

Regional Roaming Study: Initial insights

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RCC and ICT

RCC: structure, mandate, goals

SEE2020 Strategy: Jobs and Prosperity in a European
Perspective: Smart Growth Pillar, Digital Society Dimension

Strategy and Work Programme 2017-2019: Connectivity
Flagship

RCC's contribution to regional roaming agenda

Rationale:

- 2015 e-SEE Ministerial Conclusions
- EU's Enlargement Strategy
- Balkan Barometer Business Opinion Survey
- Strategy and Work Programme 2017-2019

Approach:

- Regional Roaming Platform, in an extended WB6 format
- Comprehensive legal, regulatory and market impact study of RRA; analysis of legal, regulatory framework and roaming traffic in entire WB6 region

Initial insights of Draft Market Impact Study

Pretext:

- Disclaimer: Study in draft stage, expressing consultants' views
- Comments/updates/directions and validation by regulators and ministries, so as to have truly applicative value, yet to follow

Caveats:

- Limited time series
- Significant seasonality in roaming traffic
- Non standardized data submissions
- Delicate correlations and compounded effects
- Potential general patterns of depressing roaming uptake

Initial insights of Draft Market Impact Study

Structure of Study:

- Analysis of the Regional Roaming Agreement and Associated Legal Frameworks
- Analysis of the Roaming Traffic in WB economies

Chief contributions, within noted caveats:

- Systematized regional overview of legal, regulatory and institutional frameworks, roaming traffic and market impact data and trends in WB6
- Confirmation of the potentials of the regional approach in tackling roaming prices

Initial insights of Draft Market Impact Study

Chief contributions, within noted caveats:

- Further to the introduction of RRA, prices for roaming services within the signatories have been reduced, where implemented
- No significant identifiable growth in roaming traffic within RRA signatories yet registered that might be directly attributed to the regulation of lower roaming prices
- Overview of policies and traffic in entire WB6 region - enable valuable insights for future domestic policy deliberations
- Introducing into the debate a number of recommendations, chiefly related to legal and regulatory findings

Initial insights of Draft Market Impact Study

Main considerations, *inter alia*, relate to:

- adjustments to reflect the significant amendments of the relevant EU Regulations ever since
- follow up actions, in light of the upcoming completion of the last glide path phase
- proposals for updating of implementing regulations (some tailored specifically to the present state of the industry)
- proposals for expanding the RRA context, so as to take into account structural and consumer protection measures
- proposals on roaming price control metric
- proposals on how the primary law can support and safeguard RRA, etc.

Future steps

Finalization of Study

- Consultation process
- Roaming Platform Meeting
- Meeting with Directors of Regulators

RCC commitment for follow up actions or support for any viable demand-driven ICT regional initiative.

Good.
Better.
Regional.



Thank you!

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