

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.

We have a great selection of stories this week including news of price revisions and the launch of new plans in UK, Russia, Turkey and France. Virgin Media UK has revised the charges for their fixed line services. Vodafone Romania is cutting the price of their international fixed-line calling rate. T-Mobile UK announced the introduction of two new international calling packages meanwhile O2 launched new business tariffs. In the multiplay market Neuf Cegetel has announced the launch of a new fixed and mobile internet solution for businesses in France. These 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.

We look forward to hearing from you.

Nacera Touileb – *Consultant*

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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 – Virgin Media Changes To Price Plans
- UK – TalkTalk Mobile Simplifies Offers
- UK – Onetel Revise Prices
- Belgium – Belgacom Is Reducing Its Rates
- Romania – Vodafone Cuts International Call Tariffs For Fixed Business Customers
- Russia – Comstar Offers New Tariff Plans For Tyumen Region
- T-Connect
- UK – New International Calling Packages From T-Mobile
- UK – O2 Launches a New Online Tariff Option
- Turkey – Turkcell Offers New Services
- France – New Landline And Mobile Internet Pack From Neuf Cegetel

PSTN

UK – Virgin Media Changes To Price Plans

Virgin Media have recently revised the charges for their fixed line services in the UK. The standard installation charge is up 20% to GBP 30, but monthly rental charges for the “Talk Evenings & Weekends” and “Talk Unlimited” packages have been reduced by between 3 and 10%. The call set up charge is up by GBP 0.01 for all applicable calls. International call charges have also risen by GBP 0.05 to all destinations.

Angela Toal – *Tariff Analyst*

UK – TalkTalk Mobile Simplifies Offers

As of the start of the second quarter of 2008 Talk Talk mobile has cut the range of its subscriptions on offer. The SIMple plan and the pay as you go option are no longer offered. Subscribing to talk talk is possible with pay monthly fees ranging from GBP 12 to GBP 18 with a 9 month minimum commitment.

Michaël Smit – *Tariff Analyst*

UK – Onetel Revise Prices

Onetel have announced new monthly rental charges effective from 1st April. Customers on the Evening and Weekend call plans will see their subscriptions reduce to GBP 2.65 and those on Anytime call plans to GBP 5.49. Non-direct debit customers will see an increase of 40% on their admin charges and anyone wishing to continue receiving paper bills, a GBP 1.25 fee will be added to their monthly bill.

National and international call charges are also being revised. These effect customers on UK Talk plans and include a 30% increase on daytime landline calls and a change from 4.25 pence per call to 1.4 pence per minute plus 6 pence connection fee on evening calls. A 6 pence connection fee has also been added to all international chargeable calls. These call changes come into effect on 15th May.

Bernadette Finn – *Manager, Tariff Services*

Belgium – Belgacom Is Reducing Its Rates

As of 1st April 2008, Belgacom is reducing its rates for calls from fixed lines to mobiles.

Call charges for calls to Mobistar numbers will be reduced by up to 14% and to Base numbers by up to 16%. Call set up charges and call charges for calls to Proximus numbers will remain the same.

Yilmaz Bakay – *Tariff Analyst*

Romania – Vodafone Cuts International Call Tariffs For Fixed Business Customers

Telecoms operator Vodafone Romania is cutting its international fixed-line calling rate.

These new tariffs are available to Vodafone’s business customers who will benefit from a 47% reduction of their calling rate.

Calls to mobile and fixed destinations in the US, Canada, Alaska, Israel or Hawaii are now cut by 37%. While calls to mobile operators in Europe have been reduced by 18%.

Vodafone fixed voice customers will also get cheaper rates for international calls to fixed and mobile networks in South America, Asia, Africa and Australia. Calls to these regions will decrease by 7%.

Catherine Arteaga – *Tariff Analyst*

PSTN (continued)

Russia – Comstar Offers New Tariff Plans For Tyumen Region

COMSTAR United TeleSystems JSC, a combined telecommunications operator in Russia and the CIS, announced the launch of a new tariff structure for the local connection services provided by Tyumenneftegassvyaz (TNGS), Comstar's subsidiary in the Tyumen region.

Per minute, combined and unlimited tariff plans will replace the existing single tariff plan, and will be offered to residential subscribers from 1st April, 2008. Corporate subscribers will be offered per minute and unlimited tariff plans.

The unlimited tariff plan for residential subscribers will increase by 22%, and for corporate subscribers an increase of 33% will be presented.

The new tariff plans are being introduced following the upgrading of the Tyumenneftegassvyaz network.

Catherine Arteaga – *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

UK – New International Calling Packages From T-Mobile

Starting 1st April, T-Mobile introduced two new international calling packages, with low-cost options for all new and existing FlexT customers. The International Pass and International Open Pass will allow customers to make international calls to landlines and mobiles from their mobiles.

The International Pass offers three options with a bundle of 125 minutes for calls to USA & Canada, 50 minutes for calls to Europe & Australasia and 50 minutes for calls to the Caribbean.

The International Open Pass consists of two options Open Pass Light for GBP 2.50 per month and Open Pass Max for GBP 5.00 per month.

Adriana Rodriguez – *Senior Tariff Analyst*

Mobile *(continued)*

UK – O2 Launches a New Online Tariff Option

While O2 already offers a 12, 24 and 36 month contract, an 18 month subscription is now available for business customers.

The current contracts had 16 possibilities per contract length with 300 to unlimited inclusive minutes and some contracts offering up to 3GB data. The 18 month contract offers 6 possibilities, choosing between 500 or 700 minutes also available with a data or a blackberry data plan.

Michaël Smit – *Tariff Analyst*

Turkey – Turkcell Offers New Services

Turkey's largest mobile phone operator "Turkcell" is offering a new service called "EvTurkcell" (Turkcell At Home) to both Postpaid and Prepaid customers.

The new service enables mobile customers to use their mobile phone as a standard fixed phone. In this way, customers can make calls to national fixed lines at a rate of YTL 0.05 per minute at all times.

Turkcell has also launched Turkey's first voice based SMS service "KonusGonder" (Speak & Send). Instead of writing an SMS, mobile customers can now send a voice SMS at the same price as a standard SMS.

Yilmaz Bakay – *Tariff Analyst*

Multiplay

France – New Landline And Mobile Internet Pack From Neuf Cegetel

Neuf Cegetel has announced the launch of its new fixed and mobile internet solution for small and medium-sized businesses.

The Neuf Cegetel Landline and Mobile Internet Pack provides single site companies with full services for unlimited internet regardless of access mode (fixed or mobile). This new solution is accessible nationwide in France and includes:

- ADSL broadband internet up to 20MB.
- Unlimited mobile broadband access, with a data card (3G+, 3G, Edge and GPRS compatible) and unlimited mobile calling plan.
- High security regardless of connection mode (fixed or mobile), with email protection and firewall included.
- All Microsoft Outlook features.

The new pack is launched at a promotional price of EUR 99 per month; additional mobile broadband access is available from EUR 5 per month per user. Microsoft Outlook workgroup email services are also available from EUR 6 per month per user.

Nacera Touileb – *Consultant*

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