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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.

This week Tariff Outlook covers the launch of a new DSL network in Australia, the announcement of free broadband services in the UK, and a range of new mobile offerings across Europe: 3G services are becoming more established across Eastern European countries, as we have recently seen in Poland, and the range of tariffs available to business mobile users in the UK continues to grow.

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.

Alex Lambert

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This Week's Top Stories...

- [*Optus launches DSL services*](#)
- [*Free broadband forever, from The Carphone Warehouse*](#)
- [*KPN introduces combined broadband and telephony plans*](#)
- [*OgVodafone in Iceland offers free fixed line calls*](#)
- [*TeliaSonera Finland to revise local call rates*](#)
- [*Jersey Telecom to increase line rental charges*](#)
- [*Orange Poland launches 3G tariffs*](#)
- [*Vodafone Netherlands announces new prepaid plans*](#)
- [*Several changes announced for the UK Business Mobile Market*](#)

Need to benchmark prices between different markets and services?

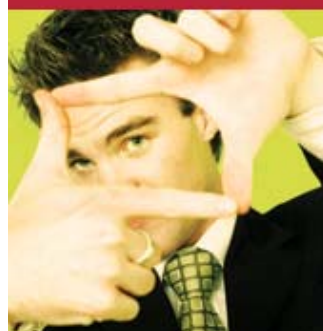
Why not consider T-Basket, the industry recognised tool. T-Basket offers a unique insight into the price relationships between telecom services in OECD (Organisation for Economic Co-operation and Development) member countries. It uses basket methodologies that are OECD based and OECD-authorized, taking 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

Products

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Consulting



those in the most competitive markets, the most industrialised markets, and those with close geographical or geopolitical proximity.

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Broadband

Optus launches DSL services

Australia's second largest telecom company Optus has launched its new DSL network, offering uncapped download speeds of up to 20 Mbps. Until now, Optus has relied solely on network capacity leased from incumbent Telstra under an unbundling agreement, based on the existing regulatory framework in Australia. The operator announced in September last year that it was spending AUD 150 million building a national broadband network so as to reduce its reliance on Telstra. It is this network that Optus claims will deliver both broadband access and telephony services to an additional 2.9 million households and businesses, adding to its cable footprint that passes 1.4 million homes in Sydney, Melbourne and Brisbane.

Called Optus Direct, the network is said to be 13 times faster than that of rival Telstra. It is hoped that this statistic will help Optus to increase its customer base from around 469,000, both by adding new customers and by migrating some of the existing 2.3 million customers of Telstra's broadband service. In addition to the standard 20 Mbps offering, the Optus Easy Start plan, a new entry-level broadband plan at AUD 19.95 per month, is available on a 30-day trial offer. The operator has said that it will also offer Optus Wholesale Residential Services, including Optus Residential Telephony and Optus Residential Broadband, along with a range of services to other telecommunication providers.

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Free broadband forever, from The Carphone Warehouse

Talk Talk, the fixed line telecoms division of The Carphone Warehouse in the UK, has launched a new service offering "Free Broadband Forever". The offer is available to any customer that signs up to the company's Talk3 International calling plan, which also offers unlimited calls to UK fixed lines and Talk Talk mobiles. Details of the monthly charges payable for the calling plan are shown below, including VAT at 17.5%:

	£ / Month
Talk3 International calling plan	9.99
Line rental	11.00
Monthly total	20.99

Customers are also required to pay a one-off connection charge of £29.99, but the £11 monthly line rental replaces any charge previously payable to BT for the use of the line. Other benefits of the new offer include: broadband speeds of up to 8 Megabits per second download, with a 40GB monthly download limit, free modem and easy installation; unlimited anytime local and national UK landline calls, plus international landline calls to 28 countries (including the EU, Australia, New Zealand, Canada and the USA).

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KPN introduces combined broadband and telephony plans

KPN Netherlands has launched a range of new broadband plans called InternetPlusBellen. The new plans include unlimited phone calls as well as broadband Internet access. The unlimited phone calls apply to fixed numbers during weeknights and weekends. There are four different plans available, depending on the speed of the Internet connection. Details of the plans are shown below – all prices include VAT at 19%:

Package	Speed	Data Limit	€/ Month
InternetPlusBellen Go	1500/256	Unlimited	34.95
InternetPlusBellen Lite	3000/512	Unlimited	39.95
InternetPlusBellen Basic	6000/768	Unlimited	59.95
InternetPlusBellen Extra	8000-12000**/ 1024	Unlimited	79.95

Notes

A connection fee of €74.95 is also payable.

The downstream speed for InternetPlusBellen Extra depends on different factors, such as the quality of the line, the distance from the exchange and the equipment used.

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PSTN

OgVodafone in Iceland offers free fixed line calls

In Iceland, OgVodafone has launched a new service called Og1 for its fixed line customers. It enables customers to make free calls to all other fixed lines in Iceland, to those of both OgVodafone and Iceland Telecom. The monthly rental for Og1 is ISK 1340, including VAT at 25%. Furthermore, the new service also offers customers 120 minutes of international fixed line calls to one of the 30 most called countries. Customers must have at least one OgVodafone mobile subscription to qualify for the new Og1 fixed line service.

OgVodafone mobile customers can also sign up for a service whereby they can call their OgVodafone home number for up to 60 minutes a day for free. These mobile customers also receive the 120 free international fixed line minutes. The monthly rental for this service is ISK 650.

These new plans demonstrate OgVodafone's attempt to cut into Iceland Telecom's market share in the telecoms market. Unfortunately the competition in the fixed market is only between these two operators. However, this represents a good offer for Icelandic consumers and it will be interesting to see what response Iceland Telecom comes up with.

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TeliaSonera Finland to revise local call rates

On the 1st June 2006, Finnish incumbent Sonera will revise its local fixed call and network charges for all area codes. As a result, the call set-up charges will decrease and the per-minute charges increase. Consumers that predominantly make shorter calls will see the greatest benefit from these changes. The new local fixed call charges are as follows: 9.9 Euro cents per call and 1.99 Euro cents per minute; the new local fixed network charges are: 8.9 Euro cents per call and 1.89 Euro cents per minute.

From the same date, Sonera plans to launch a new flat-rate option for local calls. The operator has successfully been offering such an option to the customers of its Auria division for over a year now, and is keen to offer it to all of its customers. The flat-rate option, called Sonera Puhepaketti Kiinteä, is to include unlimited calls to all Sonera fixed lines (excluding premium Rate and Internet dial-up numbers) within the same area code, for 5 Euros per month. Furthermore, consumers will get up to a 40 percent discount when calling from a Sonera fixed line to all mobile networks and a discount of about 10 percent on average for long-distance and international calls. Sonera Puhepaketti Kiinteä will be available for residential customers only.

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Jersey Telecom to increase line rental charges

From the end of June 2006, Jersey Telecom will increase the monthly rental charges for fixed lines by 3 per cent, adhering to the company's policy of increasing these charges slightly every year. In contrast, for the twelfth consecutive year the price of local calls will remain unchanged. The operator claims that it remains committed to reducing call charges as well as improving tariff discount packages and services. The following are the prices for the various plans currently available:

Price Plan	£ / Month
CoreLine	10.64
HomeStyle	14.41
FreeTalk	22.42
NetSpan	18.32
PrimeTalk	1.50
FlexiLine	31.04

The new prices will be available from June 29th 2006. Jersey Telecom has also announced that all residential customers will receive the CLI (Calling Line Identity) facility free of charge from June 2006. The current price for this service is £1.10 per month.

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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, please [click here](#)

Mobile

Orange Poland launches 3G tariffs

On 3rd April, Orange Poland launched its new 3G services including video calling, mobile video and a range of content services including music. At the same time, the operator launched two new tariffs for the residential market and two for the business market.

The new residential tariffs, Premium 100 and Premium 200, both include an allowance that can be used for voice calls, SMS, MMS, data transmission and downloads. All price plans also include free insurance, dedicated customer services and a choice of chargeable options tailored to users' calling patterns. Rates, in PLN including 22% VAT, are as follows:

Orange Poland 3G Tariffs - Residential	Orange Premium 100	Orange Premium 200
Monthly charge	110	210
Allowance	100	200
Maximum number of inclusive on-net & fixed minutes	200	500
Maximum number of inclusive x-net minutes	143	286
Out of bundle voice call charge	0.70	0.70
Out of bundle voice call charge	1.40	1.40
SMS in & out of bundle	0.20	0.20

Orange Poland 3G Tariffs - Business	Top Firma 300	Top Firma 800
Monthly charge	110	244
Allowance	100	200
Maximum number of inclusive on-net & fixed minutes	300	800
Maximum number of inclusive x-net minutes	164	364
Out of bundle voice call charge	0.67/0.37	0.67/0.31
Out of bundle voice call charge	0.73	0.61
SMS in & out of bundle	0.20	0.20

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Vodafone Netherlands announces new prepaid plans

Vodafone in the Netherlands has launched two new prepaid plans that offer all customers the opportunity to choose a tariff plan according to their usage. Prepaid customers using voice rather than SMS can now opt for Vodafone Prepaid VeelBellen, which offers cheaper call charges. Customers who prefer to text can choose Vodafone Prepaid VeelSMSen. All Vodafone Prepaid customers can also choose from the existing additional offers of "60 Halen = 3 Betalen" (which caps voice calls at 3 minutes, up to 1 hour) and Vodafone Passport. Combining VeelBellen with "60 Halen = 3 Betalen" can result in an average voice call rate of only 1.5 cents per minute. The charges below are in Euro including VAT at 19.0%:

Tariff	Call Charge Per Minute	SMS
VeelBellen	0.29	0.19
VeelSMSen	0.35	0.09

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Several changes announced for the UK Business Mobile Market

UK Mobile operator O2 has announced an increase to its range of Best for Business tariffs, with the addition of Best for Business 1500 (£95.60 per month) and Best for Business Unlimited 1500 (£105.00 per month). In addition, the range of Best for Business Unlimited Off-peak tariffs has also been increased – these tariffs allow members of a team to make fixed line or mobile calls as much as they want in the evenings or at weekends (UK only). The Best for Business Unlimited Off-Peak range includes the following tariff options: 600 minutes for £61.06 per month, 1000 minutes for £86.60 per month, 1500 minutes for £105.00 per month, 2000 minutes for £158.94 per month, 5000 minutes for £371.70 per month and 10000 minutes for £690.85 per month. There is also a new "Pay As You Use" Off-peak option – this range offers customers cheaper call rates, but with no inclusive minutes (fair usage policy applies) – the monthly charge per handset is £21.91 per month and off-peak calls to all fixed and mobile lines are free with the new option.

In another announcement, rival operator Orange has increased its range of Orange Business Plus tariffs, adding Orange Business Plus 18000 (£1,319.00 per month) and Orange Business Plus 35000 (£2,552.00 per month). Furthermore, the range of Orange Business Advance options has also been extended. Business Advance lets customers pay for all types of usage with one fixed monthly payment, shared between the users. Customers pay one monthly fee and choose how to spend the cash allowance between SMS, data, and national, international and roaming calls. Commitment to specific amounts of voice and data within the bundle is not required. No penalties apply if a customer uses more minutes or texts than planned – when exceeding the bundle, customers still pay the standard in-bundle rate for any service. Orange Business Advance offers the following bundles, for use as described above (all bundles are per month): £400, £750, £1,000, £1,500, £2,500, £3,500, £5,000 and £10,000.

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