

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.

Whilst the broadband market remains the most rapidly evolving market in terms of innovation, the last few weeks have seen a great deal of movement in the European mobile markets – this week's newsletter covers several new mobile tariff launches, as well as looking at some market developments in the Slovak 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 emails at the foot of each article.

We look forward to hearing from you.

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This Week's Top Stories...

- [*Portugal Telecom launches free calling promotion*](#)
- [*Slovakian telecoms market opens up*](#)
- [*BT promotes cheap VoIP calls with BT Communicator*](#)
- [*New broadband packages from BT*](#)
- [*BT Ireland reduce broadband costs for businesses*](#)
- [*Base unveils 'Unlimited' tariff*](#)
- [*Vodafone take on fixed line rivals*](#)
- [*T-Mobile launches 'Web'n'Walk' Internet access price plans*](#)
- [*T-Mobile Germany introduce cheap prepaid tariff*](#)
- [*E-Plus launches new prepaid tariff*](#)
- [*easyMobile launches in the Netherlands*](#)

PSTN / Regulation

Portugal Telecom launches free calling promotion

Portugal Telecom is currently promoting a campaign offering unlimited free calling for residential customers. Launched on October 10th, the promotion is called 'Planos de minutos ilimitados', and comprises several alternative time periods of free domestic calling for the customer to choose from. All plans have a monthly cost of €3.90 and they cover various times during the week and the weekend in which local and national calls will be free. Customers can choose one, or subscribe to a combination for additional discounts. The plans are as follows:

Monday to Friday:

- **PT Manhãs 9h-13h.** (Morning Plan)
- **PT Tardes 13h-17h.** (Early Afternoon Plan)
- **PT Tardes 17h-19h.** (Late Afternoon Plan)
- **PT Noites 19h-21h.** (Evening Plan)
- **PT Noites 21h-9h.** (Night Plan)

Weekends:

- **PT Fim de Semana,** (Saturdays and Sundays from 0h to 24h)

Fees and discounts are as follows:

- For each plan, the first one is charged at €3.90, and €2.00 for each additional plan.
- If the customer subscribes to PT Fim de Semana in addition to one extra weekday plan, they will get an additional discount of €0.90.
- If the customer subscribes to PT Fim de Semana and to all of the weekday plans, they will get an additional discount of €1.20.

Therefore, a subscription for all weekday plans will cost €11.90. A subscription to all plans, including the weekend plan, will cost €14.60 and will offer free domestic calling at all times of day and week.

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[Back to Top >>](#)

Slovakian telecoms market opens up

Over the past year the fixed line telecoms market in Slovakia has opened up and in the process has seen many new alternative operators launching services. When Teligen conducted the research for its 'Tariff Trends' report that was undertaken for the EU Information Society in 2004, Slovak Telecom was the only operator offering PSTN services to both business and residential customers. The landscape has now changed and 8 operators have now signed interconnection agreements with Slovak Telecom. These operators are: Amtel Slovensko s.r.o., Dial Telecom a.s., eTel Slovensko s.r.o., GlobalTel Telecom a.s., GTS s.r.o., Nextra s.r.o., Slovanet a.s. and Seleznice Slovenskej republiky (Slovak Railways).

Nextra s.r.o. is owned by Telenor, the Norwegian incumbent and is leading the competition growth with the largest number of subscribers. Currently Nextra is

offering five fixed line packages, the tariffs for which are shown below, in Slovak Koruna excluding VAT:

Monthly rentals and call charges

Nextra Packages	Nextra Hlas	Nextra Hlas Plus	Nextra Hlas 100	Nextra Hlas 333	Nextra Hlas 500
Monthly Rental	0	0	100	333	500
Minimum contract period	0	12	12	12	12
Local Calls					
Peak	1.88	1.80	1.80	1.80	2.00
Off Peak	1.40	1.40	1.40	1.40	2.00
National Calls					
Peak	3.30	2.80	2.00	2.00	2.00
Off Peak	1.70	1.70	1.70	1.70	2.00
Mobile Calls					
Peak	6.70	6.30	5.90	5.90	6.30
Off Peak	4.90	4.90	4.90	4.90	4.90

Although competition is still very much in its infancy, Slovak Telecom (ST) is sure to be viewing these new entrants with concern. It seems that Nextra wasted no time in clocking up the subscriber numbers and with its competitive call charges ST will be keeping a close eye on future developments. Furthermore, it is expected that three remaining licensees will make an entry into the market at the end of this year and undoubtedly the level of competition will increase.

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[Back to Top >>](#)

Broadband / VoIP

BT promotes cheap VoIP calls with BT Communicator

UK incumbent BT has announced a special promotion for calling popular international destinations using its VoIP service, BT Communicator. Between 3rd October and 31st December 2005, customers using the Clic2call feature of BT Communicator will be able to make calls to 30 countries for 0.5 pence per minute, including VAT. The countries covered by this promotion are: Argentina, Australia, Austria, Belgium, Canada, Chile, China, Denmark, France, Germany, Greece, Hong Kong, Iceland, Ireland, Italy, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Russia, Singapore, Spain, Sweden, Switzerland, Taiwan, United States and the Vatican. A minimum charge of 5 pence applies per call, and calls are automatically terminated after 60 minutes. Calls will also use up any applicable broadband usage allowance. Customers also need a BT residential telephone line to which calls are billed, a 16 bit windows compatible audio card, a microphone and speakers or a headset.

Clic2call is one of several features of the BT Communicator service, which uses Yahoo! Messenger as a platform, and allows customers to make

telephone calls directly from their PC. Another calling option is Clic2connect, which enables the customer to make calls via their PC using their home phone handset. Both options offer substantial savings on BT's standard home phone call rates to the most popular destinations, but this special offer on calls using Clic2call presents the most attractive deal. In addition to this promotion BT is also offering new customers one month of free calls to local and national geographic numbers, made using Clic2call and Clic2connect on BT Communicator. Dedicated Internet telephony providers such as Skype and Vonage have been taking the UK's VoIP market by storm over the last year – these new initiatives clearly show that BT is taking the market seriously and they are likely to attract customers that are tempted by the prospect of cheaper calls but have reservations about using alternative service providers.

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[Back to Top >>](#)

New broadband packages from BT

BT has also relaunched its broadband packages for residential customers as a result of extending its relationship with Yahoo. The four new packages came into effect from October 24th and offer new and existing customers broadband speeds of up to 2Mb and a range of BT Yahoo! online features. The new packages are as follows (all prices include VAT):

- BT Broadband Option 1: £17.99 per month; includes full range of online features, 5 email accounts with email anti-virus and spam filter, free modem router and connection, up to 2GB monthly usage and a wireless modem router (optional);
- BT Broadband Option 2: £22.99 per month; includes enhanced security for families, a full range of online features, 5 email accounts with email anti-virus and spam filter, free modem router and connection, up to 6GB monthly usage and a wireless modem router (optional);
- BT Broadband Option 3: £26.99 per month; includes wireless broadband for free with enhanced security, a full range of online features, 11 email accounts with email anti-virus and spam filter and up to 20GB monthly usage;
- BT Broadband Option 4: £29.99 per month; includes wireless broadband for free with enhanced security, a full range of online features, 11 email accounts with email anti-virus and spam filter and up to 40GB monthly usage.

The new BT Yahoo! online features are aimed to address the concerns of most broadband users and include: enhanced virus, spam, spyware and phishing protection; Internet telephony service BT Communicator, with Yahoo! Messenger and BT Yahoo! Video; the ability to customise browsers and homepages for each user, as well as personalised music radio and video, multiplayer gaming, movies and sports. Overall, the new packages are aimed to offer customers better value in areas of interest for the whole family, easy and safe ways to enjoy their broadband and a cheaper way to make telephone calls over the Internet.

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[Back to Top >>](#)

BT Ireland reduce broadband costs for businesses

Irish business customers can now get BT Business Broadband for just €10 per month for the first year (normally €37.50), when they sign up for BT calls and line rental (minimum call spend €190 per month).

For businesses that cannot receive broadband because of line quality or exchange availability, BT will provide BT Anytime, flat rate ISDN/PSTN dial-up access, free for 12 months, representing a saving of €35. The offer is available to new and existing BT business call and line rental customers at the customer's request. All prices exclude VAT.

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[Back to Top >>](#)

Mobile

Base unveils 'Unlimited' tariff

Belgian mobile operator Base has launched an Unlimited tariff. This offers unlimited on-net calls and texts for a fixed monthly charge of €25. Other rates are as follows:

Calls to fixed lines, per minute	€0.05
X-net mobile calls, per minute	€0.20
X-net texts	€0.15
Call set-up charge	€0.07

Billing is per second. The minimum contract duration is 24 months and a €30 joining fee applies.

The trend in mobile tariffs has recently veered towards flat rates. However, a number of operators including BASE have started offering reductions on on-net communications. What is new here is that such operators use these tariffs as a marketing tool to encourage customers to introduce others, so that they can all benefit from the reduced rates. Other recently introduced tariffs which offer cheaper on-net calls and texts, or a bonus for introducing customers are: Tempo Tribe from Mobistar, TIM Tribe and Mates Rates from T-Mobile UK. These are all prepay tariffs aimed at a young audience.

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[Back to Top >>](#)

Vodafone take on fixed line rivals

Vodafone Germany has launched 'Talk&Web', a 'communications box' that allows residential users to make voice calls, receive faxes and access the

Internet via its 3G wireless network. This product is designed to complement Vodafone's 'At Home' service, which offers consumers a flat rate voice subscription and a 384kbps Internet connection for €49.95 per month. To use the service, subscribers plug the box into a household electricity socket and attach their own phone handsets, computers and fax machines. The Talk&Web box is available for a one-off price of €99.90.

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[Back to Top >>](#)

T-Mobile launches 'Web'n'Walk' Internet access price plans

T-Mobile in the UK have recently launched 3 new Internet based pay monthly plans which include 40Mb of data download per month as well as 100, 200 or 400 inclusive calling minutes. The prices shown are inclusive of VAT:

	Web'n'walk 100	Web'n'walk 200	Web'n'walk 400
Monthly line rental	£30	£38	£55
Inclusive minutes	100	200	400
Inclusive MB	40	40	40
Price per MB after allowance	£1	£1	£1

Other UK operators have launched similar services, including: O2 i-mode, which was developed by NTT DoCoMo in Japan and is now the world's largest dedicated mobile web service; and Mobile Web from 3. All of these services offer mobile friendly webpages and access to email for customers. I-mode, being the largest and most established system has a wide range of websites available including pages to buy flights and hotels. I-mode is currently free on O2 until 31st December 2005, after which it will be available as a 'bolt-on' extra costing £3 for 2MB or £5 for 4MB. Any extra usage is charged at £3 per MB. Both T-Mobile's and 3's services have limited webpages available for mobile use at present and these include BBC, Sky, Amazon and MSN Hotmail. 3's Mobile Web currently costs £2.50 per month for 5MB of data.

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[Back to Top >>](#)

T-Mobile Germany introduce cheap prepaid tariff

Following the recent cheap price offers of its competitors, T-Mobile in Germany has introduced "Xtra Click & Go". This is a prepaid tariff that is offered and marketed exclusively via the Internet.

Calls to other T-Mobile customers are charged at €0.15 per minute and to all other networks within Germany at €0.30 per minute. Sending an SMS costs €0.15 per message.

Call set up	To fixed	On-net	Off-net	SMS
€0.07	€0.16	€0.16	€0.16	€0.08

Easymobile is 100% owned by Telmore International Holding, a joint venture between TDC (80%) and TIH Invest A/S (20%).

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[Back to Top >>](#)

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