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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.

As we near the end of the year, changes or developments in tariffs begin to slow slightly. This week we have news of some proposed tariff changes for the New Year, plus an interesting development in the leased line market in India.

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 emails at the foot of each article.

We look forward to hearing from you.

Alex Lambert

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This Week's Top Stories...

- [*VAT change in Hungary prompts Magyar Telekom to reduce tariffs*](#)
- [*Deutsche Telekom launches fixed-to-mobile tariff*](#)
- [*New tariffs from Cegetel and Neuf Telecom*](#)
- [*ntl UK announces increase in residential PSTN charges*](#)
- [*Vodafone launches push email in the UK*](#)
- [*T-Mobile offers new Prepay card*](#)
- [*Pannon simplifies roaming tariffs*](#)
- [*Bandwidth prices in India to be reduced*](#)
- [*RomTelecom launches new ADSL package*](#)

PSTN

VAT change in Hungary prompts Magyar Telekom to reduce tariffs

Magyar Telekom, the Hungarian incumbent operator, has announced tariff changes effective from January 1, 2006. These changes were triggered by the imminent reduction of the VAT rate in Hungary from 25% to 20%, also due in January 2006. Magyar Telekom's plan is to reduce the majority of its residential call charges to offer savings higher than the VAT reduction,

passing the savings on to as many customers as possible. For this reason the reductions are aimed at the tariff packages that are most popular with its 2 million-plus customers.

Tariff Percentage Reductions

Tariff Package	Rental	Local Calls	National & Mobile Calls
Felezo	(1)	50% peak & 17% off-peak	4%
Minimál	4%	4%	4%
Teleperc	6%	4-5%	4-5%
Favorit	4%	4-5%	4-5%
Favorit Plusz	4%	4-5%	4-5%
Bázis Plusz	N/C	4%	4%
Sokatmondó	N/C	4%	4%
Csevego	N/C	4%	4%

Notes:

(1) Free inclusive (national peak) minutes now doubled to 160 minutes per month.

Reductions apply at all times unless otherwise stated.

Call charges for public payphones will also be reduced from January 1st, by an average of 4%.

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Deutsche Telekom launches fixed-to-mobile tariff

Deutsche Telekom's fixed network division T-Com has introduced a new tariff option for customers who frequently make calls from their fixed line to mobile phones. This new fixed-to-mobile tariff can be used in combination with the standard packages offered by T-Com: XXL, XXL Fulltime, XXL Freetime, Call Plus and Call Time.

With the fixed-to-mobile tariff option, residential customers can make low-price calls to T-Mobile and Vodafone D2 (D-Network) or E-Plus and O2 (E-Network). A minimum monthly spend of €4 is charged for this option, and the call charges are shown below (including VAT):

	New Tariffs		Existing Tariffs		
	D - Network	E - Network	D - Network	E - Network	
Fixed-to-mobile option	0.129	0.149	Call Plus/Call Time	0.232	0.257
			XXL, XXL Freetime, XXL Fulltime	0.179	0.199

All calls charged per minute

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New tariffs from Cegetel and Neuf Telecom

Cegetel and Neuf Telecom in France have jointly launched 5 new subscription packages for their residential customers. The new packages include various bundles of call time to fixed and mobile networks (Orange, SFR and Bouygues Telecom) in France.

These new packages include two which have unlimited calling, either in the evening and weekend or at all times of day and week. The remaining packages offer the choice of 2 hours, 4 hours or 6 hours of calling to fixed and mobile networks at all times. All these new tariffs are available without any contract duration and are detailed below, including VAT:

- VAT change in Hungary prompts Magyar Telekom to reduce tariffs
- Forfait France+Mobile - 2 hours at €7.50/month
- Forfait France+Mobile - 4 hours at €14.50/month
- Forfait France+Mobile - 6 hours at €21.50/month
- Forfait France+Mobile - evening and weekend unlimited at €49/month
- Forfait France+Mobile - all times unlimited at €69/month

These new tariffs are marketed under both of the operators' names, "Cegetel & Neuf Telecom" and are aimed to offer all residential customers an option completely suited to their budget.

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ntl UK announces increase in Residential PSTN charges

UK Cable operator ntl has announced price increases that will come into effect on the 1st January 2006. The call connection charge will increase from 5p to 6p per call. This charge applies to local and national fixed line calls beginning with 01 and 02, as well as mobile calls.

In addition, there will be an increase in the minute rate for those calls that go beyond 60 minutes. Currently all Talk Plan and 321 calls to UK landlines beginning 01 or 02 that are free are capped at 60 minutes, after which the standard 321 rates apply (3p on weekdays during the day, 2p on weekday evenings and 1p on weekends). The scheduled tariff change will see a charge of 3p per minute for the portion of all calls that go beyond the 60 minute cap. This will bring the tariffs more in line with the standard telephone packages currently offered by incumbent BT. All prices include VAT at 17.5%.

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Mobile

Vodafone launches push email in the UK

Vodafone has announced the first network-designed email service from a UK operator - "Vodafone Business Email" (VBE). Alongside this service Vodafone will make Blackberry Connect and Microsoft Windows Mobile-based devices and email service available in the near future. The announcement represents a move by Vodafone to further support mobile working by improving access to desktop email and personal information management (PIM) systems for users on the move. These three new services will run alongside the successful BlackBerry and Vodafone Mobile Connect services, giving customers greater mobile email choice. All prices are shown below, excluding VAT:

	Blackberry Connect	VBE Enterprise	VBE Personal	Windows Mobile
Service Fee	£28 per user, per month on top of voice tariff	£28 per user, per month on top of voice tariff	All data usage inclusive for £12.77 on top of a voice tariff. If voice tariff is £34.05 or more it only costs £8.51	A fixed tariff comparable to BlackBerry and VBE, including full Device Management support - TBA shortly
Roaming Charges	£41 per month, includes 3MB when abroad	£41 per month, includes 3MB when abroad	£8.75 per MB	

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T-Mobile offers new Prepay card

T-Mobile in Germany has launched a new prepay card in conjunction with Mox Telecom. The new card is targeted at foreign nationals and seasonal workers. The card will be marketed under the name "MoxMobil".

For a card price of €19.95 customers can make cheap calls to 11 countries. The card includes €10 credit and calls cost €0.39/minute. The selected countries are Bosnia and Herzegovina, Turkey, Ukraine, Poland, Russia, Macedonia, Rumania, Iraq, Iran, Kazakhstan and Kosovo.

Mox Telecom is a leading supplier of calling cards with offices in Ratingen (Germany) and Dublin.

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Pannon simplifies roaming tariffs

Hungarian mobile operator Pannon has simplified its roaming tariffs for prepay users. Instead of the previous six zones, there are now only three tariff zones. Also, there will no longer be a difference between calling a landline or a mobile.

Zone 1 will cover the most frequently called destinations. 19 countries are included, such as the Czech Republic, Romania, Slovakia, Slovenia, Greece and the Ukraine. Zone 2 covers other European countries plus Tunisia and Morocco.

In addition, Pannon has added an option called Nightlife, which is available to both postpay and prepay users on the djuice tariff. For HUF 490 including VAT, they can sign up to the option, which offers a flat rate of HUF 9 per minute for calls made between 9pm and 6am every day. SMS and MMS messages can also be sent during the period for HUF 9 each.

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Leased Lines

Bandwidth prices in India to be reduced

The Telecom Disputes Settlement and Appellate Tribunal (TDSAT) in India has recently upheld an order to reduce the tariffs of international private leased circuits. VSNL, the largest provider of bandwidth in India, had originally contested the order issued by the Telecom Regulatory Authority of India (TRAI), in which it was accused of fixing ceiling tariffs on leased circuits of different capacities. However, in its ruling this week TDSAT has upheld TRAI's September 8 order and dismissed VSNL's appeal. As a result of this, tariffs on E-1 lines (2 Mbps) will come down by 29%, while those on DS-3 lines (45 Mbps) will come down by 66%.

This reduction in IPLC pricing is set to benefit many different types of company that rely on international connectivity - most notably outsourcing firms based in India, such as those that provide call centres for UK based banks and other services, stand to make substantial savings on their costs, incurred from taking the enormous amount of international traffic on which their business depends.

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Broadband

RomTelecom launches new ADSL package

Romanian incumbent RomTelecom has launched a new ADSL product called ClickNet 512, targeted at residential customers. With a 512 Kbps download speed and 128 Kbps upload speed, ClickNet 512 is the third ADSL-based product launched by the operator over the last 8 months. The new product is available for €25 per month and, besides the Internet connection, it also includes 30MB space for an e-mail box and 30MB for website hosting.

Earlier this year the company launched ADSL Express, a broadband product for business clients. This initially had a download speed of up to 1 Mbps, which has since been doubled. In July this year, Clicknet Express 1024 was launched for residential clients, also with a download speed of 1 Mbps, and now ClickNet Express 512 completes the product range. By the end of the year, RomTelecom anticipates that all of its ADSL products will be available in all big cities throughout Romania, when the current 7-city coverage is extended.

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