

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 are bringing you once again a wide variety of telecoms pricing news. Two Dutch mobile operators launched data tariffs that will bring BlackBerry usage within reach of private users. E-Plus in Germany is another operator to unveil data price plans. OTE in Greece has announced a triple play package and Bell Canada is now including home phone services in its multiplay bundle for the Quebec market. These are just some of the stories that will help you keep up to date in today's telecoms market. We have also included a short case study looking at an example of Teligen's consultancy services. To find out more, just click on the banner on the right.

We would like to take this opportunity to introduce you to **T-Connect**, the latest addition to our T-Product family. **T-Connect** is our new broadband database that presents broadband data in an easy to use and transparent format. **T-Connect** will be available in a Standard and Bespoke version 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 for further details and request a copy of our demo CD.

Please do not hesitate 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.

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...

- **T-Connect has Arrived!**
- Canada – Bell Adds Home Phone to Quebec Bundle
- Greece – OTE to Launch Triple-Play Option Package
- UAE – New Special Need Freedom Packages From Etisalat
- Teligen Tariff Consultancy – A Case Study
- Sweden – Telia Offers "Smart" Broadband
- Paraguay – Low Cost ADSL Service Announced
- Germany – Vodafone Reduces Zuhauseweb Prices
- Germany – E-Plus Announces New Data Plans
- Netherlands – KPN and T-Mobile Present New Blackberry Tariffs
- Netherlands – Telfort & The Phone House Introduce Unlimited Mobile Broadband

T-Connect

T-Connect, the latest addition to Teligen's range of T-products, is finally here. It will help you find your way through the Broadband pricing jungle and support 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 or on telephone number **+44 (0) 20 8263 5440**.

Multiplay

Bell Adds Home Phone to Bundle in Quebec

Bell Canada has enhanced its bundle offer in Quebec to include Home Phone from 12th September 2007. The Bell Bundle was introduced in May offering high speed Internet, digital television, long distance telephone and mobile telephone services. With the enhanced Bell Bundle, customers save \$5 on each Bell service. A bundle including the minimum of two services starts from \$55.95 per month.

The service is available in all areas of Quebec recently deregulated by the CRTC, including Montreal, Quebec City, Trois-Rivieres, Sherbrooke and Chicoutimi.

Angela Toal – *Tariff Analyst*

OTE to Launch Triple-Play Option Package

Greek telecommunications provider OTE will be launching a triple-play option called "OTE All In One", due out in October 2007. This price plan consists of unlimited fixed-to-fixed calls, ADSL broadband and mobile telephony, all for a single monthly payment.

Other new packages include unlimited local and domestic long-distance calls, fixed line SMS services, new fixed-to-mobile offers and price plans for business customers combining voice and data services.

Adriana Rodriguez – *Tariff 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

PSTN

New Special Need Freedom Packages From Etisalat

Etisalat, the UAE incumbent operator has announced the launch of its "Special Need Freedom Packages" to both qualified individuals and social services centres. The packages offer discounts across all services offered by the operator: PSTN, Internet access as well as mobile.

The first "Freedom Package" is designed for individuals who receive a 50% discount over standard charges for services such as Push to Talk, data usage, video calling, fixed line telephony and AL Shamil broadband, amongst others.

A second "Freedom Package" is designed for special need institutions. These will benefit from a 30% discount on services appropriate to them, such as Web Fax, SMS Broadcasting, 800 toll free services, Web Hosting and ISDN.

Nacera Touileb – *Senior Analyst*

Consultancy

Teligen Tariff Consultancy – A Case Study

The provision of information on promotions in the fast-changing mobile world is another area where Teligen has gathered extensive experience.

An international mobile operator required an overview of promotions in all of the European countries where it had operations. The overview had to be comprehensive as well as structured in such a way that the client would be able to sort promotions by type, duration and other criteria. Over time, this led to a better understanding of each competitor's focus in the marketplace.

A one-page executive summary for each country was also provided, linking to more extensive information contained in the document.

Using its language capabilities, international contacts and desk research expertise, Teligen provided a monthly update as well as pro-active alerts to help the client keep abreast of competitive activity in a notoriously fast-moving market environment.

Cora Hackwith – *Consultant*

Broadband

Telia, Sweden, Offers "Smart" Broadband

Swedish incumbent Telia claims that it will be the first in the world to offer "smart" broadband to its customers. Smart broadband means that the connection can be used for more than surfing the Internet.

The telephone jack is equipped with an intelligent box or an all-in-one box that connects all data, sound and video equipment. The Smart Start package will be available as of 12th September and comes at a monthly price of SEK 29.

Jóhanna Helgadóttir – *Senior Consultant*

Paraguay – Low Cost ADSL Service Announced

Copaco, Paraguay's state-owned fixed operator, has just announced a new low priced ADSL package. The service will offer a fixed number of Internet usage minutes each month for USD 20. This new option provides a saving of 25% compared to the basic unlimited usage plan.

Copaco currently have 6,000 ADSL customers and are hoping this new offer will boost their subscriber numbers to 10,000 by the end of this year.

Paraguayan Internet association COIT recently said the country has an Internet penetration of only 3.5%, which is the lowest level in South America. According to COIT, this is mainly due to the lack of a competitive market, which is monopolized by Copaco.

Bernadette Finn – *Manager, Tariff Services*

Germany – Vodafone reduces ZuhauseWeb prices

Vodafone Germany claims to have reduced the monthly charges for its ZuhauseWeb packages by an average of €5. Zuhause Web uses Vodafone's UMTS network and is promoted as an ideal solution for users in those areas that are not covered by DSL services. Zuhause covers a radius of up to 2km from the home.

Three price plans are available. WebStarter is aimed at the occasional surfer and charges €0.04 per minute from the start. WebVolume 1000 includes 1000MB per month, whereas heavy users are advised to sign up to WebFairFlat, which has a fair usage policy of 5000MB per month. Connection charges are waived until 20 January 2008 and all price plans have a 24-month contract duration.

Cora Hackwith – *Consultant*

Mobile

Germany – E-Plus Announces New Data Tariffs

On 1st September E-Plus unveiled three new flat rate tariffs for data usage.

For only €5.00 "Surf & Mail-Flatrate" customers can access the Internet and mail for free within the E-Plus Surf & Mail-Portal. The "Internet-Flatrate" tariff gives users unlimited access to the Internet, whereas "Internet 250" offers 250MB per month at a fixed price.

Tamara Stancic – *Consultant*

KPN and T-Mobile Netherlands Present New Blackberry Plans

In early September, T-Mobile Netherlands introduced a new tariff for the Blackberry Pearl 8100 device. For a fixed charge of €10 a month excluding VAT, customers receive unlimited e-mail and Internet access. KPN soon followed by launching their new price plan for the Pearl 8100 called 'Blackberry Start', which will cost the customer €9.95 a month plus VAT. However, the KPN tariff is subject to a 2 MB limit, while T-Mobile offers its customers unlimited Internet access.

Ansfried Lekkerkerker – *Tariff Analyst*

Netherlands – Telfort & The Phone House Introduce Unlimited Mobile Broadband

On 3 September, Dutch telecom provider Telfort and retail chain The Phone House introduced an unlimited mobile broadband package for €29.95 a month. According to the operator, this allows customers to access the Internet on their laptop or mobile device for the price of basic home Internet. The service uses KPN's UMTS/HSDPA network and is exclusive to The Phone House.

Yilmaz Bakay – *Tariff Analyst*