

## 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.

In this issue of Tariff Outlook we have a number of Internet related tariff stories. In the Netherlands Telfort is making plans to move into the fixed Internet market. Telecom Italia have announced a new multiplay service and O2 in the UK are now offering a broadband service. Also in Italy, the ISP Tiscali is now offering its customers standalone voice services. In mobile news, and good news for Dutch roamers, Vodafone in the Netherlands has dropped data roaming charges.

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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### 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)

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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**
- Germany – Tele2 Increases Its Dial-Up Internet Charges
- The Netherlands – Telfort In Move To Fixed Internet Market
- Italy – Tiscali Italia Introduces Standalone Voice Packages
- Italy – Telecom Italia Introduces New Quad-Play Offer Unica
- Spain – Telefonica To Launch 10 Mbps ADSL, Piloting 30 Mbps
- UK – O2 Launches 'O2 Broadband' Service
- Ireland – Perlico Offers €0.99 Per Month Broadband
- Teligen Tariff Consultancy – A Case Study
- Norway – Telenor To Reduce Call Charges To Other Mobile Networks
- The Netherlands – Vodafone Drops Data Roaming Prices
- Turkey – Turkcell Changes Its Tariffs
- UK – Ad-Funded MVNO Blyk Unveils Pricing
- Qatar – Qtel Introduces 3G Mobilecam For The First Time
- Armenia – Vivacell Introduce Night Tariff Plans

## 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 **00 44 208 263 5440**.

## Internet

### Germany – Tele2 Increases Its Dial-Up Internet Charges

Tele2's dial-up Internet charges have been changed on 1st October. "ActionTag" and "ActionNacht" prices have been increased by 18% to 25%. "Action1" prices vary from an increase of 64% for off-peak times (8pm-10pm) and a decrease of 75% for off-peak (6pm-8pm). "Action24" didn't have any price changes but clients are receiving 5 free minutes at the beginning of each connection.

**Tamara Stančić** – *Senior Consultant*

### The Netherlands – Telfort in Move to Fixed Internet Market

Telfort, the Dutch mobile operator owned by KPN is reportedly moving into the domestic fixed line internet market. The company plans to offer broadband up to 20 Mbps for €19.95 per month. Line rental and unlimited calls to fixed lines can be added for an additional €9.95.

Telfort said it aims to offer a simple service at a fixed price for 12 months, with no extra conditions or costs. In addition, subscribers to Telfort Internet will not require a KPN fixed-line subscription. A spokeswoman for KPN said they intend to merge its ADSL brands Speedlinq and Tiscali under the Telfort brand although no final decision has been made yet.

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

## PSTN

### Italy – Tiscali Italia Introduces Standalone Voice Packages

Tiscali, the Italian operator has launched a stand alone voice offer called Tiscali Voce. The package enables those reached by Tiscali's unbundling network to retain their home telephone number without paying Telecom Italia's monthly fee. Tiscali says this offer is aimed at those who do not need an ADSL line and only require a fixed telephone service. There are two price plans available Tiscali Voce No Limit AT €19.90 per month and Tiscali Voce Free at €9.90. Both plans include free calls to other Tiscali clients.

**Jóhanna Helgadóttir** – *Senior Consultant*

## Multiplay

### Italy – Telecom Italia Introduces New Quad-Play Offer Unica

Telecom Italia launches the first Quadruple Play offering “Unica”, based on broadband and IP technology. The package allows users to make calls from the mobile “Unico”, either through the fixed-line or mobile network using dual mode technology (Alice Wi-Fi for the fixed-line and UMTS for the mobile network), Internet and Alice Home TV content access.

The basic Unica plan offers unlimited calls from home to the Telecom Italia fixed network and also a choice of 30, 60 or 90 minutes a day over the mobile network to TIM numbers and Telecom Italia fixed numbers. All plans include the Nokia E65 handset.

As well as allowing telephone calls, the new Quadruple Play offering also includes Internet navigation without time limit and access to Alice Home TV contents.

**Adriana Rodriguez** – *Tariff Analyst*

## Broadband

### Spain – Telefonica to Launch 10 Mbps ADSL, Piloting 30 Mbps

Spain’s main telephony operator Telefonica will shortly launch ADSL of up to 10 Mbps to residential customers, according to a recent announcement.

Until now 10 Mbps ADSL has only been available to business customers.

Also announced was the starting of “digital areas” which would be equipped with fibre-optic ADSL of speeds of more than 30 Mbps and an improved version of its digital TV Imagenio.

The offer, as part of double- or triple-play packages, will soon be available to residential customers.

**Adriana Rodriguez** – *Tariff Analyst*

### UK – O2 Launches ‘O2 Broadband’ Service

O2’s new broadband service will launch in the UK on October 15th. For existing O2 Pay Monthly customers, plans will start from £7.50 per month for speeds up to 8MB, rising to £15 per month for 20MB. All plans are also available to O2 Pre-Pay and non-O2 customers for an additional £10 per month.

All subscribers will receive a wireless router, free 24-hour technical support, no monthly download limits, subject to a fair usage policy, and 100 free texts each month from their PC. O2 is also offering customers a check one month after starting the service to make sure the package selected is appropriate and that they only pay for the speed their line can support.

The service will initially cover 50% of the population, focusing on urban areas, with roll-out to other areas depending on customer demand.

**Angela Toal** – *Tariff Analyst*

### Ireland – Perlico Offers €0.99 Per Month Broadband

Irish telecoms and broadband provider, Perlico Communications, have announced a special broadband offer as part of its recently launched Perlico Freedom package. The deal offers a 1Mbps broadband connection for €0.99 (USD1.39) per month for the first six months, and then €6.99 thereafter. Perlico’s offer includes free connection or a free modem.

**Catherine Arteaga** – *Tariff Analyst*

## Consultancy

### Teligen Tariff Consultancy – A Case Study

As experts in the field of telecoms tariffs, Teligen is often asked to assist in the development of prices for new services and the restructuring of existing prices.

An Eastern European incumbent operator procured the help of Teligen to analyse the options for tariff restructuring within a rather limiting regulatory framework. Teligen provided an in-depth analysis of the current situation, highlighting the vulnerable areas of the tariffs, and in turn providing a range of suggestions for where the tariffs could be enhanced inside the existing framework. Teligen also provided different future scenarios for changes in legislation and prices, and at the end of the study ran a full day workshop where all relevant staff were able to discuss the proposals and ask questions.

Teligen believes in providing advice beyond the immediate scope of a study, in order to foster new ideas and allow for discussions around the subject at hand. Direct access to key consultants within the Teligen team can be a fundamental factor for many clients, and with Teligen's ongoing focus on tariffs we are able to cover not only the topics of the specific study, but to also draw on our wide-ranging experience with tariffs in general.

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

## Mobile

### Norway – Telenor to Reduce Call Charges to Other Mobile Networks

The Norwegian Regulator (Post og Teletilsynet) has ordered a reduction in termination charges in the mobile networks. Today there are differences in charges with Telenor's termination charges being significantly lower than those of Netcom and Tele2. A harmonisation of these charges is expected by mid-2008. Telenor is promising to pass these reductions on to their customers of both fixed and mobile services, suggesting a total value of the reduction of 120 million NOK per year. However, both Netcom and Tele2 are seeking to defer the reduction which was supposed to start with a first step on 1 October 2007.

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

### Netherlands – Vodafone Drops Data Roaming Prices

Vodafone Netherlands has reduced the cost of data roaming for its postpaid users. They have to subscribe to a "Zorgeloos Internet Blox" (Internet without worries), which entitles them to use the mobile Internet without restrictions for €9.95 per month. When they go abroad, they can use data for €0.15 per 20KB. This represents a reduction of almost 75% on the previous data roaming tariff.

In addition, Vodafone has introduced an online Data Calculator for all users. This indicates the data usage, in MB, of activities such as visiting websites, sending emails or downloading content.

**Cora Hackwith** – *Consultant*

### Turkey – Turkcell Changes Its Tariffs

On the 2nd of October 2007 Turkcell, Turkey's biggest mobile operator with 33.8 million subscribers modified its tariffs. Turkcell has stopped offering the following tariffs; KademeliCell, StandardCell and DestekCell to new customers. Instead, they categorised their offers into the following 6 tariffs:

- BizBize Canimin 3u (3 favorite Turkcell numbers only)
- BizBize Hepimiz (max. 0.15 YTL for calls to the same network and fixed)
- BirFiyat (anytime, any network, same call charge)
- BizBize Kampus (for students) BizBize Kamu (for civil servants)
- BizBize (standard).

Besides the cancellation of three old tariffs and the new categorisation, Turkcell also made some changes within each tariff regarding the call charges and monthly rental offer.

**Yilmaz Bakay** – *Tariff Analyst*

### UK – Ad-funded MVNO Blyk Unveils Pricing

The UK has seen the launch of Blyk, a new MVNO on the Orange network. Blyk is aimed at young users between 16 and 24 and provides free airtime and texts funded by advertising. To qualify for the free communications, users have to agree to receive up to six MMS messages a day, which Blyk claims will be tailored to their interests.

Blyk users receive 217 free texts and 43 free minutes each month to any UK network. Further communications are charged at 10p for a SMS and 15p per minute for a voice call.

**Cora Hackwith** – *Consultant*

### Qatar – Qtel Introduces 3G MobileCam For The First Time

Qtel has announced the launch of its new 3G MobileCam service for the first time in Qatar. The 3G MobileCam is a wireless camera that can be placed in a customer's home or office and accessed via 3G video calls from their mobile phone.

The new service will enable private and business customers to keep an eye on their promises from anywhere and at anytime, in addition to that, it will allow them to enjoy live audio, video and a talkback facility while maintaining a complete privacy as this service only accepts calls from the camera's owner or main administrator.

All Qtel's customers postpaid and prepaid, owning a 3G enabled mobiles can make use of the new MobileCam at the normal video calling rate, however, it's better used with SIMCam, a new prepaid SIM available for a QR100 one-off connection fee and QR30 monthly rental fee.

**Nacera Touileb** – *Senior Analyst*

### Armenia – VivaCell Introduce Night Tariff Plans

VivaCell Armenia is now offering Night tariff plans for Alo prepaid subscribers: Himnakan Night and Miasin Night plans are especially designed for subscribers who talk mostly within VivaCell network. Now during the night hours subscribers can talk and send SMS for only 6 drams. The Night Tariff plans are valid until December 20, 2007.

**Catherine Arteaga** – *Tariff Analyst*