

## Welcome to Teligen's Tariff Outlook Newsletter

### Message From The Editor

Welcome to Tariff Outlook, the newsletter brought to you every fortnight by Teligen's team of tariff analysts and consultants.

Once again, this issue of Tariff Outlook covers a variety of news across all telecom sectors. The European Parliament has voted in favour of new regulations to cut the cost of using a mobile abroad. The new regulations are expected to be in force by the summer and will see the cost of mobile roaming within the EU come down by as much as 70%.

In the broadband area, whereas Lebanon has seen the launch of the country's first ADSL services, Danish incumbent TDC is taking high speed Internet access to the next level with the imminent launch of a super fast product based on VDSL2 technology.

Mobile tariff reductions were announced in Greece, Spain and the Netherlands and both Armenia and Italy saw the introduction of new mobile Internet price plans. Maltacom introduced new PSTN tariffs to both the business and residential market.

Those are just some of the news items we bring you in this issue of Tariff Outlook. 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.

Our aim, as always, is to provide you with up to the minute pricing news and tariff developments. That being said, Tariff Outlook not only gives us the opportunity 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 comments or suggestions you may have that will help us deliver a newsletter that provides you with real value.

Please feel free to contact us either to obtain further information about any particular story or to give us your feedback. As the Editor of this issue, I have included my contact details 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](http://www.teligen.com/t_basket.asp)

## Consulting



### This Weeks Top Stories...

- Malta – Three New Voice Tariff Plans From Maltacom
- Belgium – Tele2 Offers International Option
- Lebanon – Ogero Launches Country's First ADSL Service
- Denmark – TDC Announces Super Fast Broadband
- Teligen Tariff Consultancy – A Case Study
- Italy – TIM Is Launching Mobile Internet Flatrate Europe - EU Vote For Low Cost Roaming
- Spain – Móvistar Cuts Mobile Rates
- Greece – Vodafone Announces Termination Charge Fall
- Armenia – Armentel Launch GPRS Service For Post-Paid Users
- Netherlands – Mobile Termination Tariffs To Be Lowered
- Greece – Cosmote Unveils New Business Plus Packages

## PSTN

### Malta – Three New Voice Tariff Plans From Maltacom

Maltacom has introduced three new flexible fixed line voice tariff plans as of 17th May 2007.

“Talk 200” and “Talk 500” include free minutes every month when calling any Maltacom number at any time of the day, whilst “Talk Evening & Weekend” provides unlimited free off-peak calls to Maltacom numbers as well as including a number of peak minutes.

There are no connection charges for existing customers switching to the new tariff plans.

**Nacera Touileb** – *Senior Analyst*

### Belgium – Tele2 Offers International Option

Tele2 in Belgium has introduced its Free Time International Option. For an activation charge of €5, this allows users to make free off-peak calls to fixed lines in 15 countries including the USA, Canada, Germany, France, Spain and Italy. A monthly cap applies and standard Tele2 rates are charged for calls to mobiles.

Tele2's International Option is compatible with other national savings schemes.

**Cora Hackwith** – *Consultant*

## Broadband

### Lebanon – Ogero Launches Country's First ADSL Service

Lebanon's first ADSL service, 'Blink', was launched on 14th May 2007. The new service, provided by incumbent operator, Ogero, offers a range of speeds from 128kbps to 2 Mbps. Prices start at LBP 35,000 (US\$23.90) per month for 128kbps to LBP 300,000 (US\$198.40) per month for 2mbps. Business prices are approx 20% higher while educational facilities are given discounts of 15-25% on the standard price.

Blink is being rolled out in ten of the most densely populated districts of the country to begin with. Initial network coverage includes Greater Beirut and Tripoli. The country's ISPs completed installation of the first ADSL lines last week, and Ogero says it aims to have 45,000 connections in service by the end of the year.

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

### Denmark – TDC Announces Super Fast Broadband

As of 1st June 2007, TDC's broadband customers will be able to enjoy broadband speeds of up to 50Mbit/s based on the VDSL2 technology. The Danish incumbent is going to offer this to residential customers in the centre of Copenhagen. TDC is going to expand into other areas in Denmark and aims to have up to 400,000 homes covered in the next two years.

**Jóhanna Helgadóttir** – *Senior Consultant*

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#### 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)

## Consultancy

### Teligen Tariff Consultancy – A Case Study

Teligen has been providing comprehensive and up to date tariff information for almost three decades, serving some of the most high profile organisations around. Teligen was one of the first organisations in Europe to focus on telecoms tariff information, and we have been continuously providing such information to clients since 1979.

One such example is the annual report on “Telecoms Tariff Trends” in the EU countries, from 1998 till present (the most recent report having been finalised in December 2006), provided to the European Commission – Teligen has provided information on price changes, time series price development information, details on tariff structures and price benchmarking results to the Commission for 10 years now, starting with a report on low-usage telephone service prices in 1997. Over the years Teligen has been providing comprehensive information on issues ranging from the state of competitive development in EU countries, via the detailed analysis of broadband prices, to the on-going supply of tariff information for the annual “Implementation Reports”.

Providing such information requires in-depth knowledge of the intricacies of the tariff information in all countries covered, and the ability to rationalise such information into a common framework that can allow direct comparisons of data and results. This has been one of Teligen’s strengths over the years; providing tariff information in database formats, and creating systems that allow the end user to see the relationships between different price elements and the end user cost.

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

## Mobile

### Italy – TIM Launches Mobile Internet Flatrate

In June 2007, Telecom Italia Mobile will be launching “Tutto Compreso Internet”. This mobile Internet service, which offers flat rate mobile Internet access, will be available for €20 per month. The tariff entitles customers to 2GB per month of mobile and PC web surfing, without the government concession tax charge, which is being refunded to customers as a bonus.

**Tamara Stancic** – *Consultant*

### Europe – EU Vote For Low Cost Roaming

On Wednesday 23rd May, the European Parliament voted in favour of new regulations to cut the cost of using a mobile abroad. Under the new regulations, mobile roaming charges within the EU will come down by as much as 70%.

The new rules are expected to come into force in time for the European summer holiday period. From July, network operators will be allowed one month to offer the price cap to customers, a month to apply the new rate once the customer responds, and a further month to automatically activate capped rates for customers who have still not responded. The maximum charge, excluding VAT, for regulated roaming calls will be capped at €0.49 per minute for outgoing calls and €0.24 for incoming calls.

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

### Spain – MÓVISTAR Cuts Mobile Rates

On 18th May, Telefonica’s mobile operation in Spain, MÓVISTAR, revised its mobile tariffs. The operator now offers four different packages on both pre-paid and post-paid terms. Call charges are said to be on average 9.5% lower than before and in some cases savings of up to 62% can be made. MÓVISTAR has discontinued a considerable number of tariffs, including its Total, Club, Tu Tiempo and 24 Horas plans.

With this tariff restructuring, MÓVISTAR is attempting to counter the threat posed by recent entrants to the Spanish market, such as Yoigo, who are offering lower flat rates and simple price plans.

**Angela Toal** – *Tariff Analyst*

### Greece – Vodafone Announces Termination Charge Fall

Vodafone Greece is to implement a cut of its termination charges from 1st June 2007. Calls made from all Greek telecommunications networks to Vodafone will now incur a termination charge of €0.1071 per minute. Compared with the previous €0.1174, this represents a 9% decrease. There will be no minimum call charge and billing is per second.

The operator pointed out that the new reduced tariff is lower than the EU average as stated in a recently published report.

**Cora Hackwith** – *Consultant*

### Armenia – Armentel Launch GPRS Service For Post-Paid Users

The Armenian operator ArmenTel has introduced a GPRS service with internet and WAP applications, for its post-paid customers. There is a monthly fee of AMD360 and a further charge determined by the amount of data sent and received.

The company has also launched a new pre-paid tariff called "Summer Nights". It will be available to customers who purchase a "mini card" from 15th May 2007. All voice calls made and SMS sent within ArmenTelis network will cost 3 drams between midnight and 08:00.

**Angela Toal** – *Tariff Analyst*

### Netherlands – Mobile Termination Tariffs To Be Lowered

Following a court appeal by mobile operators in the country, Dutch telecommunications regulator OPTA has submitted a draft decision to the European Commission in respect of a decrease in fixed-to-mobile termination fees.

The proposed tariff reduction will progress in three phases starting this summer, dropping from on average €0.12 per minute to €0.07 on July 1st 2009. The regulator stated that the proposed cuts will save consumers more than €190 million over three years.

**Ansfried Lekkerkerker** – *Tariff Analyst*

### Greece – Cosmote Unveils New Business Plus Packages

Greek mobile operator Cosmote has launched six new business packages, at more affordable prices according to the operator. The new Business Plus packages offer a flat rate for calls to mobiles and low fees for fixed-line and inter-company calls with inclusive minutes from 100 to 1000 minutes a month.

Users of these packages can benefit from Cosmote's Business to Fixed service, offering airtime bundles for calls to fixed networks for a small extra monthly fee. Up to 1,000 free minutes for calls to fixed national networks are available.

**Adriana Rodriguez** – *Tariff Analyst*