

International Mobile Roaming All about IMR 2018

International Mobile Roaming (IMR) service prices at national, regional and international level are still recognized as an increasingly important matter, with policy makers and national regulatory authorities (NRAs) looking for appropriate regulatory and market solutions. Discussions are not only focusing on voice or data roaming, or on international trade-related principles; but also addressing changes in revenue streams, usage and traffic, new business models as well as new opportunities and innovative measures on roaming such as Internet of Things (IoT) and Machine-to-Machine (M2M) communications.

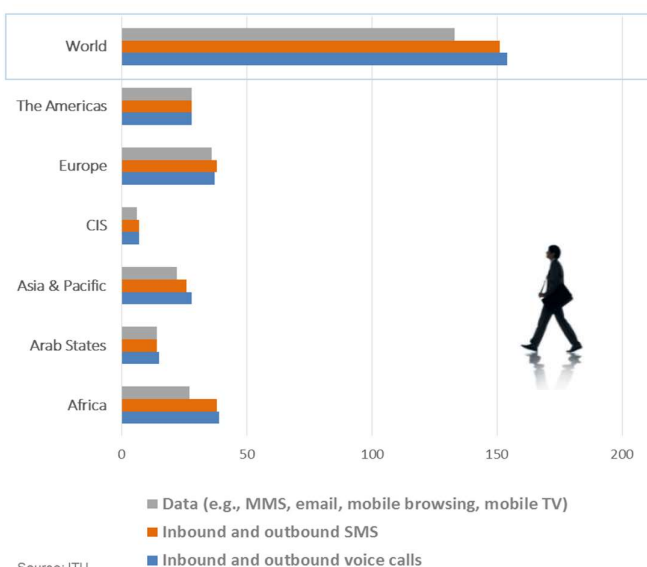


In the framework of the *ITU LET'S ROAM THE WORLD Initiative* launched in 2015 by Mr Brahima Sanou, Director of the ITU Telecommunication Development Bureau (ITU-D), this brochure presents the analysis of data collected on IMR by ITU¹, as well as a brief introduction to the publicly available [ITU IMR Strategic Guidelines](#).

Availability of Roaming services

All IMR services are available world-wide, but at different levels

What IMR services are available in your country, 2017

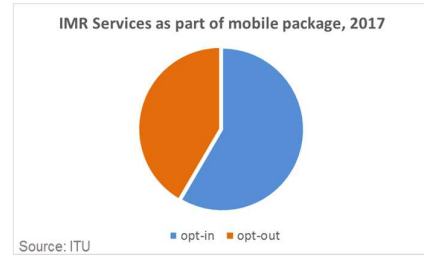


The availability of roaming services is positively increasing in all the regions.

Despite this world-wide increase, there is still some discrepancies on the availability of data roaming (e.g. MMS, Internet, email, mobile browsing, mobile TV), as can be observed in gray.

¹ All data presented in this brochure was collected by ITU in the framework of the ITU Tariff Policies Survey, available at the [ITU ICTEye](http://www.itu.int/net4/itu-d/icteye/) (www.itu.int/net4/itu-d/icteye/) for year 2017. This survey is addressed to NRAs world-wide. CIS refers to: Commonwealth of Independent States

In **81% of countries (who answered the survey) all IMR services are part of the mobile service package**, sold as bundled services to customers. The opt-out option is the most used approach, by which customers can avoid having roaming services in their monthly packages to benefit lower prices.



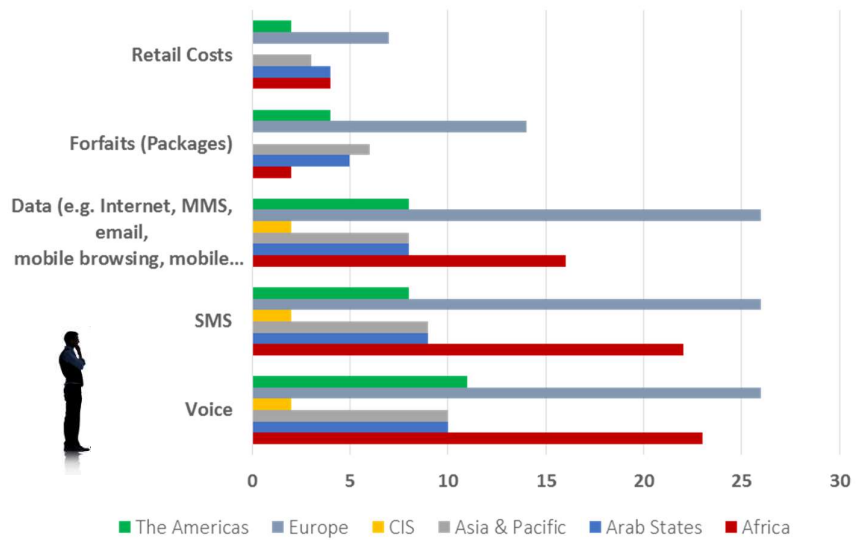
Data collection still matters...

The collection of IMR data for retail and wholesale services, by National Regulatory Authorities (NRA), remains very complicated considering that this is an international service that is managed, in most cases, by commercial agreements. Cost and tariff information is not easy to obtain nor always available.

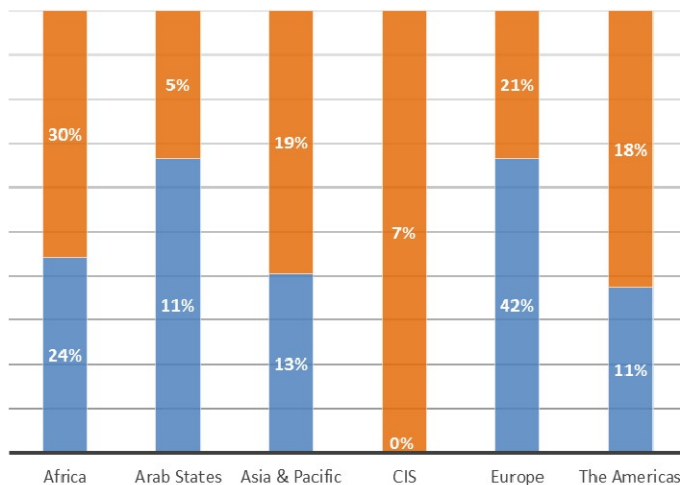
Regarding IMR retail services prices, most NRAs are collecting information on IMR traditional services such as voice, SMS and data, but not on retail costs. Only 20 countries out of 82 (who answered the survey) have reported to request retail

cost information to operators. **Data availability and greater transparency illustrate the need for further action regarding IMR.**

Is your NRA collecting RETAIL tariff/rates data on IMR, 2017

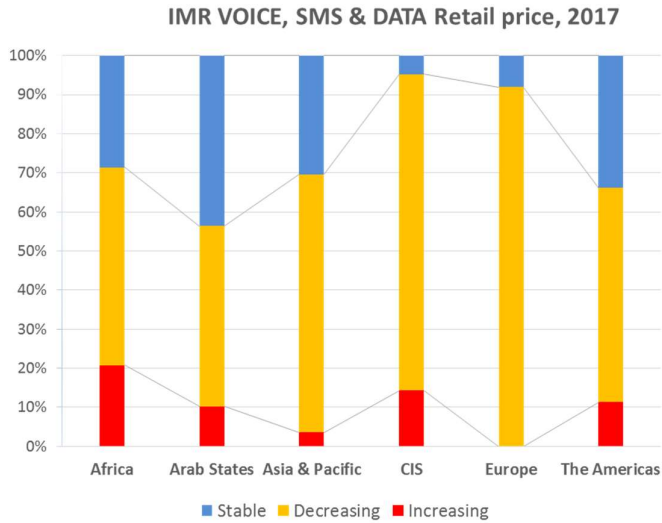


Publicly available IMR prices on the website, 2017



38 out of 95 countries, who answered the survey, are making retail prices publicly available to customers on the website.

Price of Roaming services are decreasing... but still not enough



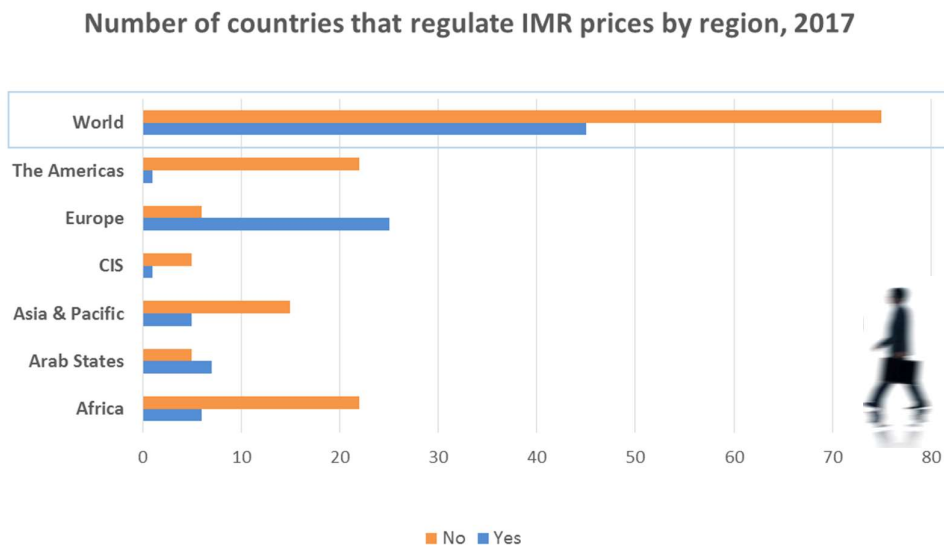
Source: ITU
Note: Regional aggregates values

The retail price trend for IMR voice, SMS and data, over the past three years, seems to be decreasing in all regions (yellow), as reported by NRAs. However, very few countries reported that IMR voice prices are still increasing in all regions. In Europe, 29 out of 32 countries reported that IMR prices decreased considerably, following the European Union (EU) IMR Directives.

A global comparison of IMR and national prices showed that roaming calls and SMS prices were **three to six times higher** than the corresponding national tariffs².

What about Roaming regulation?

The number of countries that are applying IMR regulation, targeting retail prices, is very low in all regions, except for Europe.



Source: ITU

It is important to consider that, even if prices decrease, price regulation should only be an interim measure.

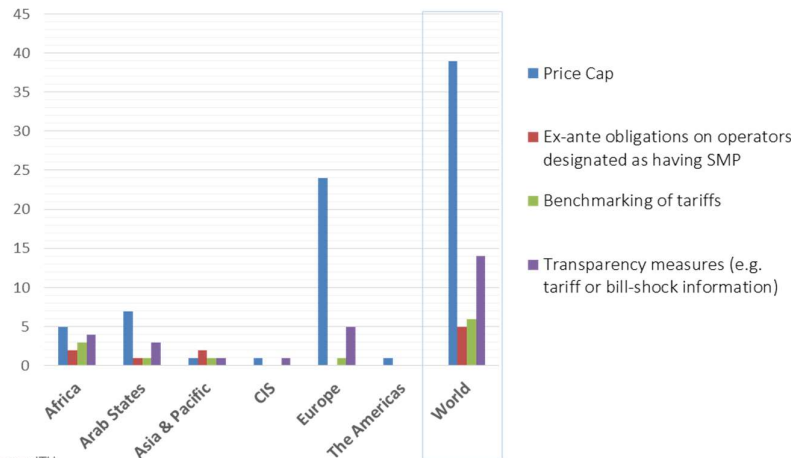
In the long term, sustainable competition in the IMR market is generally more efficient to achieve affordable price levels.

² ITU-D Study Group 1, Question 4/1 Report www.itu.int/dms_pub/itu-d/opb/stg/D-STG-SG01.04.1-2017-PDF-E.pdf

Regulatory practices applied by NRAs

In countries applying IMR retail price regulation, the Price Cap approach seems to be the more common regulatory approach applied by NRAs in all regions, and particularly in Europe.

What kind of regulatory practice is applied in your country for IMR Services? 2017

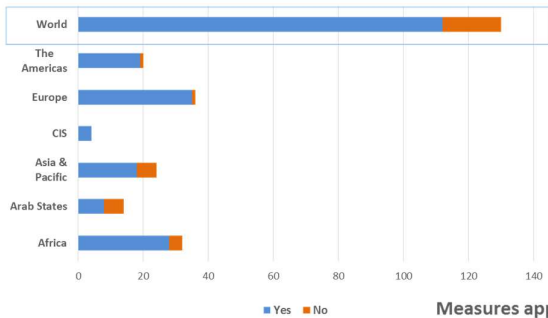


Source: ITU

Some countries are combining Price Cap with benchmarking. At present, more and more “transparency measures” are also being applied in all regions, such as: making IMR prices publicly available to customers, detailing price information in customer’s bill, and applying measures to reduce the risk of Bill shock.

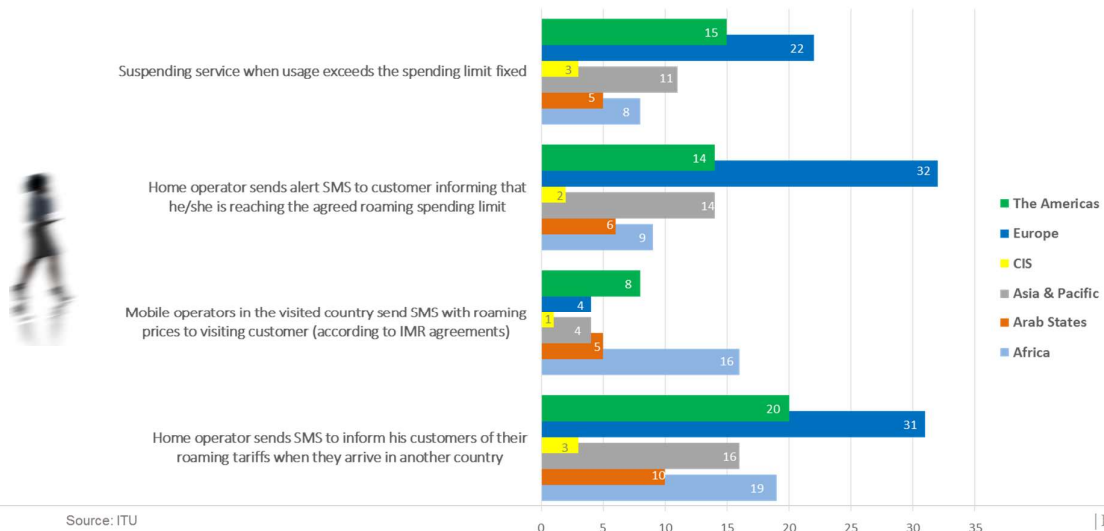
Operators are taking measures to reduce the risk of Bill shock

Country's operators are taken measures to reduce the risk of bill shock? 2017



Fortunately, more and more national network operators are applying specific measures to reduce or avoid the risk of Bill shock to their clients, as reported by NRAs.

Measures applied by Operators to avoid the risk of bill shock, 2017

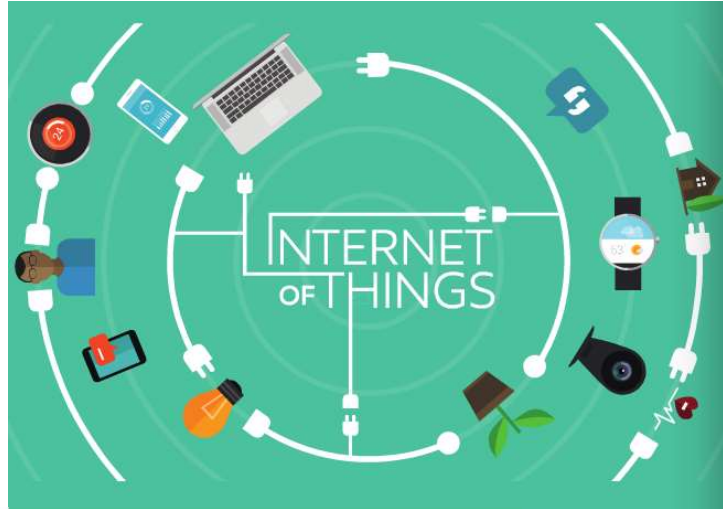


Source: ITU

Looking to the Future: Internet of Things (IoT) and Machine-to-Machine (M2M)

IoT and M2M are changing the quality of life for users and offering real opportunities for business worldwide. Billions of new mobile devices are being connected in multiple countries and regions, and this is generating enormous costs for connectivity, especially considering that these devices need to be connected all the time, everywhere.

This all-time connectivity is requiring permanent access to telecommunication networks regardless of location and, of course, without excessive fees when connecting through IMR.³



Source: ITU Unleashing the potential of the Internet of Things, 2016

The ITU International Mobile Roaming (IMR) Strategic Guidelines, 2018

Following the guidance given by stakeholders during the ITU Consultation Process, the BDT consolidated inputs from regional regulatory associations (RAs), international organizations, consumer and private sector associations, as well as recommendations, ITU data and research to develop Building Blocks for the *ITU IMR Strategic Guidelines*. These served as a foundation for harmonized guidelines to be applied around the world to improve the delivery of IMR services for the benefit of consumers⁴.

"The aim of these IMR Strategic Guidelines is to create a common understanding of the complexities of IMR and to foster harmonized solutions at national, regional and international level to enhance efficiency and transparency of retail roaming prices".



*Mr Brahima Sanou,
Director, ITU Telecommunication Development Bureau (BDT)*



Source: ITU

³ ITU IMR Strategic Guidelines (www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming_info.aspx)

⁴ Idem.

For further information

ITU International Mobile Roaming Resources Portal

www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming_info.aspx

ITU-D Regulatory and Market Environment Division

www.itu.int/treg

ITU Telecommunication Development Sector (ITU-D)

www.itu.int/en/ITU-D/Pages/default.aspx

ITU Tariff Policies Survey, ITU ICTEye Database

www.itu.int/net4/itu-d/icteye/

ITU-D Study Group 1 – Question 4/1 Economic policies and methods of determining the costs of services related to national telecommunication/ICT networks

www.itu.int/net4/ITU-D/CDS/sg/questions.asp?lg=1&sp=2018

ITU Telecommunication Standardization Sector (ITU-T)

<http://www.itu.int/en/ITU-T/Pages/default.aspx>

ITU-T Study Group 3

www.itu.int/en/ITU-T/studygroups/2017-2020/03/Pages/default.aspx



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