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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.

In this issue we have captured a lot of mobile pricing news, which is indicative of the many changes taking place in this sector of the market. We have seen a number of new mobile business tariffs introduced by T-Mobile across Europe and there has also been a significant development in Russia, where incoming mobile charges are to be abolished in the near future. In addition, one UK operator is scrapping the unpredictable roaming charges between Northern Ireland and the Republic.

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.

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This Week's Top Stories...

- [*TDC Denmark launches residential broadband telephony*](#)
- [*Saudi Telecom launches 512k DSL service*](#)
- [*Connection charge to increase down under*](#)
- [*Russia scraps incoming mobile charges*](#)
- [*T-Mobile Slovakia introduces "Equivalent" Plans*](#)
- [*T-Mobile Germany launches new price plans for business customers*](#)
- [*New social tariffs announced in Belgium*](#)
- [*T-Mobile launches Business 1-Plan*](#)
- [*Ireland gets World Class tariff*](#)

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

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Consulting



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.

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Broadband

TDC Denmark launches residential broadband telephony

On the 28th February, TDC in Denmark announced the launch of its residential broadband telephony offering. There are two plans available to start with: TDC Broadband Telephony and TDC Broadband Telephony Whole Day. Customers must have a TDC broadband connection to qualify for this new service. The prices below are in DKR, including VAT at 25%:

	TDC Broadband Telephony	TDC Broadband Telephony Whole Day
One off connection fee	850.00	850.00
Monthly rental	109.00	129.00
Peak call charges	0.21	0.00
Off peak call charges	0.00	0.00

TDC Broadband Telephony includes free off-peak calls to fixed numbers and TDC Broadband Telephony Whole Day includes free calls to fixed numbers all day and night, every day of the week. Other call types, for example calls to mobile networks, are chargeable at all times.

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Saudi Telecom launches 512k DSL service

Saudi Telecom has announced the launch of a new 512kbps speed DSL package, to be added to the range of speeds currently available of 128kbps and 256kbps. A 25% reduction on the monthly subscription is also available for residential customers. The pricing of the range of packages is as follows (VAT does not apply):

Package	Installation fees/SR	Monthly subscription fees/SR
DSL 128Kbps	300	90
DSL 256Kbps	300	100
DSL 512Kbps	300	120

The new higher speed offering is in line with Saudi Telecom's mission to offer increased and improved services to its customers.

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PSTN

Connection charge to increase down under

Australian incumbent Telstra is to raise the cost of new fixed line connections from 1st April 2006. A new standard fixed line phone connection requiring cabling work and technicians will increase by 43% to AUD299, with the cost of standard multiple connections rising 12% to AUD179. Telstra says the price change will only apply when on-site technicians and cabling work are required to connect a new service. The operator has defended the price increase as necessary in rebalancing falling fixed line revenues. There is good news for eligible pensioners however, who will receive a \$105 discount on the connection fee, as long as it is their first residential phone service.

According to a Telstra spokesperson, "this is only the second increase in the cost of new line installations in more than 16 years, aside from the introduction of the GST in 2000. The last increase was in September 2002 and was less than 10%."

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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- authorised, 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

Russia scraps incoming mobile charges

The Russian government has passed a law that will no longer allow mobile phone companies to charge incoming call fees to subscribers. Amendments to the country's communication laws were signed on 4th March and the law will come into force on 1st July. Until then Russia will continue to use what is known as the Receiving Party Pays (RPP) regime, whereby Russian subscribers pay for

the calls they receive under the terms of their contract; the result of this is that many subscribers refuse to answer their calls. The new law means that Russian mobile users will only be charged for incoming collect calls placed with the help of an operator or for ones received outside their subscription area. In what is known as a Calling Party Pays (CPP) scheme, mobile users will then only pay for those calls that they place themselves. Mobile phones are becoming increasingly popular in Russia, with one recent analyst report indicating that the number of subscribers jumped last year to 125.8 million.

The CPP regime is the most common pricing structure for mobile communications, notably in Europe and in other markets where the GSM standard is used. Exceptions include the United States and Canada. The switch in Russia from RPP to CPP is a huge undertaking and will require immense cooperation between both fixed and mobile operators. The RPP system exists in countries with unmetered local calls on the fixed network, as is currently the case in Russia – the main reason for the adoption of RPP was that it provided a simple transition from the billing systems of the traditional fixed network (i.e. it wasn't necessary to introduce a charge for fixed line users that needed to call a mobile phone). The conversion to CPP will be met by several barriers, in particular user notification and billing. The Russian government will need to ensure that arrangements are entered into without stifling competition. For example, since fixed subscribers have not been paying a premium for mobile calls, some method would have to be applied nationwide in order to advise them that the charge for calling a mobile phone will be higher. This may be done with the introduction of a new numbering scheme. Russia has already seen that RPP has a tendency to discourage mobile use and this new action is clearly a step towards promoting growth in the industry. Calls to mobile phones are increasing dramatically in CPP countries – figures demonstrate that CPP countries have much higher subscriber growth than RPP countries and also show more success in the development of popular pre-paid schemes.

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T-Mobile Slovakia introduces “Equivalent” Plans

From 1st March, T-Mobile in the Slovak Republic has expanded its tariff range with what it describes as selected monthly plans from competing mobile operators. Essentially, this relates to Orange, which is currently the only other operator in the country.

T-Mobile has said that anyone who has chosen a monthly plan available on the market can now activate the equivalent price plan at T-Mobile. A choice of 13 plans is available. All tariffs offer the operator's free customer care services at any time of day, which T-Mobile claims sets it apart from the competition.

A comparison of a selection of the two operator's price plans is shown below. Prices are in SK and include VAT:

T-Mobile				Orange			
Price Plan	Inclusive Minutes/SMS	Monthly Charge	Activation	Price Plan	Inclusive Minutes/SMS	Monthly Charge	Activation
Relax 60	60/0	369	899	Pausal 60	60/0	399	799
Relax 100	100/0	599	899	Pausal 120	120/0	789	799
Relax 200	200/0	999	899	Pausal 250	250/0	1399	799
				Pausal 50			

55 Viac	55/20	339	899	+ SMS	50/50	399	799
100 Viac	100/20	669	899	Pausal 90 + SMS	90/30	555	799

At first sight, both operators' price plans appear similar in many ways. However, an overview of call charges shows that there are differences, with T-Mobile offering a simpler tariff structure on its Relax plans:

T-Mobile				Orange			
Price Plan	On-net & fixed	X-net calls	SMS	Price Plan	On-net & fixed	X-net calls	SMS
Relax 60	7.02	7.02	2.98	Pausal 60	7.90/2.10/ 1.00	9.90/4.90	2.00
Relax 100	7.02	7.02	2.98	Pausal 120	6.00/2.10/ 1.00	9.90/4.90	2.00
Relax 200	7.02	7.02	2.98	Pausal 250	4.00/2.10/ 1.00	9.90/4.90	2.00
55 Viac	9.52/2.98/ 1.19	11.90/ 5.95/5.95	2.98	Pausal 50 + SMS	7.90/2.10	9.90/4.90	2.00
100 Viac	6.00/2.98/ 1.19	11.90/ 5.95/5.95	2.98	Pausal 90 + SMS	6.90/2.10	9.90/4.90	2.00

A price promise is a useful marketing tool as it inspires customer confidence. However, the comparison would be more complicated if factors such as contract duration, billing, additional options and on-net bonus minutes, as offered by both operators, were taken into account.

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T-Mobile Germany launches new price plans for business customers

T-Mobile Germany has launched two new price plans for business customers: BusinessSmart and BusinessSmart Pro. The BusinessSmart price plan has no monthly rental charge and only bills for call charges. T-Mobile offers business customers who use BusinessSmart for more frequent and longer calls the BusinessSmart Pro option. This monthly option includes a flat rate for any number and any length of calls, with calls to the mobile mailbox free of charge in Germany. A non-recurring fee is charged for BusinessSmart; subsidised handsets are not offered with either plan however. The price details are shown below in EUR, excluding VAT:

	Connection Charge	Monthly Rental	Calls to T-Mobile	Calls to Fixed Network	Call to other Networks
Business Smart	21.50	0	0.06	0.25	0.25
Business Smart Pro	21.50	20	0.06	0.06	0.06

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New social tariffs announced in Belgium

Belgian mobile operator Mobistar is now offering discounts on its social tariff for both pay-monthly and pre-paid customers. The social tariff offers eligible residential customers a discount, regardless of whether they are new or existing customers. Tempo pre-paid card customers receive a credit of €3.10 per month and, for pay-monthly customers, a reduction of €12 per month is offered on any type of subscription. The social discount is applicable for voice calls, SMS and MMS communications.

The social discount can be granted only once per family. It is given only to people over 65 years of age, to those on low income, or to people aged 18 or over with a disability.

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T-Mobile launches Business 1-Plan

Mobile network operator T-Mobile is targeting the UK SME market with a new business tariff. On 1st March, the operator launched Business 1-Plan, which it describes as the UK's first truly tailored mobile tariff for businesses. The plan is built to deliver a tailor-made package to reflect businesses' mobile communication needs.

This is done by choosing from a wide range of allowances of voice, text and data that can be shared across up to 250 users, depending on the employees' usage patterns. The plan includes free calls between other users on the account regardless of how often or for how long they call. International calls from the UK to Europe, the USA and North Africa (Zone 1, 2 and 3) are included in the allowance.

T-Mobile said that business users would be able to make substantial savings, quoting the example of 75 employees using 10 mobiles, selecting a monthly allowance of 4,000 minutes, 500 texts and 25mb of data: this would cost £264.06 with Business 1-Plan, a saving of up to 50% compared to its other plans and those of other operators. Each additional user would cost £15 per month. Additional benefits include a discount of 25% off standard charges when signing an 18 or 24 month contract.

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Ireland gets World Class tariff

T-Mobile UK has scrapped its cross-border roaming charges for pay monthly customers in Northern Ireland, instead introducing a 25p per minute flat rate for mobile phone calls made throughout the whole of Ireland. This new 'World Class' tariff will mean that customers will now no longer face unpredictable roaming charges when in the Republic of Ireland or close to the border. T-Mobile users

will use the Irish network Meteor to make their calls. Users will first be required to register for T-Mobile's World Class service.

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