

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. PT Telekomunikasi in Indonesia is cutting tariffs by 20%. The Portuguese ADSL provider Clix is offering a new phone package. Safaricom is launching HSDPA on the Kenya market and the iPhone is coming to Ireland. 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.

Tamara Stančić – Senior Consultant

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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.

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Consulting



This Week's Top Stories...

- Indonesia – Telkom To Cut Tariffs By 20%
- Ireland – 3 And Smart To Launch Move Into The Broadband Market
- UK – Virgin Media Broadband
- T-Connect
- France – New "All Unlimited" Offer With Ten By Orange
- UK – Vodafone Cuts Prices On Its Small Business Packages
- Netherlands, Belgium, Germany – Ortel Mobile Applies Discount On Its International Rates
- Japan – eMobile And DoCoMo Unveils Tariffs For March Launch
- Kenya – Safaricom To Launch HSDPA Service
- Ireland – iPhone Comes To Town
- Portugal – Clix New ADSL Phone Package

PSTN

Indonesia – Telkom To Cut Tariffs By 20%

PT Telekomunikasi in Indonesia has revealed it will cut tariffs by an average of 20% following the government's proposed reduction of interconnection fees which will take place on 1 April 2008. The reduction will apply to all services, including mobiles and fixed lines.

The Government already unveiled its tariffs reductions for cost-base interconnection between 20 - 40% for mobile calls and 5 - 20% for fixed line services.

Adriana Rodriguez – *Senior Tariff Analyst*

Broadband

Ireland – 3 And Smart To Launch Move Into The Broadband Market

Irish operators Smart Telecom and 3 Ireland, plan to increase their share of the domestic broadband market through a series of new product launches and initiatives.

Smart will introduce a range of products which will offer customers connection between 4 and 15Mb, with prices starting at €15 per month.

Meanwhile, 3 Ireland is launching a new pre-paid offer. Targeting the student market and international customers looking for a non-rental option, 3 is offering a '3Pay Vouchers' system which offers one day of internet access for €5. This is the first pre-paid option for the Irish market.

Catherine Arteaga – *Tariff Analyst*

UK – Virgin Media Broadband For £4.50

In the last week of February Virgin Media UK announced its broadband offer for the next month. Prices for a 2 Mbit connection start with a 6 month offer of £10 and increases to £18 after that. If the broadband is combined with a Virgin phone line the price drops to £4.50. This results in a combined price of £15.50 per month for a 12 month period. If a faster connection is required a 4 Mbit or 20 Mbit subscription is also available as well as more comprehensive phone packages.

Michaël 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 00 44 208 263 5440.

Mobile

France – New “All Unlimited” Offer With Ten By Orange

Ten recently teamed up with Orange to come up with a new offer “All Unlimited” to be launched on 6 March 2008. “All Unlimited” offers a range of inclusive voice plus Internet packages.

The unlimited internet service includes web browsing, email and Windows Live Messenger. Customers will get a similar level of experience on their phones as on their computer, featuring preinstalled icons on the telephone screen, providing access to the most commonly used applications.

Ten’s voice offer includes unlimited calls 7 days a week, 24 hours a day to all fixed lines and mobiles in France, regardless of the operator, from the third minute of communication.

Nacera Touileb – *Consultant*

UK – Vodafone Cuts Prices On Its Small Business Packages

Vodafone has reduced the monthly rental for its Small Business Packages.

Prices on a 12 or 18 month contract have gone down by 8%. For instance, customers on a Small Business 100 plan will save £1.65 per month while those on Small Business 3000 will save £14.63 per month. The company also reduced the monthly rental on 24 month contracts by 21%.

Tamara Stančić – *Senior Consultant*

Belgium, Germany, Netherlands – Ortel Mobile Applies Discount On Its International Rates

Ortel Mobile, a MVNO and provider of prepaid mobile telecommunication services targeting ethnic minorities in the Netherlands, Belgium and Germany, has now a discount of 50% on all of its international rates. The promotion is valid from the 1st of March until the 1st of June 2008.

The discount applies to calls to all international destinations made from 6pm until 6am every day of the week. A call set up fee of €0.07 applies for all international calls.

Yilmaz Bakay – *Tariff Analyst*

Japan – eMobile And DoCoMo Unveils Tariffs For March Launch

Japanese mobile operator eMobile has unveiled its tariffs for its commercial launch at the end of March. The operator will offer an unlimited calls service for JPY 980 per month, with free calls between eMobile subscribers and free SMS. The company will also offer a package with no monthly subscription fee.

Data services can also be added for JPY 2,000 per month for up to 3 MB. Additional charges will apply for usage above this level. No contract is required, although a discount will be applied if an annual contract is taken out.

DoCoMo in return plan to introduce 24 hour free calls between family members who subscribe to its discount plan from 1st April. The operator stated that the changes to its pricing plans would cut revenues by Y80bn next year but the loss would be partly offset by increases in tariffs for i-mode, its mobile internet service.

Angela Toal – *Tariff Analyst*

Mobile *(continued)*

Kenya – Safaricom To Launch HSDPA Service

Kenyan mobile service provider Safaricom plans to launch HSDPA services in March. The service, known as Bambanet, will be available on both a prepaid and postpaid basis. Contract subscribers will pay KES 5,999 for the modem and a 3G SIM card, based on a two-year contract. There will also be a monthly access fee for 700 MB.

The HSDPA technology will be used to deliver services such as mobile video conferencing and video calls, as well as computer data access over a modem. Initially, subscribers will receive data download speeds of up to 3.6 Mbps, and this will later be updated to 7.2 Mbps.

Angela Toal – *Tariff Analyst*

Ireland – iPhone Comes To Town

O2 Ireland has announced that it will be the exclusive carrier for Apple's iPhone when it is launched in Ireland on the 14th March. The phones will be sold through its own retail stores and Carphone Warehouse. Suggested handset prices are €399 for the 8Gb and €499 for the 16Gb versions. Two new iPhone tariffs are being offered by O2 with monthly fees starting at €45. Tariff packages will include anytime cross network minutes, texts and 1Gb data bundle.

Bernadette Finn – *Manager, Tariff Services*

Multiplay

Portugal – Clix New ADSL Phone Package

Portuguese broadband provider Clix has announced a new service bundle with ADSL internet access of up to 4 Mbps and fixed telephony. The package does not require a landline subscription, and the internet service includes unlimited traffic for two years and 3 packages of TV to choose from.

Adriana Rodriguez – *Senior Tariff Analyst*

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