



Broadened

Six months ago, *PC Advisor* nailed a broadband flag to its mast with an in-depth 40-page supplement devoted to the subject. Half a year on, Guy Dixon takes stock and revisits some of our original case studies to see how things have changed

A recent poll on the *PC Advisor* website revealed that over the past six months more than one in four respondents had upgraded to a broadband connection. Collectively, that means more than half of *PC Advisor* readers have moved up to a high-speed internet connection. Back in mid-summer, that figure stood at just 17.5 percent.

One crucial aspect remains the same, however. Nearly a third (32.2 percent) of

respondents indicated they simply can't get ADSL or cable connections in their area – figures almost perfectly in line with official broadband availability.

For this substantial minority, little has changed in the past six months despite all the hullabaloo surrounding BT Wholesale's preregistration scheme. The telco's plan was to sniff out potentially profitable ADSL pockets of demand by asking interested parties to register on its website.

There have also been several BT Wholesale broadband trials that never seem to come to commercial fruition and the occasional mention of so-called Midband – an ISDN-based product that could potentially be rolled out to most of the UK's population. Sadly it is businesses and residential users in the more sparsely populated regions who would benefit most from broadband technology.

Six months ago it was the no-frills connection-only ADSL service from BT Broadband that was making all the running, questioning the very *raison d'être* of the traditional ISP. Why pay for all those extra trimmings, such as umpteen email addresses, web space and aggregated content, when all you use your ISP for is a leg up to the internet?

BT then proceeded to blast our TV screens with a surreal £33m 10-day advertising campaign, starring pigs on motorbikes and three-headed dinosaurs with a gastronomic penchant for

horizons

pensioners. The ad campaign left *PC Advisor* reader Tony Balding in a state of confusion. "I keep seeing these TV ads for BT Broadband where a rhino, dinosaur or some other character escapes from 'the pipe'," he explains. "What's this ad all about? I've had broadband, though not with BT, for some while now and not once have I experienced anything like this. Am I missing something?"

Competitive advantage

At least by placing the term 'broadband' at the centre of its advertising message – as opposed to the less user-friendly 'ADSL' – BT provided a consciousness-raising boost that benefitted cable and ADSL providers alike.

At the time, BT Broadband was charging £27 per month – a long way off the cheapest resellers of ADSL (much of its pricing thunder was

eclipsed by value deals from the likes of Pipex). However, it still compared favourably with the content-rich broadband offering from AOL which was priced at £34.99 per month.

Six months on BT's comparative value-for-money rating is looking less appealing. With AOL now offering a comprehensive broadband content package, email and instant messaging, free helpline and parental controls for 99p more per month (those signing up before the end of March actually get a month free) family users may no longer see BT Broadband as a realistic option.

Add to this the variety of extremely competitive deals that continue to appear on the market, seducing broadband virgins, and BT Broadband may have to do more than offer free activation until the end of March if it's to hit its self-imposed summer target of half a million subscribers.

Case study: Telewest

Name **Peter Jackson**

ISP **Telewest Blueyonder (1Mbps)**

Went broadband **November 01**

In the past six months Peter says he's had just one "outage" lasting about three hours. It just so happened that this was during a critical period when he needed to email reports to clients. He says the support he received from Telewest Blueyonder was "very good" but he's "not happy that this is no longer going to be a freephone service".

Over the past six months he has found himself paying for bigger items online such as flights and credit card bills. His daughter has taken to spending hours on the web, mostly using instant messaging, in line with most broadband usage. Meanwhile, Peter's 56K modem has found its way into the bin.



Case study: Force9

Name **Vince Marsters**

ISP **Force9 (ADSL)**

Went broadband **June 02**

Vince experienced technical problems back in October when he says the whole of Plusnet, which owns Force9, seemed to fail.

Though it took a day to fix the problem, he says he would still opt for Force9 if he had to choose his broadband connection again. "Force9 offers me so much more than basic internet access, particularly Fax2email and [scripting language] CGI."

He now downloads files without having to think about their sizes. This is especially useful in his work as a field engineer, as some of the files (driver updates) can be over 100MB in size.

Looking to the future, Vince says he'd like an SLA (service level agreement) where Force9 would contractually guarantee a certain level of service. The issue is a contentious one, as many broadband ISPs are reluctant to offer SLAs on their residential services, as BT Wholesale (from which they buy ADSL) doesn't offer great scope for doing so. As such, Vince warns against building a business around the broadband packages currently on offer.

"I think many people view ADSL as an alternative to a leased line, which it isn't. It can (and has done in the past) go down for days and you have no comeback. The sooner some people realise this the better," he warns.

Vince says he would certainly consider a faster ADSL service should it become available. "If a 1Mbps home connection came along at around £35 per month then I might consider the switch. It's a question of wait and see until BT Wholesale make the first move."



Bandwidth throttling

The challenges faced by broadband ISPs attempting to deal with heavy users of P2P (peer-to-peer) file-swapping services such as Kazaa aren't getting any easier either. Love it or loath it, the P2P revolution has proved a key spur to the uptake of broadband. But it could be placing an intolerable burden on ISPs.

It was BT Broadband that first broached the issue by stating in its terms and conditions that it didn't expect a user of its service to download more than 1GB worth of data within any 24-hour period. While this represents far more than an average user would ever dream of downloading, hefty P2P users are taking up far more bandwidth than broadband suppliers can afford.

FairADSL, for example, has been forced to throttle P2P applications after discovering that such file-swapping networks accounted for 60 percent of its traffic. This despite the fact that P2P was coming from a minority of users.

So-called 'throttling' doesn't choke off P2P usage altogether, but it does slow download speeds ensuring the quality of other broadband usage, such as online gaming. Much will depend on how the entertainment and IT industries respond to the challenges ushered in by the P2P file-sharing revolution.

If its usage can't be contained, a further more expensive tier of broadband services will have to be provided to accommodate hefty download usage.

On the up

The cable landscape is healthier than it was half a year ago. Britain's cable duopoly – that is, NTL and Telewest – appear to have held their own in terms of broadband subscriber numbers, weathering a barrage of marketing from their ADSL rivals. Both NTL and Telewest also show clear signs of digging their way out of their respective financial nightmares, following the cable industry's frenetic acquisition spree in the late 90s.

NTL, the bigger of the two companies, has emerged from US Chapter 11 bankruptcy with a business that is split in two: UK and Ireland operates as a separate entity to continental Europe.

Nearly £7bn worth of debt has been swapped with creditors in exchange for shares in the new companies. The smart money was always on the both cable companies staving off collapse. The even smarter money is now on a merger between to form a cable monopoly.

Standing alone

The past six months has also seen NTL offering standalone broadband packages without any compulsion to take its TV or phone services. Nor will the company charge you a price premium for doing so.

Customers are looking at £24.99 per month for NTL's 600Kbps (kilobits per second) service, £34.99 per month for its 1Mbps (megabits per second) package, which compare favourably with any of the ADSL providers.

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Case study: BT Openworld

Name **Guy Dixon**

ISP **BT Openworld Home 500**

Went broadband **November 00**

PC Advisor's online editor, Guy, has been with BT Openworld for two and a half years and can only recall one or two outages. The biggest problem has been trying to get BT Openworld to sell him a basic wireless networking solution that would allow him to move his notebook throughout the house, while connecting wirelessly to an ADSL modem.

Though BT has been advertising its BT Voyager 2000 Wireless ADSL modem at www.bt.com/homenetworking for some time, Guy couldn't find anyone at either BT Openworld or within BT Retail (responsible for the provision of BT Broadband) who had heard of the product. This is a shame, because having installed the modem and fitted the BT Voyager 1020 Laptop Adapter card he was roaming wirelessly at broadband speeds in under 20 minutes.

Guy would switch to cable if it became available in his area of East London, opting for a top-of-the-range 1Mbps package. He was interested to read recent announcements by London-based ISP Bulldog, which has begun offering 2Mbps ADSL downstream speeds during non-office hours. Again, though, he was disappointed to find the company's service doesn't stretch beyond the centre of the metropolis. He can only hope that if and when BT Wholesale gets round to reselling SDSL, there will be ISPs prepared to offer up residential versions.



Telewest, by contrast, continues to penalise broadband customers uninterested in the delights of topless darts and endless travel channels. Non-TV punters pay £5 more – £29.99 for its 512Kbps service and £39.99 for 1Mbps. Disappointingly, Telewest has also opted to drop its freephone support.

DIY solutions from the cable companies are also making life easier for prospective cable broadband customers. Over the past six months, Telewest Broadband has joined its sibling NTL by launching a £12.50 self-install pack to digital TV customers. It makes use of the cable modems embedded in the latest generation of set-top boxes and allows a connection between the set-top box and PC for either 512Kbps or 1Mbps Blueyonder broadband services. Customers will normally receive their pack within 48 hours and setup is said to take around 30 minutes.

All hooked up

Refusing to let the ADSL resellers have wireless networking their own way, NTL has teamed up with Linksys to provide customers with much-needed cable broadband home networking solutions.

NTL offers its customers the opportunity to share internet access, files, printers and scanners as well as playing multiple player games with users around the house – all via a single high-speed broadband connection.

Linksys is supplying wired and wireless routers, along with PCI, PC Cards and USB adapters for desktop and notebook computers. Prices for a typical wireless home network solution – that is, a wireless router and wireless USB adapter – costs around £149.99.

Wholesale war

The last six months has also witnessed the first serious challenge to BT Wholesale (which resells ADSL to other ISPs) as a broadband wholesaler.

Back in the summer there was speculation surrounding the UK's biggest ISP, Freeserve, and whether it would pay NTL for the right to deliver broadband service over the company's cable network. In fact it was archrivals AOL that has made the initial running.

This spring will see AOL Broadband available to customers living in broadband-enabled NTL franchises – some 7.2 million

Case study: BT Broadband

Name **Oliver Dell**

ISP **BT Broadband**

Went broadband **September 02**

Our very own web developer, Oliver Dell, considered an NTL broadband package when he moved into an NTL franchise area last summer, but was put off by the company's insistence that he take their TV and phone services as well.

The company, thankfully, has since changed its policy in this regard. Instead, he plumped for no-frills BT Broadband and was immediately impressed with the efficiency of the sales staff who, he says, asked all the right questions. Oliver was up and running within seven days.

In the past six months he has invested in a SpeedTouch 530 ADSL modem router, which comes with both a USB and ethernet interface. The USB connection allows him to access his broadband connection over his laptop, while his newly acquired Xbox games console plugs into a 16-port hub which in turn plugs into the ethernet socket on his ADSL modem. This allows him to indulge in a spot of online gaming – particularly MotorGP (a motorbike racing game). Next steps include building a more extensive network off his hub.

Oliver also plugs an AirStation WLA-L11G wireless access point into his SpeedTouch 530, which means he can access his broadband connection from any room in his spacious abode via his Dell (no relation) laptop – complete with Wi-Fi PC Card.



homes – giving AOL the largest nationwide reach of any broadband player in the UK. If or when an NTL/Telewest merger takes place, a cable monopoly could give BT Wholesale a very serious run for its money in terms of opening up its network to third-party providers of residential broadband. ■