

## 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 is the 50th issue of the Tariff Outlook and we are very pleased with the reception that our newsletter has received from you our readers. Among the stories we bring to you in this 50th issue is the news of a pre-paid fixed line package being offered to people in Brazil who do not have a telephone. The South African incumbent is offering a new broadband bundle and Sonera in Finland is restructuring its broadband pricing. The Norwegian MVNO One Call launches a free plan and O2 in Germany makes some changes available to its business customers. Those are just a few of the stories we bring to you this week. We hope you enjoy the read!

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](http://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.

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.

**Jóhanna Helgadóttir** – Senior 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](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](http://www.teligen.com/t_world_total.asp)

## Consulting



### This Weeks Top Stories...

- Telefonica Brazil Offers A New Pre-Paid Fixed Line
- Telkom, South Africa, Launches New Broadband Bundle
- Sonera, Finland, Clarifies Broadband Pricing Structure
- Orange France Has Launched "Mobile Minutes + Unlimited International" Option
- BSNL, India, Introduces VPN Over DSL Broadband
- Teligen Tariff Consultancy – A Case Study
- BT, UK, Launches Business VoIP Service
- One Call, Norway, Introduces "Free" Plan
- Cosmote, Romania, Unveils Integrated Bundle
- O2, Germany, Introduces Changes For Its Business Customers

## PSTN

### Telefonica Brazil Offers A New Pre-Paid Fixed Line

From April 14th Telefonica Brazil has been offering a new pre-paid fixed line for people who still do not have a telephone at home.

Linha Control 80 comes at R \$19.90 per month and includes 80 minutes a month which can be used to make local and national calls to fixed lines.

However, customers wanting to make international calls or calls to mobiles are advised to purchase pre-paid phone cards.

**Adriana Rodriguez** – *Tariff Analyst*

## Broadband

### Telkom, South Africa, Launches New Broadband Bundle

The South African incumbent operator Telkom has just announced a series of new broadband bundles for the consumer and small business market.

Telkom's new entry level DSL service called Do Broadband is being offered at R279 per month, a saving of 37% on the current level. The new service offers up to 384 Kbps plus a 1 GB Internet account.

Do Broadband Level 2 which offers a similar service but with 2GB Internet saves subscribers 12% a month while Level 3 the top end product, offers DSL to 4 Mbps and a 3 GB Internet account. This option offers subscribers a monthly saving of 18%.

These packages are already available and Telkom claims that they will make broadband in South Africa more affordable and accessible to all.

**Bernadette Finn** – *Manager, Tariff Services*

### Sonera, Finland, Clarifies Broadband Pricing Structure

Sonera, the Finnish incumbent, is clarifying its broadband pricing structure by reducing the number of price areas and introducing different pricing models for city centres and thinly populated areas. With the new pricing structure price levels will be slightly higher in the more thinly populated areas than in city centres.

As well as introducing a new a pricing structure Sonera is also reducing prices for higher download rate subscriptions. The download rates of Sonera Broadband range from 1 Mbit/s to 24 Mbit/s, with a maximum transmission rate of a fibre-optic based subscriptions offered in the big cities with speeds up to 100 Mbit/s.

**Jóhanna Helgadóttir** – *Senior Consultant*

### Orange France Has Launched "Mobile Minutes + Unlimited International" Option

Orange, France Telecom's Internet service provider has launched "Mobile minutes + unlimited international", an option available to Orange Broadband Internet customers with VOIP and Orange "la fibre" (FTTH) customers.

This option offers customers 30 minutes for calls to any mobiles operator in France plus unlimited calls to landlines in French Overseas Departments and European countries, as well as to landlines and mobiles in North America. There is no minimum term contract, no service connection charge and no contract termination fees.

**Nacera Touileb** – *Senior Analyst*

## BSNL, India, Introduces VPN Over DSL Broadband

As of 1st May 2007, BSNL, India's Telecommunications company, will offer VPN (Virtual Private Network) over DSL Broadband service to businesses and government and educational institutions. Customers needing a number of connections are eligible for bulk connection discounts. The VPN over Broadband will be in addition to the Broadband services already offered.

Furthermore, BSNL is offering a discount of 20% on fixed Broadband monthly charges to Government Departments, provided the number of connections taken is 5000 or more.

**Adriana Rodriguez** – *Tariff Analyst*

## Consultancy

### Teligen Tariff Consultancy – A Case Study

When several competing companies have common interests it can often be problematic to share information. In such cases Teligen can act as the 'middle man', ensuring that results are produced without any source data being disclosed.

Teligen has worked with several groups of operators or service providers over the years, from being the central collection point for information, to analysing the data and producing the intended results. With the use of Non Disclosure Agreements (NDAs) for each participating company, Teligen can collect price information from each participant for their own or other providers' services; this information is not disclosed to the other participants, and Teligen can ensure that the output data cannot be used to identify the specific price information of an individual participant.

Such methods have been used successfully in cases where, for example, several operating companies have common interests in approaching a regulator, or where a group of operating companies need to establish whether their prices are within an acceptable range of established price benchmarks (such as the OECD baskets, for example). Teligen has considerable experience in this type of study, right back to our launch in 1976.

**Halvor Sannæs** – *Director Tariff Service*

## VoIP

### BT, UK, Launches Business VoIP Service

BT, the UK incumbent, has launched a new business service called Office Anywhere. The new service allows free Internet phone calls to UK landlines to be made from BT's extensive network of Wi-Fi hotspots. The service also features capped calls to UK mobiles and international landlines wherever users have access to a compatible wireless network.

Users have a choice of three bundles: Simple, which includes 10MB of data a month, Professional with 30MB of data a month and Unlimited with unlimited usage. These bundles can be combined with a voice package of either 250 or 700 inclusive minutes. The different package combinations vary from £39.50 to £75.50 a month.

**Tamara Stancic** – *Consultant*

## Mobile

### One Call, Norway, Introduces "Free" Plan

The Norwegian MVNO One Call has introduced a new plan "One Call Mobil Faktura" where the customer will be allowed 88 minutes of free calls and 78 free SMS' per month. There are no monthly charges, no connection charge, and no commitments. Prices for calls and messages beyond the allowance are in the low end of the price range in Norway. One Call uses the Netcom mobile network in Norway.

The usage volume of 88 minutes and 78 messages has been established as the average consumption for mobile users in Norway. This new plan should then allow the "average user" to have literally free mobile service.

**Halvor Sannæs** – *Director Tariff Services*

### Cosmote, Romania, Unveils Integrated Bundle

Cosmote in Romania has launched the Cartela Extra Option, a bundle of voice and messaging services that can be added to an existing prepaid account. For €5 per month, users receive a number of on-net minutes and messages as well as an allocation of minutes to the fixed network.

The operator said that the bundle had been introduced as a response to the increased demand for integrated communication packages. The launch is being supported by an extensive campaign using various media.

**Cora Hackwith** – *Consultant*

### O2, Germany, Introduces Changes For Its Business Customers

O2 is offering its business customers a new Blackberry International Option. For a monthly rental of €59.00 customers get an inclusive volume of 30MB. Blackberry International Option can be used nationally as well as abroad. The option can be combined with all four existing business packages.

The company also reduced its prices for its data packages. The monthly rental for the business options Time 10, Time 30 as well as Data-Fair-Flat has been reduced by up to 50%. In keeping with the re-launch the company is introducing a customer-friendly 10KB billing.

**Tamara Stancic** – *Consultant*