

**Before the  
Federal Communications Commission  
Washington, D.C. 20554**

In the Matter of )  
 )  
Inquiry Concerning Deployment of Advanced ) WC Docket No. 19-285  
Telecommunications Capability to All  
Americans in a Reasonable and Timely  
Fashion

**COMMENTS OF DR. TIMOTHY J. TARDIFF**

**Introduction and Summary**

The Federal Communications Commission's (FCC) Notice of Inquiry (NOI) in this proceeding seeks, among other things, data on deployment fixed broadband services for the period 2014-2018 for five speed metrics: (1) 10 Mbps downstream/1 Mbps upstream, (2) 25 Mbps downstream/3 Mbps upstream, (3) 50 Mbps downstream/5 Mbps upstream, (4) 100 Mbps downstream/10 Mbps upstream, and (5) 250 Mbps downstream/25 Mbps upstream.<sup>1</sup> These Comments, which update Reply Comments I submitted in the two previous broadband progress proceedings,<sup>2 3</sup> present percentages of U.S. households living in census blocks with zero, one, two, or three or more suppliers.<sup>4</sup>

These Comments provide an analysis of the change in broadband services using a consistent set of measures over time,<sup>5</sup> based on availability measures that Advanced Analytical Consulting

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<sup>1</sup> Federal Communications Commission, *Inquiry Concerning the Deployment of Advanced Telecommunications Capability to All Americans in a Reasonable and Timely Fashion*, GN Docket No. 19-285, Fifteenth Broadband Deployment Report and Notice of Inquiry, October 23, 2019, ¶ 9, available at <https://docs.fcc.gov/public/attachments/FCC-19-102A1.pdf>.

<sup>2</sup> Reply Comments of Dr. Timothy J. Tardiff, *Inquiry Concerning Deployment of Advanced Telecommunications Capability to All Americans in a Reasonable and Timely Fashion*, WC Docket No. 17-199, October 6, 2017, available at <https://ecfsapi.fcc.gov/file/10061571715086/Tardiff%20reply%20comments%202017%2010%2006.pdf>.

<sup>3</sup> Reply Comments of Dr. Timothy J. Tardiff, *Inquiry Concerning Deployment of Advanced Telecommunications Capability to All Americans in a Reasonable and Timely Fashion*, WC Docket No. 18-238, October 1, 2018, available at <https://ecfsapi.fcc.gov/file/100172553392/tardiff%20reply%20comments%202018%2010%2001.pdf>.

<sup>4</sup> The FCC has observed that even two suppliers (especially if they are wireline suppliers) can competitively constrain one another. Federal Communications Commission, *Restoring Internet Freedom*, WC Docket No. 17-108, Declaratory Ruling, Report and Order, and Order, January 4, 2018, ¶ 126, ("Internet Freedom Order"), available at [https://docs.fcc.gov/public/attachments/FCC-17-166A1\\_Rcd.pdf](https://docs.fcc.gov/public/attachments/FCC-17-166A1_Rcd.pdf).

<sup>5</sup> In previous proceedings evaluating the extent of broadband availability and competitive intensity, the FCC has not always used a consistent measurement of the change in broadband provision. For example, as I described in my 2017 Reply Comments, the FCC deemed competition to be insufficient in its 2010 Internet Order (Federal Communications Commission, *Preserving the Open Internet*, GN Docket No. 09-191, *Broadband Industry Practices*, GN Docket No. 09-191, Report and Order, December 23, 2010, ¶ 32, available at

Group, Inc. (AACG) has developed from the FCC's Form 477 data.<sup>6</sup> To the extent that stakeholders believe that the most appropriate measure of broadband is evolving over time, the consistent set of measures allows parties to see that evolution across time and geography. The consistent measures for broadband availability since 2013 reveal substantial growth in broadband availability at the 25 Mbps downstream/3 Mbps upstream speed level. Further, comparing the growth trends for the 25 Mbps downstream/3 Mbps upstream speed level with the trend for the 10 Mbps downstream/1 Mbps upstream speed level suggests that the strong growth in availability at the higher speed level was the combination of a modest increase in the number of providers and an upgrade in the offerings of existing providers from lower speed levels. With respect to the faster speed levels, the wireline growth patterns for the 50 Mbps downstream/5 Mbps upstream and 100 Mbps downstream/10 Mbps upstream speed levels are broadly similar to the corresponding pattern for the 25 Mbps downstream/3 Mbps upstream speed level. When fixed wireless and satellite are included, approximately three-quarters of U.S. households lived in census blocks with 2 or more alternatives at the 50 Mbps downstream/5 Mbps upstream speed level and approximately half of households at the 100 Mbps downstream/10 Mbps upstream speed level (compared to the virtual ubiquity of competitive alternatives at the 25 Mbps downstream/3 Mbps upstream speed level). Finally, there has been some growth since the middle of the 2014-2018 period for the 250 Mbps downstream/25 Mbps upstream speed level (over 1 in 5 households lived in census blocks with two or more alternatives) and the percentage of households with no suppliers had decreased to about 27 percent by the end of the period, with virtually none of this progress due to fixed wireless and satellite.

These Comments, consistent with the FCC's *Internet Freedom Order* (¶¶ 124-125),<sup>7</sup> provide results separately for all fixed broadband Internet Service Providers (ISPs), including fixed

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[https://apps.fcc.gov/edocs\\_public/attachmatch/FCC-10-201A1\\_Rcd.pdf](https://apps.fcc.gov/edocs_public/attachmatch/FCC-10-201A1_Rcd.pdf)) and that progress in broadband deployment was insufficient in its 2016 Broadband Progress Report (Federal Communications Commission, *Inquiry Concerning the Deployment of Advanced Telecommunications Capability to All Americans in a Reasonable and Timely Fashion, and Possible Steps to Accelerate Such Deployment Pursuant to Section 706 of the Telecommunications Act of 1996, as Amended by the Broadband Data Improvement Act*, GN Docket No. 15-191, 2016 Broadband Progress Report, January 29, 2016, ¶ 4, available at [https://apps.fcc.gov/edocs\\_public/attachmatch/FCC-16-6A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/FCC-16-6A1.pdf)), based on very different measures of broadband availability. In particular, in 2010, the FCC evaluated the adequacy of broadband availability by measuring the percentage of households living in census *tracts* in which 0, 1, 2, or three or more providers offered service at the 3 Mbps downstream/0.768 Mbps upstream speed level. In contrast, in 2016, the FCC evaluated broadband progress based on the percentage of the population living in census *blocks* (a much more granular scale) in which 0, 1, or 2 or more providers offered service at the 25 Mbps downstream/3 Mbps upstream speed level. Inconsistent measurement, as in any scientifically valid research, cannot produce valid conclusions on the *growth* in broadband availability.

<sup>6</sup> A description of these consistent measures and reports updating the measures after the FCC releases new Form 477 data can be found at <http://aacg.com/litigation/telecommunications/net-neutrality/>.

<sup>7</sup> While the FCC (¶ 125) appeared to question the strength of the competitive pressure exerted by fixed wireless and satellite, at least 75 percent of the locations of the top 10 winning bidders in the 2018 CAF II rural broadband auction will be served by fixed wireless or satellite. These locations account for about 60 percent of the 713,176 locations proposed by the winning bidders. Glass, V. and Tardiff, T., "The Federal Communications Commission's Rural Infrastructure Auction: What is Hidden in the Weeds?" *Telecommunications Policy*, Vol. 43, Issue 8, 2019, Tables 6 and 7.

wireless and satellite, and for wireline ISPs, e.g., cable television and telephone companies. In the tables below, data for the periods from December 2014 through June 2018 were calculated by Advanced Analytical Consulting Group, based on the FCC's biannual releases of Form 477 data<sup>8</sup> and the data for December 2013 was presented in former Chairman Tom Wheeler's 2014 speech.<sup>9</sup>

## **10 Mbps Downstream/1 Mbps Upstream**

Table 1 presents broadband availability for the period from December 2014 through June 2017 when wireline, fixed wireless, and satellite ISPs are included.<sup>10</sup>

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<sup>8</sup> Since the FCC changed how it measures broadband availability in its Internet Service Access Reports (available at <https://www.fcc.gov/internet-access-services-reports>), Advanced Analytical Consulting Group produces a series of consistent availability measures, including a series consistent with the FCC's December 2009 through December 2013 measures. A description of this analysis can be found at <http://aacg.com/litigation/telecommunications/net-neutrality/>.

<sup>9</sup> "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, p. 2, available at [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf).

<sup>10</sup> The corresponding availability for December 2016 from the *Internet Freedom Order* are 93.6 percent, 5.7 percent, 0.6 percent, and 0.1 percent for 3 or more, 2, 1, and no alternative providers, respectively. 2018 Order, ¶ 124. The small differences between the FCC's percentages and the corresponding percentages in Table 1 are due to small differences in households (Table 1) versus population (FCC) in each census block. Since the average number of persons per household varies across census blocks, such small differences are not surprising.

**Table 1: Percentage of US households in census blocks in which wireline, fixed wireless, and satellite broadband ISPs reported deployment at speeds of at least 10 Mbps down/1 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	79.4%	81.9%	83.9%	92.7%	93.9%	93.9%	94.9%	97.2%
2	NA	17.1%	14.7%	13.3%	6.7%	5.7%	5.6%	4.7%	2.7%
1	NA	3.4%	3.3%	2.9%	0.5%	0.4%	0.5%	0.4%	0.0%
0	NA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

Primarily because fixed wireless and satellite ISPs offering service at this speed were widely available throughout the period,<sup>11</sup> Table 1 shows a modest increase in competitive alternatives. For example, as of December 2014, 79.4 percent lived in census blocks with three or more alternatives, while only 3.4 percent lived in census blocks with only one broadband provider at this speed. By June 2016, the percent of households in census blocks with three or more suppliers reached 92.7 percent, while the percent in census blocks with only one broadband provider at this speed had declined to 0.5 percent. By the end of the period (June 2018), 97.2 percent of households lived in census blocks with three or more alternatives, and every census block had at least two providers. The percent of households in census block with no providers of at least 10 Mbps down/1 Mbps up has remained at 0 percent since December 2014.

Table 2 displays the results for wireline ISPs only for the period from December 2013 through June 2018.<sup>12</sup>

**Table 2: Percentage of US households in census blocks in which wireline broadband ISPs reported deployment at speeds of at least 10 Mbps down/1 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	9.8%	7.5%	8.9%	9.3%	8.5%	9.3%	10.7%	14.3%	11.8%
2	51.5%	55.4%	58.2%	59.0%	56.5%	57.2%	59.5%	57.7%	60.6%
1	30.3%	28.8%	24.9%	24.6%	27.9%	27.2%	24.0%	22.8%	22.5%
0	8.4%	8.2%	8.0%	7.2%	7.1%	6.3%	5.8%	5.2%	5.1%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

<sup>11</sup> The FCC reported that as of December 2014, satellite broadband service at speeds of at least 10 Mbps downstream and 1 Mbps upstream was available in 99.4 percent of developed census blocks. Federal Communications Commission, "Internet Access Services: Status as of December 31, 2014," Industry Analysis and Technology Division, Wireline Competition Bureau, March 2016, Figure 5, available at <https://www.fcc.gov/internet-access-services-reports>.

<sup>12</sup> The corresponding availability for December 2016 from the *Internet Freedom Order* are 9.0 percent, 58.5 percent, 26.3 percent, and 6.2 percent for 3 or more, 2, 1, and no alternative providers, respectively. 2018 Order, ¶ 125.

Similar to Table 1, Table 2 shows a modest increase in competitive wireline alternatives.<sup>13</sup> For example, as of December 2013, 61.3 percent (9.8 percent + 51.5 percent) lived in census blocks with two or more alternatives, while 8.4 percent lived in census blocks with no wireline broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more suppliers reached 65.0 percent (8.5 percent + 56.5 percent), while the percent in census blocks with no wireline broadband providers at this speed had declined to 7.1 percent. By the end of the period (June 2018), 72.4 percent (11.8 percent + 60.6 percent) of households lived in census blocks with two or more alternatives, while the percent in census blocks with no broadband providers at this speed had declined to 5.1 percent.

## 25 Mbps Downstream/3 Mbps Upstream

Table 3 presents broadband availability for the period from December 2014 through June 2018 when wireline, fixed wireless, and satellite ISPs are included.<sup>14</sup>

**Table 3: Percentage of US households in census blocks in which wireline, fixed wireless, or satellite broadband ISPs reported deployment at speeds of at least 25 Mbps down/3 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	6.5%	6.0%	7.1%	21.9%	42.5%	71.7%	89.3%	93.7%
2	NA	30.4%	29.9%	30.8%	40.3%	33.4%	22.5%	9.6%	6.2%
1	NA	51.9%	52.8%	51.2%	30.4%	19.6%	5.8%	1.1%	0.1%
0	NA	11.1%	11.2%	10.8%	7.4%	4.5%	0.0%	0.0%	0.0%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

The data show a large increase in competitive alternatives. For example, as of December 2014, 36.9 percent (6.5 percent + 30.4 percent) lived in census blocks with two or more alternatives, while 11.1 percent lived in census blocks with no broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more suppliers reached 62.2 percent (21.9 percent + 40.3 percent) while the percent of households in census blocks with no broadband providers at this speed had declined to 7.4 percent. Indeed, in the sixth month period from December 2015 to June 2016, the percentage of households in census blocks with two or more alternatives had increased from 37.9 percent (7.1 percent + 30.8 percent) to 62.2 percent, primarily due to an increase in satellite and fixed wireless providers offering service at this

<sup>13</sup> Former Chairman Wheeler's 2014 speech reported wireline ISP availability only, which provides an additional observation (December 2013) for this table (and Tables 4 and 6 below). That speech reported availability at 10 Mbps downstream and 0.768 Mbps upstream, a somewhat slower speed level with concomitant somewhat higher availability levels.

<sup>14</sup> The corresponding availability for December 2016 from the *Internet Freedom Order* are 43.9 percent, 32.6 percent, 19.1 percent, and 4.4 percent for 3 or more, 2, 1, and no alternative providers, respectively. 2018 Order, ¶ 124.

speed.<sup>15</sup> By the end of the period (June 2018), 99.9 percent (93.7 percent + 6.2 percent) of households lived in census blocks with two or more alternatives.

Table 4 displays the results for wireline ISPs only for the period from December 2013 through June 2018.<sup>16</sup>

**Table 4: Percentage of US households in census blocks in which wireline broadband ISPs reported deployment at speeds of at least 25 Mbps down/3 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	2.4%	2.2%	2.5%	2.5%	5.3%	6.0%	7.1%	10.5%	8.2%
2	22.9%	28.6%	28.5%	28.6%	42.6%	43.8%	47.7%	45.8%	50.7%
1	55.3%	57.3%	57.0%	57.0%	41.4%	40.6%	36.2%	35.5%	33.4%
0	19.4%	11.9%	12.0%	11.8%	10.7%	9.6%	8.9%	8.2%	7.8%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

Table 4 shows a steady increase in competitive wireline alternatives. For example, as of December 2013, 25.3 percent (2.4 percent + 22.9 percent) lived in census blocks with two or more wireline alternatives, while 19.4 percent lived in census blocks with no wireline broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more wireline suppliers reached 47.9 percent (5.3 percent + 42.6 percent), while the percent in census blocks with no wireline broadband providers at this speed had declined to 10.7 percent. By the end of the period (June 2018), 58.9 percent (8.2 percent + 50.7 percent) of households lived in census blocks with two or more wireline alternatives, while the percent in census blocks with no wireline broadband providers at this speed had declined to 7.8 percent.

<sup>15</sup> In Table 4 below (where fixed wireless and satellite ISPs are not included), the trend from December 2014 through December 2015 is similar to the trend in Table 3, albeit at a somewhat higher level of availability. Subsequently, the respective trends diverge, suggesting that satellite and fixed wireless alternatives are generating much of the large increases in post 2015 availability shown in Table 3.

<sup>16</sup> The corresponding availability for December 2016 from the *Internet Freedom Order* are 5.9 percent, 45.2 percent, 39.6 percent, and 9.2 percent for 3 or more, 2, 1, and no alternative providers, respectively. 2018 Order, ¶ 125.

## 50 Mbps Downstream/5 Mbps Upstream

Tables 5 and 6 present the growth in broadband availability at the 50 Mbps downstream/5 Mbps upstream speed level. While the progress in wireline broadband availability is quite similar to the corresponding pattern for the 25 Mbps downstream/3 Mbps upstream speed level, broadband availability is relatively lower when fixed wireless and satellite are included, indicating that fixed wireless and satellite have had yet to provide ubiquitous service at the 50 Mbps downstream/5 Mbps upstream speed level as of June 2018.

Table 5 presents broadband availability for the period from December 2014 through June 2018 when wireline, fixed wireless, and satellite ISPs are included.

**Table 5: Percentage of US households in census blocks in which wireline, fixed wireless, and satellite broadband ISPs reported deployment at speeds of at least 50 Mbps down/5 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	2.8%	3.3%	3.6%	6.4%	9.7%	9.1%	13.7%	35.3%
2	NA	26.4%	26.7%	28.2%	35.9%	37.3%	42.4%	42.9%	38.5%
1	NA	55.5%	57.4%	55.9%	46.4%	43.6%	39.2%	35.0%	21.7%
0	NA	15.2%	12.6%	12.3%	11.2%	9.4%	9.3%	8.4%	4.5%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

The data show a substantial increase in competitive alternatives. For example, as of December 2014, 29.2 percent (2.8 percent + 26.4 percent) lived in census blocks with two or more alternatives, while 15.2 percent lived in census blocks with no broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more suppliers reached 42.3 percent (6.4 percent + 35.9 percent) while the percent of households in census blocks with no broadband providers at this speed had declined to 11.2 percent. By the end of the period (June 2018), 73.8 percent (35.3 percent + 38.5 percent) of households lived in census blocks with two or more alternatives, with at least one ISP offering service at this speed available in census blocks with 95.5 percent of US households.

Table 6 displays the results for wireline ISPs only for the period from December 2013 through June 2018.

**Table 6: Percentage of US households in census blocks in which wireline broadband ISPs reported deployment at speeds of at least 50 Mbps down/5 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	1.6%	1.6%	2.0%	2.1%	3.9%	4.4%	6.2%	10.1%	7.7%
2	16.0%	24.3%	25.7%	26.2%	35.5%	37.3%	43.5%	44.3%	48.6%
1	61.4%	58.4%	59.4%	59.0%	48.9%	47.9%	40.6%	36.7%	35.2%
0	21.0%	15.6%	12.9%	12.7%	11.7%	10.4%	9.7%	9.0%	8.5%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

Table 6 shows a steady increase in competitive wireline alternatives. For example, as of December 2013, 17.6 percent (1.6 percent + 16.0 percent) lived in census blocks with two or more wireline alternatives, while 21.0 percent lived in census blocks with no wireline broadband providers at this speed.<sup>17</sup> By June 2016, the percent of households in census blocks with two or more wireline suppliers reached 39.4 percent (3.9 percent + 35.5 percent), while the percent in census blocks with no wireline broadband providers at this speed had declined to 11.7 percent. By the end of the period (June 2018), 56.3 percent (7.7 percent + 48.6 percent) of households lived in census blocks with two or more wireline alternatives, while the percent in census blocks with no wireline broadband providers at this speed had declined to 8.5 percent.

## 100 Mbps Downstream/10 Mbps Upstream

Tables 7 and 8 present the growth in broadband availability at the 100 Mbps downstream/10 Mbps upstream speed level. Similar to the patterns for the 50 Mbps downstream/5 Mbps upstream speed level, while the progress in wireline broadband availability is somewhat similar to the corresponding pattern for the 25 Mbps downstream/3 Mbps upstream speed level, broadband availability is relatively lower when fixed wireless and satellite are included, indicating that fixed wireless and satellite have had yet to provide very much service at the 100 Mbps downstream/10 Mbps upstream speed level as of June 2018.

Table 7 presents broadband availability for the period from December 2014 through June 2018 when wireline, fixed wireless, and satellite ISPs are included.

**Table 7: Percentage of US households in census blocks in which wireline, fixed wireless, and satellite broadband ISPs reported deployment at speeds of at least 100 Mbps down/10 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	1.7%	1.9%	2.1%	2.4%	3.2%	4.0%	10.8%	9.4%
2	NA	17.9%	18.0%	19.4%	18.5%	22.4%	26.4%	35.7%	39.8%
1	NA	42.7%	45.1%	44.4%	47.1%	48.9%	53.2%	41.8%	40.7%
0	NA	37.7%	35.0%	34.1%	31.9%	25.5%	16.4%	11.6%	10.1%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

The data show a substantial increase in competitive alternatives. For example, as of December 2014, 19.6 percent (1.7 percent + 17.9 percent) lived in census blocks with two or more alternatives, while 37.7 percent lived in census blocks with no broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more suppliers reached 20.9 percent (2.4 percent + 18.5 percent) while the percent of households in census blocks with no broadband providers at this speed had declined to 31.9 percent. By the end of the period

<sup>17</sup> Former Chairman Wheeler's speech reported availability at 50 Mbps downstream and 3 upstream, a somewhat slower speed level with concomitant somewhat higher availability levels.



(June 2018), 49.2 percent (9.4 percent + 39.8 percent) of households lived in census blocks with two or more alternatives, with at least one ISP offering service at this speed available in census blocks with 89.9 percent (9.4 percent + 39.8 percent + 40.7 percent) of US households.

Table 8 displays the results for wireline ISPs only for the period from December 2014 through June 2018.

**Table 8: Percentage of US households in census blocks in which wireline broadband ISPs reported deployment at speeds of at least 100 Mbps down/10 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	1.2%	1.4%	1.5%	1.4%	1.7%	2.6%	8.4%	6.1%
2	NA	16.5%	17.8%	18.1%	17.3%	20.5%	25.3%	35.9%	40.9%
1	NA	44.3%	45.6%	46.1%	49.0%	51.6%	55.2%	43.7%	42.6%
0	NA	38.0%	35.2%	34.4%	32.3%	26.1%	16.9%	12.0%	10.4%
Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, <a href="https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf">https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf</a> . December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <a href="https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477">https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477</a> .									

Table 8 shows a steady increase in competitive wireline alternatives. For example, as of December 2014, 17.7 percent (1.2 percent + 16.5 percent) lived in census blocks with two or more wireline alternatives, while 38.0 percent lived in census blocks with no wireline broadband providers at this speed. By June 2016, the percent of households in census blocks with two or more wireline suppliers reached 18.7 percent (1.4 percent + 17.3 percent), while the percent in census blocks with no wireline broadband providers at this speed had declined to 32.3 percent. By the end of the period (June 2018), 47.0 percent (6.1 percent + 40.9 percent) of households lived in census blocks with two or more wireline alternatives, while the percent in census blocks with no wireline broadband providers at this speed had declined to 10.4 percent.

## 250 Mbps Downstream/25 Mbps Upstream

Finally, Tables 9 and 10 show that (1) while there is substantially less availability of broadband capability at the 250 Mbps downstream/25 Mbps upstream speed level than at the slower speed levels and (2) the results with and without fixed wireless and satellite differ very little (indicating that the non-wireline alternatives have yet to offer services at this speed level), there has nonetheless been some progress since the middle of the 2014-2018 period. For example, Table 9 shows that as of June 2016, only 1.5 percent (0.1 percent + 1.4 percent) of households lived in census blocks with 2 or more alternatives, and 77 percent of households were in census blocks with no offerings at this speed level. However, by the end of the period (June 2018), 23.0 percent (2.4 percent + 20.6 percent) of households lived in census blocks with two or more alternatives, while the percentage of households in census blocks with no broadband at this speed level had declined to 26.8 percent.

**Table 9: Percentage of US households in census blocks in which wireline, fixed wireless, and satellite broadband ISPs reported deployment at speeds of at least 250 Mbps down/25 Mbps up**

Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	0.0%	0.1%	0.1%	0.1%	0.4%	0.7%	3.8%	2.4%
2	NA	0.1%	0.6%	1.2%	1.4%	5.9%	9.0%	14.6%	20.6%
1	NA	4.9%	11.4%	19.0%	21.6%	34.8%	38.8%	39.6%	50.2%
0	NA	95.0%	87.9%	79.6%	77.0%	58.9%	51.5%	42.0%	26.8%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

**Table 10: Percentage of US households in census blocks in which wireline broadband ISPs reported deployment at speeds of at least 250 Mbps down/25 Mbps up**

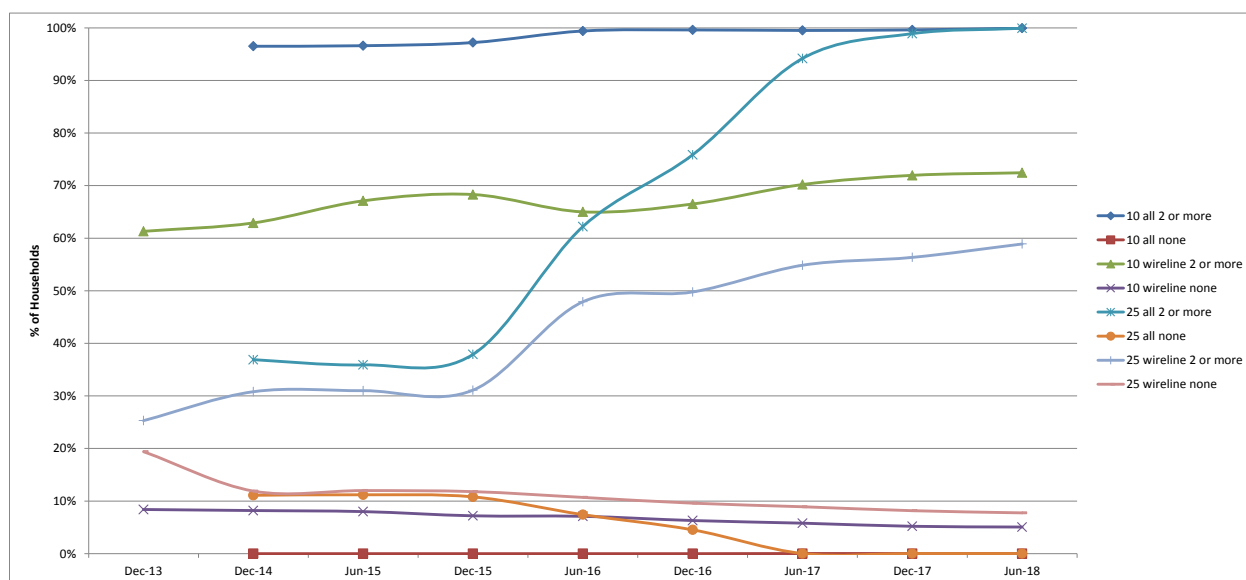
Alternatives	Dec-13	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18
3 or more	NA	0.0%	0.1%	0.1%	0.1%	0.2%	0.4%	3.7%	1.7%
2	NA	0.1%	0.6%	1.2%	1.3%	5.3%	8.5%	14.1%	20.7%
1	NA	3.9%	10.4%	18.0%	20.4%	35.4%	39.4%	39.8%	50.8%
0	NA	96.0%	89.0%	80.7%	78.1%	59.1%	51.8%	42.4%	26.9%

Sources: December 2013: "Prepared Remarks of Chairman Tom Wheeler: The Facts and Future of Broadband Competition," September 4, 2014, [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-329161A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-329161A1.pdf). December 2014, June 2015, December 2015, June 2016, December 2016, June 2017, December 2017, and June 2018: calculated from data available at <https://www.fcc.gov/general/broadband-deployment-data-fcc-form-477>.

## Summary

As shown in Figure 1 below, comparing the growth trends for the 10 Mbps downstream/1 Mbps upstream speed level with the trend for the 25 Mbps downstream/3 Mbps upstream speed level suggests that the strong growth in availability at the higher speed level was the combination of a modest increase in the number of providers and an upgrade in the offerings of existing providers from lower speed levels.

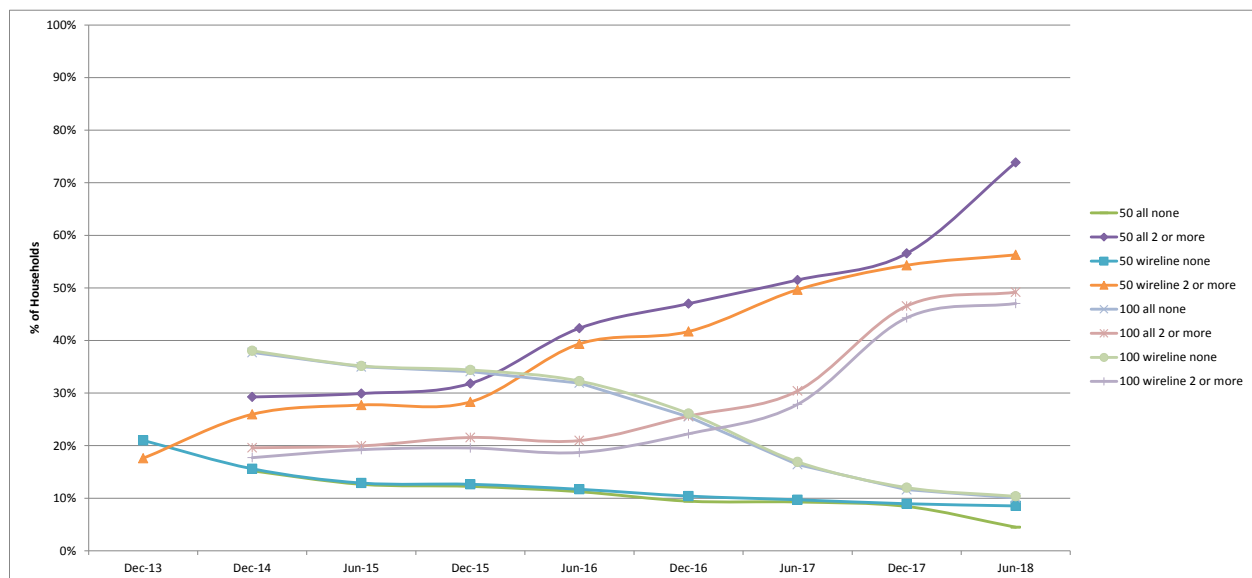
**Figure 1: Broadband progress December 2013 through June 2018: 10 Mbps downstream/1 Mbps upstream and 25 Mbps downstream/3 Mbps upstream**



In particular, Figure 1 shows that the percentage of households with two or more wireline, fixed wireless, and satellite suppliers at the 10 Mbps downstream/1 Mbps upstream speed level (10 all 2 or more) has been consistently above 90 percent. The corresponding growth in wireline suppliers at this speed level (10 wireline 2 or more) saw the percentage of households living in census blocks with two or more alternatives change from about 60 percent to about 70 percent. For the 25 Mbps downstream/3 Mbps upstream speed level, wireline-only broadband progress (25 wireline 2 or more) tracked the corresponding progress when all broadband suppliers are included (10 all 2 or more) through December 2015. Subsequently, the convergence in the percentage of households living in census blocks with two or more wireline providers at the 25 Mbps downstream/3 Mbps upstream speed level (25 wireline 2 or more) towards the corresponding percentage at the 10 downstream/1 Mbps upstream speed level (10 wireline 2 or more) suggests that wireline suppliers have been upgrading their offerings (and/or customers are opting for the higher level). Similarly, the convergence in the percentage of households living in census blocks with two or more wireline, fixed wireless, and satellite providers at the 25 Mbps downstream/3 Mbps upstream speed level (25 all 2 or more) towards the corresponding percentage at the 10 downstream/1 Mbps upstream speed level (10 all 2 or more) additionally reflects the effect of satellite broadband becoming ubiquitously available by the end of the period. Finally, the four lower curves (25 wireline none, 25 all none, 10 wireline none, 10 all none) show that the percentage of households in census blocks without wireline providers has dropped to less than 10 percent, even at the 25 Mbps downstream/3 Mbps upstream speed level, while at the same time when satellite and fixed wireless providers are added to the mix, broadband service has been ubiquitously available at 10 Mbps downstream/1 Mbps upstream throughout the period and at the higher speed level by the end of the period.

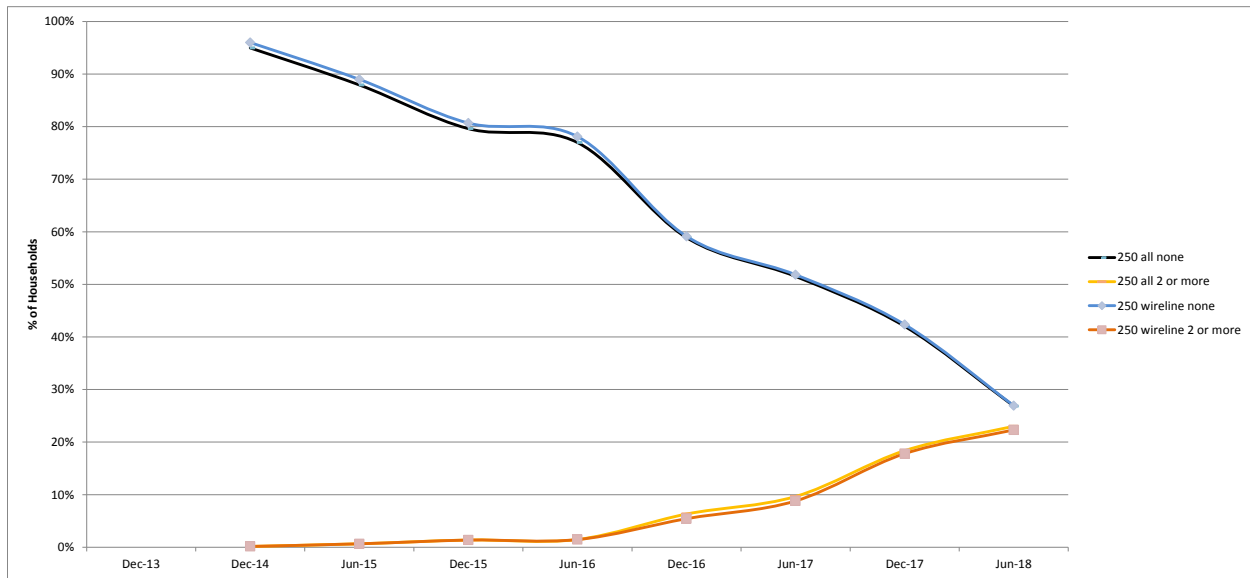
Figure 2 depicts the growth in broadband availability at the 50 Mbps downstream/5 Mbps upstream and 100 Mbps downstream/10 Mbps upstream speed levels. As discussed earlier, the growth patterns for two or more wireline suppliers (50 wireline 2 or more and 100 wireline 2 or more) are broadly similar to the corresponding pattern for the 25 Mbps downstream/3 Mbps upstream speed level depicted in Figure 1. However, when fixed wireless and satellite are included (50 all 2 or more and 100 all 2 or more), there are fewer available suppliers. While virtually all U.S. households lived in census blocks with two or more wireline alternatives at the 25 Mbps downstream/3 Mbps upstream speed level as of June 2018, the corresponding percentages were 73.8 percent for the 50 Mbps downstream/5 Mbps upstream speed level and 49.2 percent for the 100 Mbps downstream/10 Mbps upstream speed level.

**Figure 2: Broadband progress through June 2018: 50 Mbps downstream/5 Mbps upstream and 100 Mbps downstream/10 Mbps upstream**



Finally, Figure 3 shows that (1) there has been some growth since the middle of the 2014-2018 period for the 250 Mbps downstream/25 Mbps upstream speed level (over 1 in 5 households lived in census blocks with two or more alternatives and the percentage of households with no suppliers had decreased to about 27 percent by the end of the period and (2) virtually none of this progress has been due to fixed wireless and satellite, as indicated by the coincidence of the “wireline” and “all curves”.

**Figure 3: Broadband progress through June 2018: 250 Mbps downstream/25 Mbps upstream**



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November 22, 2019

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### **Professional Summary**

Dr. Timothy J. Tardiff has more than 30 years of academic and consulting experience. He has participated in numerous legal and regulatory proceedings regarding telecommunications, economics, intellectual property antitrust, and regulation issues. His research consulting, and expert witness experience in telecommunications has addressed pricing and costing issues involving increasingly competitive services, such as wireless and traditional wireline services. This experience has also included extensive examination and economic evaluation of all facets of the costing methodologies used to establish prices in rate-regulated industries—including expert reports and testimonies in a U.S. Department of Transportation proceeding on the reasonableness from an economic perspective of the rates international carriers at Los Angeles International Airport pay for use of terminal space. His work has included the telecommunications, software, transportation, energy, and public utility industries, and he has published extensively in economics, telecommunications, and transportation journals.

Dr. Tardiff is an economic consultant with clients in the telecommunications and regulated utilities industries. From 2006 to 2009, he was a Managing Director at Huron Consulting Group. Prior to joining Huron, Dr. Tardiff served as a vice president in the telecommunication practice at NERA Economic Consulting. During his career, he has served as the director of Marketing Research and senior member of the transportation practice at Charles River Associates, Inc. and assistant professor in the Department of Civil Engineering and Division of Environmental Studies at the University of California, Davis.

Dr. Tardiff's research has addressed the demand, cost, and competitive aspects of converging technologies, including wireless and broadband. He has evaluated pricing policies for increasingly competitive telecommunications markets, including appropriate mechanisms for pricing access services to competitors and studied actual and potential competition for services provided by incumbent telephone operating companies. Most recently, he has analyzed the effects of convergence and growing intermodal competition on whether incumbent firms

should be considered dominant in the provision of certain services and the regulatory and antitrust implication of such determinations.

Since the passage of the United States Telecommunications Act, Dr. Tardiff has participated in interconnection arbitrations, unbundled element proceedings, universal service investigation, applications by incumbent local exchange carriers for authorization to provide interLATA long-distance, and implementation of the Triennial Review Order rules for unbundling network elements in over 25 states and before the United States Federal Communications Commission. His international research and consulting experience includes studies and expert reports on telecommunication competition issues in Canada, Japan, New Zealand, Peru, Australia, and Trinidad and Tobago, where he was an economic expert in an interconnection arbitration between two wireless carriers.

## **Education**

- Ph.D., Social Sciences, University of California, Irvine, CA
- B.S., Mathematics, California Institute of Technology, Pasadena, CA

## **Testimony experience**

- Affidavit of Timothy J. Tardiff on presumptive just and reasonable rates for pole attachments, prepared for filing with the Federal Communications Commission on behalf of Verizon Maryland LLC, Complainant v. The Potomac Edison Company, Defendant, November 21, 2019.
- Affidavit of Timothy J. Tardiff on presumptive just and reasonable rates for pole attachments, prepared for filing with the Federal Communications Commission on behalf of Verizon Pennsylvania LLC and Verizon North, Complainants v. Metropolitan Edison Company, Pennsylvania Electric Company, and Pennsylvania Power Company, Defendants, November 20, 2019.
- Reply Witness Statement of Dr. Timothy J. Tardiff on international interconnection rates, prepared for filing with the Telecommunications Authority of Trinidad and Tobago on behalf of Telecommunications Services of Trinidad and Tobago Limited, Reference Nos: 4/07/07/5 and 4/07/06/6, April 17, 2019.
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- Deposition Testimony, Susan Mojica, Individually and on behalf of others similarly situated v. Securus Technologies, Inc., Civil Action No. 5:14-cv-5258-TLB, U.S. District Court for the Western District of Arkansas, July 12, 2016 and August 30, 2016.
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- Reply Affidavit of Timothy J. Tardiff on the economic evaluation of the monetary value of possible joint use agreement advantages, prepared for filing with the Federal Communications Commission on behalf of Verizon Virginia and Verizon South, Verizon Virginia LLC and Verizon South, Inc., Complainant v. Virginia Electric and Power and Light



Company dba Virginia Dominion Power, Respondent, Docket No. 15-190, File No. EB-15-MD-006, February 9, 2016.

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- “The Economics of Access Stimulation: Economic Evaluation of the ‘Fact Report’ by Drs. Alan Pearce and W. Brian Barrett,” ex parte filing with the Federal Communications Commission on behalf of Qwest Communications International, WC Docket No. 07-135, August 5, 2010.
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- Expert Report of Dr. Timothy J. Tardiff on interconnection costs and rates, prepared for filing with the Telecommunications Authority of Trinidad and Tobago on behalf of Telecommunications Services of Trinidad and Tobago Limited, Reference No: 4/7/06/4, August 24, 2007.
- Expert Report of Daniel P. Wikel and Timothy J. Tardiff on airport terminal rental rates, prepared for filing with the Office of the Secretary, United States Department of

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- Participant in AGT International Symposium on Local Interconnection Policy, Emerald Lake, British Columbia, Canada, May 27-28, 1994.
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## **Professional associations**

- Member, American Economic Association
- Associate Member, American Bar Association
- Member, Federal Communications Bar Association

## **Fellowships, grants and awards**

- First Place, Dissertation Contest of the Transportation Science Section of the Operations Research Society of America.
- National Science Foundation (NSF) Research Initiation Grant (Engineering Division), 1976-1978.
- NSF Grant for Improving Doctoral Dissertation Research in the Social Sciences, 1973-1974.
- NSF Predoctoral Fellowship, 1972-1974.
- Public Health Service Traineeship, 1971-1972.