

## Welcome to Teligen's Tariff Outlook Newsletter

### Message from the Editor

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

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.

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## This Week's Top Stories...

- [\*Netia in Poland launches new tariff plans\*](#)
- [\*Telecom Fiji to cut call rates and raise rental\*](#)
- [\*TDC announces an upgrade in broadband speeds\*](#)
- [\*StarHub Singapore launches 25 Mbps broadband service\*](#)
- [\*Vodafone introduce Stop the Clock and new Anytime Perfect Fit bundles\*](#)
- [\*KPN launches online tariffs\*](#)
- [\*Bouygues Telecom launches Welcome Sound service\*](#)

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## PSTN

### Netia in Poland launches new tariff plans

Netia, the second largest telephony operator in Poland, introduced a new set of tariffs for residential customers on April 1st 2005. These tariffs give Netia customers the option to choose either free calls at specific times, cheap call charges or free minutes included in the monthly rental. The new tariffs are called Wieczory i Weekendy, Duzo Rozmow and Pakiet 30, 45, 60 and 240.

A summary of the prices is shown below, exclusive of VAT:

**Wieczory i Weekendy** is aimed at customers who use the phone predominantly at the weekend. For a monthly charge of 69.97zł local and national weekend calls are free of charge.

**Duzo Rozmquam** ("I talk a lot") offers cheap call charges for a monthly rental of 36.89zł. Starting with 0.10zł/min (peak) and 0.05zł/min (off-peak) for local calls this tariff is suitable for customers who use the phone a lot. A call set-up charge of 0.15zł/call applies.

**Pakiet 30, 45, 60 and 240** include free minutes depending on which package is chosen - 30, 45, 60 or 240 minutes respectively (see table below). Once the included minutes have been used different call charges for each package apply.

Package	PLN/month	Incl. min/month
<b>Pakiet 30</b>	24.59	30
<b>Pakiet 45</b>	40.98	45
<b>Pakiet 60</b>	45.08	60
<b>Pakiet 240</b>	69.67	240

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### **Telecom Fiji to cut call rates and raise rental**

The recent Commerce Commission decision on Telecom Fiji pricing will see some charges reduced by as much as 80% over the next three years, beginning June 2005. These price reductions, however, will be accompanied by an increase of more than 300% in monthly line rentals over the coming two years. This will compensate for the significant reductions on Internet, fixed line and mobile calls that have been ordered.

Telecom Fiji Ltd., the monopoly provider in Fiji, will increase residential line rentals initially from FJ\$2.80 to FJ\$8 per month from June. This will be followed by a further 25% increase next year and finally by an additional 20% in 2007. Business line rentals will rise to \$35 per month from June, then to \$40 per month in 2006 and \$45 per month in 2007.

Local calls are set to remain at \$0.1091 per call while intra-region calls will decrease by around 14% over the next three years. Inter region calls will be reduced from \$0.4296 per minute to \$0.2675 per minute, before decreasing again to \$0.18 next year and \$0.1291 in 2007.

International calls will be reduced to 75 cents per minute from June, then by a further 6.6% next year and 7% in 2007. Existing charges for retail Internet dial-up services will be reduced by 26% and mobile charges will be reduced by up to 70% over three years.

*A recent study by Teligen showed that Fiji has some of the lowest overall prices in the Pacific area. However the balance between fixed (rental) prices and call prices was creating problems in the emerging competitive environment on Fiji. The line rental for the telephone service was one of the lowest in the region.*

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## **Broadband Internet**

### **TDC announces an upgrade in broadband speeds**

TDC in Denmark has begun the process of doubling its ADSL broadband speeds for residential customers. On 1st May the company started upgrading its ADSL broadband network speeds and the process is expected to last for up to six weeks. Up to 93% of TDC's residential ADSL customers will experience an increase in transmission speed. Importantly, this speed increase will not see an increase in subscription charge. In fact customers who use speeds of 2048Kbps will see a reduction in price.

*Currently more than 60% of TDC's residential ADSL customers have a 512/128Kbps connection. This upgrade means that they will be migrated to a 1024/128Kbps connection where possible, at the same price as before – DKK 359, including VAT. This sort of upgrade in broadband transmission speed is becoming more common across Europe as network capacities are improved, and we can expect to see more of the same as other service providers follow suit. However, compared with other regions in the world such upgrades merely represent a process of catch-up, as some Asian countries, for example, already have speeds 20 times greater than this.*

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### **StarHub Singapore launches 25 Mbps broadband service**

Broadband Internet access provider StarHub has introduced a new product to its portfolio called MaxOnline Ultimate, which comes with speeds of up to 25 Mbps. This new speed is the highest so far offered in Singapore and is the latest addition to StarHub's plug-and-play broadband service offerings, which also include MaxOnline 6500 (6.5 Mbps), MaxOnline 2000 (2 Mbps), and MaxOnline FlexiSurf 2000 (2 Mbps - pre-paid broadband).

MaxOnline Ultimate is charged at a monthly subscription fee of S\$116 (S\$121.80 incl. GST). In addition to the huge download speed, MaxOnline Ultimate provides upload speeds of up to 1 Mbps, almost four times higher than that presently available from typical Singapore residential packages. The product is targeted at heavy Internet users and is ideal for home networking households with multiple Internet users and devices connected to the Internet. As an initial promotion with the launch, StarHub is also offering a free HP Notebook together with a 10% discount off the monthly fee of a two-year MaxOnline Ultimate subscription.

*This is a prime example of the gulf between Asia and Europe in terms of broadband rollout and service offerings. In Europe we are seeing transmission speeds increase as network capacities are upgraded, but the range of speeds, both old and new, are on a different scale to those that Asian customers are now seeing.*

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## Mobile

### Vodafone introduce Stop the Clock and new Anytime Perfect Fit bundles

Vodafone in the UK has introduced a new add-on feature for their pay monthly and prepay customers called Stop the Clock, enabling them to talk for up to an hour at evenings and weekends, while paying only for the first three minutes of the call. Customers on pay monthly are required to sign up to an 18 month contract, whereas prepay customers on Smartplus can sign up to the service for free.

*This makes Smartplus one of the most attractive prepay services in the UK market and should attract customers because of the amount of free minutes on offer. This new add-on package could also be seen as a response to the recent introduction of cheaper prepay calling plans or reductions in call charges by other UK operators.*

Accompanying this launch, Vodafone has also increased their Anytime Perfect Fit offering from five packages to nine, which will give their customers more of a choice of bundle to suit their requirements. A summary of the new Perfect Fit range is shown below:

Package	Monthly Rental (GBP)	Bundled Minutes (all networks)
<b>Anytime 25</b>	15	25
<b>Anytime 75</b>	20	75
<b>Anytime 125</b>	25	125
<b>Anytime 200</b>	30	200
<b>Anytime 275</b>	35	275
<b>Anytime 350</b>	40	350
<b>Anytime 500</b>	50	500
<b>Anytime 700</b>	60	700
<b>Anytime 1000</b>	75	1000

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### KPN launches online tariffs

KPN has launched five new mobile price plans which are only available online. Three of these have inclusive minutes and two of these are available as SIM only tariffs. The operator claims that these plans offer a discount in comparison to in-store plans. In addition, discounts are on offer for both one-year and two-year contracts. A summary of the new price plans is shown below:

Package	Inclusive Minutes (per month)	Monthly Rental (€)	SMS Charge (€)
Small	120	19.50	0.16
Medium	240	29.50	0.14
Large	360	39.50	0.12

The Small and Medium price plans are also available as SIM only versions for €15 and €22.50 respectively. KPN offers a two-month rollover on inclusive calling credit. A call set-up charge of €0.07 applies to all calls. Data charges are identical for each price plan.

*In a country with a mature mobile market such as the Netherlands, it makes sense to offer a SIM only price plan to users who do not require a handset upgrade every year. However, the SIM only plans do not represent a huge discount compared to the handset-inclusive tariffs. This appears to be a reflection of the extremely competitive mobile market in the Netherlands, where rewards such as a PC for taking out a 2-year contract with handset are no rarity. It is worth noting that, in contrast to UK operators for example, KPN does not charge its online users more to call a Customer Services agent, which increases the attractiveness of such plans.*

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**Bouygues Telecom launches Welcome Sound service**

Bouygues Telecom in France has launched the “Welcome Sound” service, as of 28 April 2005. This is a new service aimed at Bouygues Telecom’s post paid subscribers allowing them to personalise their mobile handset welcome tone. Regardless of operator, a person calling a Bouygues Telecom Welcome Sound subscriber will hear a particular background tune chosen by the subscriber, rather than the standard ringing tone.

Subscribers of this service will be able to choose their welcome tone from a catalogue of more than 6,000 tunes. The service is accessible to all post paid subscribers, regardless of handset, for €1.00 a month and has no minimum contract period. Subscriptions are offered until August 21, 2005 and customers have the choice of various means of downloading the Welcome Sound:

- Through an automated voice service, accessible from either a mobile or fixed telephone, which gives a free demonstration and all details of the service;
- Via the 123 Welcomesound site, available on I-mode or via WAP connection;
- Over the Internet, through the Bouygues Telecom website.

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