

INTERNATIONAL



## Report on the LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming (IMR)

ITU Headquarters, Geneva, Switzerland, 18 September 2015



The second edition of the ITU High-Level Workshop on International Mobile Roaming **“LET’S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming (IMR)”** as part of the Global Initiative launched in 2013 by Mr Brahima Sanou, Director of the ITU Telecommunications Development Bureau, welcomed over 200 participants, including policy makers, national regulatory authorities (NRAs) leading private sector companies of the information and communication technology (ICT) sector around the world, Regional Regulatory Associations, International Organization, and consumer representatives. The Dialogue was organized by the International Telecommunication Union and took place at ITU Headquarters in Geneva, Switzerland, on 18 September 2015 in conjunction with the annual meeting of the ITU-D Study Groups meetings (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).

## **Discussions**

The Dialogue included discussion on three overarching topics and was organized in three sessions, including (1) the high stakes of roaming, (2) the economics of roaming and, (3) towards ubiquitous roaming for all. It provided participants with the opportunity to engage with internationally renowned experts and panelists, exchange views and experiences and identify common approaches to respond efficiently to the challenges of IMR.

The Dialogue recognized the importance of collaboration among stakeholders in IMR and highlighted ITU’s role as a facilitator to bring about expert information exchange and host debates around IMR with the aim of creating an understanding of the complexities of the issues and thereby fostering solutions that ultimately benefit on the one hand consumers with lower prices and on the other hand operators with increased returns on their investments.

The Dialogue on International Mobile Roaming includes a diverse set of subjects, including trends in revenue, usage and traffic, new business models and new opportunities as well as innovating and capitalizing on roaming for M2M communications and the Internet of Things (IoT). Although roaming demand and usage is increasing, this demand does not always translate into higher roaming revenues for operators, which calls for business innovations on the one side and still lower roaming tariffs on the other hand to stimulate further demand. Moreover, roaming alternatives such as OTT services should also be considered when examining policy or regulatory measures. In relation to M2M roaming, it is important to distinguish M2M roaming from traditional consumer voice and data roaming, as the issues and implications arising are quite different and the problems associated with consumer roaming prices do not materialize.

Looking at the types of roaming business model and regulatory innovations that could bring direct benefits to the end-consumers, internationally harmonized standards are needed to foster innovative roaming solutions. The status and relationship between operators and their bilateral commercial negotiations are key elements in this process.

Roaming prices remain high, with the cost structure of roaming being seen as a primary driver of roaming prices. Changing market structures through e.g. the entrance of MVNOs, leads to competition and thereby to price reductions over time. Also, through intensified dialogue and better more in-depth understanding into the workings of roaming and its cost structure on the part of the regulator, regulators can introduce better-targeted incentives to reduce the technical costs of investing in roaming infrastructure.

Given that the evolution of roaming rates is a complex process which takes time, that there is no “one-fits-all-off-the-shelf” solution, and there are a number of tools and ITU recommendations available, as well as tools that Regional Regulatory Associations have adopted. In this framework it was highlighted that:

- BDT developed a series of studies and other tools to support regulators in their strategy to reduce the prices of roaming and enabling competition in this market. The **ITU International Mobile Roaming (IMR) Resources Portal** ([http://www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming\\_info.aspx](http://www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming_info.aspx)) was developed as a one-stop portal, bringing together the work done by ITU on this topic and creating a platform to inform members about activities undertaken by other regional and international organizations as well as on initiatives at national, bilateral, regional and international level;
- The ITU National Regulatory Authority (NRA) Technical Guide and online cost analysis tool is an important tool for the IMR dialogue between NRAs and operators (available at the [IMR Resources Portal](#));
- ITU Study Groups provide a discussion platform for Members to contribute and discuss the cost elements of the roaming service ([ITU-D Study Group 1](#) and [ITU-T Study Group 3](#));
- Countries can also capitalize on the experience from regions where roaming regulations has been successfully implemented.

The roaming market and any regulation thereof is very complex, has multiple impacts and implications and requires a thorough understanding of retail and wholesale cost structures, network elements, cost components involved and commercial agreements related to Inter-Operator tariffs (IOT). A particular point is the challenge for NRAs of data collection and subsequent analysis of the wholesale market as well as the fact that the wholesale market for roaming in many countries at the present time is not compatible with the provision of roaming services at the retail level.

For operators, data collection requires a deep understanding of different underlying (billing) systems as well as cost components and structures involved, complex relationships, dynamics and commercial sensitivity of the information requested, alongside the need for regulators to have the right legal powers to obtain that information.

The activities of the ITU towards to have an open dialogue between all stakeholders is key to find solutions for the future. This Dialogue has certainly provided spotlight on some of the key issues, the role of all stakeholders, and what is really at stake.

In conclusion, the Dialogue recognized that it is important to create an enabling environment with appropriate innovative mechanisms to address international mobile roaming. It is therefore important to carry forward the dialogue and review developments in the international mobile roaming market, and in particular look at the economic and regulatory measures which have been taken around the world to reduce prices, and to make communications even more affordable for end users. Affordability is key going forward.

### **Suggested Actions**

High International Mobile Roaming (IMR) service prices at national, regional and international level is recognized as an increasingly important issue, with industry, regulators and policy makers giving due attention to this fact and looking for appropriate business, regulatory and policy solutions.

As greater regional integration has brought the issue of IMR to the forefront of the policy and regulatory arena, ITU has recognized the importance of sharing information and providing guidance at legal, technical and economic level, and has undertaken numerous and significant policy and regulatory actions on this issue. In this respect, participants agreed that Strategic Best Practices Guidelines and recommendations addressed to all stakeholders would contribute to create an enabling environment for the international mobile roaming market. Participants provided that ITU could be ideally placed to provide Members with a neutral platform to draft such Guidelines.

ITU IMR Strategic Best Practice Guidelines together with the ITU Cost Methodology and online Cost Analysis Tool will help countries to address the issue and improve negotiations between all stakeholders with the aim to reduce high mobile roaming retail prices and find longer term solutions to introduce competition in this market.

As part of this initiative, ITU proposes to organize IMR Round-Tables addressed to ITU Members but also open to private sector, industry and consumer associations for the development of the IMR Strategic Best Practice Guidelines, and ensure high level adoption through the organization of an ITU High Level IMR Meeting.

ITU, together with Regional Regulatory Associations (RA) can also facilitate the dissemination of the results through various channels, including presentations at select ITU and regional RA events, and capacity building.

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