

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.

This issue of Tariff Outlook covers again a variety of news across all telecom sectors and from countries as far apart as Malta, Finland and Armenia. In a strategic move, Sonera in Finland has announced it is to stop offering dial-up Internet access later this year. Swisscom has cut its fixed-to-mobile call charges and Portugal Telecom has revamped its fixed-line tariff. In Italy, Infostrada has launched an 'unlimited' tariff to entice customers away from Telecom Italia. As always, mobile roaming is high on the agenda of regulators, mobile operators and consumers alike and we have covered two news items in this area.

Furthermore, we have included a short case study giving an example of Teligen's consultancy services – click on the banner on the right to find out more.

For additional details on these stories or any others that are of interest to you, I would encourage you to visit our website www.teligen.com. This will provide you with details of our subscription based databases, the T-Products, and allow you to request a copy of our demo CD.

As always, we aim to provide you with up to the minute pricing news and tariff developments. Moreover, Tariff Outlook not only serves as an opportunity for us to communicate with you on a regular basis but presents an opportunity to you to give us your views. 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 get in touch with us to provide general feedback or to request further details about any particular story featured in this issue. The editor's contact details are below.

We look forward to hearing from you.

Cora Hackwith – *Consultant*

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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

Consulting



This Weeks Top Stories...

- Switzerland – Swisscom Decreases Call Charges
- Portugal –Telecom revises Fixed-Line Tariff
- Italy – Infostrada Unveils Unlimited Tariff
- Sonera, Finland, Drops Dial-Up Internet Connections
- Maltanet Doubles its Broadband Speed
- Teligen Tariff Consultancy – A Case Study
- First Vote on Roaming in the European Parliament
- Vodafone to Adjust Data Roaming Prices
- Armentel Announce New Corporate Tariff Plans

PSTN

Switzerland – Swisscom Decreases Call Charges

From 1st May 2007, Swisscom will be reducing its call charges from the fixed network to the mobile networks Swisscom Mobile, Orange and Sunrise.

By reducing these call charges, Swisscom is passing on to its customers the reduction of 12% in the transit charges of mobile operators. This represents the fee that the telecommunications provider has to pay to have calls completed on a mobile network.

Calls to the mobile networks of Tele2 and other Swiss providers remain the same as their termination charges have not been reduced.

Tamara Stancic – *Consultant*

Portugal – Telecom Revises Fixed-Line Tariff

The Portuguese regulator ANACOM has approved a decision on the tariff proposal for residential customers of the fixed-line telephone service provided by PT Telecom.

The new tariff offers customers two alternatives for the analogue access service: one which corresponds to the monthly payment currently in force, with free-of-charge calls during night time, and another, which is optional, without free calls at night but with a discount of €0.50 (inc. VAT) off the monthly charge.

The new charges took effect on 1st March 2007.

Adriana Rodriguez – *Tariff Analyst*

Italy – Infostrada Unveils Unlimited Tariff

Italian alternative fixed line operator Infostrada has launched Happy NoLimit, which allows users to make unlimited calls to the fixed network, both locally and nationally, at any time of day. These calls are entirely free as they do not incur a call set-up charge. Calls to mobiles and Internet dial-up calls are chargeable and do attract a setup fee.

New users switching to this tariff will no longer have to pay rental to Telecom Italia. Consequently, on a promotional basis, Infostrada is offering to reimburse these charges to users who are unable to switch immediately. In addition, the connection charge is waived. A limited duration offer of free calls to a number of European countries plus Canada and the USA also applies.

Cora Hackwith – *Consultant*

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

Broadband

Sonera, Finland, Drops Dial-up Internet Connections

The Finnish incumbent Sonera is going to drop dial-up Internet connections altogether. Dial-up Internet packages have not been sold to new customers since the 15th of January of this year. Current dial-up customers have been warned that their connections will be cut off in September 2007. Sonera is going to offer customers broadband packages with unlimited usage. The current package on offer includes a 2Mb download at €30 a month.

Johanna Helgadóttir – *Senior Consultant*

Maltanet Doubles its Broadband Speed

Maltacom's Internet provider, Maltanet, has doubled the speed of its entry-level broadband products at no extra costs to its customers as of 14th March 2007.

Maltanet has also upgraded the speed of its Lm5.95 per 30 days package. In particular, it has increased the download speed by 100%, from 128Kbps to 256Kbps, and the upload speed by 400%, from 64Kbps to 256Kbps.

Nacera Touileb – *Senior Tariff Analyst*

Consultancy

Teligen Tariff Consultancy – A Case Study

Teligen is often asked to provide tariff data to companies that either want to collate prices from a range of sources or that need external data from a neutral source.

Most incumbent operators are constantly involved in price discussions with the national regulator. One issue in such discussions can be the source of the price data used – it is often sensible to get an external agency to provide the data, so as to ensure that the data is presented in a neutral way, and that the data for other regions or countries is covered consistently.

Additional functionality in the tariff presentation, such as price benchmarking and international coverage, can often be important in the provision of such data – Teligen is able to provide comprehensive data from a wide range of sources. The output formats can be developed to the client's requirements, and the scope of the tariff data and analysis can be as wide as the client requires.

Teligen has extensive experience in providing tariff information to support a variety of requirements, and is able to work with the client to obtain the best "value for money" results from the tariff delivery.

Halvor Sannæs – *Director Tariff Services*

Mobile

First Vote on Roaming in the European Parliament

New EU regulations capping roaming charges should be approved before the summer of this year. This is promoted by the European Council which, at a recent meeting in Hanover, was pushing for a fast-track agreement to reduce roaming tariffs. Current proposals from the European Commission aim to reduce international mobile roaming charges by up to 70% by this summer.

Bernadette Finn – *Manager, Tariff Services*

Vodafone to Adjust Data Roaming Prices

In common with O2 and 3, Vodafone has also announced a drop in its data roaming prices. On 1st July, a new flat rate tariff will be launched in most of Vodafone's European markets, to replace the previous rates which were based on per MB charging. A new fixed rate will be applied to a data consumption of up to 50MB during either a 24-hour period or a calendar day.

The new flat rate data roaming prices apply to Vodafone affiliates and partner networks. Customers using a different provider will be charged per MB, as before. The new rates are likely to benefit high volume data users but perhaps not those who send the occasional email or access websites infrequently when abroad. In that case, the new tariff may well act as an incentive to higher data usage.

Cora Hackwith – *Consultant*

Armentel Announce New Corporate Tariff Plans

The Armenian incumbent operator, Armentel has just announced a series of new mobile tariff plans for the business market.

These plans are being offered to any company with three or more subscriber lines. The plans entitled Corporate Standard, Universal and Premium are suitable for companies with up to 299 lines. Two further plans, Corporate Team and Corporation, are offered to specific teams of 1-30 or 30+ within companies. Rental charges range from AMD 600 to AMD 3,360 per month, VAT inclusive. Call charges also decrease depending on the number of subscribers or the monthly bill of the corporate team.

These new plans came into effect on 14th March 2007.

Bernadette Finn – *Manager, Tariff Services*