Regulatory analysis of international roaming services
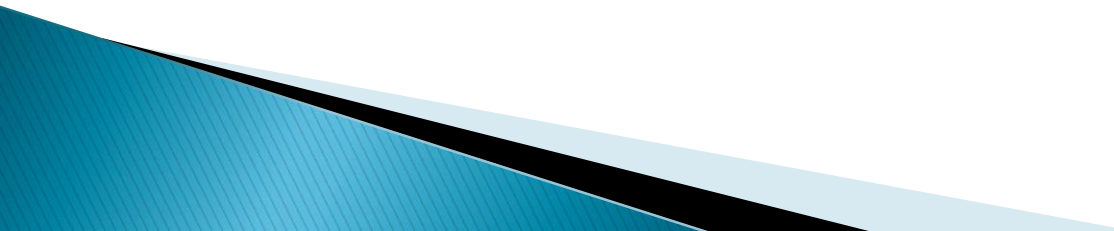
Yangon, 1 September 2014

Robert Clarke
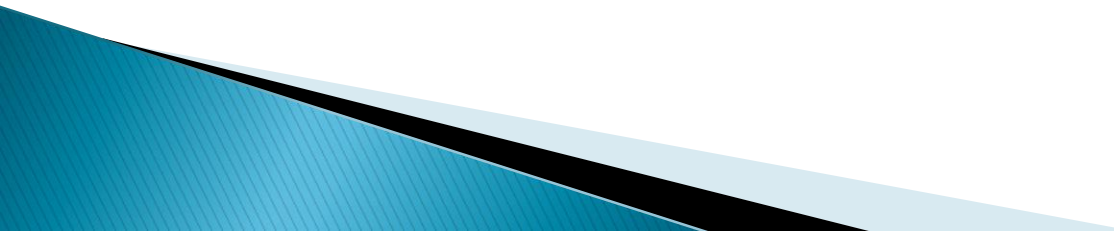
- This presentation is based on the ITU Report of March 2014

- The Report is available at www.itu.int/en/ITU-D/Regulatory-Market/Documents/Roaming/Roaming%20Guide-E.pdf

Contents

- Who?

- With whom?

- Using what?

- How?

- Choosing a solution

Who?

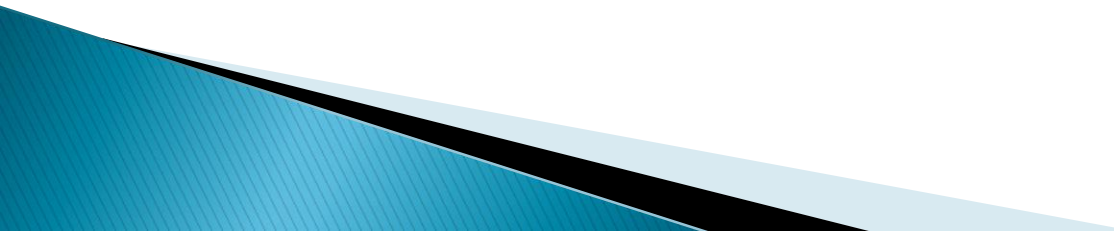- Ministry

- Sector regulator

- Competition regulator

With whom?

▶ Unilateral action
  ◦ e.g. Oman, Australia

▶ Multilateral action
  ◦ e.g. ASEAN, SADC

▶ Bilateral action
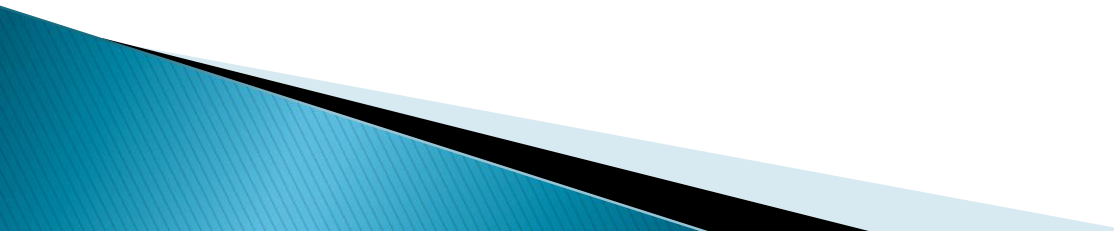 ◦ e.g. Singapore–Malaysia; New Zealand–Australia

Using what?

▸ Publicly available information

▸ Commercially sensitive information

▸ Other information
  ◦ e.g. surveys; expert reports

How?

- Processing roaming information

- Presenting roaming information

Choosing a solution

- Fix the symptoms

- Fix the underlying problem

- Threaten to fix

Conclusions

- **Unilateral action** on international roaming services can reduce retail margins but cannot impact the underlying wholesale prices paid to foreign "host" networks.

- **Multilateral action** faces coordination and enforcement issues.

- **Bilateral cooperation** (that is, cooperation between two countries) is the most effective option for countries considering investigating the provision of international mobile services.