

# ITU/BDT LET'S ROAM THE WORLD Initiative

INTERNATIONAL MOBILE ROAMING CONSULTATION MEETING  
Geneva, 15-16 September 2016

## International Mobile Roaming (IMR) – Setting the Scene

Sofie Maddens and Carmen Prado-Wagner  
Regulatory and Market Environment Division (RME)  
Telecommunication Development Bureau (BDT)

# AGENDA

- Setting the scene – International Mobile Roaming (IMR) issues today
- The ITU IMR Resources Portal
- General trends on IMR pricing and regulation
- ITU/BDT Director, Mr. Brahim Sanou LET'S ROAM THE WORLD Initiative
- Building blocks for IMR Strategic Best Practices 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**



Inelastic Demand



Home NW  
Retail Margin

+

Visited NW  
Wholesale  
Margin

=

Home  
NW  
Retail  
Price

# Some issues to be considered

- 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;
- As well as on the tools developed by ITU:
  - 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.



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

INTERNATIONAL



MOBILE ROAMING

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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 problems 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 as a result of activities done by other regional and international level.

### Other interesting IMR links

### More ITU-D resources

- EU First results of the roaming public consultation (March 2016)
- EU New rules on roaming charges and open markets (October 2015)
- Final Report on the GCC International Mobile Roaming consultation (June 2015)
- Bilateral agreement between Belgian and Luxembourg telecoms regulators (April 2015)
- GSMA - GSM Roaming and Coverage Maps
- African Union (AU) International Mobile Roaming Guidelines (September 2013)
- APT Working Group Report on IMR (May 2012)
- Trans-Tasman mobile roaming - joint Australia-New 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

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

- 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

Report on International Mobile Roaming 2016

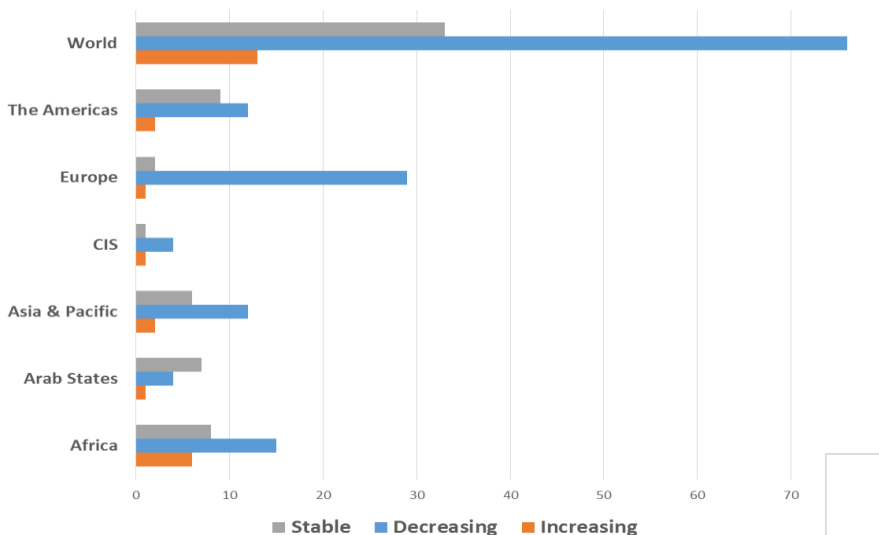
- International Roaming: Analysis of the impacts of "Roam Like at Home" (RLAH) - December 2014
- International Roaming BEREC Benchmark Data Report April 2013 - September 2013

### 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

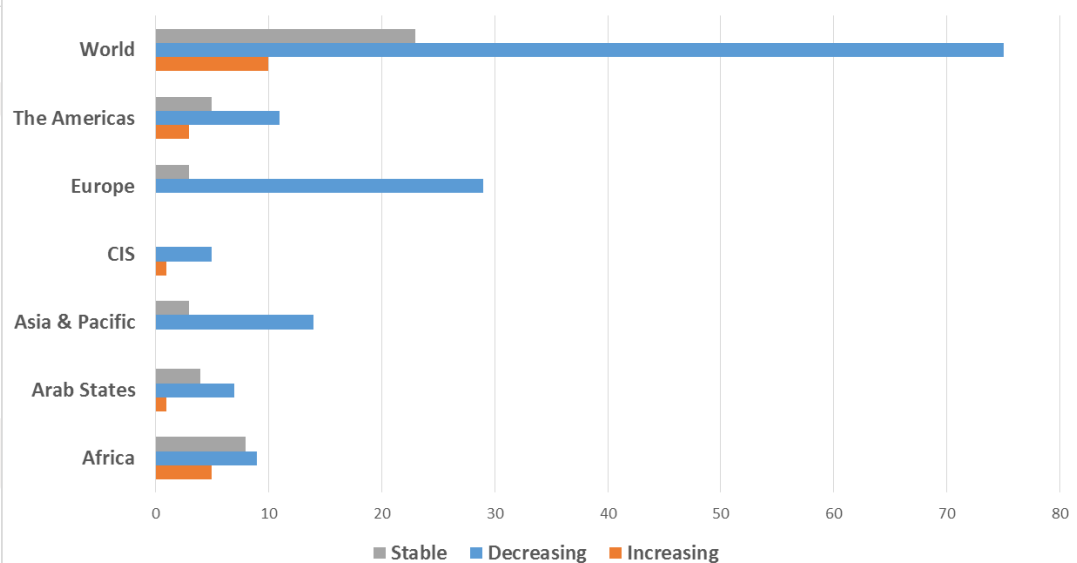
# General trends on pricing

What is the general trend of the IMR RETAIL PRICE OF VOICE over the past three years in your country, 2015?



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?



# IMR price still remains a very important issue

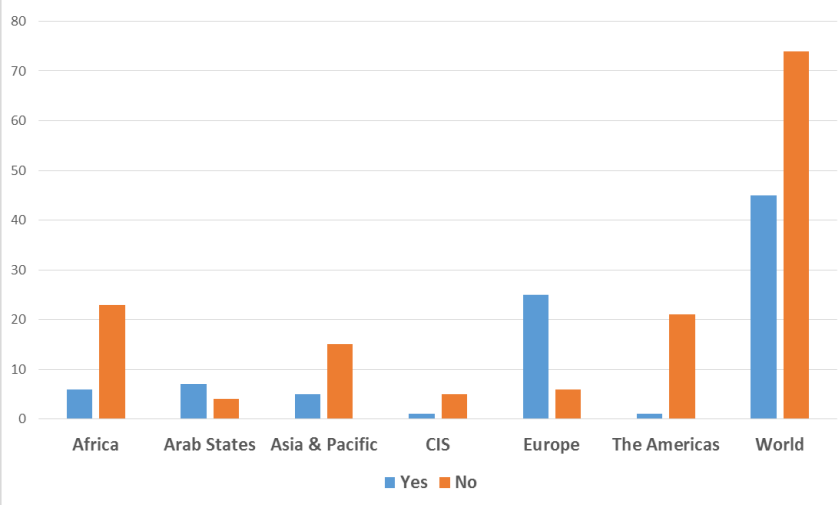
- Despite price reduction for IMR
- The emergence of a range of alternative technologies and calling solutions
- Prices still diverge significantly from costs



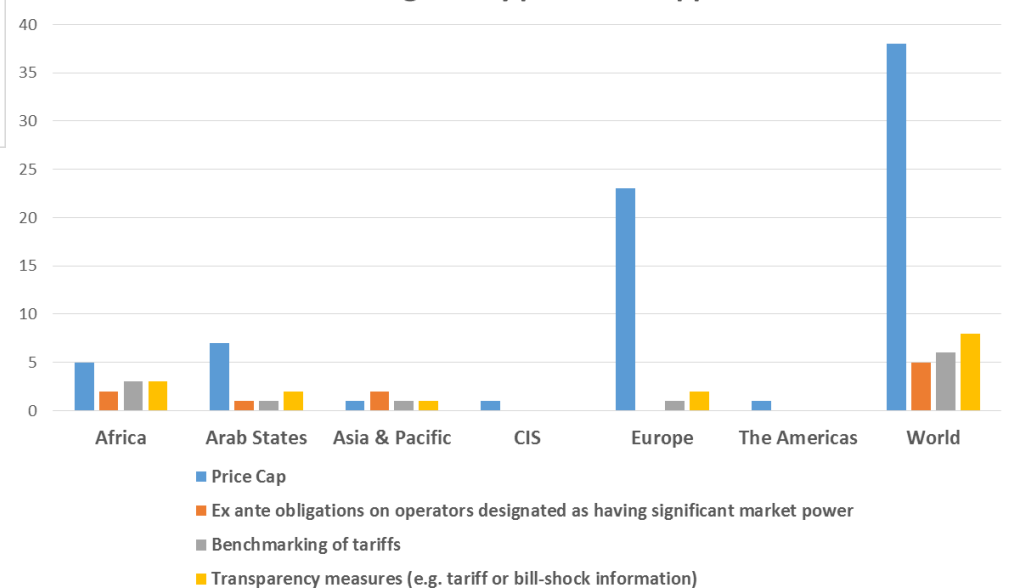
# What about IMR Regulation....

## Are countries regulating IMR retail prices?

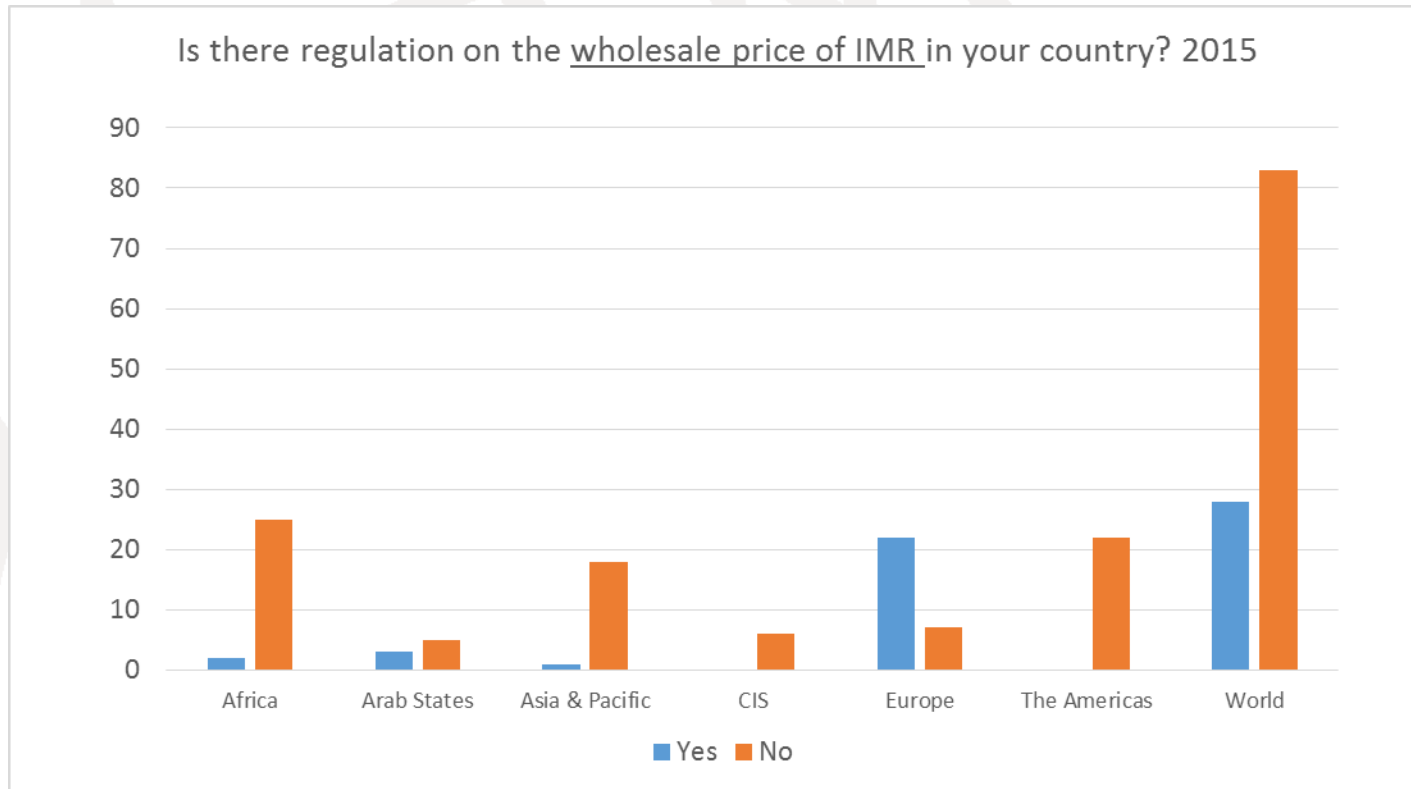
Are retail prices of IMR regulated in your country? 2015



What kind of regulatory practice is applied? 2015

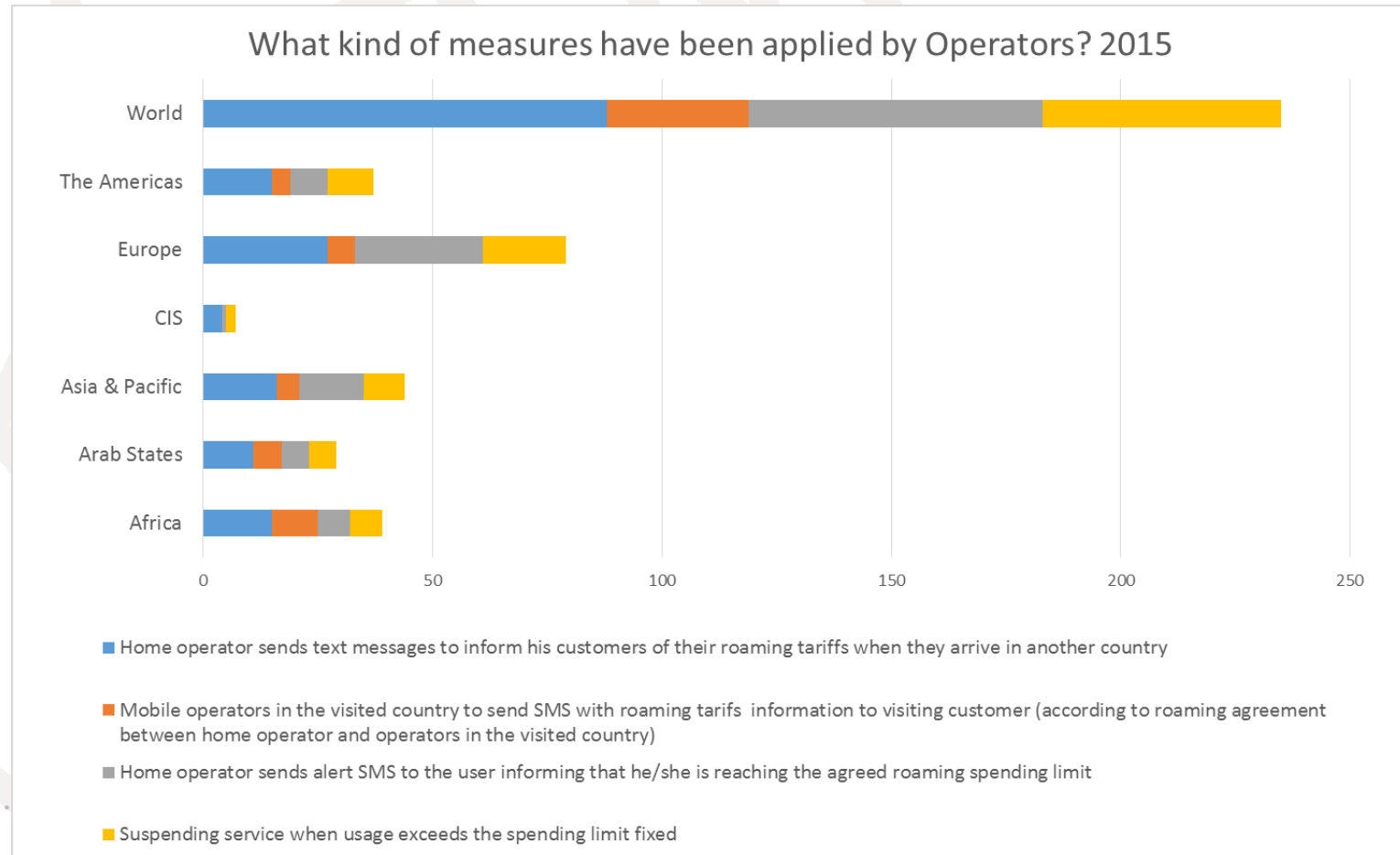


# Are countries regulation IMR Wholesale prices?



# 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.



- The ITU/BDT Director, Mr. Brahim Sanou LET'S ROAM THE WORLD
- Building blocks for IMR Strategic Best Practices Guidelines

# To go ahead with 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

# ITU/BDT Director, Mr Brahima Sanou LET'S ROAM THE WORLD initiative

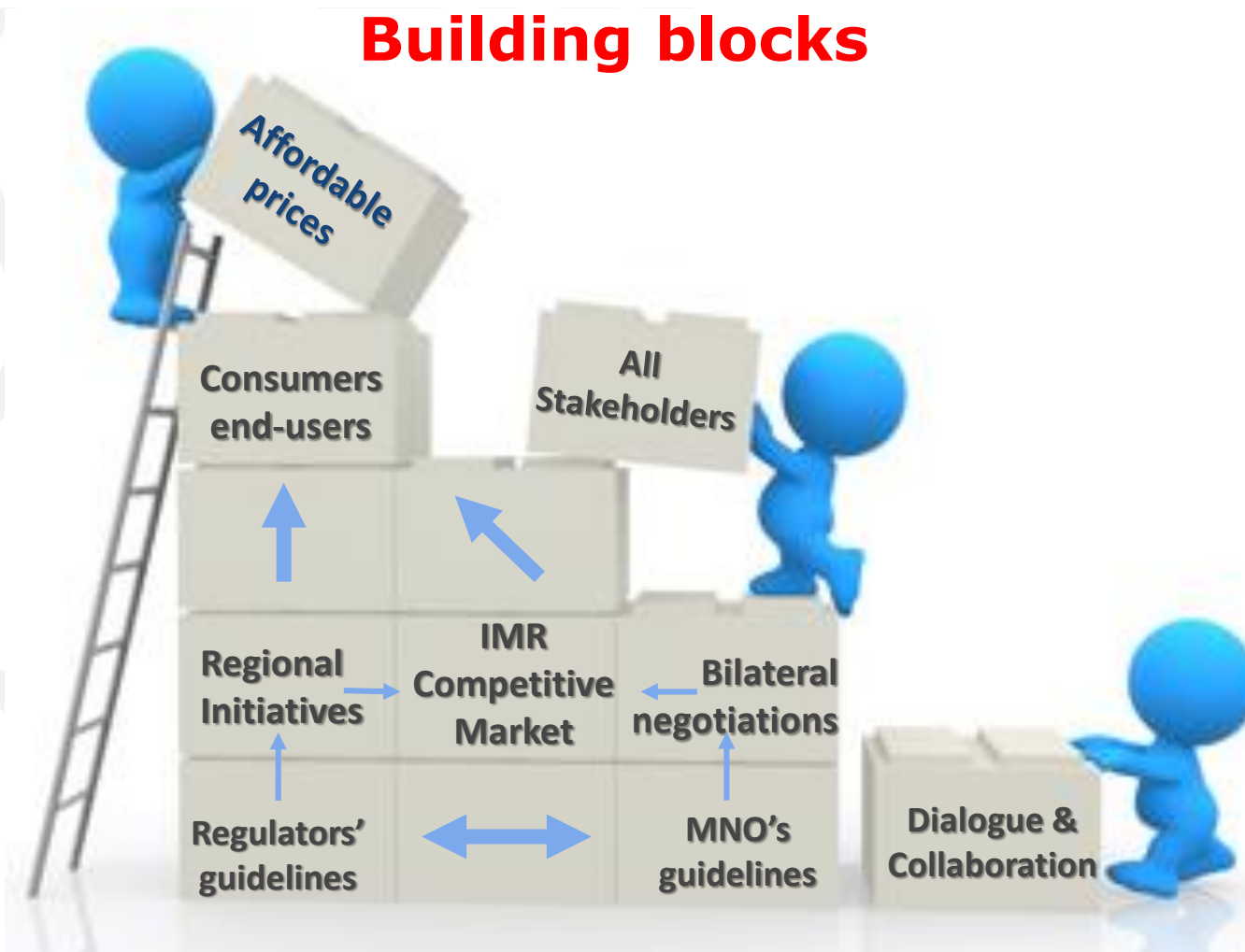
- ITU is a neutral platform actively working on IMR (research, data collection, studies, development of tools...)
- Enhance dialogue with all stakeholders (e.g. IMR Consultation meetings, Round-tables)
- Together all stakeholders to develop “IMR Strategic best practices guidelines” building blocks
- Ensure its high level adoption (through the organization round tables and high Level IMR Meetings)
- 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

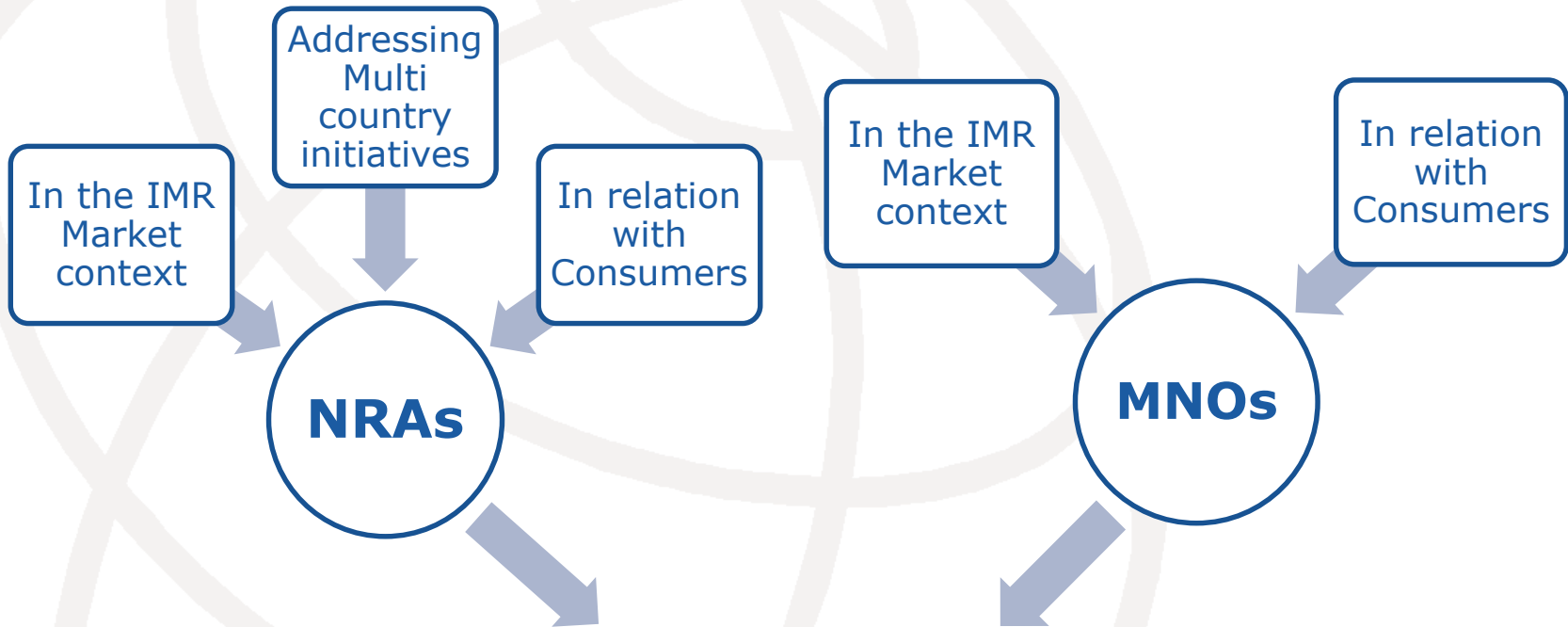
## The ITU Initiative

### Building blocks





# Ideas for IMR Best Practice Guidelines



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.



# International Telecommunication Union

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