

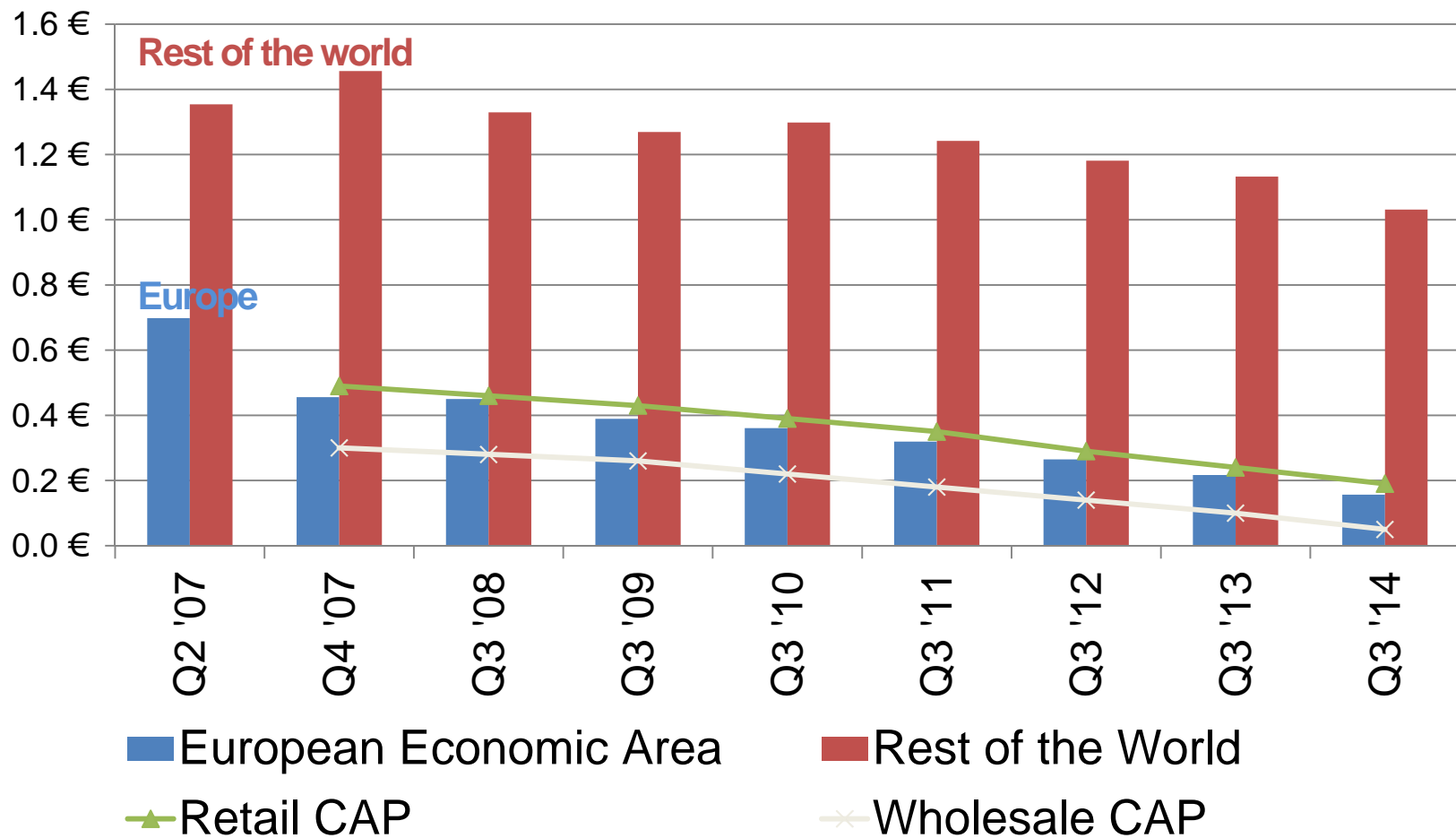
Roam Like at Home: The next legislative framework

Let's Roam the World: The ITU Global Strategic Dialogue on International Mobile Roaming

Geneva, 18 September 2015

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Average retail price per minute (outgoing calls)



End of roaming surcharges in mid-2017

- 1st Roaming Regulation entered into force in 2007 and brought significant reduction in prices:
 - SMS and voice prices have fallen by 80%
 - Data roaming is now 90% cheaper

- Nevertheless, roaming prices still above domestic prices

- On 30 June 2015, the European Parliament and the Council reached an agreement on the 'Connected Continent ' Regulation of the European Commission
 - Roam like at Home: As of 15 June 2017, mobile operators are not allowed to apply any surcharge in comparison to the domestic retail price on roaming customers in any Member State
 - Price reductions already expected in mid-2016

Fair use policy

■ Roaming providers may apply a “fair use policy” to the consumption of Roam Like at Home services.

- In order to prevent abusive or anomalous usage by customers for purposes other than periodic travel.
- For roaming that goes beyond fair use, the surcharge shall not exceed the wholesale caps.

■ Detailed rules have to be defined by the Commission after having consulted BEREC.

Exceptions

- Roaming providers may request authorisation to apply a surcharge in addition to the domestic price:
 - In exceptional circumstances, in case they are not able to recover their overall actual and projected costs
 - To the extent necessary to recover costs
 - Having regard to the applicable maximum wholesale charges

- Methodology for assessing the sustainability to be defined by the Commission after having consulted BEREC

Wholesale roaming market review

- To make the end of roaming surcharges sustainable by 15 June 2017
 - European Commission shall review the wholesale roaming market by 15 June 2016 and
 - make a legislative proposal to amend the wholesale regulation

- Shall take into account
 - the degree of competition in retail and wholesale markets, in particular, for small operators
 - risks of distortion of competition and investment incentives in home and visited markets
 - the need to prevent permanent roaming at wholesale level

- Shall ensure that operators are able to recover all costs of providing regulated wholesale roaming services, including joint and common costs