

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.

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...

- [TeliaSonera Sweden launches new residential tariff](#)
- [KPN slashes fixed-to-mobile rates](#)
- [TELE2 Spain launches ADSL & fixed telephony offer](#)
- [Telenor increase speed for Business Broadband](#)
- [T-Online introduce T-Online dsl flat rate](#)
- [BigPond unveils 12 months half price broadband deal](#)
- [WIND launches 'All Inclusive' price plan](#)
- [Proximus Belgium unveil new Small Business Packages](#)
- [T-Mobile NL introduces new prepaid package](#)
- [New LLU prices from BT](#)

PSTN

TeliaSonera Sweden launches new residential tariff

On November 15th TeliaSonera Sweden launched a new tariff, Telia Call to Friends (Telia Ringa til vänner) that allows customers to call both fixed and mobile at SEK 0.00 per minute. The free calls apply to all fixed line calls and calls to the TeliaSonera mobile network.

The monthly rental for Telia Call to Friends is SEK 299, all prices include VAT at 25%.

For calls to other mobile networks, customers pay SEK 1.29 per minute. All calls have a call set up charge of SEK 0.59 per call.

According to a research commissioned by TeliaSonera and Ericsson Consumer & Enterprise Lab, Swedish people use the home phone most when staying in touch with family and friends. However, the mobile phone is also popular for staying in touch with family and friends but even more so when staying in touch with colleagues who are working outside the office.

On the topic of integrating fixed and mobile telephony TeliaSonera is conducting a technical trial on the Inlicensed Mobile Access technology which allows for the use of one handset for both fixed and mobile telephony. These tests are taking place both in Sweden and Denmark. There is no set date for the launch of this service from TeliaSonera.

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[Back to Top >>](#)

KPN slashes fixed-to-mobile rates

Dutch Telecom KPN has said it will cut fixed-to-mobile call rates by 12% with effect from the start of December. KPN says the reduction will apply to both residential and business lines. Both present and new customers can profit from these new tariffs.

The new reduced tariffs are especially attractive to business customers as according to KPN, 1/3 of average business call charges consist of calls made from fixed to mobile.

This reduction only applies to the call charges per minute (see tables below). The call setup charge per call remains the same, which means € 0.0518 for residential and € 0.0435 for business.

	Old			New		
	Standard	Reduced	Weekend	Standard	Reduced	Weekend
KPN Mobile	0.1601	0.1550	0.1485	0.1394	0.1341	0.1279
Orange	0.1755	0.1736	0.1653	0.1531	0.1500	0.1428
T-Mobile	0.1745	0.1723	0.1643	0.1529	0.1492	0.1426
Vodafone	0.1621	0.1571	0.1510	0.1403	0.1354	0.1293
Telfort	0.1754	0.1728	0.1653	0.1527	0.1494	0.1428
Tele2	0.1711	0.1717	0.1626	0.1488	0.1470	0.1397

Notes:

Call charges are given in rate per minute. However, calls are charged on a per second basis Charges apply for all subscription types

Time bands:

Standard: Monday to Friday 08.00-20.00

Reduced: Monday to Friday 20.00-08.00

Weekend: Saturday and Sunday 00.00-24.00

Please contact Teligen for details of the new residential tariffs

Comment: KPN announced that it would cut the fixed-to-mobile call rates by 12%, after analysing the tariff changes we can conclude that this reduction percentage may vary between 12% and 14% depending on which network you're calling to and when. This amendment is the result of the mobile operators' decision to reduce mobile termination (MTA) charges. KPN is passing the reduction on to its customers by lowering the tariffs proportionately.

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[Back to Top >>](#)

Broadband

TELE2 Spain launches ADSL & fixed telephony offer

Tele2 AB, the pan-European telecommunications company, announces that Tele2 Spain, using Comunitel's extensive network, has launched a new product for residential ADSL and fixed telephony customers, which combines high speed ADSL, unlimited local and national calls and free monthly rental.

The new service, called Línea Tele2 ADSL, is based on Comunitel's direct access technology and is available in all areas where Comunitel has a network.

For € 39.90 per month plus V.A.T. customers will be able to surf the net 24 hours a day to a speed of 6 Mbps download and 500 Kb upload and make unlimited national calls to fix lines any time of the day. This service also has the advantage of a free line rental. Tele2 ADSL clients will stop paying to Telefonica the monthly rate of € 13.43 which over 12 months means a saving of € 161.16 for the year.

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[Back to Top >>](#)

Telenor increase speed for Business Broadband

Effective from 15 November 2005 Telenor will offer their business customers increased speed for new and existing ADSL connections. This is the 3rd time this year that Telenor will increase speed and/or reduce prices for their ADSL products. The latest speed and price changes are:

Product	Old Speed (kb/s)	New Speed (kb/s)	Old Price (NOK)	New Price (NOK)
ADSL Bedrift	2000/400	6000/600	1,090.-	1,090.-
ADSL Bedrift	4000/600	6000/600	1,390.-	1,090.-
ADSL				

Småbedrift	1000/350	4000/600	649.-	699.*
ADSL Småbedrift	750/250	2000/400	499.-	499.-

* Existing customers will keep the lower old price, but get the new higher speed.

Comment: These changes are in line with similar changes from other providers in the Norwegian market. There is a general drive towards higher speeds and lower prices. Most ADSL products in Norway offer unlimited usage.

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[Back to Top >>](#)

T-Online introduce T-Online dsl flat rate

T-Online is offering unlimited internet connection and phones calls for €19.90/month.

The new DSL-Flatrate T-Online dsl flat is available for all T-DSL connections (T-DSL 1000 to T-DSL 6000) for a monthly price of €9.95.

For an additional €9.95/month customers receive a flatrate for DSL Telefonie (VoIP). This offer includes calls free of charge to landlines and to all users of T-Online DSL Telefonie. Calls to other networks are charged €0.22/min.

T-Online dsl flat has minimum contract duration of 12 months.

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[Back to Top >>](#)

BigPond unveils 12 months half price broadband deal

BigPond, Telstra's ISP division has unveiled a new deal, offering new customers up to 12 months half priced broadband, and free installation. BigPond is offering this to new ADSL, Cable and Wireless Broadband customers who have or take up eligible Telstra home phone and mobile services and sign up online with a 24-month contract.

Telstra full service home phone customers get six months half priced broadband. If they combine an eligible Telstra mobile plan, or sign up online, they will get nine months half priced broadband. The free installation bonus applies to 1-port modem self-install ADSL and Cable kits, with \$129 off other installation options, including the cost of a BigPond Wireless Broadband desktop modem or mobile card. A spokesman for BigPond said customers taking up this offer would save between \$308 and \$908 in the first 12 months depending on the plan they opt for.

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[Back to Top >>](#)

Mobile

WIND launches 'All Inclusive' price plan

Italian mobile operator WIND has unveiled a price plan called All Inclusive. Despite the name, the plan does not include unlimited calls but it does offer 10 hours of calls per month, distributed as follows: 5 hours of on-net calls plus 5 hours of calls to fixed lines and other mobile operators. In addition, the plan offers the opportunity to acquire a handset for €9 per month. This is quite rare in the Italian market, which is geared towards customers acquiring a handset and a price plan separately without benefiting from operator subsidies.

Calls to WIND and other operators including fixed lines	€0.20 per minute
SMS	€0.15
MMS	€0.60
On-net video calls	€0.50 per minute
X-net video calls	€1 per minute

Customers who sign up before the end of the year will receive a 50% line rental discount throughout 2006.

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[Back to Top >>](#)

Proximus Belgium unveil new Small Business Packages

Proximus Belgium has just released three new small business packages for companies with two or more mobiles: SME Light, Medium and High. These packages feature a standard call rate for all national destinations at all times of the day. Both the light and medium packages have a flat rate at all times, with the high package users benefiting from decreasing rates: the more they call, the lower the price per minute. Other advantages include €0,095 per minute (excl. VAT) between company mobiles where these calls are not deducted from the call time included in your subscription, and free 'Proxicomfort' to help manage your calls.

Package	Monthly Rental	Inclusive Minutes	Call Costs Outside Plan	Calls to Company Mobiles
SME Light	€8,25	25	€0,205	€0,095
SME Medium	€15,00	75	€0,175	€0,095
SME High	€30,00	150	€0,14 (1) €0,095 (2)	€0,095

(1) From 151st Minute to 300th Minute.

(2) Over 300 Minutes.

All Rates are exclusive of VAT.

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[Back to Top >>](#)

T-Mobile NL introduces new prepaid package

On 25th November, T-Mobile introduces in cooperation with TMF a new prepaid SIM-only package special for young people who SMS a lot.

The T-Mobile Prepaid TMF SIM-only card costs € 14.95 inclusive of € 15 free top up.

T-Mobile recently reduced their Prepaid After3 Off-peak tariff from 0.20 cent to 0.19 cent.

From the 31st of October until the 30th of June 2006, customers will get 50 Free SMS for each top up and can top up as many times as they want.

The TMF SIM Prepaid package makes use of the After3 Tariff, which means that you actually get € 4.50 (50 SMS x € 0.09) free with each top up.

After3 Tariff

	Standard	Reduced
Calls to Fixed and Mobile	0.45	0.19
Call Set Up	0.07	0.07
SMS	0.09	0.09

Standard: Monday to Friday 0800 – 15.00

Reduced: All other times

Comment: Most young people between 14 and 25 years SMS a lot. Besides the free 50 SMS with each top up, the customer gets free TMF content on their mobile with which they can personalise and stay in touch with the last TMF SMS facts.

TMF (The Music Factory) was launched in 1995 as a 100% music channel on TV. Its target group are people between 13 and 34 years, mainly the group 13 – 19 years. TMF has become the most interactive television channel for young people in the Netherlands. There's also a TMF magazine and in combination with internet and mobile is TMF nowadays a multimedia platform.

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[Back to Top >>](#)

Data Networks**New LLU prices from BT**

BT has announced that it will be introducing new local loop unbundling "LLU"

price reductions designed for operators investing in LLU.

From 15 December, the price for new fully unbundled will be reduced from £168.38 (ex. VAT) to £99.95 (ex. VAT), BT will also be withdrawing the minimum term rental charges for both its shared and fully unbundled products giving LLU operators the opportunity to pass this benefit on to the end-customers.

LLU will benefit from a 40% reduction in the price of connecting new broadband customers to BT's fully unbundled LLU offering, this reduction follows the 70% reduction in total charges for shared LLU introduced by BT Wholesale in September 2004.

With the introduction of these new price reductions, the UK is now ranked third in Europe on price comparison for LLU.

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[Back to Top >>](#)

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