

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 the news of new iPhone tariffs from O2 in the UK to mark the launch of the 3G version of the device. In other news, Vodafone has been pretty busy recently with new broadband services in New Zealand and Italy. Also, in fixed line services, Cameroon's regulator has cut call prices and GO Plus in Malta has launched new plans. Finally, in the UK mobile market, Virgin has increased some of its call charges and T-Mobile has introduced a new plan in the USA aimed at families.

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*

Tel: + 44 (0) 20 8263 5342, **email:** atoal@teligen.com

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

Consulting



This Week's Top Stories...

- Cameroon – Regulator Cuts Call Prices
- Malta – New Talk Anytime Plan From Go Plus
- India – BSNL Cuts Fixed And Mobile Call Tariffs
- Teligen concludes price benchmarking study for TRA Bahrain
- Italy –Vodafone Launches New ADSL Service
- New Zealand – Vodafone Launches Fixed Broadband Network
- Belgium – Telenet Offers More Data Volume
- UK – O2 New Tariffs For 3G iPhone
- UK – Virgin Mobile Increases Charges
- Portugal – New Mobile Voice Tariffs From TMN
- USA – T-Mobile to offer a New Unlimited Family Plan

PSTN

Cameroon – Regulator Cuts Call Prices

Cameroon's Telecommunications Regulatory Board has announced a 20% reduction in phone call prices starting 1st June, following negotiations with the three operators in the country - Camtel, MTN and Orange.

Operators were recommended by the TRB to put in place "simplified and homogeneous pricing." The TRB has also been promoting the sharing of infrastructure to help bring down costs further..

Catherine Arteaga – *Tariff Analyst*

Malta – New Talk Anytime Plan From Go Plus

Go Plus has launched a new fixed line tariff "Talk Anytime," available for existing and new GO Plus postpaid residential customers. The new plan has a monthly subscription fee of EUR 9.99 (VAT included) and allows customers to talk for free, anytime of the day, any day of the week and for as long as they like when calling other Go fixed line numbers.

Local calls from a "Talk Anytime" line to other fixed local networks are charged at EUR 0.035 per minute and calls to mobile numbers are charged at EUR 0.232 per minute. International calls are charged according to charges for direct dialing in or TEN21 services.

Nacera Touileb – *Consultant*

India – BSNL Cuts Fixed And Mobile Call Tariffs

Indian state-run telecommunications operator, Bharat Sanchar Nigam Ltd has reduced tariffs for national calls from fixed and mobile lines.

Fixed line users will now be charged INR 0.80 to INR 1.20 per minute for national calls, while mobile users will have to pay between INR 0.40 to INR 1.40 per minute depending on their tariff plan. The new rates are effective from 11th June.

Angela Toal – *Tariff Analyst*

Teligen concludes price benchmarking study for TRA Bahrain

The price benchmarking study on Fixed voice telephony, Mobile voice telephony, Broadband and Leased lines in 22 Arab countries was recently released by TRA Bahrain. The results highlight the lack of rebalancing in the Arab countries, and also the relatively high prices of Broadband services. On the other hand, Mobile services are doing relatively well by international standards. The key results from the study can be downloaded from the TRA Bahrain website: <http://www.tra.org.bh/en/newsroom.asp>. The study will be updated.

For more information contact: **Halvor Sannæs**, *Director Tariff Services*.

Broadband

Italy – Vodafone Launches New ADSL Service

Vodafone Station is a solution for both private and business customers combining voice with fixed and mobile broadband services in a single wireless modem. It allows customers to make voice calls and access the internet via ADSL from home without having to pay line rental to Telecom Italia.

Vodafone Casa Internet and Telephone is already available and currently offers two plans: "Flat" where customers can surf the net from home without limits for EUR 29 per month (including line rental) and "Free" where customers have unlimited internet access at home for EUR 3 per day plus a monthly charge of EUR 9 (including line rental).

Both plans also offer calls to fixed lines (up to 3000 minutes a month) and Vodafone mobile numbers (up to 1000 minutes per month) at EUR 0.16 per call and mobile internet access for EUR 5 per day or EUR 20 per month for 100 hours on weekdays and unlimited access at weekends.

Adriana Rodriguez – Senior Tariff Analyst

Meanwhile, in New Zealand:

New Zealand – Vodafone Launches Fixed Broadband Network

Following the "unbundling" of Telecom New Zealand's local loop, Vodafone recently launched a new fixed-line broadband network in the country's largest city, Auckland. The "Red" network offers broadband at speeds up to 24 Mbps on ADSL2+.

There are three packages available: "Easy" with a 1 GB monthly data allowance, "Ideal" with a 5 GB allowance and "Ultimate" with a 20 GB allowance. Prices start at NZD 70 for the basic package. If customers exceed their monthly data allowance they can either surf at 64 kbps for the rest of the month or purchase an add-on to double their allowance and continue to surf at full speed. Prices for the add-ons range from NZD 5 for 1 GB to NZD 30 for 20 GB.

All the packages include: 10 free email addresses, email protection and 30 MB of web space. They also include the standard home phone calling plan, with calls to landlines charged at NZD 0.25 and capped at NZD 2.50 for up to 2 hours and calls to mobiles at NZD 0.38. However, customers can upgrade to another talk plan if this does not suit their needs. For example, for an additional NZD 20 per month customers can make unlimited calls anytime to national landlines. A 2 hour cap applies to each call. Calls beyond 2 hours are charged at standard rates.

The Company intends to expand the coverage of its "Red" Network later this year.

Angela Toal – Tariff Analyst

Belgium – Telenet Offers More Data Volume

From 1st August Telenet will increase the data volume on two of their broadband packages. ExpressNet will go up from 12 GB to 20 GB per month and TurboNet will rise from 35 GB to 60 GB per month. Extra volume will be charged at EUR 1.02 per GB, but Telenet also announced plans to decrease this price soon.

Besides this change in data volume, Telenet is also increasing the upload speed of both of the packages. ExpressNet will increase to 512 kbp/s and Turbonet to 1024 kbp/s. Download speeds and monthly rental charges will stay the same for both packages.

Rick Gerritsen – Tariff Analyst

Mobile

UK – O2 New Tariffs For 3G iPhone

UK mobile operator O2 has just announced new tariff plans for the recently launched Apple 3G iPhone. O2, which has exclusive rights to sell the iPhone in the UK, will offer the device on four tariffs. Subscribers to the 8GB iPhone get the handset free when they pay GBP 45 or GBP 75 per month, alternatively they can pay GBP 99 for the handset and pay the lower tariffs of GBP 30 or GBP 35 per month. Likewise, customers who take the 16GB iPhone pay GBP 159 for the device on the lower tariff plans, GBP 59 on the GBP 45 plan and it is free on the GBP 75 plan. All tariff plans include unlimited Wi-Fi and data access. The phones become available on the 11th July 2008 and are subject to an 18 month minimum contract.

Bernadette Finn – *Manager, Tariff Services*

UK – Virgin Mobile Increases Charges

As of 9th June the minimum call charge on all Virgin Mobile residential pay monthly tariffs increased 50% to GBP 0.10 per call. The Company also made changes to its call charges recently.

The charge for calls to other network mobiles for both pay as you go and pay monthly customers increased by 14.3% and the charge for texts to other network mobiles increased 20%.

Yilmaz Bakay – *Tariff Analyst*

Portugal – New Mobile Voice Tariffs From TMN

As of 3rd June, TMN has launched three new mobile voice tariffs: 'Plano pré-pago ao segundo' (Prepay plan per second) and 'Plano pós-pago ao segundo' (Postpay plan per second), which both feature per second billing after an initial of 10-second period and 'Plano leve pré-pago' (Light prepay plan) which does not require obligatory top-ups and features per second billing after an initial 30-second period.

TMN has also changed the 'Casa T Fixo' tariff. The plan is billed in 10-second increments after the first minute at the moment, but will now start being billed per second after the first minute.

Adriana Rodriguez – *Senior Tariff Analyst*

USA – T-Mobile to offer a New Unlimited Family Plan

T-Mobile USA has announced a new unlimited plan created especially for families. The plan offers "unlimited" nationwide calling (with nationwide roaming and long distance) and "unlimited" nationwide text, picture and instant messaging.

To take advantage of this plan, new and existing T-Mobile customers can subscribe to the first line for USD 99.99 per month and add up to four additional lines at USD 49.99 per month per line (plus taxes and fees).

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