

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 are covering several changes announced by Orange. They have introduced new mobile and fixed line packages for business customers in France and they have new broadband packages in France and Romania. Orcon has also improved its broadband packages in New Zealand with the launch of its ADSL2+ network. Meanwhile, BT have launched a new Virtual Phone System for small businesses in UK and in Norway, MTU has launched a new mobile network.

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.

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 Week's Top Stories...

- UK – New Virtual Phone System "RingCentral" For Small Businesses From BT
- France – Orange Offers New "Mobile And Fixed Line" Plans
- Brazil – Virgin Media Broadband
- France – Orange Offers All-In-One Broadband
- Croatia – Dubrovnik Telekom Launches Wimax Broadband
- Romania – Orange Launches Unlimited Internet Plans
- New Zealand – Orcon Launches The First Unbundled Service
- Teligen Tariff Consultancy – A Case Study
- Norway – MTU Launches New Mobile Network
- Turkey – Vodafone Turkey Reveals New Tariff For Its Business Customers
- Uganda – Uganda Telecom Introduces 3G Services
- UK – Virgin Mobile Launches New SIM Only Tariff
- Austria – iPhone Launched By T-Mobile
- Slovenia – Mobitel Slovenia Introduces Quad-Play

PSTN

UK – New Virtual Phone System “RingCentral” For Small Businesses From BT

BT has announced the launch of its virtual phone system “RingCentral” in the UK available as of March 11, 2008.

The new virtual phone system is a web based tool specifically designed for smaller companies. It offers a phone system including advanced call management, voicemail and internet fax capabilities.

The new system is priced at GBP 15 (excluding VAT) per month, and companies get a non-geographic 0800 Freefone or an 0844 Contactcall number that can be configured for multiple extensions with voicemail, automatic call screening and forwarding, a click-to-call button to use on web sites and emails, call logs for sales leads, fax capabilities and message alerts.

BT “RingCentral” also allows callers to be welcomed with a recorded customer greeting, in-queue music or promotional announcement, and enables users to make and answer calls online, through their PCs using the Desktop Call Controller.

Nacera Touileb – *Consultant*

France – Orange Offers New “Mobile And Fixed Line” Plans

The new “mobile and fixed line” business plans offered by Orange France include a single contract, bill and customer service contact with a single account manager.

Customers can choose between 4 different plans ranging from EUR 17 to EUR 41 per month:

- “Le Pack”, includes the “optima” option, account management and call transfer
- “Le Pack illimité Interne” includes all the features of the “Le Pack”, plus unlimited calls between colleagues
- “Le Pack illimité +” includes all the features of “unlimited sharing” as well as unlimited peak calls to fixed lines in Metropolitan France
- Finally “Le Pack illimité + vers L’international” is a plan including all of the above along with unlimited fixed line and mobile calls to Canada and the United States and calls to fixed lines in Europe

Catherine Arteaga – *Tariff Analyst*

Brazil – Brasil Telecom Shows Fixed-Mobile Service

Brasil Telecom is launching a new fixed-mobile service called Unico WiFi. Customers subscribed to both fixed and mobile services will be offered a mobile phone that can also connect over a Wi-Fi network, in order to make low-cost calls. The service will initially use the Excalibur, a smartphone model from HTC, and PCTel is the software developer.

The launching of this product is expected in the second quarter of this year.

Adriana Rodriguez – *Senior Tariff Analyst*

Broadband

France – Orange Offers All-In-One Broadband

French mobile operator Orange has launched a new all-in-one broadband offer for fixed line customers called 'optimale decouverte internet' or Optimal Internet Discovery.

This new non commitment plan costs EUR 39.90 per month and includes 1 Megamax broadband with unlimited access, digital TV with over 60 channels and 2 hours of calls to fixed lines included with their telephone subscription.

The Digital TV access works via a livebox costing EUR 3 per month subject to eligibility and payment of a EUR 49 deposit for the set-top box.

Bernadette Finn – *Manager, Tariff Services*

Croatia – Dubrovnik Telekom Launches Wimax Broadband

Dubrovnik Telekom has started providing internet access via WiMAX. The Company is the first operator in the region to provide commercial broadband internet access services.

The cost of the services range from HRK 189 to HRK 449 for consumer users. Business users can opt for the wDSL Pro service, with prices ranging from HRK 299 to HRK 899.

Tamara Stančić – *Senior Consultant*

Romania – Orange Launches Unlimited Internet Plans

Orange Romania has launched unlimited internet access plans for laptops or desktop computers with an upload speed of up to 1.46 Mbps.

All plans include 3.6 Mbps broadband internet access in regions covered by Orange's 3G+/3G coverage area. Regions not covered by Orange's 3G+/3G network will connect to the internet at EDGE speeds of up to 220 kbps.

Customers can choose from a number of plans, ranging from Internet Unlimited Start at EUR 10 per month, to Internet Unlimited Home Plus at EUR 30 per month. Plans offering evening and weekend only access or unlimited daytime usage are also available.

A special price is available for 1 or 2 year contracts.

Catherine Arteaga – *Tariff Analyst*

New Zealand – Orcon Launches The First Unbundled Service

A new ADSL2+ network, with broadband speeds of up to 24Mbps download and 1Mbps upload, is now available in five Auckland suburbs as of 13th March 2008. The service is offered by Orcon. They plan to extend the service to at least another ten exchanges in the near future.

The Orcon@Home+ Plans start at NZD 79.95 per month for the Purple+ package which offers a broadband only service and a 10GB monthly download limit. Gold+ and Platinum+ packages are also available with higher download limits and inclusive unlimited local and national calls. All of these plans are offered without minimum contract periods.

New packages have also been launched for those living outside the Orcon+ Network.

Angela Toal – *Tariff Analyst*

Teligen Tariff Consultancy – A Case Study

Teligen has been providing comprehensive and up to date tariff information for almost three decades, serving some of the most high profile organisations around. Teligen was one of the first organisations in Europe to focus on telecoms tariff information, and we have been continuously providing such information to clients since 1979.

One such example is the annual report on “Telecoms Tariff Trends” in the EU countries, from 1998 till present (the most recent report having been finalised in December 2006), provided to the European Commission – Teligen has provided information on price changes, time series price development information, details on tariff structures and price benchmarking results to the Commission for 10 years now, starting with a report on low-usage telephone service prices in 1997. Over the years Teligen has been providing comprehensive information on issues ranging from the state of competitive development in EU countries, via the detailed analysis of broadband prices, to the on-going supply of tariff information for the annual “Implementation Reports.”

Providing such information requires in-depth knowledge of the intricacies of the tariff information in all countries covered, and the ability to rationalise such information into a common framework that can allow direct comparisons of data and results. This has been one of Teligen’s strengths over the years; providing tariff information in database formats, and creating systems that allow the end user to see the relationships between different price elements and the end user cost.

Halvor Sannæs – *Director Tariff Services*

Mobile

Norway – MTU Launches New Mobile Network

MTU has bought the 3rd GSM license in Norway and has opened its own network. They are offering two basic unlimited price plans.

“MTU Fri” has no fixed charges and no call charges for the first 142 minutes each month. The first 100 SMS each month are also free. The call charges beyond the 142 minutes are comparable with the average prices from Telenor

“MTU Fastpris” has a monthly charge for unlimited minutes, 200 free SMS and 100 free MMS each month.

A third “Fastpris +” plan offers cheaper handsets through the MTU webshop.

In areas not yet covered by their new network, MTU are offering services over the Telenor network.

Halvor Sannæs – *Director Tariff Services*

Turkey – Vodafone Turkey Reveals New Tariff For Its Business Customers

Vodafone Turkey has revealed new business tariffs called “Isinizi dusunen paketler” (Care for your business tariffs).

Companies with two or more business postpaid connections can choose between two options, either costing YTL 59.9 or YTL 99.9 per month. Each option comes with 2500 free minutes per month for calls made within the same company business plan. Customers will also get a certain amount of free allowance per month for all other calls depending on which option they have chosen. A standard call charge will apply when the allowance is exceeded.

Yilmaz Bakay – *Tariff Analyst*

Mobile *(continued)*

Uganda – Uganda Telecom Introduces 3G Services

Uganda Telecom launched 3G services earlier this month. The service will initially be available in Greater Kampala, Entebbe and Jinja districts and will roll-out to other districts later in the year.

Charges include UGX 400 to make a video call and UGX 1 per KB to access the internet or watch television. All local free to air television stations can be accessed on the service. Negotiations are on-going with pay television stations GTV and DStv.

Angela Toal – *Tariff Analyst*

UK – Virgin Mobile Launches New SIM Only Tariff

“Liberty SIM” is Virgin Mobile’s new name for their SIM only packages launched on the UK market.

The six new tariffs are based on their existing tariffs with extra texts, minutes or discounts of up to 40%. For example 750 minutes and 750 texts is now available for GBP 30, while the Virgin Texter 20 tariff now includes 1850 extra text and 150 extra minutes for the same price of GBP 20.

All the price plans include an incentive in the form of a discount plan. A reduction of GBP 10 per GBP 100 spent on air-time is offered on new handsets, up to a maximum discount of GBP 100.

Michaël Smit – *Tariff Analyst*

Austria – iPhone Launched By T-Mobile

Where we recently reported the iPhone launch in Ireland in the second week of March, the same date was set for Austria’s launch. Despite the late announcement only one day in advance, there are little surprises.

An 8GB iPhone is available for EUR 399 and the 16GB for EUR 499. Both phones can be connected to the T-mobile network using either the Classic or Supreme package. The Classic package at EUR 39 a month gives 1000 any time any network minutes and 3GB of Internet usage. The Supreme subscription allows 3 GB internet access and a mixture of SMS and minutes to mobile, fixed lines and Add-ons.

Both come on a 24 month contract, with Visual Voicemail for no extra charge.

Michaël Smit – *Tariff Analyst*

Multiplay

Slovenia – Mobitel Slovenia Introduces Quad-Play

As of 12 March 2008 Mobitel is offering a complete telecommunications service to the Slovenian market. Under the new “M4” brand Mobitel will be offering GSM/UMTS services, broadband internet, telephony and TV.

Mobitel also introduced a new option as of 4 March 2008. Customers with the “Tris advantage” package can make calls at lower prices to three chosen numbers. Subscribers can make calls to the same network at a 70% discount, other Slovenian mobile networks at a 30% discount and fixed networks at a 30% discount.

Yilmaz Bakay – *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