

## Welcome to Teligen's Tariff Outlook Newsletter

### Message From The Editor

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

It has been another exciting couple of weeks in the telecom sector. Deutsche Telekom introduced new mobile and triple-play prices and Tele2 in France is undercutting the triple-play market with its latest offer. 3 in the UK has launched new data tariffs and Verizon in the USA launched a fixed price lifetime DSL package. The EU has also announced that all EU mobile operators have reported their new roaming tariffs.

We would like to take the opportunity to introduce you to the latest addition to our T-Product family: **T-Connect**. A new broadband database that we strongly believe will help you to find broadband data in an easy to use and clear format. **T-Connect** will be available in a Standard and Bespoke versions and will be launched in October 2007.

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.

**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](http://www.teligen.com/t_basket.asp)

## Consulting



### This Weeks Top Stories...

- T-Connect, Our Broadband Service is Finally Here
- Germany – Deutsche Telekom Introduces New Mobile and Triple-Play Pricing
- France – Tele2 France Undercuts Triple-Play Market
- Switzerland – Swisscom Bundles Mobile and Fixed-Line Broadband Access
- USA – Verizon Launches Fixed Price Lifetime DSL Package
- Germany – O2 Simplifies DSL Tariffs
- UK – 3 Launches "Tenner-a-Month" Data
- EU – Roaming and the EU
- France – Neuf Cegetel Launches Unlimited Legal Music Downloads
- Austria – A1 Adds to Youth Tariff Range
- Sweden – Telia Launches Mobile Broadband
- UK – T-Mobile Launches New FamilyShare Tariff

## T-Connect

It is finally here! A product that will help you to find your way through the Broadband pricing jungle and support you with your day-to-day business activities.

T-Connect has been developed to capture the ever changing Broadband market and its many different structures. T-Connect is a single source of broadband price and service information covering 30 European countries and over 300 tariff packages in its standard version. T-Connect can also be tailored to your specific data coverage requirements.

If you are looking for the best offer available in a country, or wish to see how price levels in one country compare with the prices in another, T-Connect will provide you with the facts and benchmarking results based on proven methodology.

T-Connect is an interactive system that allows you to tailor the benchmarking parameters to your requirements, and also lets you generate results based on different methodologies.

Teligen's price benchmarking experience is unrivalled in the business. We have been offering databases and systems for comparing prices of telecoms services since 1991, and have been providing the OECD Price Benchmarking results continually since 1995.

To find out more about T-Connect please contact us either at [sales@teligen.com](mailto:sales@teligen.com) or on telephone number **+44 (0) 20 8263 5440**.

## Multiplay

### Germany – Deutsche Telekom Introduces New Mobile and Triple-Play Pricing

This week, German incumbent operator Deutsche Telekom revealed new pricing for its mobile and triple-play services in Germany. A new plan called 'MyFaves' gives T-mobile customers the opportunity to select five phone numbers they can call for a fixed low price.

In addition, they also introduced their IPTV packages, called Entertain Comfort, expanding the service to the ADSL2+ network. Starting at €59.95 a month, the packages offer customers Internet access, a fixed line and a TV service.

**Ansfried Lekkerkerker** – *Tariff Analyst*

### France – Tele2 France Undercuts Triple-Play Market

Tele2 France has introduced their "Tele2 Box Essentiel" triple-play offer, at EUR 19.90 per month in unbundled areas (zones covered by Tele2) and EUR 29.90 in non-unbundled areas, (zones not covered by Tele2). The service includes ADSL up to 20MB and TV.

This offer comes with 41 TV channels and 32 radio stations and unlimited Internet access 24 hours a day, every day. 5 email addresses are also included.

**Adriana Rodriguez** – *Tariff Analyst*

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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)

### Switzerland – Swisscom Bundles Mobile and Fixed-Line Broadband Access

As of 27th August 2007, Swisscom customers can combine a mobile telephone subscription with a standard DSL connection without having a fixed-line phone connection. The fixed network connection will be muted so that phone calls will no longer be possible. The offer also includes the use of supplementary services such as Bluewin TV or Combox pro.

Residential customers can choose between NATEL swiss liberty and NATEL pro subscriptions, while business customers can choose between NATEL business and NATEL CMN mobile telephone packages. All customers can choose either Bluewin DSL 3500 or DSL 5000 broadband access. For example: NATEL swiss liberty combined with Bluewin DSL 3500 will cost CHF 74 a month and save customers CHF 25.25 each month on fixed network fees.

**Angela Toal** – *Tariff Analyst*

## Broadband

### USA – Verizon Launches Fixed Price Lifetime DSL Package

Verizon, the US communications company has just announced a new service that allows its subscribers to lock into the price they pay for broadband per month.

These price-for-life plans target the low end users, specifically the 768 kb/sec and 3 Mb/sec usage plans. Subscribers will save 25% on the entry-level package and almost 7% on the faster speed plan. These savings are based on comparison of Verizon's regular rates without commitment. Subscribers need to sign up by October 31st to take advantage of this offer.

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

### Germany – O2 Simplifies DSL Tariffs

O2 in Germany has simplified the structure of its DSL packages, which offer Internet access as well as telephony using WiFi.

All three price plans now offer speeds of up to 4Mbps, with higher bandwidths available at a surcharge. The "DSL S" package charges per minute for both calls and Internet access. A flat rate for Internet access is included in both the M and L plans, whereas the latter also includes a flat rate for phone calls at the total price of €35 per month.

To promote the new packages, connection charges and the cost of the "Surf&Phone Router" will be waived until mid-November.

**Cora Hackwith** – *Consultant*

### UK – 3 Launches "Tenner-a-Month" Data

On 3rd September the mobile operator 3 will launch its new data tariffs: Broadband Lite, Broadband Plus and Broadband Max. At £10 a month, the basic Mobile Broadband package gives customers 1GB of data. Data usage outside these bundles is charged at 10p/MB.

Customers will be able to browse the Internet at speeds of up to 2.8Mbps and the company will give existing customers a free USB modem. The service goes live on 3rd September with a phased roll out: Londoners inside the North Circular, England north of Birmingham, Scotland, and Ireland get access first, but by December the operator estimates 85 per cent of the UK population should be covered.

**Tamara Stancic** – *Consultant*

## Mobile

### EU – Roaming and the EU

According to an announcement from the European Commission all mobile operators have now informed the Commission of their new Eurotariffs. This comes after the Commission's publication of its "name and shame" roaming benchmarking website on 2nd August. All these tariffs are now listed on the Commission's website.

There is already good news for customers roaming in Europe. In 23 of the 27 EU Member States at least one mobile operator offers roaming tariffs below the regulation's ceilings.

**Jóhanna Helgadóttir** – *Senior Consultant*

### France – Neuf Cegetel Launches Unlimited Legal Music Downloads

Neuf Cegetel launched an unlimited legal music download service based on the digital catalogue of Universal Music, available to its "100% Neuf Box" service and Broadband customers. Subscribers are able to put music on their PC, MP3 player and mobile phone; they can also listen to a 30 second clip of any track. There are two Neuf Music options to choose from:

1. **Neuf Music Initial**, which is included in the "100% Neuf Box" service, allows customers unlimited downloads of music in their favourite genre.
2. **Neuf Music Optimal** gives unlimited downloads of all tracks and videos in the Universal Music Catalogue.

Orange France also plans to offer free unlimited music downloads by the first half of 2008.

**Nacera Touileb** – *Senior Analyst*

### Austria – A1 Adds to Youth Tariff Range

A1, Mobilkom's mobile operation in Austria, has added another price plan to its Xcite range, which is aimed at users under 26. As the name implies, the new Xcite Easy\_5 plan offers a flat rate of €0.05 for calls and texts anywhere in Austria.

The other Xcite tariffs are Zero, offering free on-net calls, and Easy, another flat rate tariff. All youth packages are subject to a minimum monthly usage.

**Cora Hackwith** – *Consultant*

### Sweden – Telia Launches Mobile Broadband

On August 23rd, Telia, the Swedish incumbent, launched five mobile broadband subscriptions. The subscriptions are aimed at both residential and business customers and start at SEK 40 per month with a monthly cap of SEK 399. The service also gives customers access to Telia's nationwide network of surfing zones, Telia Homerun as well as the mobile network.

**Jóhanna Helgadóttir** – *Senior Consultant*

### UK – T-Mobile Launches New FamilyShare Tariff

T-Mobile's FamilyShare tariff gives customers one monthly bill with unlimited calls between members of a family group at no extra cost.

FamilyShare plans are available from 1st September starting at £55 a month with FamilyShare Light for 500 minutes and 300 texts and FamilyShare Max at £150 a month.

At the end of each month, there is just one bill and customers can check the status of their allowance at any stage during the month.

**Adriana Rodriguez** – *Tariff Analyst*