

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.

Following recent changes by BT and Virgin Media, this issue of Tariff Outlook brings you news of changes from yet another UK fixed line operator – this time it's Talk Talk. Meanwhile, in Pakistan PCTL has brought out new packages for its fixed line service. In other news, Algeria Telecom has halved its ADSL Tariffs, KPN Netherlands has increased its leased lines charges and Norway's Netcom has reduced prices for its mobile data services.

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 – Talk Talk Changes To Price Plans
- Pakistan – PCTL Pakistan Introduced New Packages
- Bulgaria – BTC Offers Free Calls With Voice Over IP
- Algeria – Algeria Telecom Slashed ADSL Tariffs By 50%
- Teligen Tariff Consultancy – A Case Study
- Norway – Netcom Reduces Prices For Mobile Data Communications
- Asia Pacific – Bridge Alliance Launches Data Roaming Plan
- South Africa – Neotel Offering Voice Services And Internet For Consumer Services
- Netherlands – KPN Netherlands Increases Leased Lines Charges

PSTN

UK – Talk Talk Changes To Price Plans

Talk Talk is the latest UK fixed line operator to revise its charges. Calling packages have been renamed as Weekend, Evening & Weekend and Anytime and the monthly rental charges for the Evening & Weekend and Anytime packages have been reduced by more than 20% to GBP 2.65 and GBP 5.49 respectively.

However, the Company has also recently introduced a charge of GBP 1.25 per month for customers who wish to continue to receive bills by post. Furthermore, from 15 May 2008 call charges will also increase. Chargeable evening calls will go up from GBP 0.0425 per 70 minute call to GBP 0.014 per minute with a GBP 0.06 connection fee, while the per minute charge for daytime calls will increase by 30%.

Angela Toal – *Tariff Analyst*

Pakistan – PCTL Pakistan Introduced New Packages

As of April 2008, Pakistan Telecommunication Company Ltd. is offering three new packages for fixed telephone customers which will replace the old tariffs.

The basic plan, called Basic Plus, has no monthly line rental and only call charges apply.

Customers who prefer to have up to 2,500 minutes of free calls per month to national fixed telephones can subscribe to Pakistan Plus. There is a monthly line rental charge for this service and call charges apply for calls outside of the free allowance.

In addition to above mentioned packages, PCTL now also offers the Value Plus package. This package includes 25 minutes of free calls to national fixed lines per month and 1,200 "Phone n Net" dial-up internet minutes. A monthly line rental is payable and call charges also apply for calls outside of the free allowance.

All packages have a connection charge.

Bernadette Finn – *Manager, Tariff Services*

Broadband

Bulgaria – BTC Offers Free Calls With Voice Over IP

The Bulgarian Telephone Company BTC has launched a VoIP service, offering free calls within Bulgaria and international calls at half-price.

To use BTC ADSL Voice, subscribers need to have any of the four available BTC ADSL packages. The choice of package does not affect the amount of included minutes for free phone calls.

Users can choose between two connection technologies: with ADSL Voice adapter (which allows using the service through a telephone set with tone dialling) or with special software (for direct calls from the user's personal computer with a headset and a microphone).

BTC ADSL Voice costs BGL 8.90 per month (in addition to an ADSL package from the Telco) and includes 3,600 minutes of national phone calls each month.

Adriana Rodriguez – *Senior Tariff Analyst*

Broadband *(continued)*

Algeria – Algeria Telecom Slashed ADSL Tariffs By 50%

Algeria's communications minister has announced a permanent reduction of 50% in the price of ADSL services as of 21st April 2008.

The incumbent operator Algeria Telecom will reduce its monthly charges to DZD 590 for 128 Kbps, DZD 1,100 for 256 Kbps, DZD 1,500 for 512 Kbps and DZD 16,000 for 1 Mbps.

The announcement was part of events for the national internet day, celebrated for the first time in Algeria.

Nacera Touileb – *Consultant*

Consultancy

Teligen Tariff Consultancy – A Case Study

Teligen is often asked to provide tariff data to companies that either want to collate prices from a range of sources or that need external data from a neutral source.

Most incumbent operators are constantly involved in price discussions with the national regulator. One issue in such discussions can be the source of the price data used – it is often sensible to get an external agency to provide the data, so as to ensure that the data is presented in a neutral way, and that the data for other regions or countries is covered consistently.

Additional functionality in the tariff presentation, such as price benchmarking and international coverage, can often be important in the provision of such data – Teligen is able to provide comprehensive data from a wide range of sources. The output formats can be developed to the client's requirements, and the scope of the tariff data and analysis can be as wide as the client requires.

Teligen has extensive experience in providing tariff information to support a variety of requirements, and is able to work with the client to obtain the best "value for money" results from the tariff delivery.

Halvor Sannæs – *Director Tariff Services*

Mobile

Norway – Netcom Reduces Prices For Mobile Data Communications

As of 1 April 2008 the Norwegian mobile operator Netcom has reduced its prices for data communications in most European countries. The price per MB has been reduced by up to 75%, and a new uniform price structure applies. For Netcom users roaming on some of the Nordic networks in Denmark, Sweden, Finland, Estonia and Latvia the price is NOK 20 per MB, for most of the other European countries the price is NOK 30 per MB (incl. VAT). The new prices apply to all ordinary tariff packages except Kontant and YoungTalk.

The equivalent prices for Telenor residential customers are NOK 25 per MB in the Nordic countries, and NOK 40 per MB in the rest of Europe. The lists of applicable networks in the two regions are different for the two operators.

Halvor Sannæs – *Director Tariff Services*

Mobile *(continued)*

Asia Pacific – Bridge Alliance Launches Data Roaming Plan

Asia Pacific mobile alliance Bridge Alliance has launched the Bridge DataRoam5 capped usage price plan for mobile data roaming on the alliance's member operator networks. With a usage of 5 MB, the data plan is for customers who have lower data usage requirements. Bridge Alliance is providing two plans, a monthly plan at USD 15 for 5 MB and a weekly plan at USD 12.50 for 5 MB.

Bridge DataRoam5 is designed to allow both business and leisure travellers to use mobile data roaming more freely when they roam on Bridge Alliance eleven member networks. These are: Airtel (India), AIS (Thailand), CSL (Hong Kong), CTM (Macau), Globe Telecom (Philippines), Maxis (Malaysia), SK Telecom (Korea), SingTel Mobile (Singapore), SingTel Optus (Australia), Taiwan Mobile (Taiwan) and Telkomsel (Indonesia).

Catherine Arteaga – *Tariff Analyst*

South Africa – Neotel Offering Voice Services And Internet For Consumer Services

South African operator Neotel has launched its first products for the consumer market, starting in parts of Johannesburg and Pretoria. The company has been testing the NeoConnect Prime package since March and is planning to launch a full commercial product in May to customers already expressing interest.

NeoConnect runs over a CDMA2000 EVDO network, offering voice services and internet at average speeds of 300-700 Kbps. The bundle includes 1,000 minutes to Neotel numbers, 50 SMS to Neotel numbers, an e-mail account and internet access up to 10 GB for ZAR 599 per month. The price includes all device charges and VAT.

Catherine Arteaga – *Tariff Analyst*

Leased Lines

Netherlands – KPN Netherlands Increases Leased Lines Charges

As of April, KPN has increased the charges for its digital and analogue leased lines.

The monthly line rental per connection point for digital leased lines has increased by 2-3% while per distance monthly rental remains the same.

For analogue lines, the price changes affect both the monthly line rental per connection point and per distance. Monthly charges have increased 12% for point to point and 24%, for multipoint connections.

KPN applies a monthly line rental per connection point and per distance.

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