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Teligen Outlook

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Welcome to Teligen's Tariff Outlook Newsletter

Message from the Editor

Welcome to Tariff Outlook, a fortnightly newsletter brought to you free-of-charge by Teligen's team of tariff analysts and consultants.

Of the stories we bring to you this week the hot topic is undoubtedly the announcement from the EU that it is proposing to reduce roaming charges. The telecoms industry and consumers in Europe alike will be keeping a close eye on this discussion. KPN Netherlands has introduced a new flat fee fixed package that can be used in conjunction with its basic telephony package, BasisBellen - the new package allows the customer to call free to fixed numbers in the Netherlands. Orange UK has this week launched new mobile tariffs based on human behaviours, with interesting names like Racoona, Dolphin, Panther and Canary. Finally, with the addition of a new MVNO to the Icelandic mobile market, it is hoped that the competition will increase in a small market that has until now had only two mobile operators.

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, so feel free to contact us - we've put our numbers and e-mail addresses at the foot of each article.

We look forward to hearing from you.

Jóhanna Helgadóttir

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This Week's Top Stories...

- [*KPN Netherlands introduces flat fee package*](#)
- [*BT launches ultra-fast consumer broadband service*](#)
- [*New pre paid Internet access cards from Forthnet Greece*](#)
- [*EU announces proposals to reduce roaming charges*](#)
- [*New post paid plans from Bouygues France*](#)
- [*Orange UK launches new plans based on customer behaviour*](#)
- [*Sweden's Halebop reduces international call rates to over 200 countries*](#)
- [*New MVNO launched in Iceland*](#)

Want up to date tariff information at the touch of button?

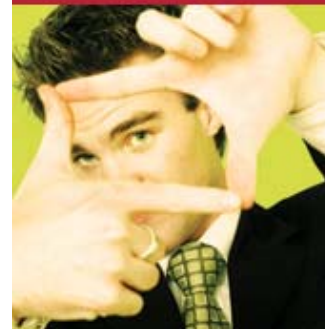
T-World Total is the most advanced information system and calculation tool of its kind. It will answer your questions about tariffs, their structures and levels. It will allow you to compare prices among operators and countries in customisable list formats. In addition it has an in-built Analyser, with an integrated global location database. It allows the user to show price

Products

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Consulting



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, please [click here](#)

Fixed and Mobile

KPN Netherlands introduces flat fee package

KPN has launched a flat fee package called “BelVrij Altijd” or “call free at all times”, which can be added to the BasisBellen fixed line subscription. In November last year, the operator launched “BelVrij Avond & Weekend” or “call free evenings and weekends”, which has since been taken up by 75,000 of its customers. Details on both packages are below, all prices include VAT at 19%.

Package	Inclusive Calls		Cost Per Month	Other Services
	Type	When		
KPN BelVrij Altijd - KPN call free all times	Fixed network excl. premium and Internet numbers	24/7	€13.95	No set up charge for inclusive calls. 15% discount on international calls
KPN BelVrij Avond & Weekend - KPN call free evening and weekends	Fixed network excl. premium and Internet numbers	Monday-Friday 7pm - 8am plus weekends	€6.75	No set up charge for inclusive calls. 15% discount on peak calls and international calls

The BasisBellen subscription is charged at €19.66 per month and includes 60 monthly minutes for off-peak calls within the Netherlands.

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[Back to Top >>](#)

Broadband and Internet

BT launches ultra-fast consumer broadband service

BT is launching a nationwide ultra-fast broadband service with speeds of up to 8MB and upload of up to 448Kb to their consumer customers, for no extra cost. Also unveiled was a Broadband Talk deal for new broadband customers switching to BT.

From Tuesday 4th April, new customers taking BT’s Option 4 broadband package are offered this new service with an inclusive offering of free Evening and Weekend UK Broadband Talk calls for £11.99 for the first three months.

Current price promotion – Prices include VAT at 17%.

- **Option 1:** £14.99 monthly rental for the first three months, then £17.99 thereafter.
- **Option 2:** £20.99 monthly rental for the first three months, then £22.99 thereafter.
- **Option 3:** £25.99 monthly rental for the first three months, then £26.99 thereafter.

- **Option 4:** £29.99 monthly rental

Option 4 was available to customers as of April 4th, option 3 is available to customers from April 11th and options 1 and 2 will be available to new customers from spring 2006.

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[Back to Top >>](#)

New pre paid Internet access cards from Forthnet Greece

The new pre paid NetKey cards provide customers with all types of Internet access without commitments and contracts. The cards have been upgraded and enriched and are now available in a new format and with new capabilities. These new cards are aimed at occasional Internet users, as the hourly costs of the cards are charged at local rates and are well below that of "free Internet" type services.

The new generation of NetKey cards provides Internet access via PSTN, ISDN 64K, ADSL 256K connections and via WI-FI from all Forthnet HotSpots as well as combined use of all these access methods. The pricing of the new generation NetKey cards range is as follows (VAT at 19% included).

Internet Access Type	PSTN / ISDN 64 / ADSL 256		WI-FI	
	€/Minutes	Internet Access Time/Hours	€/Minutes	Internet Access Time/Hours
NetKey €5	€0.0042	10 hours	€0.025	1.67 hours
NetKey €10	€0.0034	25 hours	€0.025	3.34 hours
NetKey €20	1 month unlimited Internet access			
NetKey SMS €1.19	€0.0099	1 hour	€0.0297	20 minutes

The Internet access time as in the table above shows how much usage each key holds in hours.

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[Back to Top >>](#)

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, please [click here](#)

Mobile

EU announces proposals to reduce roaming charges

The European Commission has unveiled proposals to reduce international roaming charges within the EU. The rules now being proposed would require that international roaming charges were not higher than national charges and the introduction of a flat pricing structure. This would also mean that charges receiving calls would be abolished.

The EU Commissioner Viviane Reding said that in spite of warnings and policy initiatives, roaming prices remained unjustifiably high at the retail level even. In October 2005, the European Commission launched a website showing comparisons of EU roaming charges. This website, said Reding, showed that charges varied widely between operators in the 25 EU member states.

The proposed new laws on roaming charges are due to come into force in the second half of 2007, subject to approval from the European Parliament and national governments. If approved, the laws would be immediately applicable in all 25 EU member states and "would not require further transposition to become national law".

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[Back to Top >>](#)

New post paid plans from Bouygues France

Bouygues has launched a new post-paid plan Forfait Neo, available in 7 packages from 2-hours to 15-hours talk-time. The Plan is available either on a 12-month or a 24-month contract, with reduced monthly rental prices for taking the longer subscription. The advantages of the plan are: unlimited calls to fixed lines and mobiles from 20:00 to 00:00 every day; international calls to Europe and North Africa at national prices and unlimited e-mail, photo and video with i-mode. The charges below are in EUR including VAT at 19.6%.

Package	Monthly Rental	24 Month Contract	0.30 / Min
2H	43.90	39.90	
3H	48.90	44.90	
4H	53.90	49.90	
6H	75.90	67.90	
8H	91.90	83.90	
10H	107.90	99.90	
15H	147.90	139.90	

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[Back to Top >>](#)

Orange UK launches new plans based on customer behaviour

From the beginning of April, UK mobile network operator Orange is offering a new range of price plans that it claims are built specifically around the behavioural characteristics of the modern mobile user. The operator has identified four specific customer types within the mobile market, following research into the behaviours of mobile users across the UK. The plans have been developed to suit the customer needs identified by each of these specific behaviours, with each behaviour being represented by a specific animal: the highly sociable customer would choose a package from Dolphin, those who use their phone as a tool not a toy would choose a package from Raccoon, those who love to chat would choose a package from Canary, and those who like extras as standard would choose a package from Panther. The research showed that these packages acted as useful references for customers, with the specific target audiences able to relate to the different animal names. A summary of the new price plans and associated features is shown below (all prices include VAT at 17%):

Plan	Included Minutes	Included SMS	Additional Extras	Bonus Extras
Dolphin £19	50	25	-	+25 extra texts
Dolphin £25	0	500	-	+500 extra texts
Dolphin £25	75	125	-	+125 extra texts
Dolphin £30	100	200	-	+200 extra texts
Raccoon £25	100	0	50 fixed line minutes	+50 extra fixed line minutes
Raccoon £30	200	0	100 fixed line minutes	+100 extra fixed line minutes
Raccoon £35	240	0	120 fixed line minutes	+120 extra fixed line minutes
Canary £30	200	75	50 evening & weekend minutes	+75 extra texts and 50 extra evening and weekend minutes
Canary £40	300	100	75 evening & weekend minutes	+100 extra texts and 75 extra evening and weekend minutes
Panther £45	400	100	200 X-net mins on 3G	+100 extra texts
Panther £55	600	100	300 X-net mins on 3G	+100 extra texts
Panther £75	900	100	450 X-net mins on 3G	+100 extra texts

Notes

The plans listed above are for customers that commit to an 18-month contract; the bonus extras apply for the first 6 months of the contract only; out-of-bundle charges apply to calls and SMS.

With each of the new price plans, customers choosing an 18-month contract can also benefit from the newly introduced "Magic Numbers" option: this allows customers to nominate their most frequently called Orange number, to which they can then make calls of up to an hour while paying for no more than a minute. Every six months the customers can choose an additional Magic Number. The new animal packages have initially been launched for pay-monthly customers only, with equivalent pay-as-you-go packages to be launched later in the year.

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[Back to Top >>](#)

Sweden's Halebop reduces international call rates to over 200 countries

Halebop has just announced it will reduce international call rates to 203 countries from Sweden. This follows the international call rate reductions it introduced over a month ago when it reduced call charges to 27 countries. With these new offerings, Halebop has now cut international call rates from mobile phones to all countries on its price list. All rates below include VAT at 25%.

Here are some examples of some of the new prices:

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Country	To Fixed/Kr per minute	To Mobile/Kr per minute
Australia	1.47	3.47
Egypt	1.97	2.07
Poland	0.47	2.47
Puerto Rico	0.77	0.77
Saudi Arabia	1.97	2.47
Thailand	0.87	0.87
USA	1.47	1.47

Halebop is a Prepay mobile service offered by TeliaSonera in Sweden, targeted at young people. The service offers low prices for international calls, low SMS rates (Kr 49 per message worldwide) and no charge for calls between Halebop phones. Halebop has positioned this service to compete with low cost IP telephony alternatives. To ensure its competitiveness, Halebop plans to update these prices on a monthly basis.

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[Back to Top >>](#)

New MVNO launched in Iceland

This week a new MVNO was launched in Iceland, the new mobile company has been given the name Sko. Sko is basing its business model on that of easyMobile in the UK and Telemore in Denmark. Overheads are to be kept under control by keeping most operations online. Sko uses the networks of both Iceland Telecom and Ogvodafone.

All pricing information is very simple and all prices are shown including a VAT of 25%. Call charges, for all calls fixed and mobile, are a flat rate of 14.90IKR per minute, the billing is in 20 second intervals. Text messages are 4.90IKR and MMS messages are 14.90IKR, both these charges are nearly half of the charges that Iceland Telecom and Ogvodafone charge for these services. Finally, customers must ensure that they use their phone for a minimum of 490IKR per month.

This is definately a welcome addition to the Icelandic telecoms market. Over the past few years there have only been the two mobile operators Iceland telecom and Ogvodafone. It will be interesting to see what the other two operators come up with to answer the low call charges and low charges for SMS and MMS messages. Hopefully though this new addition to the mobile market will lead to increased competition and improved offerings to the Icelandic consumers.

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[Back to Top >>](#)

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