

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 edition you will notice a lot of activity in mobile pricing including new roaming tariff options in Germany and France, news of a dedicated plan for calling favourite numbers in Germany and a new plan for UK text-aholics from Vodafone. Residential customers have not been forgotten either with new plans on offer from Deutsche Telecom and Avea in Turkey.

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.

Bernadette Finn – *Manager, Tariff Services*

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Consulting



This Week's Top Stories...

- UK – Virgin Media Price Changes
- Germany – Deutsche Telekom Reduces Residential Packages
- Teligen Tariff Consultancy – A Case Study
- The Netherlands – T-Mobile Introduces New SMS Bundle & New Roaming Tariff
- France – New Voice And Data Roaming Offers From Orange
- UK – Vodafone Introduces Unlimited Texts Plan
- Turkey – Avea Introduces A New Residential Tariff
- Germany – New Favourite Number Calling Plan
- The Netherlands – KPN Change MobilThuis Call Charges
- Spain – Ono Offers Broadband Internet Speeds Up To 100 Mbps

PSTN

UK – Virgin Media Price Changes

Virgin Media have announced further changes to take effect from 1st June 2008. The charge for daytime calls to UK landlines will rise by 23% to GBP 0.04 per minute. Customers who subscribe to packages which include daytime calls will not be affected by this change.

Virgin's bundle charges will also increase by GBP 1 per month however, customers who switch to paperless billing will avoid this increase. This is because the discount for using the Company's e-bill service is being doubled.

Angela Toal – *Tariff Analyst*

Germany – Deutsche Telekom Reduces Residential Packages

T-Home the residential fixed line service has reduced the price of many of its packages. Reductions of between 10% and 14% have been made to both the 'Call & Surf' combo packages and 'Call Comfort' telephony only packages. These prices came into effect on 19th May 2008.

Adriana Rodriguez – *Senior Tariff Analyst*

Consultancy

Teligen Tariff Consultancy – A Case Study

As experts in the field of telecoms tariffs, Teligen is often asked to assist in the development of prices for new services and the restructuring of existing prices.

An Eastern European incumbent operator procured the help of Teligen to analyse the options for tariff restructuring within a rather limiting regulatory framework. Teligen provided an in-depth analysis of the current situation, highlighting the vulnerable areas of the tariffs, and in turn providing a range of suggestions for where the tariffs could be enhanced inside the existing framework. Teligen also provided different future scenarios for changes in legislation and prices, and at the end of the study ran a full day workshop where all relevant staff were able to discuss the proposals and ask questions.

Teligen believes in providing advice beyond the immediate scope of a study, in order to foster new ideas and allow for discussions around the subject at hand. Direct access to key consultants within the Teligen team can be a fundamental factor for many clients, and with Teligen's ongoing focus on tariffs we are able to cover not only the topics of the specific study, but to also draw on our wide-ranging experience with tariffs in general.

Halvor Sannæs – *Director Tariff Services*

Mobile

The Netherlands – T-Mobile Introduces New SMS Bundle & New Roaming Tariff

As of 22nd May T-Mobile is offering its mobile customers a new SMS bundle as an add-on to its Relax calling packages. The Relax SMS Maximaal bundle offers customers a total of 1000 SMS based on a monthly rental. If the total monthly SMS limit is exceeded, an out of the bundle charge per SMS applies. T-Mobile now offers seven SMS bundles in total.

In other news, T-Mobile will offer both its residential as business customers a new roaming tariff. With T-Mobile Grenzeloos customers can make, receive calls and use mobile internet in the European Union for advantageous charges. The new tariff replaces T-Mobile's current T-Mobile Buitenland (Foreign Country) tariff and comes into effect on 19th June 2008.

Yilmaz Bakay – *Tariff Analyst*

Mobile *(continued)*

France – New Voice And Data Roaming Offers From Orange

Orange has announced the launch of two new voice and data roaming offers for consumer and business customers. These offers are designed to make it cheaper for customers to stay in touch whilst travelling abroad within the EU and will be available across the European network from this summer.

The new voice roaming offer is called Favourite Countries and it is aimed at those that travel abroad regularly. Customers are charged an upfront monthly fee of EUR 5 (including VAT), they select a country or countries of their choice from a list of eligible countries and benefit from discounted or national rates when calling anywhere in the EU from those countries.

The new data roaming offer, called Travel Data Daily, is designed for occasional data roamers to access their emails and browse the web on their laptop or mobile device when travelling abroad. Customers pay one upfront fixed price which will range from EUR 12 – 15 (including VAT) for a 50Mb for daily internet access within the EU.

Nacera Touileb – *Consultant*

UK – Vodafone Introduces Unlimited Texts Plan

Vodafone has this month introduced a new plan in the UK that gives customers the possibility to send unlimited text messages for GBP 15 per month. This “best for texter” plan is only available on an 18 month contract. It is suitable for subscribers who hardly call, but have high text usage. This plan has a fair use policy, with a maximum of 3000 text messages per month.

Rick Gerritsen – *Tariff Analyst*

Turkey – Avea Introduces New Residential Tariff

As of 27 May 2008, Avea is offering a new tariff for its residential customers. The new tariff, called ‘HerYone300’ (AllCalls300), offers subscribers 300 free minutes per month that can be used on all national calls. A call charge per minute applies when the monthly limit is exceeded.

Yilmaz Bakay – *Tariff Analyst*

Germany – New Favourite Number Calling Pla

Following the discovery that 80% of their customers calls were to just 5 numbers, T-Mobile has introduced the “MyFaves” plan in Germany. This plan offers three monthly options that give small, medium and large discounts on the subscriber’s five most important phone numbers. The monthly charge ranges from EUR 9.95 to EUR 24.95 and with reduced eurocent per minute rates depending on the option chosen.

Rick Gerritsen – *Tariff Analyst*

Mobile *(continued)*

The Netherlands – KPN Change MobielThuis Call Charges

As of 15 May KPN Mobile, the mobile unit of the Dutch incumbent operator, changed its tariffs for MobielThuis. MobielThuis (MobileAtHome) is an add-on to the Flexibel packages and enables mobile customers of KPN to make calls from their home zone (approx. 100m) at fixed line call charges.

While the monthly rental decreased, calls to fixed lines increased. Calls to mobiles depend on which Flexibel calling package the customer has subscribed to. In addition, a call setup charge applies.

Yilmaz Bakay – *Tariff Analyst*

Broadband

Spain – Ono Offers Broadband Internet Speeds Up To 100 Mbps

Spanish cable network operator Ono will become the first broadband operator to launch a nationwide 100 Mbps broadband connection in Spain. Initially the operator plans to test this technology for six months before the service's commercial launch in Madrid, Valencia and Barcelona, scheduled for the last quarter of this year.

The operator intends to conduct a massive deployment of this technology in a EUR 75 million investment, which will enable it to complete the new network in 2009. Ono has not unveiled any details regarding the price for the service, but internet forums are speculating a EUR 100 monthly fee.

Catherine Arteaga – *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