

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.

In this issue we have stories from countries like Croatia, Finland, India, Australia and the Netherlands, to name a few. The Croatian regulator has banned an offer from T-Com and has forced T-Com to come back with a revised offering. Sonera in Finland is raising the charges for fixed telephony in rural areas in an attempt to push customers towards wireless technology. Virgin Mobile in Australia will launch a broadband package and mobile operators in the Netherlands are all setting their roaming charges at the same rate.

Those are just a few of the stories we have covered this month and we hope you enjoy the read! 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 this update are of interest, further details of the tariffs and services can be found in our comprehensive subscription based databases, the T-Products. Just click on www.teligen.com for more information and to 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 telecoms tariff news. 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. Therefore, we would 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. The Editor's details for this issue are below.

We look forward to hearing from you.

Jóhanna Helgadóttir – Senior Consultant

Tel: + 44 (0) 208 263 5206, **email:** johannah@teligen.com

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...

- Croatian Regulator Bans T-Com's 'Non-Stop' Service
- Sonera, Finland, Changes Regional Fixed Line Pricing
- BSNL, India, Unveils Prepaid Fixed Wireless Tariff
- Telenet, Belgium, Launches Telephony And Interactive Digital Television
- Virgin Mobile, Australia, Launches Broadband Bundle
- Telekom South Africa Reduces Broadband Tariffs
- Teligen Tariff Consultancy – A Case Study
- Dutch Mobile Providers 'Agree' On Roaming Tariffs
- AT&T, USA, Introduces Mobile Video Calling
- New Mobile Email Personal Edition From Qtel
- Vodafone Netherlands Launches SIM Only Package

PSTN

Croatian Regulator Bans T-Com's 'Non-Stop'

Service T-Com's 'Non-Stop' service which offers free phone calls inside the T-Com network for a monthly rental of HRK20 has been banned by The Croatian Telecommunications Agency (HAT). Instead, it has approved of the 'Slobodono Vrijeme' (Free Time) tariff which is very similar to the 'Non-Stop' option. 'Slobodono Vrijeme' gives customers free phone calls but only during off-peak hours. The monthly rental is higher than that of 'Non-Stop'.

Tamara Stancic – *Consultant*

Sonera, Finland, Raises Regional Fixed Line Pricing

The Finnish incumbent Sonera has announced that as of 1st September 2007 prices of fixed-line telephone subscriptions will be raised. The raise will mainly affect consumer customers of fixed voice services in sparsely populated areas. Sonera recommends wireless solutions to the customers of these areas. Sonera's mobile network covers nearly 100% of the population in Finland and 97% of its land area. Sonera claims that currently wireless broadband is now the number one choice in sparsely populated areas.

Jóhanna Helgadóttir – *Senior Consultant*

BSNL, India, Unveils Prepaid Fixed Wireless Tariff

On 1st August 2007, BSNL India started offering a prepaid tariff called 'Tarang' for its Wireless Local Loop (WLL) service. The tariff is broadly similar to prepaid offerings on BSNL's GSM network. The starter pack costs INR 200.00 with INR 150.00 of talk time value included.

Adriana Rodriguez – *Tariff Analyst*

Multiplay

Telenet, Belgium, Launches Telephony And Interactive Digital Television

The Belgian operator, Telenet has recently announced the launch of its telephony and interactive television services in Brussels and Leuven. The launch of these services follows the takeover of UPC Belgium by Telenet at the beginning of 2007.

Telenet telephony will be offered through the existing cable connection in Brussels and Leuven; customers will be able to subscribe to one of Telenet's telephony offers "Freephone" and "Freephone 24". Otherwise, they can take up the Telenet Packs which include Internet and telephone which gives them a reduction of 25% on their monthly fees.

The interactive digital television package will be the same as the basic package that Telenet offers in the rest of its cable region.

Nacera Touileb – *Senior Analyst*

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

Virgin Mobile, Australia, Launches Broadband Bundle

Virgin Mobile has just announced a new service in Australia offering a fixed line telephone service with broadband Internet access. Customers will receive unlimited local and national long distance calls and 4GBs of download data for AUD 60 month. All traffic will be carried on Optus' 3G network.

The service, Virgin Broadband at Home, is one part of a new suite of services being offered by Virgin. Other services include Virgin Broadband and Virgin Mobile Broadband. The service will be available from 1 August, initially from Virgin Mobile stores but later from a wider range of other outlets.

Bernadette Finn – *Manager, Tariff Services*

Telekom South Africa Reduces Broadband Tariffs

Telekom South Africa has reduced the charges for its DSL and Do Broadband packages with effect from 1st August 2007, subject to approval by the regulator (Icasa). Charges have been cut on average by 18.2%.

Prices will now range from R152 for the entry level 384 Kbps DSL only package to R554 for its' 4Mbps Do Broadband package.

This is part of a review of charges for all of its' regulated basket of products.

Angela Toal – *Tariff Analyst*

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 Service*

Mobile

Dutch Mobile Providers 'Agree' On Roaming Tariffs

It seems like all big players on the Dutch telecom market have decided not to get competitive over roaming tariffs. Following the EU's decision to set the maximum roaming tariffs to €0.60 for making a mobile phone call and to €0.30 for receiving a call on a mobile phone while abroad, one could have expected these tariffs to decrease even further due to competition between mobile operators. However, operators in the Netherlands do not seem to be getting competitive. T-Mobile was the first operator to announce that roaming prices will be set to €0.58 and €0.29, respectively. KPN, Vodafone, Telfort and Orange quickly followed suit and announced that they will be lowering their prices to the exact same level as T-Mobile has.

Ansfried Lekkerkerker – *Tariff Analyst*

AT&T, USA, Introduces Mobile Video Calling

AT&T has introduced its Video Share service in nearly 160 markets in the US. Users can share live videos over their mobile phones while on a voice call. The service enables one-way live streaming-video feeds that can be seen by both parties while they are participating in a two-way voice conversation.

Video Share works over the AT&T 3G network and IMS platform. The service will be accessible over any of the three primary screens that customers use most frequently – the mobile device, the PC and the television.

The company is offering two tariffs for this service. 25 minutes of Video Share will be available for \$4.99 and 60 minutes for \$9.99. Users can also choose pay as you go where the service will be charged per minute.

A Video Share-capable handset is required to use the service.

Tamara Stancic – *Consultant*

New Mobile Email Personal Edition From Qtel, Qatar

On July 29th 2007, Qtel, Qatar's incumbent operator launched the new Mobile Email service Personal Edition. The new service provides full access to the user's Internet/ISP mailbox on the mobile handset and allows instant reading, writing and sending of emails.

A one-off registration fee and a monthly fee apply. All local Mobile Email data traffic will be free for all customers.

Nacera Touileb – *Senior Analyst*

Vodafone Netherlands Launches SIM Only Packages

Vodafone Netherlands has introduced four different SIM-only subscription packages. The new Vodafone Scherp (Sharp) tariffs have one-year contract duration and offer monthly bundles of between 125 and 450 minutes. Three types of SMS bundles are also on offer, which reduces the cost per SMS by up to 68% compared to the standard rate of €0.25.

The new Scherp packages are competing with the SIM only tariffs from Telfort, the KPN-owned operator that implemented price reductions in May this year. Telfort has responded to the challenge by emphasizing its regular promotions as well as the fact that, unlike Vodafone Scherp, it bills by the second.

Cora Hackwith – *Consultant*