

## Welcome to Teligen's Tariff Outlook Newsletter

### Message From The Editor

Happy New Year and welcome back to Tariff Outlook, the fortnightly newsletter brought to you by Teligen's team of tariff analysts and consultants.

It's never much fun facing into January after the holiday season and difficult enough to get your head around what's been happening in the pricing marketplace. Not to worry, we have pulled together some of the latest news of price changes and tariff promotions to kick start your year. Some of the stories below include price increases in Denmark and Portugal, new promotions in Ireland and savings for subscribers in Nepal, Columbia and the Netherlands.

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.

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.

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

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### This Week's Top Stories...

- Denmark – TDC Increase Charges for Landline Telephon
- Ireland – Eircom Offers Free Talktime to New Customers
- Nepal - NT to Cut Fixed, Mobile Call Tariffs
- Germany – Versatel Offers New Structure for DSL
- Portugal - PT Increases ADSL Speeds
- T-Connect
- Colombia - CRT Cuts Mobile Interconnect Fees
- Netherlands - Vodafone Lowers Prices for Mobile Internet
- Spain – Sogecable and Orange to Launch Joint Services Throughout 2008

### 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)

## PSTN

### Denmark – TDC Increase Charges for Landline Telephony

On 1 January 2008 TDC increased its monthly landline rental charge by DKK 5 per month. However, they also increased the discount for residential customers who have both telephony and broadband on the same line from DKK 40 to DKK 45 per month. Therefore these customers will avoid any extra charges. Almost 40 per cent of landline customers also have broadband via their phone line.

**Angela Toal** – *Tariff Analyst*

### Ireland - Eircom Offers Free Talktime

Irish incumbent operator Eircom, have kicked off the New Year with a promotional offer on their Talktime packages. New subscribers to their Retail PSTN service will benefit from one month's free rental on the Talktime package they have chosen. All Talktime packages qualify in the promotion including Talktime 15 up to Talktime Anytime and Talktime Mobile. This offer runs from 23rd January until 23rd March, 2008.

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

### Nepal - NT to Cut Fixed and Mobile Call Tariffse

Nepal Telecom (NT), the largest telephone and mobile services company in the country, is reducing the call rates for its landline (PSTN), and pre and post-paid mobile services from February 13, 2008.

The company announced that it is reducing the existing Rs 3 per call for post-paid calls made at peak times between 8 am to 8 pm and call rates made off-peak between 8pm to 8 am. Also announced was a 14% reduction on call rates for pre-paid mobile during peak hours.

Call rates on calls made during business hours between 8am to 6 pm from landline phones would also be reduced.

**Adriana Rodriguez** – *Senior 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)

## Broadband

### Germany – Versatel Offers New Structure for DSL

As of January 2008, Versatel in Germany has changed its tariff structure. The company isn't offering fixed DSL packages anymore. Instead customers can construct their own tariffs designed to their needs.

The basis for each tariff is the "Basis-Flatrate DSL 2000" priced at €19.90 per month. Each additional module for instance higher bandwidth can be selected individually for an additional monthly charge.

**Tamara Stančić** – *Tariff Analyst*

### Portugal - PT Increases ADSL Speed

Portugal's biggest Telecom operator, Portugal Telecom has increased its ADSL broadband internet speeds. For some packages the speed went up by eight-fold from the original speed.

The 256kbps SAPO ADSL increased to 2Mbps, for the SAPO 2Mbps and 8Mbps services a 4Mbps and 16Mbps is now customary. Similar increases are found for the TELEPAC ADSL where 4, 8, and 16Mbps are now offered. These were respectively 1, 4, and 8 Mbps. Both SAPO and TELEPAC 24Mbps remain unchanged. Until the end of March a promotional tariff is being offered with a discount of up to €10.00 off the monthly rental.

**Michael Smit** – *Tariff 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**.

## Mobile

### Colombia - CRT Cuts Mobile Interconnect Fees

Colombia's telecoms regulator, the Comision de Regulacion de Telecomunicaciones (CRT) has announced it has cut the maximum connection fee mobile that operators are allowed to charge for calls made to their networks by rivals' customers. CRT set the new maximum fee at COP123.74 (US\$0.06) per minute, down from COP250 (US\$ 0.12), a drop of 51%.

The interconnection between operators will continue to be symmetric but charged on a per-second basis.

The fee reduction is aimed at boosting competition among operators to improve the affordability of its services over time and the resulting price elasticity will be an important driver for future revenue growth and promoting investment in the sector.

On the other hand, the changes will affect Millicom Colombian local mobile operator Tigo, in the short term it will see a negative effect on revenues and margins as the company currently generates substantially more incoming than outgoing calls interconnecting with other operators. In Q4 the impact will be limited but in 2008 revenue and margin in Colombia will be affected.

**Catherine Arteaga** – *Tariff Analyst*

### Netherlands - Vodafone Lowers Prices for Mobile Internet

Vodafone hopes to break open the market for mobile internet on the laptop by revising their packages for mobile internet. Customers can now make significant savings on these services. The savings differ from up to 50% on national and up to 85% on international tariffs depending on the data package the customer chooses.

Until now, mobile internet was only affordable for business customers because of the high costs. Vodafone expects, by lowering the prices, that residential customers can also make the step to mobile internet on their laptop.

The new tariffs are valid from 3 January 2008.

**Yilmaz Bakay** – *Tariff Analyst*

## Multiplay

### Spain – Sogecable and Orange to Launch Joint Services Throughout 2008

Sogecable and Orange have signed agreements to launch, at the beginning of 2008, one joint "Triple Play" offer, bundling the ADSL broadband access and Orange's calling services with the satellite pay TV Digital+ of Sogecable. In addition, this agreement will allow all Orange's customers with a 3G handset to enjoy Digital TV + Mobile.

Sogecable and Orange have also reached an agreement to develop during the next month:

- A high definition version of Digital + mobile.
- A Digital Guide+, an exclusive service that will allow Orange's customers to access the information and to consult, on their mobile phones the programming of Digital+ for the next days.

**Nacera Touileb** – *Consultant*