



Workshop Theme 4: ITU/BDT LET'S ROAM THE WORLD Initiative



Building Blocks for International Mobile Roaming Strategic Guidelines

ITU-D SG 6/1 Expert Meeting
Consumer Protection in a Digital
Collaborative Economy
Chongqing, China
9-11 November, 2016

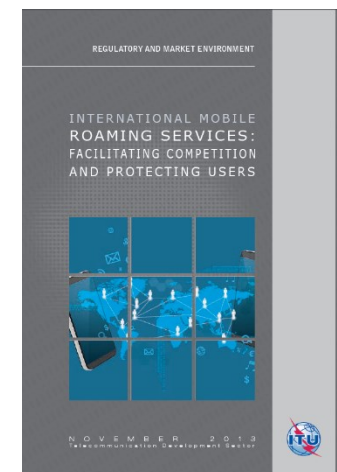
Agenda

- Setting the scene – International Mobile Roaming (IMR) issues today
- Some issues to be considered when analyzing the IMR situation
- ITU/BDT Director, Mr Brahim Sanou LET'S ROAM THE WORLD Initiative
- Building blocks for IMR Strategic Guidelines

Setting the scene

The issue of high IMR service prices at national, regional and international level is recognized as an increasingly important issue, for both voice and data services.

- IMR incurs additional charges in **its cost structure that often are not cost based**;
- Any IMR measures, by their nature, **must be multi-country**;
- Action by National Regulatory Authorities (NRAs) requires **understanding the real cost-based** wholesale and retail charges as well as IOTs (inter operator tariffs) information;
- As **IMR relies on inter-Operators negotiations**, NRAs are not always informed;
- There is **no “one-fits-all” solution**.



In addition...

- Insufficient attention on the part of consumers until they receive the **bill-shock** and difficulty to compare mobile roaming prices
- Low demand-elasticity for **IMR voice** services (changing over time specially for data services)
- Cross-border nature of the IMR service = potential **double marginalization** and possible **double taxation**

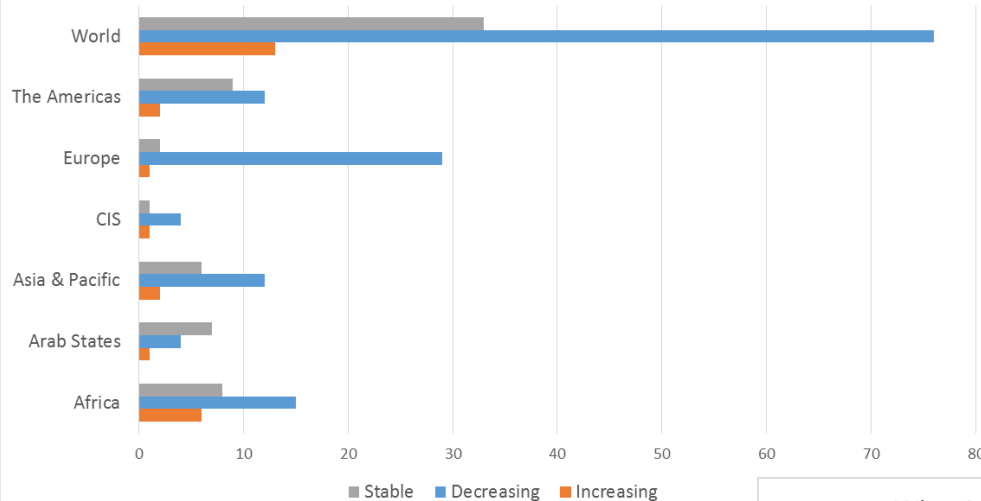


IMR price still remains a very important issue

- Despite price reduction for IMR
- The emergence of a range of alternative technologies and calling solutions
- Prices still diverge significantly from costs

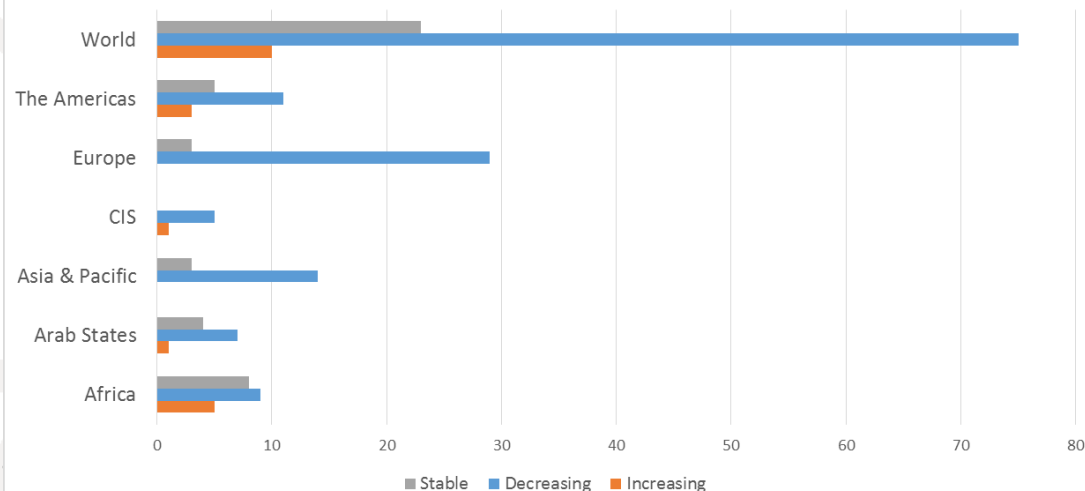
General trends on pricing

What is the general trend of the IMR RETAIL PRICE OF VOICE over the past three years in your country?



General trends on pricing are positive since prices at retail level seem to be decreasing in all regions for both voice and data.

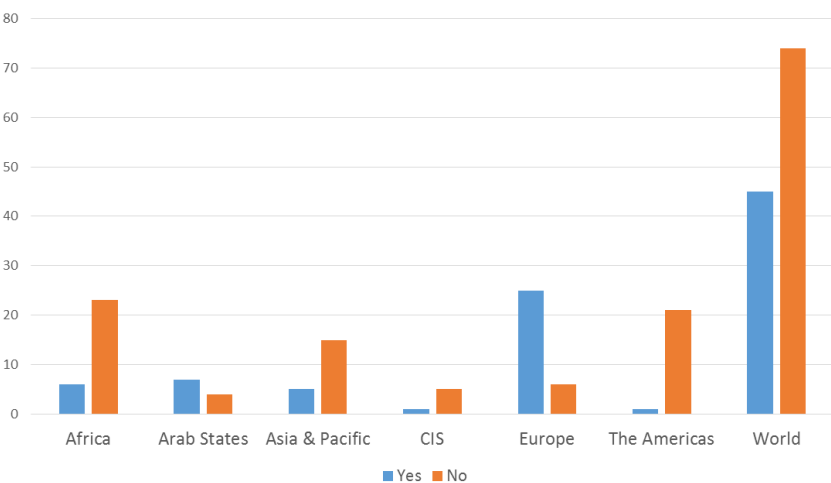
What is the general trend of the DATA IMR RETAIL PRICE over the past three years in your country?



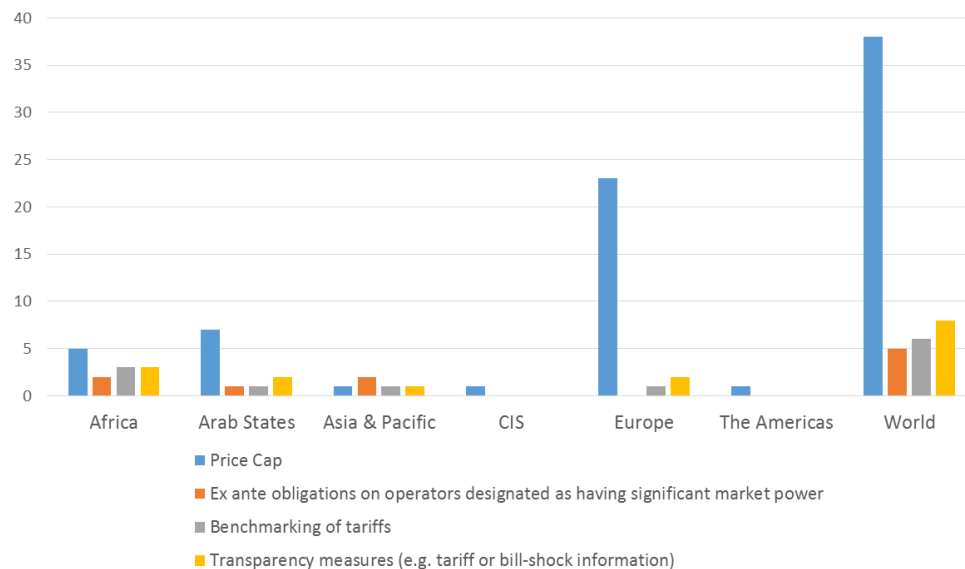
What about IMR Regulation....

Are countries regulating IMR retail prices?

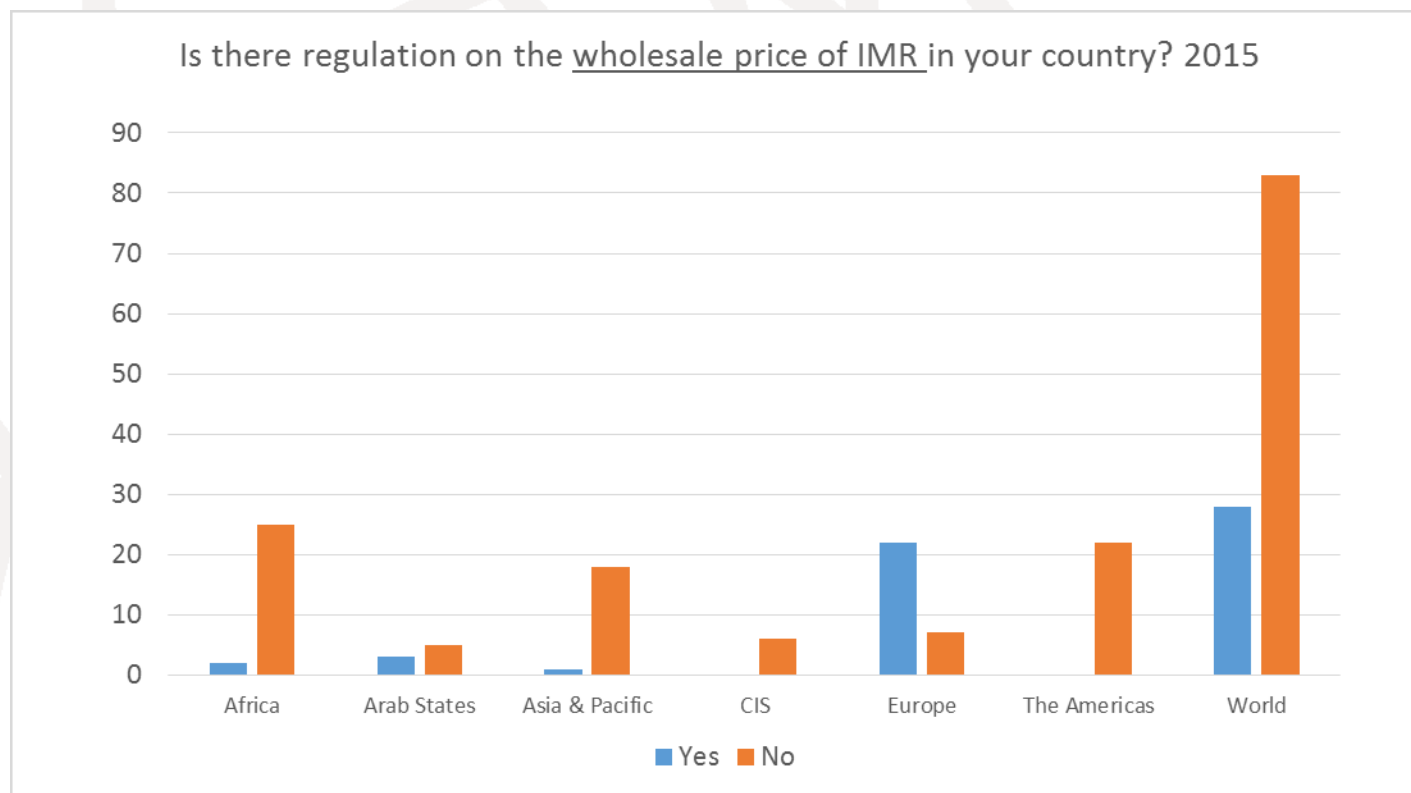
Are retail prices of IMR regulated in your country? 2015



What kind of regulatory practice is applied? 2015

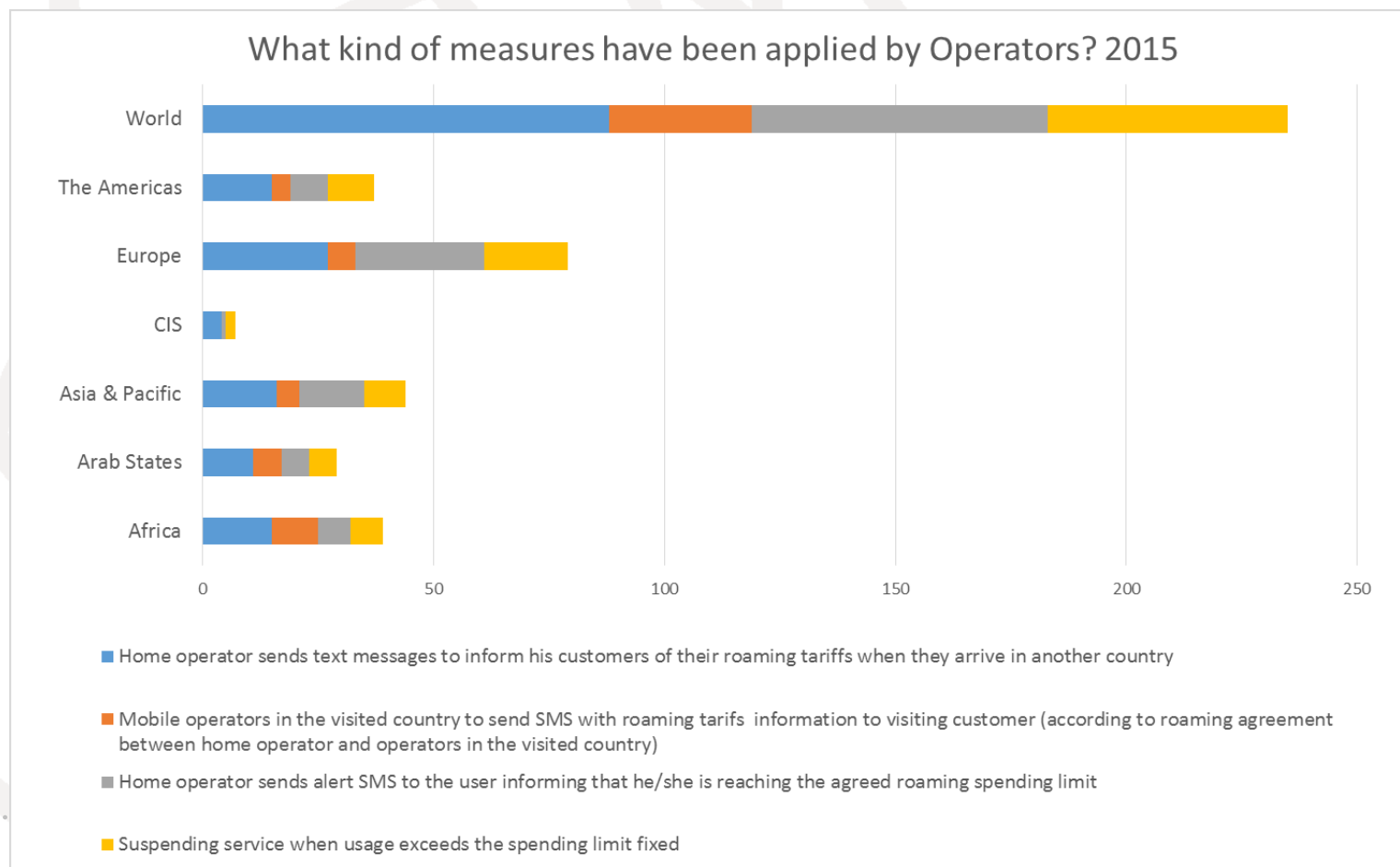


Are countries regulation IMR Wholesale prices?



Measures taken by Operators to reduce the risk of bill shock

From 124 countries responses received, only 17 reported that operators have not taken any measure.



Top Measures applied by Operators

- From 124 countries responses received, only 17 reported that operators have not taken any measure;
- The most applied measures are:
 1. Home operator sends text messages to inform his customers of their roaming tariffs when they arrive in another country.
 2. Home operator sends alert SMS to the user informing that he/she is reaching the agreed roaming spending limit.
 3. Suspending service when usage exceeds the spending limit fixed.

The IMR discussion

- Actions should be taken...
- It is important to have an inclusive dialogue
- Define appropriate solutions on:
 - business,
 - regulatory, and
 - policy issues
- To consider common features that are among best practices
- To build on ITU-D Reports and Discussions as well as on ITU-T Recommendation D-98 "*Charging in International Mobile Roaming Service*", and subsequent new ITU-T D-97 on "*Methodological principles for determining international mobile roaming rates*" (on the way).

Elements for success

Commitment from all stakeholders to work together and move forward....

- Global and universal approach – interconnect the global ecosystem with a regional integration and coordination
- Concrete mandate - Political support and prioritization
- Support from ITU
- Data collection – information sharing
- Clear deliverables and milestones for economic and consumer welfare - harmonization
- Transparency
- Taxation
- New business models - Affordability
- Borderless industry/borderless regulation strategy
- Balance between Consumer protection and Operator revenues
- Self regulation vs *ex-ante* / *ex-post*



ITU Actions on IMR

- The BDT Director's Let's Roam the World Initiative;
- International Telecommunications Regulations (ITR's);
- The ITU-T Recommendation D-98, and subsequent new ITU-T Recommendation D.97 on "Methodological principles for determining international mobile roaming rates" on the way;
- The tools developed by ITU on:
 - ITU-D IMR Portal, Research, Data and Analysis, Reports, and Workshops,
 - ITU-T SG3 IMR National Regulatory Authority (NRA) Technical Guide, and
 - the ITU-T SG3 IMR Online Cost Analysis Tool.
- All this material is available on the ITU IMR Roaming Portal



LET'S ROAM THE WORLD - ITU International Mobile Roaming (IMR) Resources Portal



YOU ARE HERE HOME > ITU-D > REGULATORY & MARKET ENVIRONMENT > LET'S ROAM THE WORLD - ITU INTERNATIONAL MOBILE ROAMING (IMR) RESOURCES PORTAL

SHARE



[ITU successfully organized the LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming \(IMR\) that took place at the ITU Headquarters in Geneva, Switzerland, on 18 September 2015 in conjunction with the annual meeting of the ITU-D Study Groups \(Study Group 2 on 7-11 September and Study Group 1 on 14-18 September\) and back-to-back with the Mobile Roaming rapporteur group Meeting of ITU-T Study Group 3 \(16-17 September\), as part of the Global Initiative launched in 2013 by Mr Brahima Sanou, Director of the ITU Telecommunication Development Bureau in coordination with the ITU Telecommunication Standardization Bureau \(TSB\).](#)

During the last several years significant policy and regulatory actions have taken place to tackle the problem of high International Mobile Roaming (IMR) service prices at national, regional and international level. The aim has been to reduce what is viewed as excessively high mobile roaming retail prices but also to find longer term solutions to introduce competition in this market which is still viewed as not being contestable. Despite price reduction for IMR and the emergence of a range of alternative technologies and services that do not always offering close substitutes to roaming, may help in averting some of the price divergence that prices diverge significantly from costs and that action has taken place to date across different regions is expected to be used to improve the delivery of IMR services. The International Mobile Roaming (IMR) Resources was developed to provide information on activities done by other regions and at international level.

Other interesting IMR links

- EU First results of Roaming consultation (March 2016)
- EU New rules on roaming (October 2015)
- Final Report on the Global Roaming consultation (October 2015)
- Bilateral agreement between Luxembourg telecoms regulator and the UK
- GSMA - GSM Roaming and Coverage
- African Union (AU) International Mobile Roaming Guidelines (September 2013)
- APT Working Group Report on IMR (November 2013)
- Trans-Tasman mobile roaming - joint investigation by New Zealand and Australia (Zealand IMR investigation)
- Symposium on International Mobile Roaming organized by OMC and Australia Delegation, Geneva, Switzerland March 2012
- Ofcom's website on IMR for UK consumers
- International Mobile Roaming Explained, source GSMA, 2012

- ITU Guide for NRAs on International Mobile Roaming Cost analysis
- ITU International Mobile Roaming Cost Analysis Tool

RECENT ITU ACTIVITIES ON

- [ITU-BDT Arab Regional Workshop on International Mobile Roaming: National & International Perspectives](#), Khartoum, Sudan 27-29 October 2015
- [LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming \(IMR\) Geneva, Switzerland 18 September 2015](#)
- [ITU International Mobile Roaming \(IMR\) Cost Analysis Tool](#)
- [ITU Guide for NRAs on International Mobile Roaming Cost analysis, Technical Paper](#) September 2015

- [Report on International Mobile Roaming 2016](#)
- [International Roaming: Analysis of the impacts of "Roam Like at Home" \(RLAH\) - December 2014](#)
- [International Roaming BEREC Benchmark Data Report April 2013 - September 2013](#)

BUILDING BLOCKS FOR BEST PRACTICES GUIDELINES

The ITU Global Dialogue on International Mobile Roaming, held in Geneva in September 2015, gathered a diverse selection of stakeholders to review recent developments in the area of international mobile roaming. In particular the economic and regulatory measures being employed to reduce the prices that users pay for roaming services. Set against the backdrop of an ICT industry playing host to the emergence of machine-to-machine communications and the Internet of Things, the dialogue provided a neutral platform to

• GSR Discussion Papers on...
 • Study Group Questions
 • Economic and Financial Fora in all regions
 • Work with RAs

ITU/BDT Director, Mr Brahima Sanou

LET'S ROAM THE WORLD initiative

- ITU is a neutral platform actively working on IMR (research, data collection, studies, development of tools...)
- ITU can enhance dialogue with all stakeholders (e.g. IMR Round-Tables)
- Together all stakeholders to develop “IMR Strategic best practices guidelines” building blocks
- Ensure its high level adoption (through the organization round tables and high Level IMR Meetings)
- ITU can work together with Regional Regulatory Associations (RA) to facilitate the dissemination of the results through various channels, such as:
 - ITU Events;
 - Regulatory Regional Association events, and
 - Capacity building





Let's Roam the World: Proposed Roadmap



- It is essential to **open the IMR discussion** to all stakeholders;
- To make sure **to use all tools**, recommendations and research already developed by ITU, RAs and Regional and International organizations [*available at the ITU IMR Portal*];
- Compare the regional initiatives – **identify common denominators for IMR gaps**;
- **Increase public awareness** – using ITU, RAs, NRAs and operator media channels;
- Draft the building blocks for **IMR Strategic Guidelines** by end of this year;
- Organize a **wider consultation meeting**, and a **session during GSR-2017** to present the results of the work done in the framework of this LET'S ROAM THE WORLD initiative;
- A potential output on “IMR Strategic Guidelines” can be presented at the **WTDC-2017 High Level Ministerial Round Table** (October 2017).

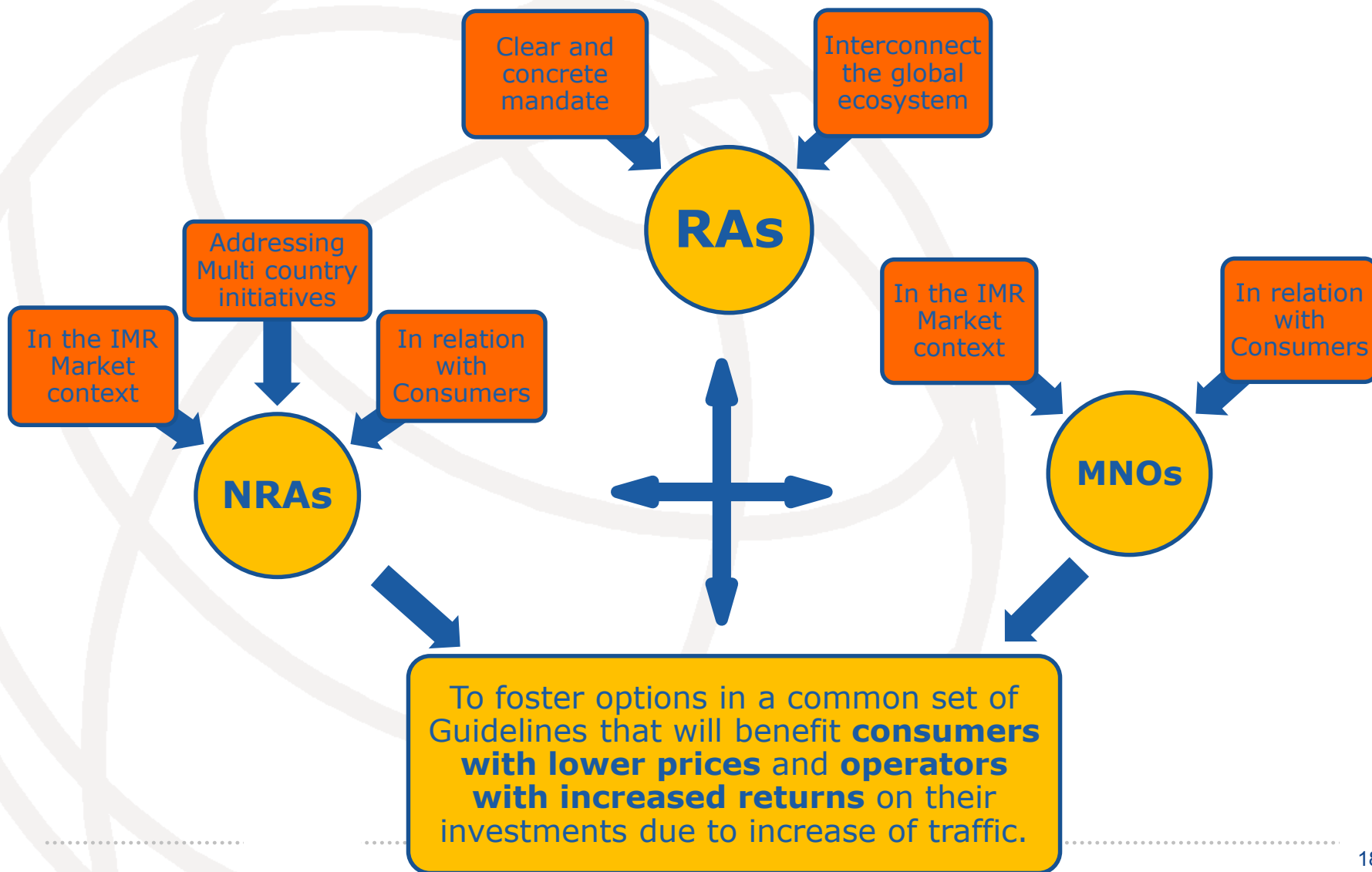


IMR Best Practice Guidelines Draft Proposal

- BDT started drafting these building blocks for IMR Strategic best practices guidelines draw from recognized international best practices and from renowned publications, text and documents;
- The aim of this Draft Proposal is to provide a basis for discussion and to create a common understanding;
- To foster options in a common set of Guidelines that will benefit on the one hand **consumers with lower prices** and on the other hand **operators with increased returns on their investments due to increase of traffic.**



Ideas for IMR Strategic Guidelines



Building blocks for IMR Strategic Guidelines

Inclusive dialogue and collaboration with market players [*to stay in touch with market realities*], with all stakeholders [*across the sectors*] and across countries and regions [*borderless*] is relevant as we live in world of borderless industries - need to define appropriate policies and strategies.





Thank You!
