

Welcome to Teligen's Tariff Outlook Newsletter

Message from the Editor

Welcome to the third edition 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...

- [*Neuf Telecom introduces new tariff plans*](#)
- [*Cegetel announces new tariffs for residential customers*](#)
- [*TDC Denmark introduces two new PSTN tariffs*](#)
- [*Australian broadband usage takes off, driven by dramatic price cuts*](#)
- [*Vodafone Germany launches "Zuhause", a landline alternative*](#)
- [*EasyMobile launches in the UK*](#)
- [*T-Mobile Germany unveils a new Relax call option - Local*](#)

PSTN

Neuf Telecom introduces new tariff plans

Neuf Telecom has introduced new Forfaits tariffs, from March 15th 2005, aimed at business customers. The monthly rental for the new tariffs shows a decrease of at least 10% on the existing ones. The new tariffs are Forfaits Locaux, Forfaits France and Forfaits Mobile/International. All new prices are listed below and are exclusive of VAT:

Forfaits Locaux

	€month
Fixed 2 hours	3.00
Fixed 4 hours	6.00
Fixed 6 hours	9.00
Fixed 10 hours	15.00
Fixed 15 hours	22.50
Fixed 20 hours	30.00
Fixed 30 hours	45.00
Fixed 40 hours	60.00
Fixed 60 hours	90.00
Fixed 80 hours	120.00
Fixed 100 hours	150.00

Forfaits France

	€month
Fixed 3 hours	6.00
Fixed 5 hours	9.00
Fixed 8 hours	14.00
Fixed 10 hours	17.50
Fixed 15 hours	25.00
Fixed 25 hours	41.00
Fixed 35 hours	57.00
Fixed 45 hours	73.00
Fixed 75 hours	122.00
Fixed 110 hours	178.00

Forfaits Mobile/International

	€month
Fixed 30 minutes	6.00
Fixed 1 hours	11.00
Fixed 2 hours	20.00
Fixed 4 hours	40.00
Fixed 6 hours	60.00
Fixed 8 hours	80.00
Fixed 10 hours	100.00
Fixed 15 hours	150.00

Note:

Tariff applies to calls to Alaska, Austria, Belgium, Canada, Denmark, Finland, Germany, Hawaii, Ireland, Italy, Liechtenstein, Luxembourg, Monaco, Netherlands, Norway, Portugal, San Marino, Spain, Sweden, Switzerland, UK, USA and Vatican.

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[Back to Top >>](#)

Cegetel announces new tariffs for residential customers

Cegetel has introduced new PSTN tariffs aimed at Residential customers. These new tariffs allow customers to make unlimited calls to mobiles in France either off peak or at all times, depending on the chosen tariff. These tariffs are effective as of March 21st 2005. All prices listed below are inclusive of VAT:

Forfait Fixe-Mobile Soir et Weekend Illimite

Monthly Rental	€month
Unlimited evening and weekend calls	24.00

Note:

Unlimited calls to SFR, Orange and Bouygues Telecom mobiles during the week from 19.00 to 08.00 and all weekend.

Forfait Fixe-Mobile Illimite

Monthly Rental	€month
Unlimited calls at all times	35.00

Note:

Unlimited calls to SFR, Orange and Bouygues Telecom mobiles at all times. The same Forfait Illimite is offered to Business customers at €35.00/Month VAT excluded.

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[Back to Top >>](#)

TDC Denmark introduces two new PSTN tariffs

TDC is widening its range of PSTN tariffs for residential customers. These tariffs give TDC customers the option to choose a tariff that offers either free calls at specific times or free minutes included in the monthly rental.

TDC Samtale Basis and Full packages. Both packages include free off peak calls: evening, weekends and public holidays. The TDC Samtale Full package also offers a 15-20% discount on calls made at other times and a choice of 3 add on services like voicemail, call forwarding and call waiting. Both packages include the monthly rental for the standard telephone line.

TDC Taletid 60, 180 and 300 are aimed at the youth market and customers aged 18-28 are eligible for this tariff. The TDC Taletid plans include free minutes depending on which package is chosen - 60, 180 or 300 minutes respectively. Furthermore, installation is half price and there is a choice of three value added services at a lower than standard rate. Once the included

minutes have been used standard call charges apply.

All prices below are inclusive of 25% VAT

Installation charges

All Regions - Excluding Standard Telephone Set	DKr
TDC Fastnet - standard	950
TDC Samtale (1)	950
TDC Taletid - talktime for 18-28 year olds	475

Note:

(1) Installation for TDC Samtale is free if customers already have TDC Fastnet

Monthly Rental

All regions - Excluding Standard Telephone Set	DKr/Month	Included Minutes per Month
TDC Fastnet - standard	119	119
TDC Samtale Basis - Basispakke	159	159
TDC Samtale Full - Fuldpakke	169	169
TDC Talktime Taletid 60 min (1)	129	129
TDC Talktime Taletid 180 min (1)	165	165
TDC Talktime Taletid 300 min (1)	190	190

Note:

(1) Talktime taletid packages include 60, 180 and 300 minutes respectively

Call Charges

Call Set Up Charge	DKr
All packages	Per call
Fixed and mobile calls	0.25

Fastnet - Standard

Per Minute Charges	DKr/Minute	
	Standard	Reduced
National	0.25	0.125

Samtale

Per Minute Charges	DKr/Minute	
	Standard	Reduced
Basic	0.25	0.00
Full 15% (1)	0.2125	0.00
Full 20% (2)	0.2000	0.00

Notes:

(1) With this option customers can make discounted calls to all fixed numbers in Denmark and to fixed and mobile numbers abroad.

(2) With this option customers receive the discount on four chosen numbers - these can be fixed numbers in Denmark or fixed and mobile numbers abroad.

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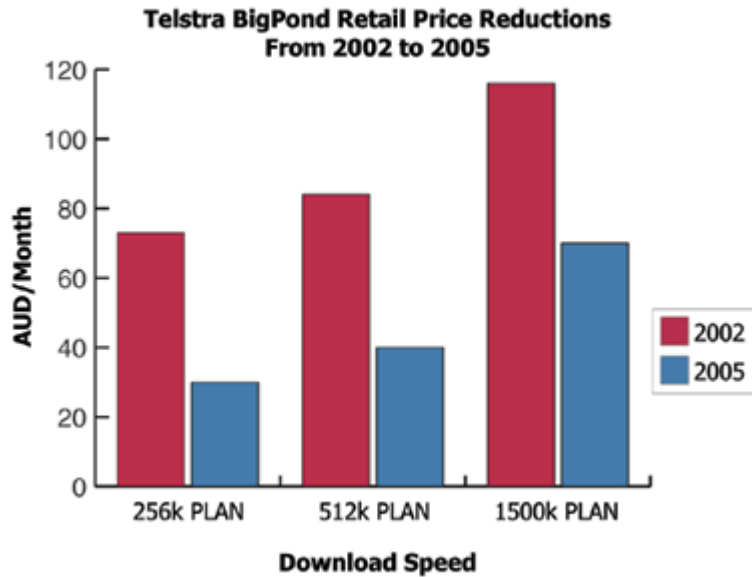
[Back to Top >>](#)

Broadband Internet

Australian broadband usage takes off, driven by dramatic price cuts

Over the past 12 months consumers and businesses in Australia have literally fallen over themselves to join the broadband revolution, in response to a series of widespread price cuts. A review by the Australian Competition and Consumer Commission (ACCC) showed that at the end of 2004 there were 1.55 million broadband services connected across the country, representing an increase of 121.6% on December 2003 figures. ADSL is proving to be the broadband service of choice, unsurprisingly as delivery is via the existing telephone network, and is showing figures in the region of 1.05 million connected services.

The price reductions that have driven this surge in adoption have resulted from a series of contributing events - a year ago Telstra reduced the price of its retail broadband product without offering a similar cut to its wholesale service. Subsequent complaints from Telstra's wholesale customers (its rival ISPs) forced an investigation by the ACCC into alleged anti-competitive behaviour. Since then Telstra has reduced its wholesale DSL pricing, with the latest reduction taking effect from 1 January 2005. This has brought its wholesale pricing in line with its retail offering and has enabled rival broadband operators to offer competitive services, ultimately to the benefit of the retail customer. A look at the change in Telstra's DSL pricing provides a good indication of the range of price reductions that customers have seen recently across the board:



Notes to graph:

figures used are monthly rentals (incl. GST) for comparable ADSL products offered to pre-selected Telstra customers. Associated monthly usage allowances and excess usage charges may differ slightly.

As is clear the reduction in Telstra's retail prices over the last few years is substantial, ranging from a 59% to a 40% decrease. Australian ADSL customers now have a huge choice of products in a relatively competitive marketplace, as illustrated by the surge in take-up. Telstra's "rethinking" of their wholesale broadband pricing will undoubtedly help to sustain the competition while the benefits evident in the retail market over the long term are obvious. In the advent of Australia's new-found love affair with broadband, however, there may be other problems to tackle - can the aging copper networks to which most broadband ISPs are locked handle the new levels of industry demand? It may be necessary to look at alternative media such as WiFi to help alleviate any capacity concerns on Telstra's infrastructure.

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[Back to Top >>](#)

Mobile

Vodafone Germany launches "Zuhause", a landline alternative

Vodafone has introduced a landline alternative called "Zuhause" (At home), effective as of March 2005. All tariffs detailed below are inclusive of VAT.

With Vodafone Zuhause customers can make cheap calls from their home area. When buying the Vodafone Zuhause SIM card the customer leaves his home address at the Vodafone shop and within a few days the customer's home area will be activated and calls can be made with the Zuhause tariff. In the second half of 2005 Zuhause customers will be provided with a landline number.

Tariffs	Euro
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Connection	24.95
Monthly Rental	20.00
Incl. min/month (1)	1000
Call charges thereafter (2)	0.04
Call charges to mobile networks (2)	0.25
National SMS	0.20
Voice mail	Free

Notes:

(1) Applies to national fixed networks and other Vodafone Zuhause customers.

(2) Billing is per minute

As the majority of calls are still made via the landline network, Vodafone is hoping to use this Zuhause product to compete with the existing landline operators and to capture a share of the PSTN market.

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[Back to Top >>](#)

EasyMobile launches in UK

On 10th March, easyMobile introduced its prepay offering to the UK. As an introductory offer, the company said it would charge 9p for anytime, x-net calls to all UK networks and 3p for texts, valid until the end of June. A few days later, in response to competitive pressures from Fresh (owned by the Carphone Warehouse) and Virgin, this was reduced further to 6p for voice calls and 2p for texts. Standard prices after the introductory period will be 15p for calls, including voice mail and data calls, and 5p for text messages. An easyMobile SIM card costs £20, which comes pre-loaded with £20 worth of calling credit. There is no monthly rental, but a minimum usage of £5 over a three-month period is required. Customers who do not meet this requirement will be charged £0.75 per month.

The easyMobile concept appears attractive as it offers clear and transparent pricing for calls and texts. A similar offering from Telmore in Denmark, on which easyMobile has based its concept, managed to acquire a 10% market share within three years. It is said that this has been one of the factors prompting Orange to withdraw from the Danish market. Focusing again on the UK, the introductory offer seems hard to beat, although the Carphone Warehouse, another MVNO, lost no time in announcing a price drop for its Fresh tariff. Initially, Fresh prices were dropped to 2.5p for texts and 7.5p for voice calls, with a further reduction to 1.7p for texts and 5p for voice calls within a few days. Virgin Mobile, the biggest MVNO in the UK, did not drop its prices in retaliation. However, the immediate reaction from Virgin Mobile was to issue a number of press releases pointing out the 'catches' in the easyMobile offering, such as charges for paper bills, chargeable reminder texts in case of negative balance, an account blocking fee and lack of roaming facilities. This, in turn, led easyMobile to accuse Virgin of panicking in the face of competition. All the same, it seems unlikely that prices will drop any further as they would no longer be sustainable. We expect that any future attempts to lure customers will be focused on issues such as customer services, 'hidden' charges and the range of handsets on offer.

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[Back to Top >>](#)

T-Mobile Germany unveils a new Relax call option - Local

T-Mobile Germany is to launch a Local option tariff in May. This is a new Relax option for cheaper local calls, and the new tariff will allow customers to make calls to local fixed lines at only €0.01 per minute.

The monthly rental for the new package will be €10 per month and will include 1000 minutes of call credit. Customers can use these included minutes to call two local area codes of their choice.

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[Back to Top >>](#)

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