

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.

This issue of Tariff Outlook covers a variety of news across all telecom sectors. In the multiplay market Orange has recently launched a fixed line and broadband service for business and residential customers in Romania, while Brazil's Embratel plans to launch a business multiplay service next year. Meanwhile in the mobile market Tesco has unveiled a new mobile service for Ireland, Verizon Wireless are now offering unlimited data plans to Blackberry users in the USA and T-Mobile has published its tariffs for the iPhone in Germany. Those are just some of the stories 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 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 continuing aim is to provide you with up to the minute pricing news and tariff developments. That being said, Tariff Outlook not only serves as an opportunity for us 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 feedback 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. Please see the contact details below the name for the editor.

We look forward to hearing from you.

Angela Toal – *Tariff Analyst*

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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...

- Italy – Telecom Italia Unveils Alice 7Mega ADSL
- Romania – Fixed Telephony Service Offered Now By Orange Romania
- Brazil – Embratel To Launch Quadruple Play For Corporate Market In 2008
- Greece – Tellas Announces Family Products Features Upgrade
- T-Connect
- Bahrain - Batelco Slashes Price Of Inet Dedicated Access Services
- USA – Verizon Launches Unlimited Data Plan
- Germany – T-Mobile, Apple Unveil iPhone Tariffs In Germany
- Ireland – Tesco Launches Mobile Phone Service

Broadband

Italy – Telecom Italia Unveils Alice 7Mega ADSL

On the 30th October, the Italian telecom incumbent upgraded its ADSL flat offer for residential and business customers to Alice7Mega.

While the previous ADSL flat offer used to come with a download speed of 2Mbps and upload speed of 256kbps, Telecom Italia have now upped the speeds. Customers still pay the same price, but the offer has now a different name and higher speeds.

Existing Alice Flat customers will be gradually switched over to the faster speed, without additional costs or the need to make a request.

This is not the only change that Telecom Italia has made. They also lowered the monthly rental and upgraded the upload speed for their Alice 20Mega offer.

Yilmaz Bakay – *Tariff Analyst*

Multiplay

Romania – Fixed Telephony Service Offered Now by Orange Romania

Orange Romania has launched a bundled telephony/broadband service targeting business and residential customers.

The Home & Office Packs provide fixed line telephony and broadband internet access via HSDPA and include a SIM card and a HSDPA terminal. The terminal enables users to simultaneously use voice and data services, via Wi-Fi and through a regular network cable, for one or more computers.

Home & Office Pack plans cost from €12 depending on the number of minutes and amount of Internet traffic included with the service. Customers who already own one or more Orange mobile service plans and purchase a Home & Office Pack will receive free calls from their fixed number to their mobile numbers and vice-versa.

Orange also announced the extension of its UMTS network and upgrade to HSDPA, offering up to 7.2 Mbps download speed. The areas in Bucharest where the Orange mobile internet may reach the said speed include Unirii Square, Magheru Blvd – Universitate, Victoria Square, Pipera and Baneasa.

Catherine Arteaga – *Tariff Analyst*

Brazil – Embratel to Launch Quadruple Play For Corporate Market in 2008

Brazilian fixed line operator Embratel plans to launch a converged data, video and voice service for the corporate market in 2008. The service will technically be quadruple play as it will include mobile telephony.

The cost of the service, which will be called Embratel IP, has still not been defined.

Adriana Rodriguez – *Senior 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

Greece – Tellas Announces Family Products Features Upgrade

Tellas, the Greek operator, has announced the upgrading of the Tellas Zisto family products features, furthering the completion of the pilot programme applied to its network.

The new Tellas services which are provided via Tellas Zisto are as follows:

- Tellas Zisto DSL: combines telephony and unlimited DSL Internet at up to 12Mbps/1Mbps speed.
- Tellas Zisto Telephone and DSL: includes unlimited local and long distance calls every day all day and 12Mbps DSL.
- Tellas Zisto Telephone: the new fixed line telephony service with unlimited local and long distance calls everyday all day.

All Tellas services are offered directly from its privately owned network and are free from the OTE fixed monthly line fee. Moreover, all Tellas subscribers can optionally have pay as you go access to Internet with DSL for €0.033 per minute.

Nacera Touileb – *Senior Analyst*

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 or on telephone number **+44 (0) 20 8263 5440**.

Data Networks

Bahrain – Batelco Slashes Price of Inet Dedicated Access Services

With effect from 1st November 2007 Batelco, Bahrain's Internet services provider, has reduced the cost of its Inet Dedicated Access services by 40%, for business and educational customers.

Inet Dedicated Access Service offers Internet access at speeds of up to 100Mbps. The dedicated connection is enabled through a point-to-point data connection using Local Leased or LAN Connect, allowing companies to connect their whole network to the Internet.

With the newly reduced prices, customers have the opportunity to upgrade their existing bandwidth to the Internet, for a minimal increase to their current monthly rental.

Adriana Rodriguez – *Senior Tariff Analyst*

Mobile

USA – Verizon Launches Unlimited Data Plan

Verizon Wireless has introduced new email and data plans for its Blackberry users. Available from 3rd November, the E-Mail and Web for Blackberry service offers customers unlimited email and Internet browsing for \$29.99 a month plus the cost of their voice plan. Data only users will pay \$34.99 per month.

Angela Toal – *Tariff Analyst*

Germany – T-Mobile, Apple Unveil iPhone Tariffs In Germany

The Apple iPhone was launched in Germany on the 9th November. Customers can choose from three tariffs: Complete M, Complete L and Complete XL. All tariffs include flat-rates for unlimited internet access via T-Mobile's EDGE network and Deutsch Telekom WLAN Hotspots. The tariffs also offer free use of Visual Voicemail. This option enables users to see who called and if they left a message without the need for calling their voicemail box.

The tariffs vary in monthly rental from €49 up to €89 and each comes with a certain amount of included minutes and text messages. The iPhone itself costs €399 in combination with a two year contract on the Complete tariffs.

Tamara Stančić – *Senior Consultant*

Ireland – Tesco Launches Mobile Phone Service

Supermarket chain Tesco Ireland has become the country's newest mobile operator with the launch of Tesco Mobile on the 29th October. The new operator is offering the service as an MVNO piggybacking on O2's network, will use the 089 prefix and offer just one pricing plan.

The prepay phone plan offers 20 cent calls to any network at any time with all text messages costing 9 cent. Unlimited calls, texts and picture messages to other Tesco Mobile customers are available by buying In Touch 10 (10 days) and In Touch 30 (30 days) bundles.

Tesco Mobile prepay handsets are currently available at 48 Tesco stores while credit top-ups will also be available in all 97 Tesco Ireland stores and at 3,000 other independent locations nationwide.

Tesco Ireland is aiming to secure 5 percent of the Irish mobile market over the next four years.

Bernadette Finn – *Manager, Tariff Services*