

Welcome to Teligen's Tariff Outlook Newsletter

Message From The Editor

Welcome to Tariff Outlook, a fortnightly newsletter brought to you free-of-charge by Teligen's team of tariff analysts and consultants.

In this edition of Tariff Outlook we see a lot of activity in the mobile market particularly surrounding roaming charges with new proposals to impose caps from the EU and Telenor following the trend among European operators by cutting their roaming rates. We also announce some new pricing plans being introduced by Neuf Cegetel, KPN and E-Plus.

If these stories, or any others featured in our newsletter are of interest, further details of the tariffs and services can be found in our comprehensive subscription based databases, the T-Products. Go to: www.teligen.com for further details and request a copy of our demo CD. You will also notice that we have included a short case study looking at an example of Teligen's consultancy services – if you are interested in learning more about this, just click on the banner on the right.

Our continuing aim is to provide you with up to the minute pricing news and tariff developments. That being said, Tariff Outlook not only serves as an opportunity for us to communicate with you on a regular basis but equally for you to tell us what you think. As such, we would really appreciate any feedback you may have that will help us deliver a newsletter that provides you with real value.

Please feel free to contact the editor if you have any questions about a particular story, or even just to give us your comments.

We look forward to hearing from you.

Bernadette Finn – *Manager, Tariff Services*

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Need to benchmark prices between different markets and services?

Why not consider T-Basket, the industry recognised tool. T-Basket offers a unique insight into the price relationships between telecom services in OECD (Organisation for Economic Co-operation and Development) member countries. It uses basket methodologies that are OECD based and OECD-authorized, taking pricing information from the Teligen Master Tariff Database. It forms the basis of the official OECD price performance statistics. This unique tool uses proven methodologies to show you numerically and graphically whether an operator's prices are in line with those in the most competitive markets, the most industrialised markets, and those with close geographical or geopolitical proximity.

To find out more or to request a demonstration, http://www.teligen.com/t_basket.asp

Want up-to-date tariff information at the touch of button?

T-World Total is the most advanced information system and calculation tool of its kind. It will answer your questions about tariffs, their structures and levels. It will allow you to compare prices among operators and countries in customisable list formats. In addition it has an in-built Analyser, with an integrated global location database. It allows the user to show price developments of a call with duration, or a circuit with distance and it also allows easy calculation of national distances and corresponding circuit prices. With so much to offer this makes T-World Total the only choice for your market intelligence needs.

To find out more or to request a demonstration, http://www.teligen.com/t_world_total.asp

Consulting



This Weeks Top Stories...

- Neuf Cegetel Launches "Neuf Integrale" Service
- TNZ Increase Monthly Charges
- Teligen Tariff Consultancy – A Case Story
- EU to Imposing Caps on Roaming Prices
- Telenor, Norway, Reduces Roaming Prices in Europe
- KPN Introduces "At Home" Tariff
- Germany – E-Plus Introduced Discount Tariff

PSTN

Neuf Cegetel Launches "Neuf Integrale" Service

Neuf Cegetel group has just launched a new range of switched voice telephony services "Neuf Integrale" effective from 5th February 2007

The new direct service is available from €11.90 per month (including 19.6% VAT) and subscribers using this service no longer have to pay a subscription fee to the incumbent operator.

Neuf Cegetel has also launched variations of "Neuf Integrale" with several flat rate packages, ranging from €18.90 to €29.90 per month (including 19.6% VAT), based on line subscription and subscriber usage level requirements.

Additional benefits of the packages include:

- Auto call-back when the number they are trying to reach is busy
- Conferencing function (three people on the line)
- A last call return service, to find out who has tried to call them
- Voicemail

Nacera Touileb – *Tariff Analyst*

TNZ Increase Monthly Charges

Telecom New Zealand plan to increase monthly rental charges on a number of plans from March 2007. The plans affected by the price increase are Homeline and Anytime with rentals increasing by just over 3% on average.

Calls to the 018 directory service will also increase by 50% from mobile phones. Calls to this service from fixed phones remain the same at 50 cents.

Bernadette Finn – *Manager, Tariff Services*

Consultancy

Teligen Tariff Consultancy – A Case Study

As experts on telecoms tariffs Teligen is often asked to assist in the development of prices for new services and the restructuring of existing prices.

An Eastern European incumbent operator got the help of Teligen to analyse the options for tariff restructuring within a rather limiting regulatory framework. Teligen provided an in-depth analysis of the current situation, highlighting the vulnerable areas of the tariffs, and providing a range of suggestions for where the tariffs could be enhanced inside the current framework. Teligen did also provide different future scenarios for changes in legislation and prices, and at the end of the study also a full day workshop where all the involved staff was able to discuss the proposals and ask questions.

Teligen believes in providing advice beyond the immediate scope of a study, in order to foster new ideas and allow for discussions around the subject at hand. Direct access to key consultants within the Teligen team can be a key factor for many clients, and with Teligen's ongoing focus on tariffs we are able to cover not only the topics of the specific study, but also draw on our wide-ranging experience with tariffs in general.

Halvor Sannæs – *Director Tariff Services*

Mobile

EU to Imposing Caps on Roaming Prices

We recently covered a story in *Tariff Outlook* about the Telecom Regulatory Authority of India (TRAI) and the high roaming fees charged by mobile operators in the country. We have similar concerns here in Europe with the European Union (EU) announcing to the press this week that the Union is getting closer to reaching a final decision on the ratification of a regulatory regime. This regime will determine retail price capping levels for roaming subscribers across all member states of the EU by the end of this year.

The proposals have been welcomed by mobile customers who have long complained that roaming rates are a rip-off. Subscribers roaming across national boundaries pay an average of four times the domestic rate for international calls.

Also included in the proposals by the 27 member states of the EU are the imposing limits of no more than €0.50 per minute for outbound calls and €0.33 per minute for incoming calls.

Commissioner for Information Society and Media, Viviane Reding said "that despite the opposition of Europe's big mobile players, some smaller service providers have come to accept the concept of capped roaming charges and have even gone so far as to ask the EC to consider expanding capping regulations to include international SMS and data services".

Adriana Rodriguez – *Tariff Analyst*

Telenor, Norway, Reduces Roaming Prices in Europe

In line with what has been happening in other European countries Telenor the Norwegian incumbent is cutting its roaming charges. Telenor claims that the cut will amount to approximately NOK170 million or nearly 21 million Euros. According to Telenor the cost of a call for residential customers will be cut by 25%-50% and 20%-40% for a business call.

Telenor customers travelling in Europe will be charged one price whether they make calls to Norway, to another country in Europe or locally within one of the European countries. Furthermore, Telenor is simplifying the tariff structure by operating only two zones Europe and the Nordic Region. The roaming tariffs will apply for both residential and business customers.

Jóhanna Helgadóttir – *Senior Consultant*

KPN Introduces "At Home" Tariff

KPN has launched a home zone tariff in the Netherlands, which will be available from 8th February. The price plan is called "Mobiël Thuis" and is available as an add-on to the KPN Mobiël and FlexiBel subscriptions. Calls from the home zone to fixed lines will cost less than €0.03 per minute, according to the operator. Calls to mobiles and international calls will also be subject to a special rate. Users signing up before 30th June will save almost 33% on the standard monthly charge.

KPN said that the home zone will extend to approx. 100m in urban areas, whereas in the country, it could cover a number of kilometres. The tariff was introduced to accommodate customers who would like to use their mobile handsets for all calls, including those originating from the home.

Cora Hackwith – *Consultant*

Germany – E-Plus Introduced Discount Tariff

From the 1st February 2007 customers can opt for the new "Zehnsation" (zehn means ten in German) tariff. Calls are 0.10€ per minute to all national networks which offers a saving on the standard call charges however, text messages are more expensive on this plan.

The connection charge is free when signing on for this tariff online before the end of February. A minimum monthly usage and minimum contract duration of 24 months apply.

Tamara Stancic – *Consultant*