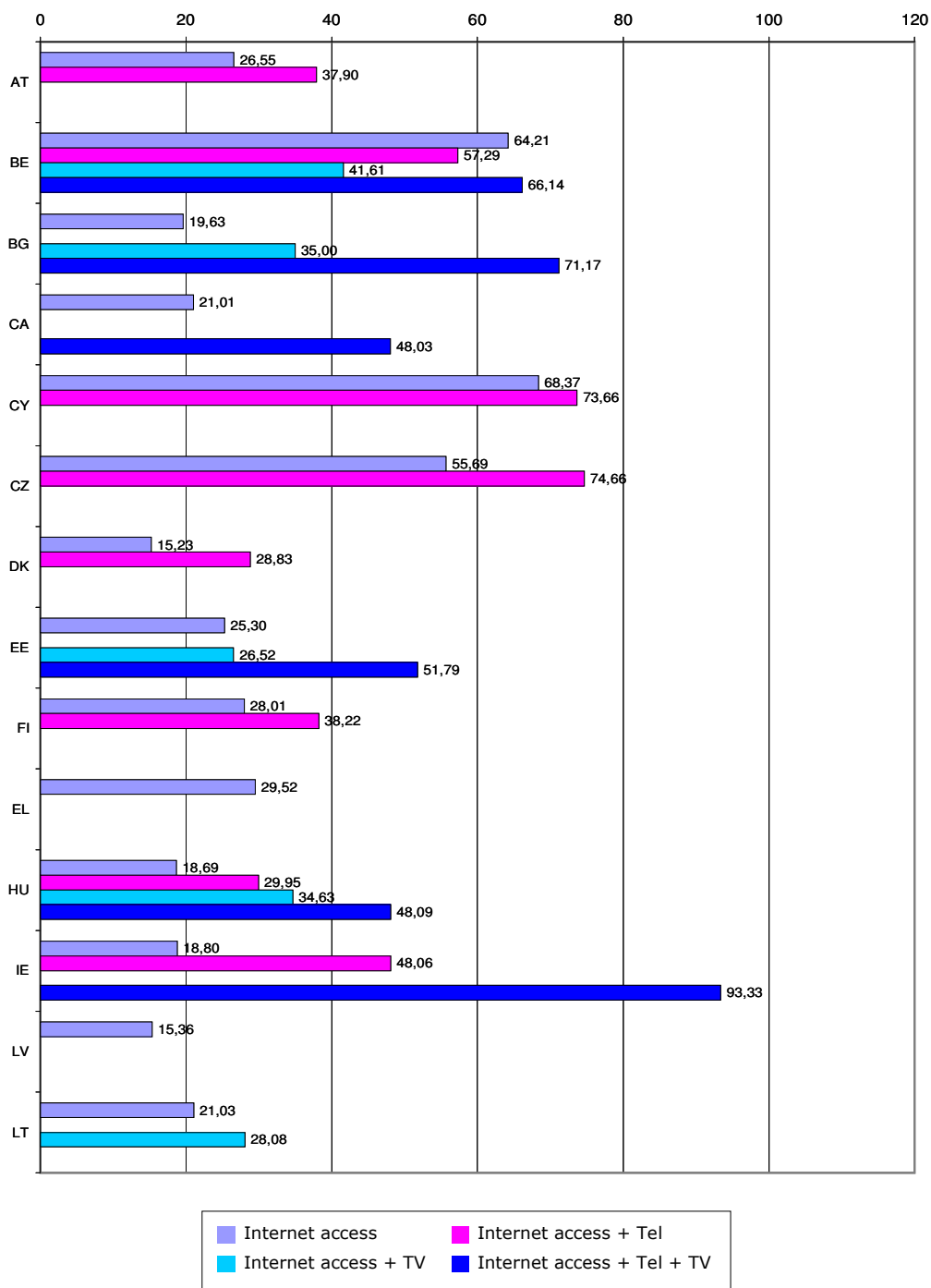
Within a single country, bundled offers were all more expensive than “Internet only” offers. Moreover, bundles that included Fixed Telephony Services tended to be more expensive than bundles that included television, while triple play offers were usually the most expensive offers. The median followed this pattern but the average did not as the bundle including television was more expensive than the one including fixed telephony.

- In the following countries, only “Internet only” offers were available: *Bulgaria, Czech Republic, Japan and the State of New York*.
- In the following countries all types of bundles were offered and followed the above pattern: *Canada, Iceland and Poland*.
- In *Greece, Hungary, Lithuania and Slovenia*, where all bundles were also available, the pattern was not followed, as one offer at least diverged.
- The other countries did not offer all types of bundles, though followed the above pattern. *Austria* and *Sweden* are both exceptions to this pattern as total charges for Internet access + Tel bundle were higher than for Triple play offers.

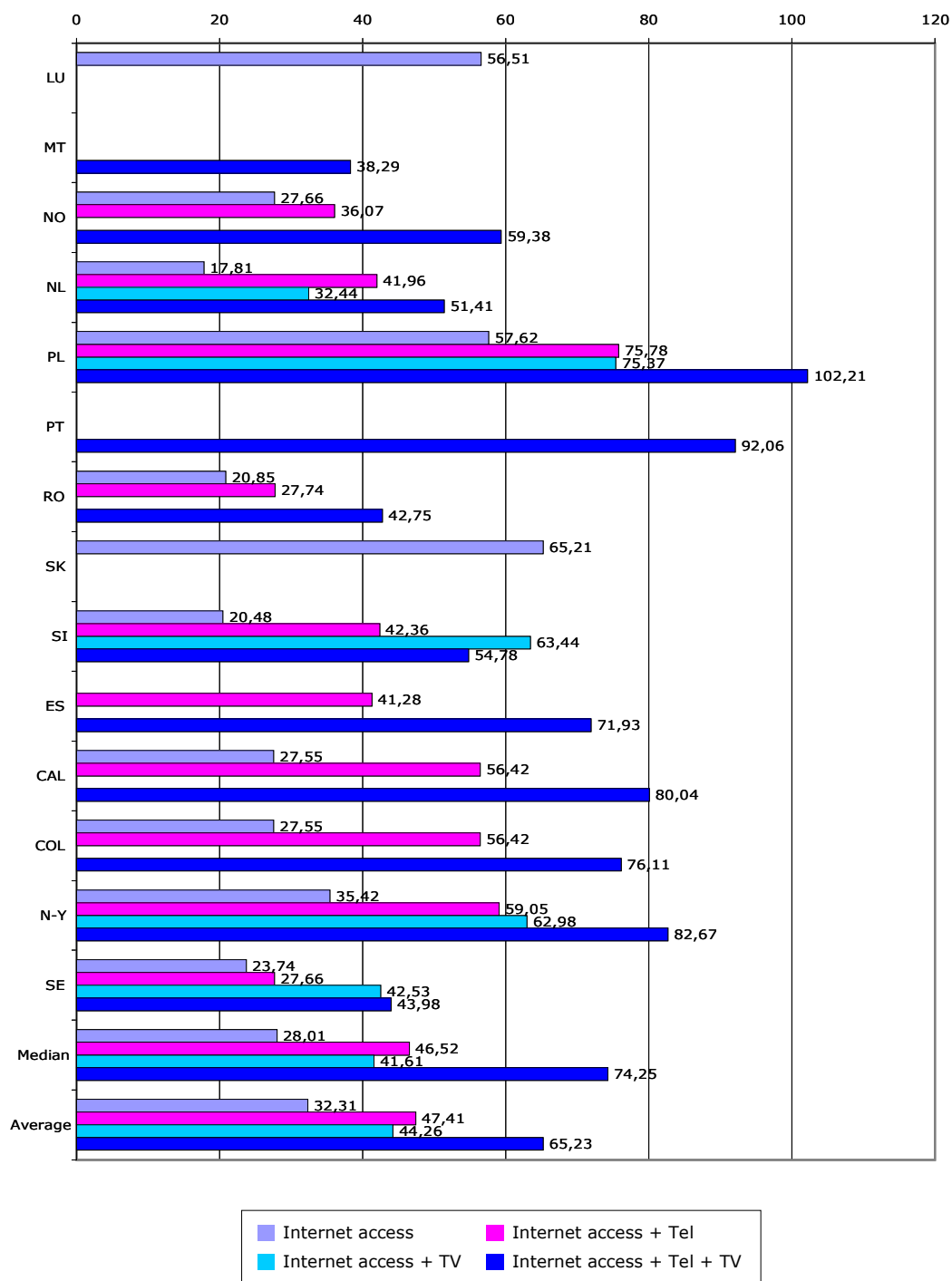
#### 5.5.4 BASKET "2048KBPS-4096KBPS (INCL.)", IN €/PPP (VAT INCL.)

For the following countries, no offer corresponding to this basket was available in the sample: *France, Germany, Iceland, Italy, Japan, Korea, and the UK.*

**Least expensive offer:  
Comparison of all bundles  
Basket "'2048-4096 (incl.)"**  
Total cost/month in €/PPP (VAT incl.)



**Least expensive offer:  
Comparison of all bundles  
Basket "'2048-4096 (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**





### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “2048-4096”**

For the following countries, no offer corresponding to this basket was available in the sample: *France, Germany, Iceland, Italy, Japan, Korea, and the UK.*

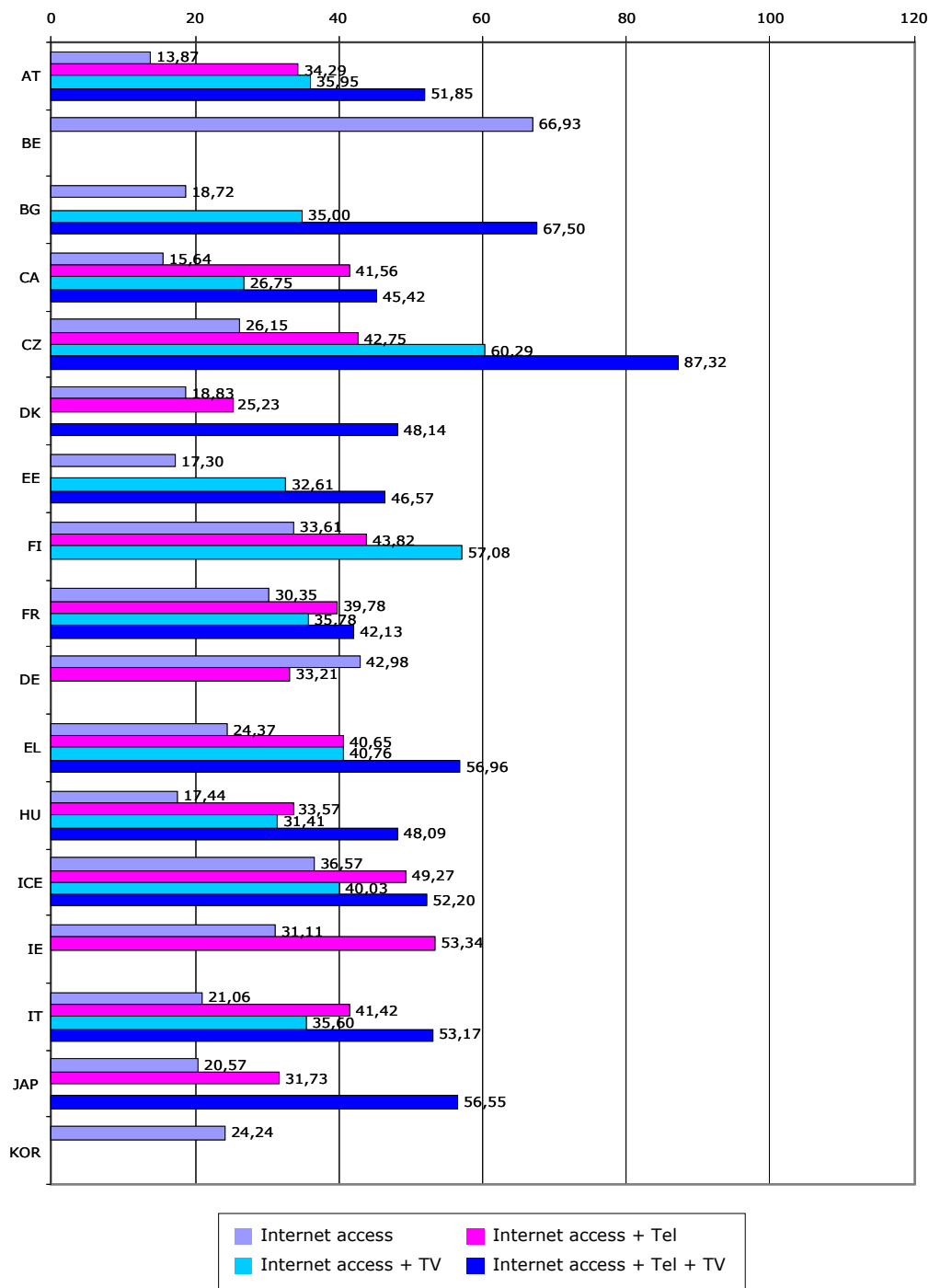
Within a single country, bundled offers tend to be more expensive than “Internet only” offers. Moreover, bundles that included fixed telephone tended to be more expensive than bundles that included television, while triple play offers were usually the most expensive offers. The median also followed this pattern, though the average of the “Internet access+TV” offers were higher than the average of Internet and fixed telephone bundles.

- In the following countries, only “Internet only” offers were available: *Greece, Latvia, Luxembourg and Slovakia.*
- In *the Netherlands* and *Poland*, all types of bundles were offered. They followed the above pattern.
- In *Belgium, Hungary, Slovenia, the State of New York and Sweden*, where all types of bundles were available, charges followed the pattern with the exception of one offer.
- The other countries did not offer all types of bundles, though the available offers followed the above pattern.

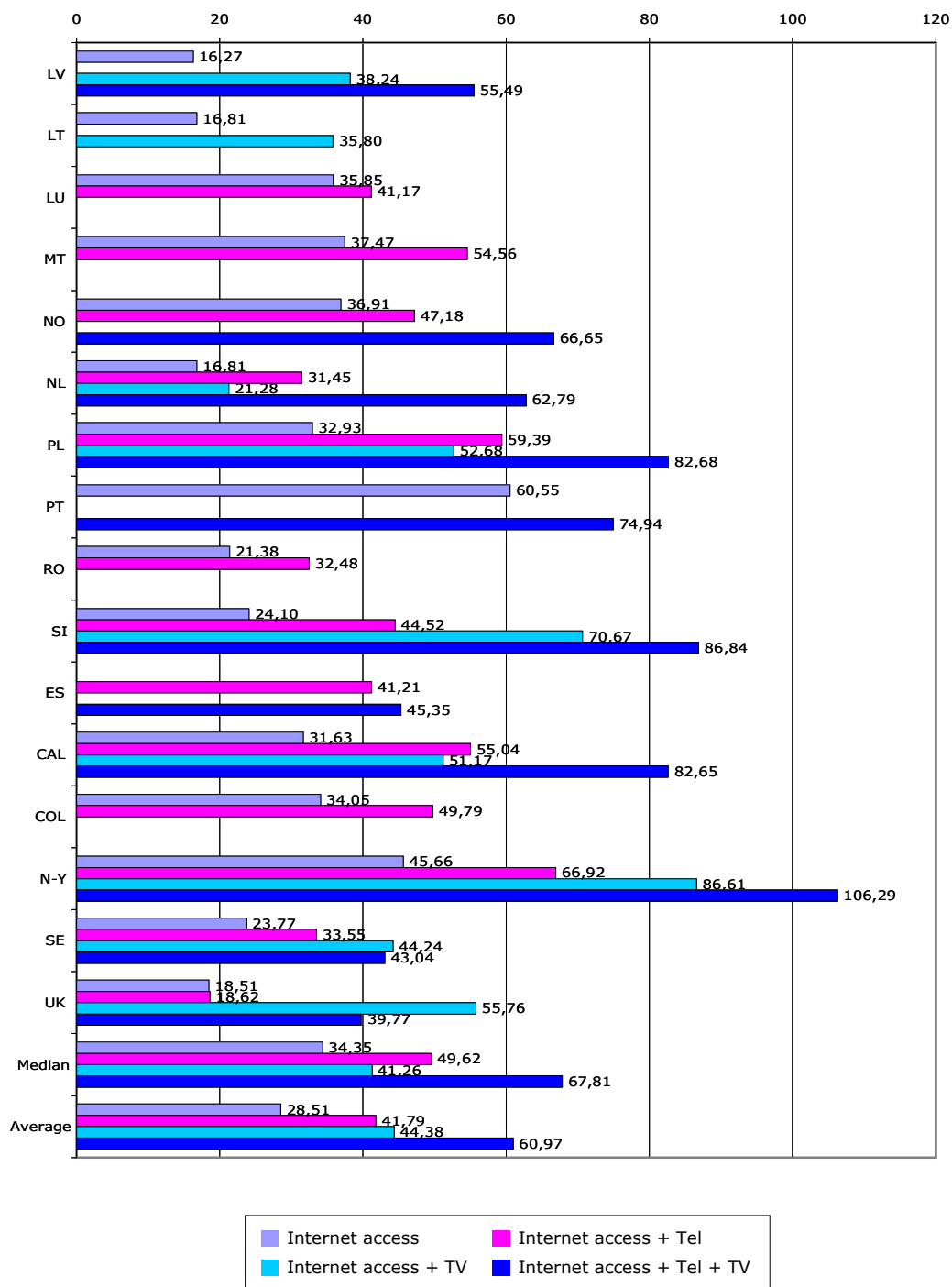
### 5.5.5 **BASKET "4096KBPS-8192KBPS (INCL.)", IN €/PPP (VAT INCL.)**

For the following countries, no offer corresponding to this basket was available: *Cyprus* and *Slovakia*.

**Least expensive offer:  
Comparison of all bundles  
Basket "4096-8192 (incl.)"**  
Total cost/month in €/PPP (VAT incl.)



**Least expensive offer:  
Comparison of all bundles  
Basket "'4096-8192 (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “4096-8192”**

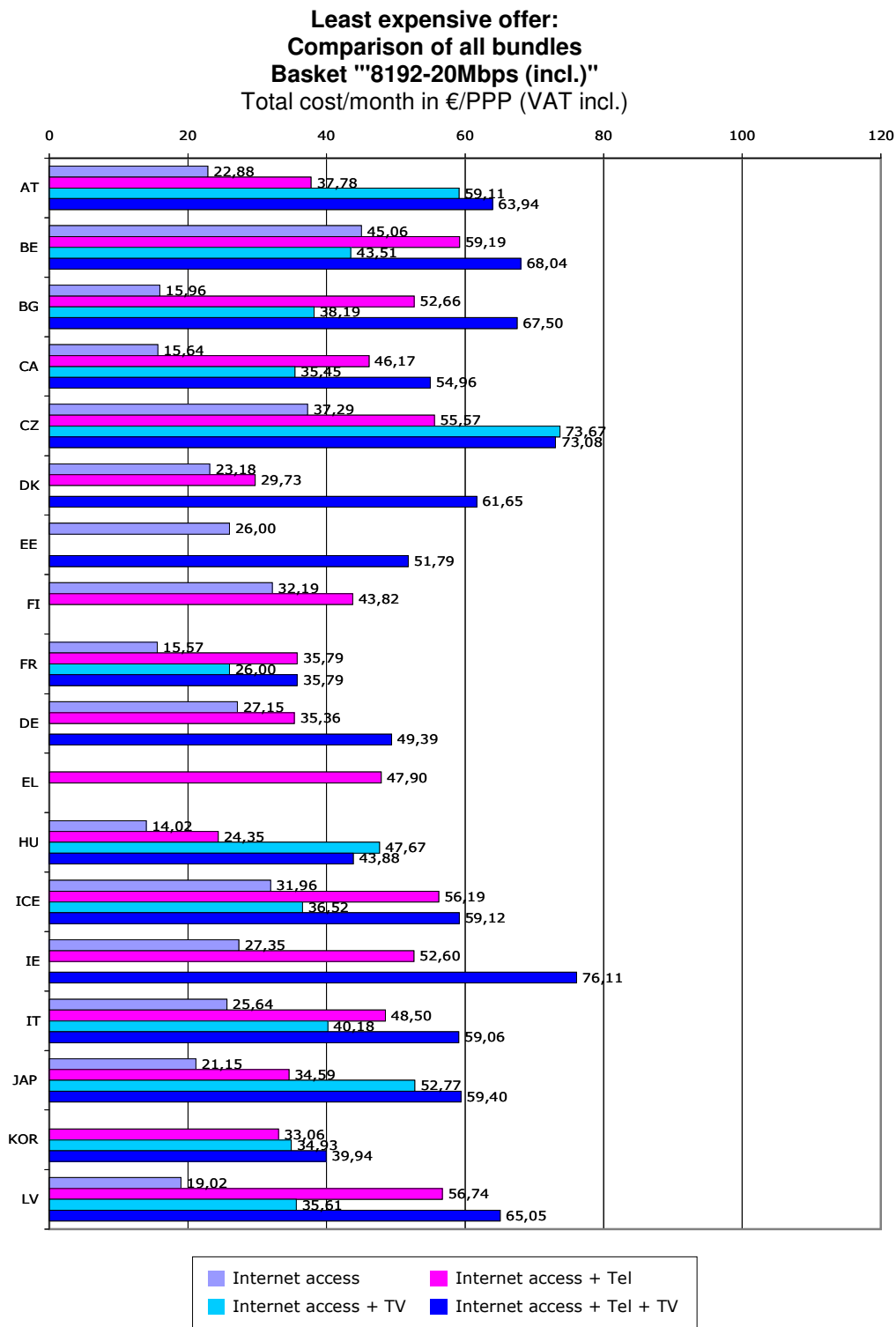
For the following countries, no offer corresponding to this basket was available: *Cyprus* and *Slovakia*.

Within a single country bundled offers tend to be more expensive than “Internet only” offers. In contrast to the previous baskets, there is no clear trend that bundles that included fixed telephone tended to be more expensive than bundles that included television.

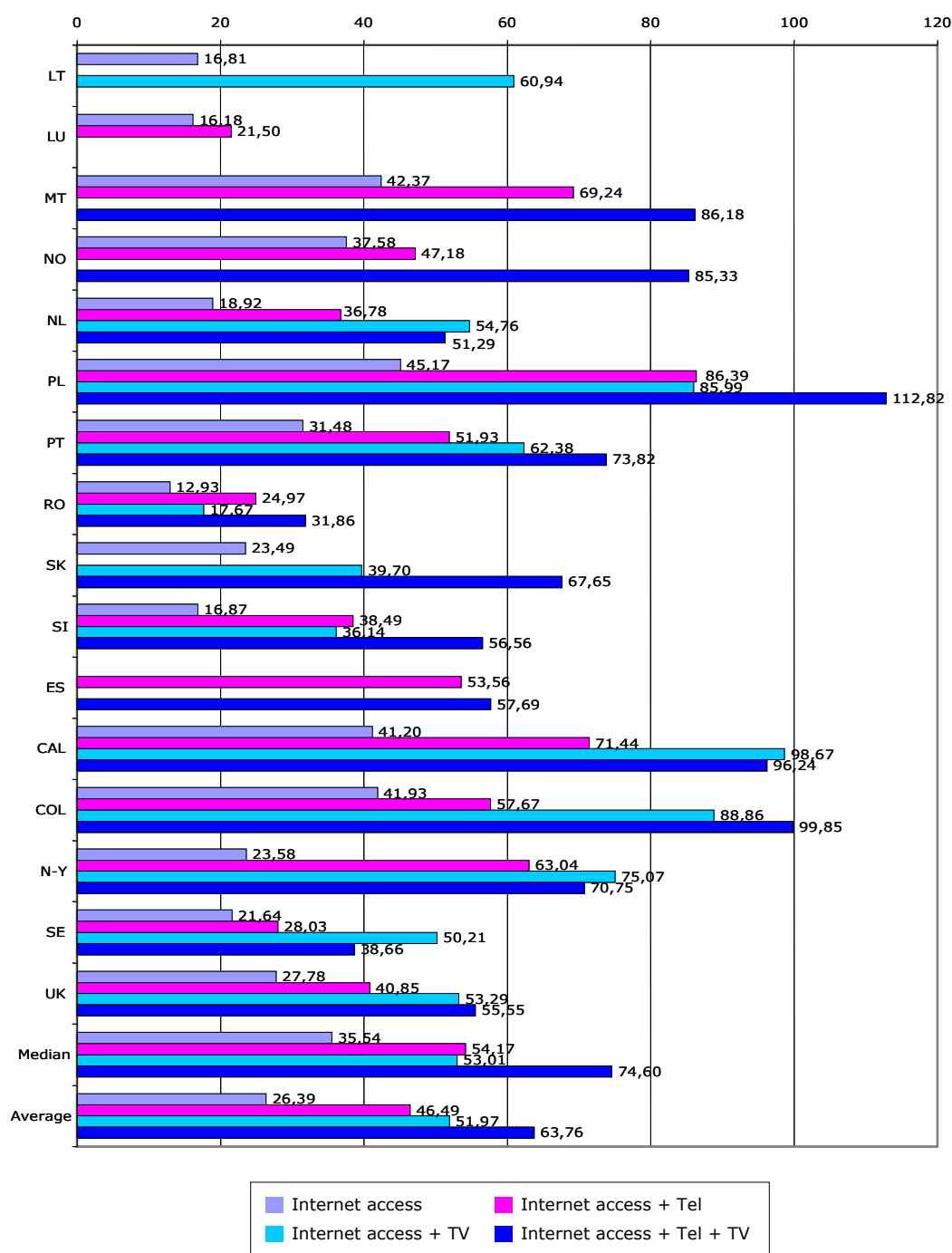
- In *Belgium* and *Korea*, only “Internet only” offers were available.
- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+Tel” bundle was the most expensive: *Canada, France, Hungary, Iceland, Italy, the Netherlands, Poland* and *the State of California*.
- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+TV” bundle was the most expensive: *Austria, Czech Republic, Greece, Slovenia, the State of New York, Sweden* and *the United Kingdom*.
- In *Sweden* and in the *United Kingdom*, the least expensive bundle including TV is more expensive than the least expensive triple-play offer.

### 5.5.6 **BASKET "8192KBPS-20MBPS (INCL.)", IN €/PPP (VAT INCL.)**

For Cyprus, no offer corresponding to this basket was available in the sample.



**Least expensive offer:  
Comparison of all bundles  
Basket "'8192-20Mbps (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “8192-20Mbps”**

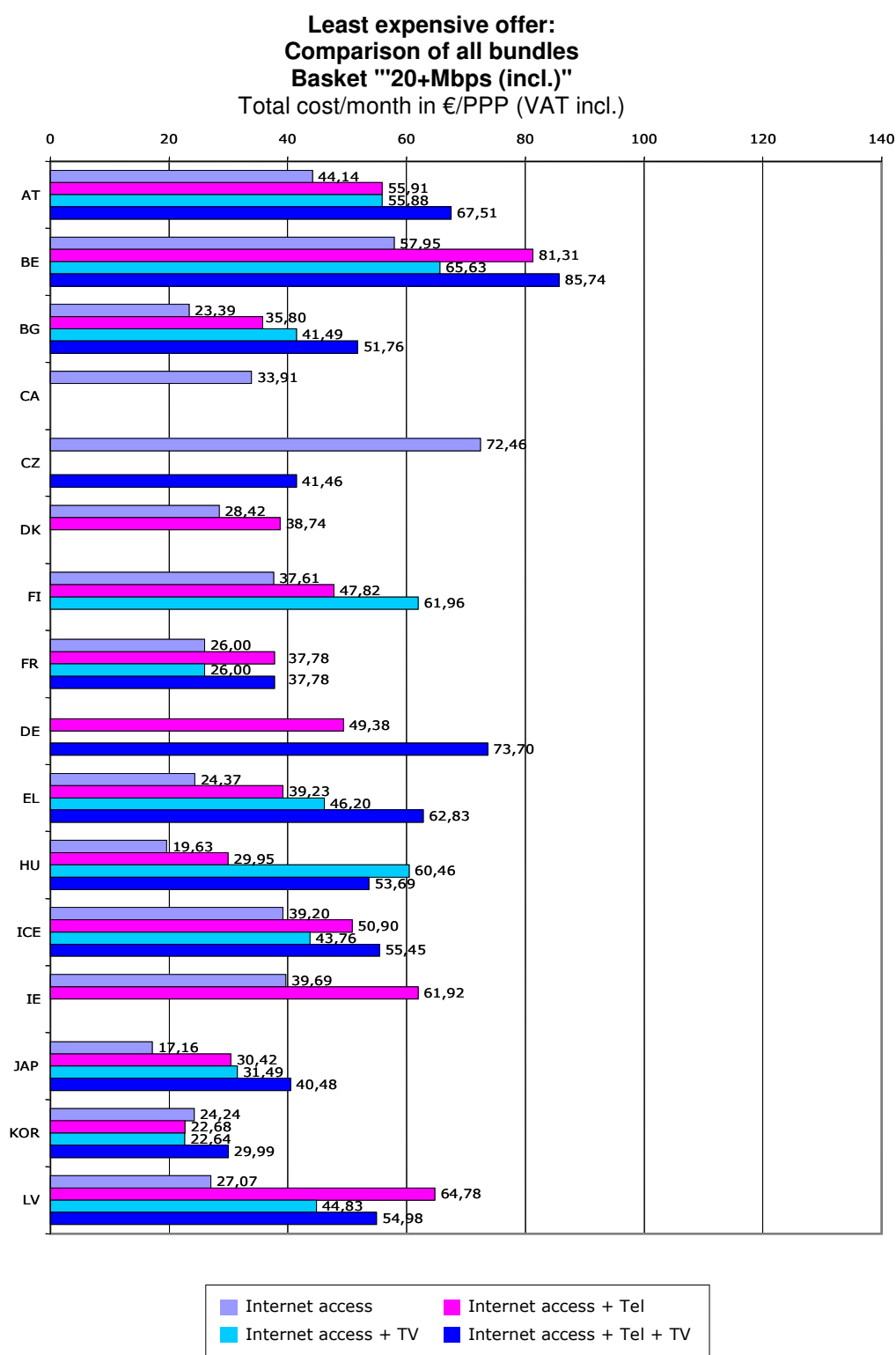
For *Cyprus*, no offer corresponding to this basket was available.

Within a single country bundled offers tend to be more expensive than “Internet only” offers. As was the case for the previous basket, there was no clear trend that bundles that included fixed telephone tended to be more expensive than bundles that included television.

- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+Tel” bundle was the most expensive: *Belgium, Bulgaria, Canada, France, Iceland, Italy, Latvia, Poland, Romania and Slovenia*.
- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+TV” bundle was the most expensive: *Austria, Czech Republic, Hungary, Japan, the Netherlands, Portugal, the State of California, the State of Colorado, the State of New York, Sweden and the United Kingdom*.
- In seven countries, triple-play offers are cheaper than or cost the same as double-play offers. In *France*, the bundle including Internet access and fixed telephone had the same total charges than triple play. In *Czech Republic, Hungary, the Netherlands, the State of California, the State of New York and Sweden*, “Internet+TV” bundles are more expensive than triple-play.
- The other countries did not offer all types of bundles, though the available offers followed the pattern that triple play offers were more expensive than double play offers, which were more expensive than “Internet only” offers.

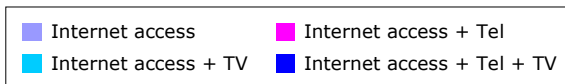
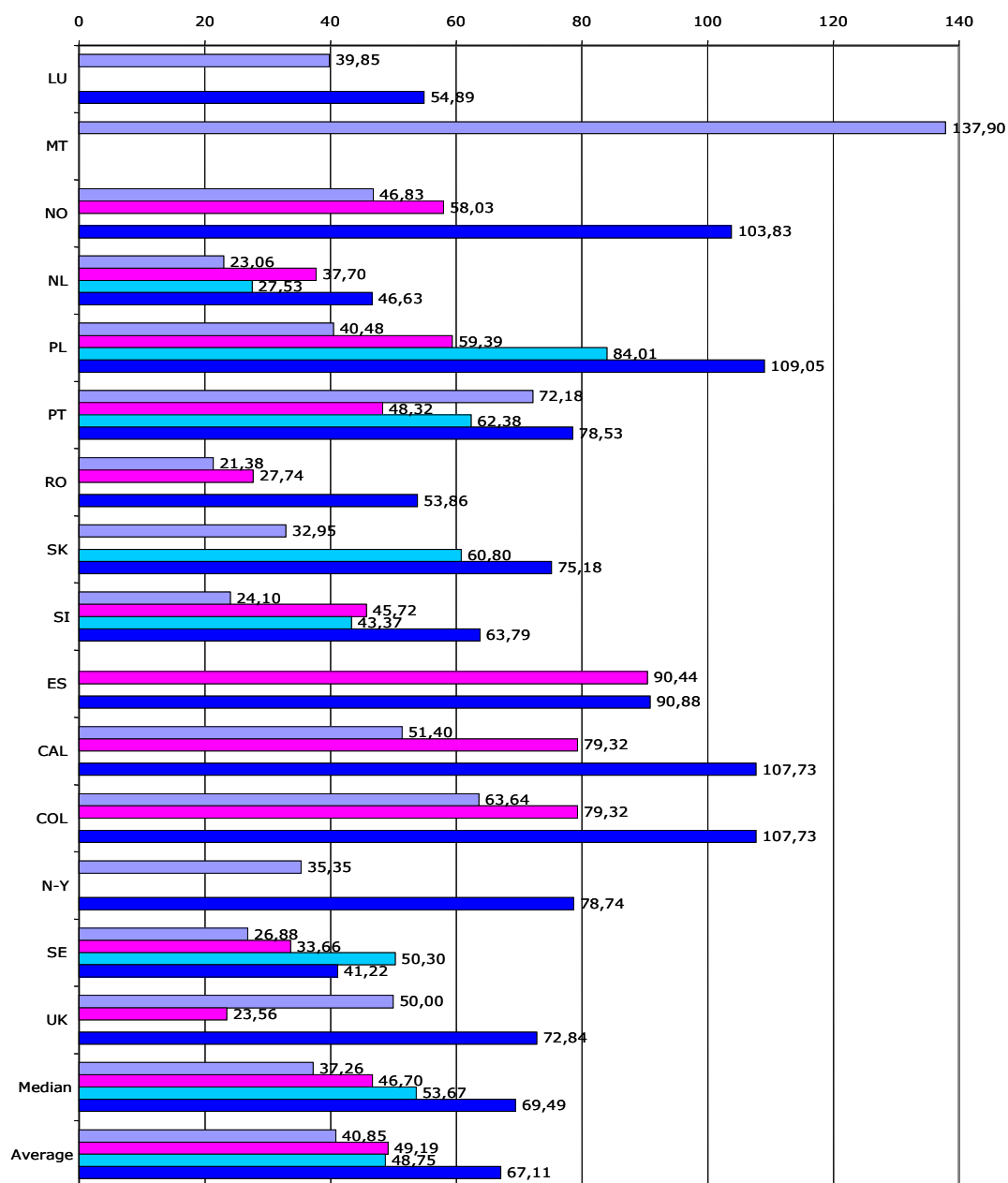
### 5.5.7 **BASKET "20+Mbps", IN €/PPP (VAT INCL.)**

For the following countries, no offer corresponding to this basket was available in the sample: *Cyprus, Estonia and Italy.*





**Least expensive offer:  
Comparison of all bundles  
Basket "'20+Mbps (incl.)" (followed)  
Total cost/month in €/PPP (VAT incl.)**



### **Conclusions on the least expensive offer per country for “Internet only” and all bundle types – basket “20+Mbps”**

For the following countries, no offer corresponding to this basket was available: *Cyprus, Estonia and Italy.*

Within a single country, bundled offers tend to be more expensive than “Internet only” offers. In this sample, there are two exceptions to this pattern: *Korea and the United Kingdom.* There are also three countries for which the bundle including Internet access and fixed telephony or TV is more expensive than “Internet+Tel+TV” bundles: *Hungary, Latvia and Sweden.* In France, as was the case for the previous basket, the bundle including Internet access and fixed telephony is charged at the same rate as triple-play offer.

- In the following countries, only “Internet only” offers were available: *Canada, Lithuania and Malta.*
- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+Tel” bundle was the most expensive: *Austria, Belgium, France, Iceland, Korea, Latvia, the Netherlands and Slovenia.*
- In the following countries, all types of bundles were offered and from the bundles including two services, the “Internet+TV” bundle was the most expensive: *Bulgaria, Greece, Hungary, Japan, Poland and Sweden.*

## 6. GENERAL FINDINGS

Based on the results of the comparisons above, the general findings can be summarised as follows:

1. When comparing the average Broadband Internet Access Cost (based on the least expensive offers per country and expressed in EUR/PPP) in the New Member States (NMS) with the average in the EU15, prices in the former are higher in 2 of the 7 baskets. In October 2009, the average cost in the NMS is lower in the following baskets: 144-512 kbps incl., 512-1024 kbps incl., 1024-2048 kbps incl., 4096-8192 kbps incl. and 8192-20Mbps incl.
2. The comparison over time of the Broadband Internet Access Cost (based on the least expensive offers per country and expressed in EUR/PPP) in the New Member States (NMS) indicates a further decrease of costs, already observed in April 2009, in the baskets 4096 kbps - 8192 kbps incl., 8192 kbps-20 Mbps incl. and 20+ Mbps. This could possibly be stimulating consumers in the NMS into migrating to higher speeds.
3. There is no basket for which the EU15 average, based on the least expensive offers, is the lowest compared to the other groups of countries. The EU15 average is the highest for the following baskets: 144 kbps-512 kbps incl., 512 kbps-1024 kbps incl., 1024 kbps-2048 kbps incl. and 4096 kbps-8192 kbps incl. For the baskets 144-512 kbps incl., 1024 kbps - 2048 kbps incl., 2048 kbps-4096 kbps incl. and 20+ Mbps, the Non EU average is the lowest, followed twice by the averages for the EU15 average (for the fourth and seventh baskets) and twice by the NMS average (for the first and third baskets).
4. The difference between the least expensive offer in a given country and the median Broadband Internet Access Cost might shed some light on the transparency and thus the competitiveness of the market. It remains, however, hazardous to try to draw general conclusions on the basis of the observed values.
5. Most offers in the sample are of the 'unmetered' type; in cases where both metered and unmetered types are offered, no conclusion can be drawn as to which type of offers are less expensive.
6. In general it can be concluded that the charges depend on the download speed, but in only a very few countries (e.g. *Malta*), the cost of higher speeds are also systematically more expensive. In most cases and despite the global trend that charges depend on the download speed, offers with higher speeds can be less expensive than offers with lower speeds (e.g. *Austria* and *France*). This could indicate a low transparency of the market or it could be caused by regional availability or it may come from the new technology developments (DOCSIS 3.0 for cable offers and deployment of FTTC and FTTH networks).

7. The analysis does not show unambiguously that where, in a given country, xDSL, Cable as well as FTTx based access are offered (i.e. 'multi-platform countries'), generally the prices are lower compared to countries where only one technology is offered (i.e. mono-platform countries). In 24 cases, all three technologies were available for a specific basket in a specific country. In 10 of these cases, the FTTx offer was the least expensive, and in 11 cases, xDSL was the least expensive. Cable was the least expensive in 1 case, and in 2 cases, prices were equal for different technologies (*Finland*). In about two third of the cases where only xDSL and Cable technologies were offered, the Cable median offer was more expensive than the xDSL median offer in any given country.
8. Depending on the basket, the number of cases in which incumbent operators emerge as the least expensive ones varies between 1 out of 15 countries (for the offers with download speeds of 8192 kbps-20+ Mbps incl.) and nearly 1 out of 2 countries (512 kbps-1024 kbps incl.), but they never form the majority of the cases. Compared to April 2009, more incumbent operators provided the least expensive offers.
9. There is no general conclusion to be drawn on the way in which the total charges are split between recurring and non-recurring charges: in some countries, the least expensive offers do not explicitly charge for one-off expenses, whereas in some other countries, the least expensive offers for some baskets may comprise 40% or more (see e.g. Germany in the basket 512 kbps-1024 kbps incl.) of the non-recurring charges.
10. In October 2009, for the first time, over 50% of the offers that were collected contain services in addition to the Internet access (telephone and/or television); this trend to bundle offers is to be observed for nearly all countries. Not all countries offer each type of bundles.
11. For the bundled offers including Fixed Telephone Services, it could be observed that most often additional charges for the fixed telephone services are required. This implies that 'flat fees' are not at all common for these bundles. Flat fees were however recurring in France and in the USA.
12. The bundle including Internet Access and Television Services is the least popular one in October 2009. It is only offered in 28 countries (of which seven countries are non EU), compared to 33 countries for the two other types of bundles.
13. In October 2008, the bundled offers including Television Services were on average less expensive than the bundled offers including Fixed Telephony. In October 2009, this is not systematically the case any more, especially for the baskets with higher speeds, as this trend is reversed in a number of countries. Finally, on average and for all baskets triple play offers are the most expensive bundles.

## ANNEXE 1: OVERVIEW OF THE MOBILE ISPs SELECTED FOR EACH COUNTRY.

Country	ISP	Status
Austria	T-Mobile Austria	Incumbent
	Mobilkom Austria	New entrant
	H3G Austria	New entrant
	Orange Austria	New entrant
Belgium	Belgacom Mobile	Incumbent
	Base	New entrant
	Mobistar	New entrant
Bulgaria	BTC Mobile - Vivatel	Incumbent
	Cosmo Bulgaria Mobile	New entrant
	MobilTel	New entrant
Canada	Bell mobility	Incumbent
	Rogers Wireless	New entrant
	Telus	New entrant
	Cytamobile Vodafone	New entrant
	Areeba	New entrant
Czech Republic	T-mobile CZ	Incumbent
	Telefonica O2 CZ	New entrant
Denmark	TDC	Incumbent
	Telenor Denmark	New entrant
	Telia	New entrant
	Telmore	New entrant
Estonia	EMT	Incumbent
	Elisa Estonia	New entrant
	Tele 2 Estonia	New entrant
Finland	Elisa Finland	Incumbent
	DNA	New entrant
	Sonera	New entrant
France	SFR	Incumbent
	Bouygues Télécom	New entrant
	Orange France	New entrant
Germany	T-Mobile Germany	Incumbent
	E-Plus	New entrant
	O2 Germany	New entrant

	Vodafone Germany	New entrant
Greece	Cosmote Greece	New entrant
	Vodafone Greece	New entrant
	Wind Hellas	New entrant
Hungary	Magyar Telekom	Incumbent
	Pannon	New entrant
	Vodafone Hungary	New entrant
Iceland	Siminn	Incumbent
	Vodafone Iceland	New entrant
Ireland	3 Ireland	New entrant
	Meteor	New entrant
	O2 Ireland	New entrant
	Vodafone	New entrant
Italy	Telecom Italia	Incumbent
	H3G Italy	New entrant
	Vodafone Italy	New entrant
	Wind	New entrant
Japan	NTT DoCoMo	Incumbent
	au by KDDI	New entrant
	Softbank	New entrant
Korea	KT Telecom	Incumbent
	LG Telecom	New entrant
Latvia	Latvijas Mobilais Telefons	Incumbent
	BITE Latvia	New entrant
	Tele 2 Latvia	New entrant
	Telekom Baltija	New entrant
Lithuania	Bite Lietuva	New entrant
	Omnitel	New entrant
	Tele 2 Lithuania	New entrant
Luxembourg	Tango	New entrant
	Voxmobile	New entrant
Malta	Go Mobile	Incumbent
	Vodafone Malta	New entrant
The Netherlands	KPN	Incumbent
	T-Mobile NL	New entrant
	Vodafone NL	New entrant
Norway	Telenor	Incumbent
	ICE	New Entrant

	NetCom	New Entrant
Poland	PTC	Incumbent
	Polkomtel	New entrant
	PTK Centertel	New entrant
Portugal	TMN	Incumbent
	Optimus	New entrant
	Vodafone Portugal	New entrant
Romania	Cosmote Romania	New entrant
	Orange Romania	New entrant
	Vodafone Romania	New entrant
Slovakia	T-Mobile Slovakia	Incumbent
	Orange Slovakia	New entrant
Slovenia	Debitel	New entrant
	Mobitel	New entrant
	Simobil	New entrant
Spain	Orange Spain	Incumbent
	Movistar	New entrant
	Vodafone Spain	New entrant
Sweedden	TeliaSonera	Incumbent
	Nordisk Mobiltelefon Sweden	New entrant
	Tele2 Sverige	New entrant
	Telenor Sverige	New entrant
	Tre	New entrant
The United Kingdom	T-Mobile UK	Incumbent
	3UK	New entrant
	O2 UK	New entrant
	Orange UK	New entrant
	Vodafone UK	New entrant
USA	AT&T	Incumbent
	Sprint	New entrant
	T-Mobile USA	New entrant
	Verizon	New entrant