
ITU-BDT Arab Regional Workshop on Mobile Roaming: National & International Practices

27 to 29 of Oct, 2015 Sudan - Khartoum

ITU works and activities related to Mobile Roaming

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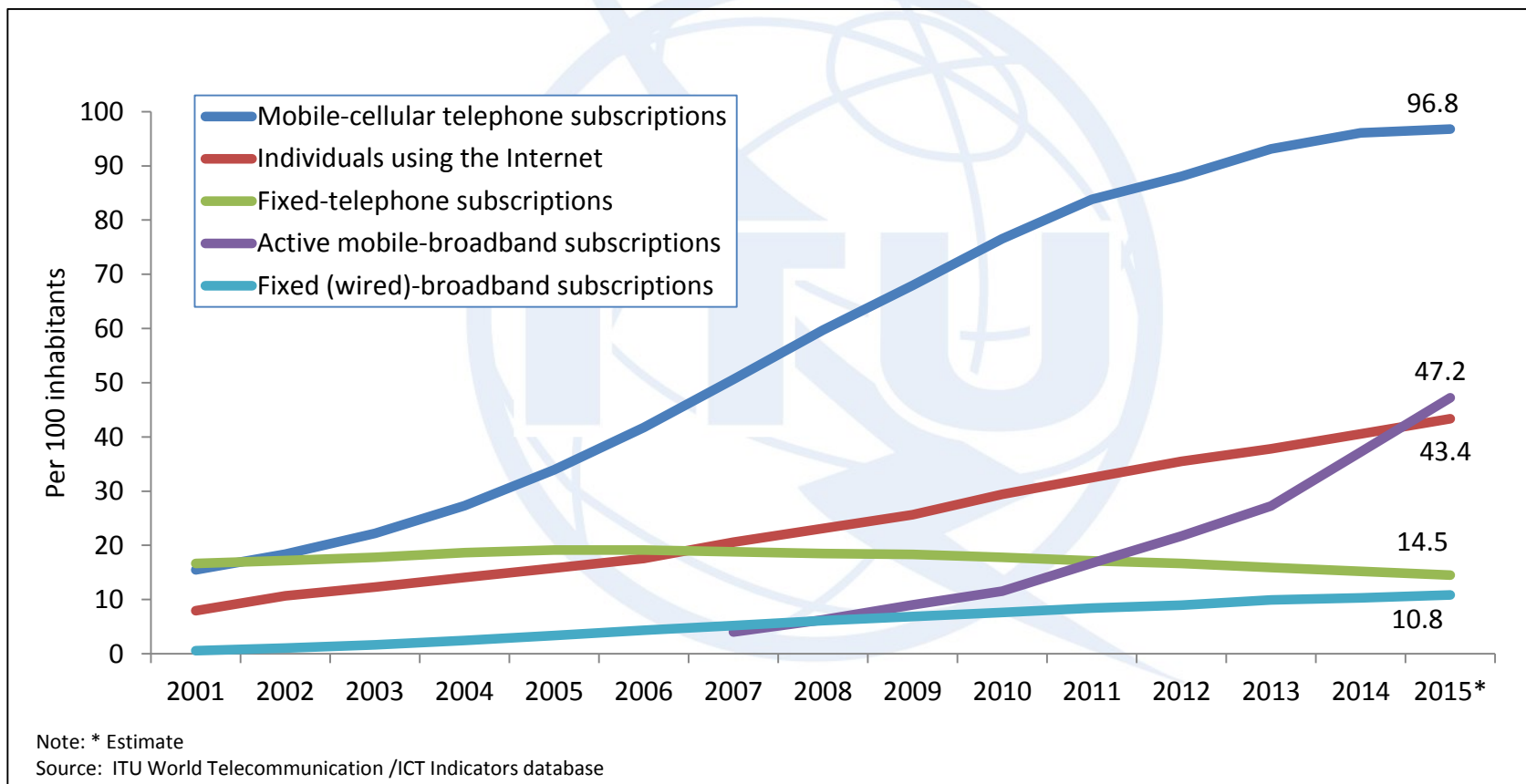
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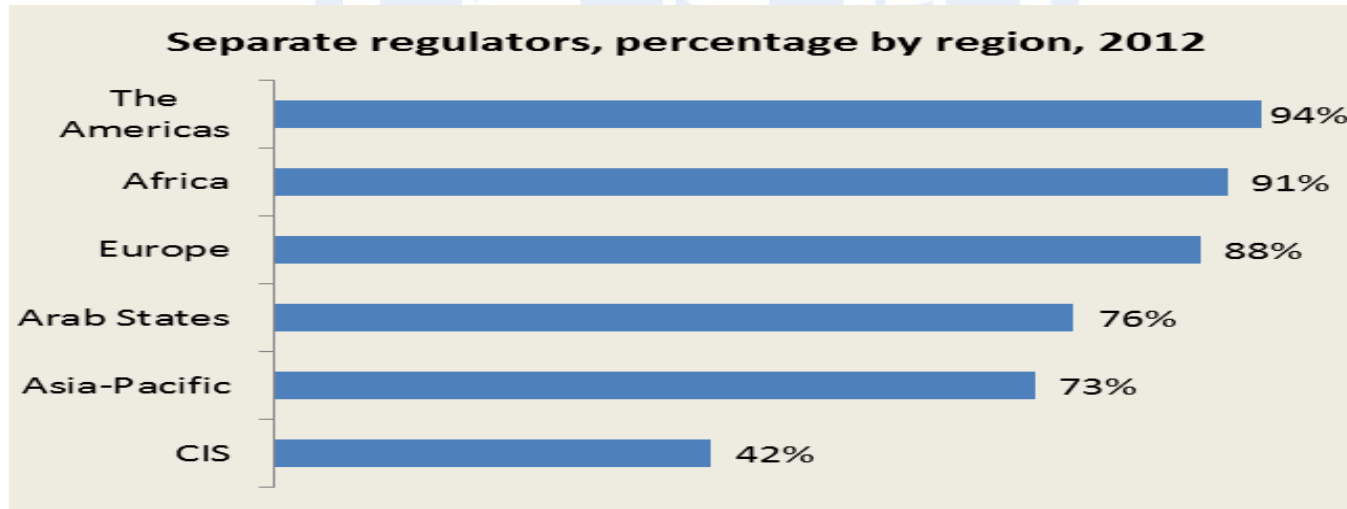
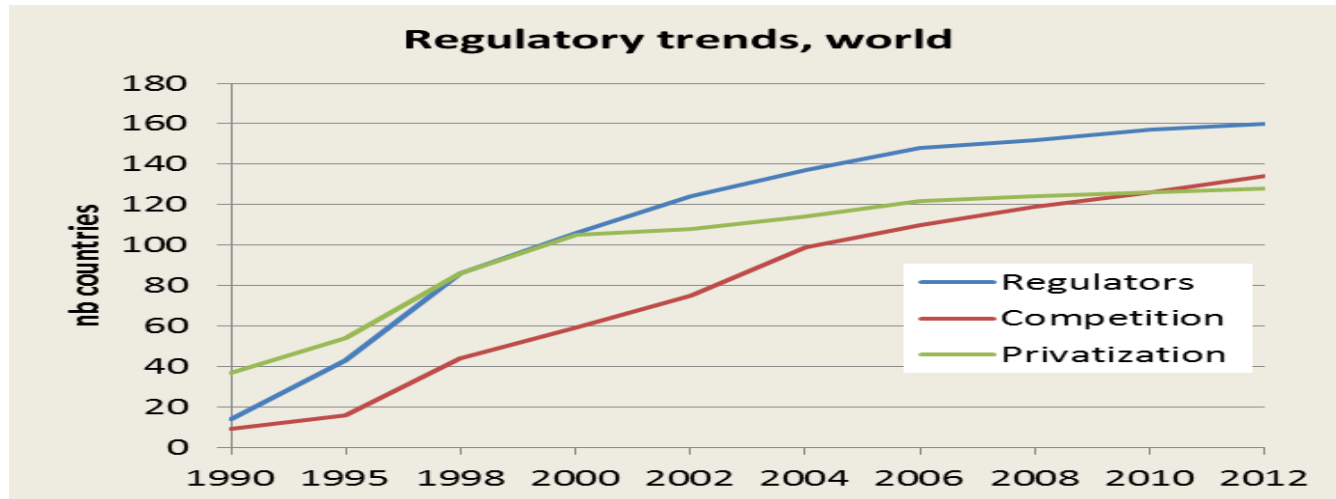
Global ICT development

Years 2001-2015

Mobile catches up with the world Population



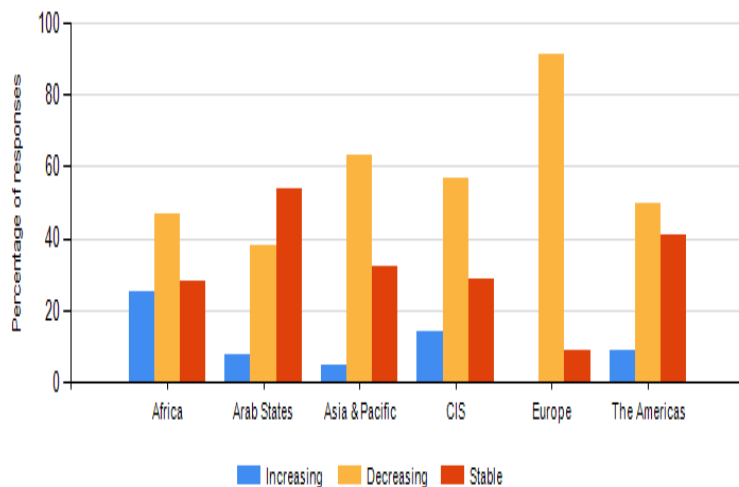
Liberalization and regulatory reform trends



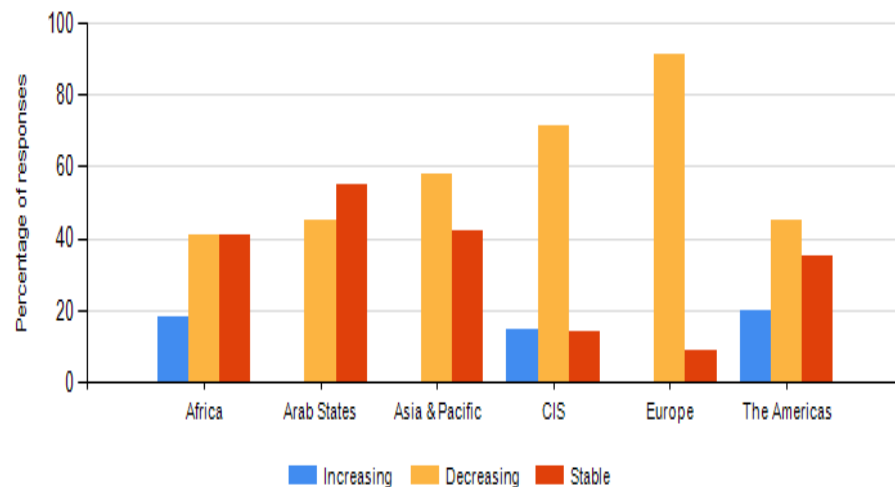
ITU TARIFF POLICIES- Mobile Roaming 2014

IMR Voice and SMS Trends

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



What is the general trend of the SMS IMR RETAIL PRICE over the past three years in your country?

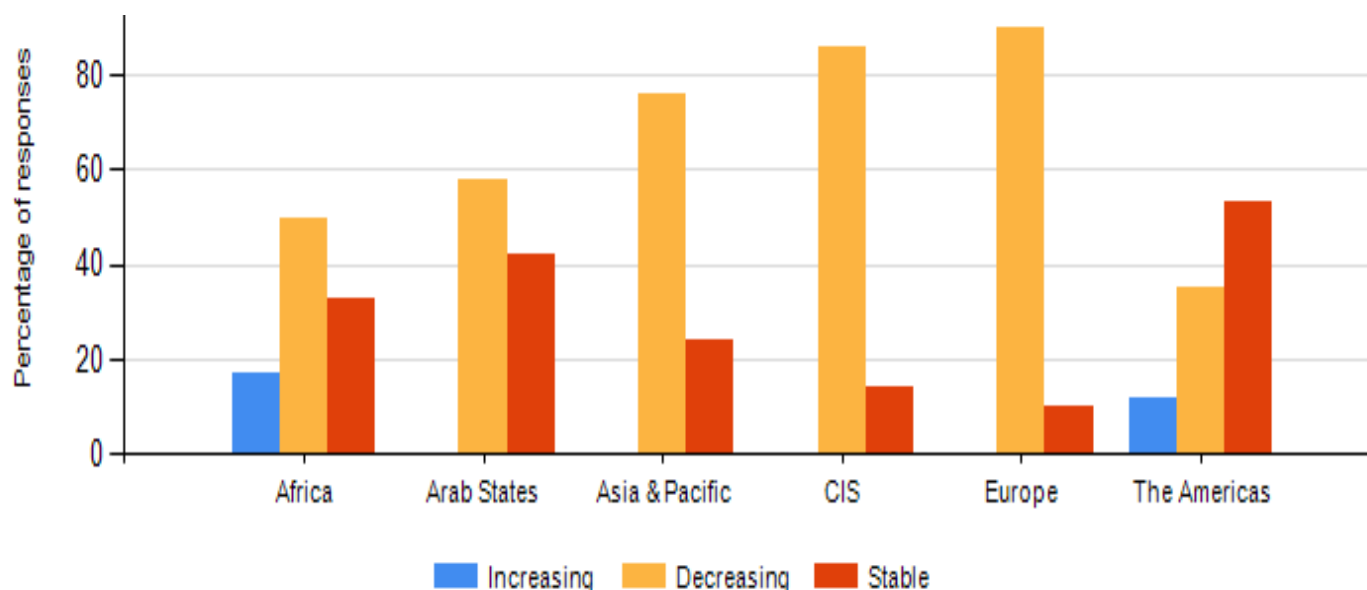


Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

ITU TARIFF POLICIES- Mobile Roaming 2014 - Cont'd

IMR Data Trends

What is the general trend of the DATA IMR RETAIL PRICE over the past three years in your country?

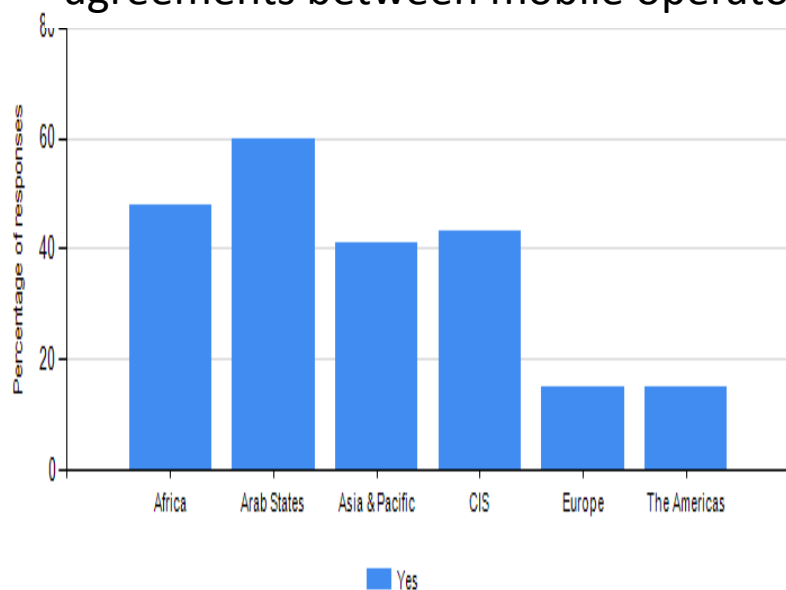


Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

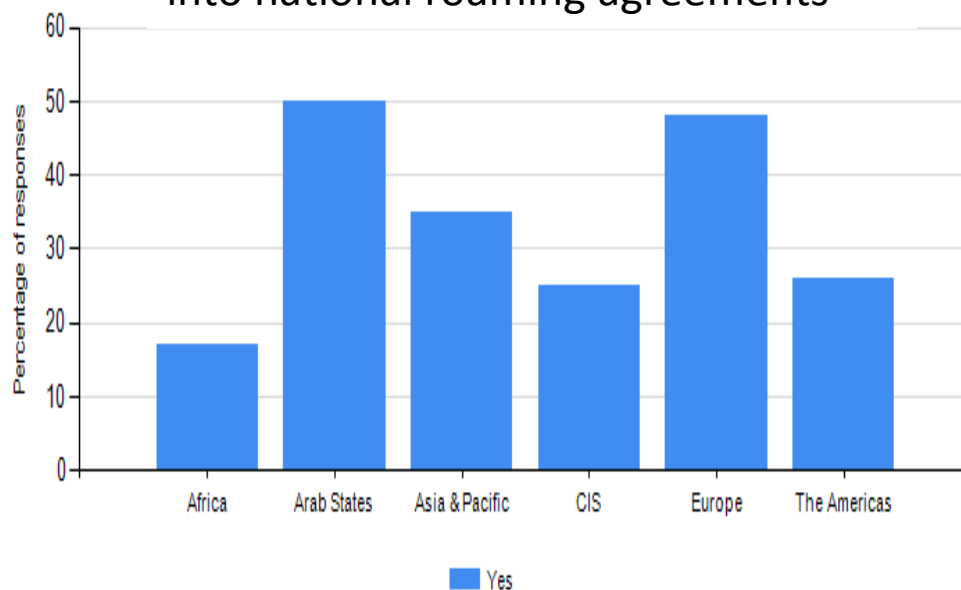
ITU TARIFF POLICIES- Mobile Roaming 2014 - Cont'd

National Roaming Agreements

Do you require national roaming agreements between mobile operators



If no, have mobile operators entered into national roaming agreements

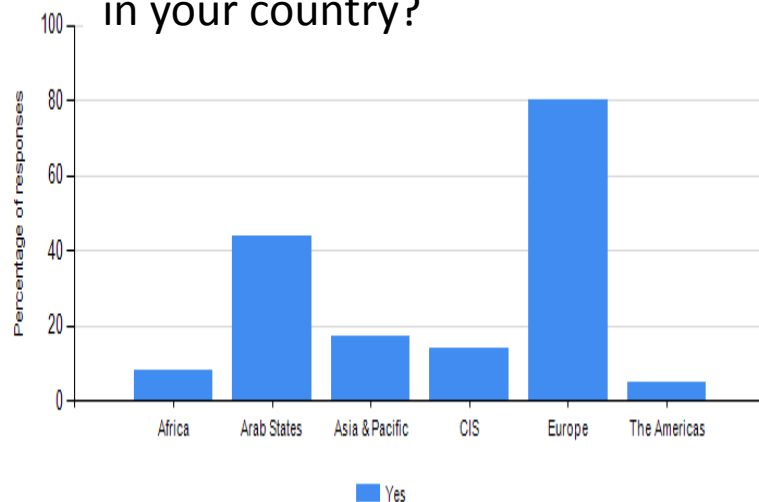


Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

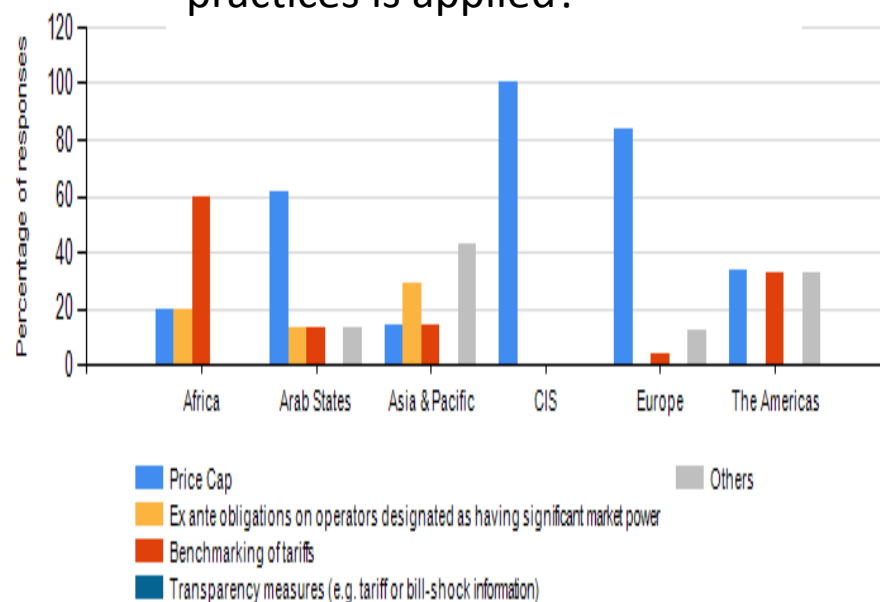
ITU TARIFF POLICIES- Mobile Roaming 2014 - Cont'd

IMR Retail prices regulation

Are retail prices on IMR regulated in your country?



If yes, what kind of regulatory practices is applied?

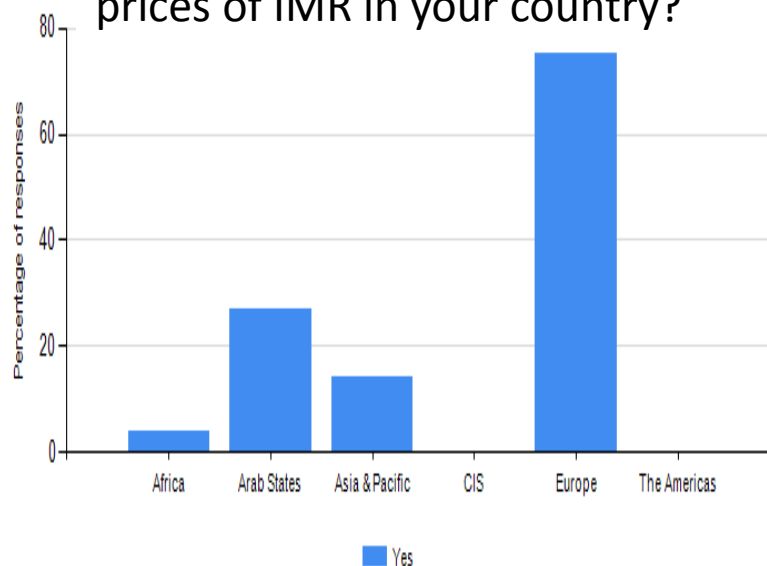


Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

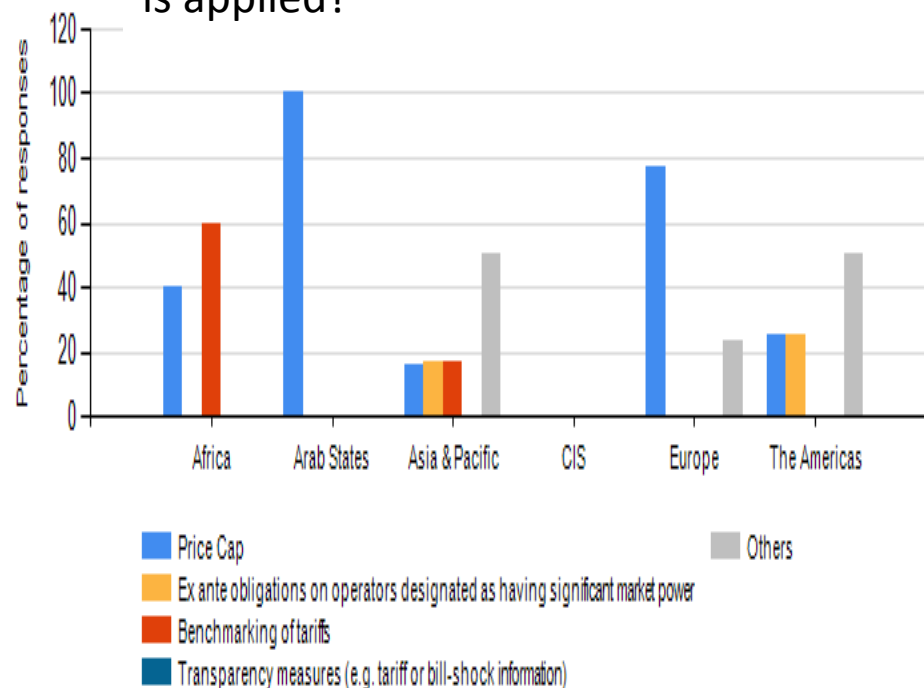
ITU TARIFF POLICIES- Mobile Roaming 2014 - Cont'd

IMR Wholesale prices regulation

Is there regulation on the wholesale prices of IMR in your country?



If yes, what kind of regulatory practices is applied?

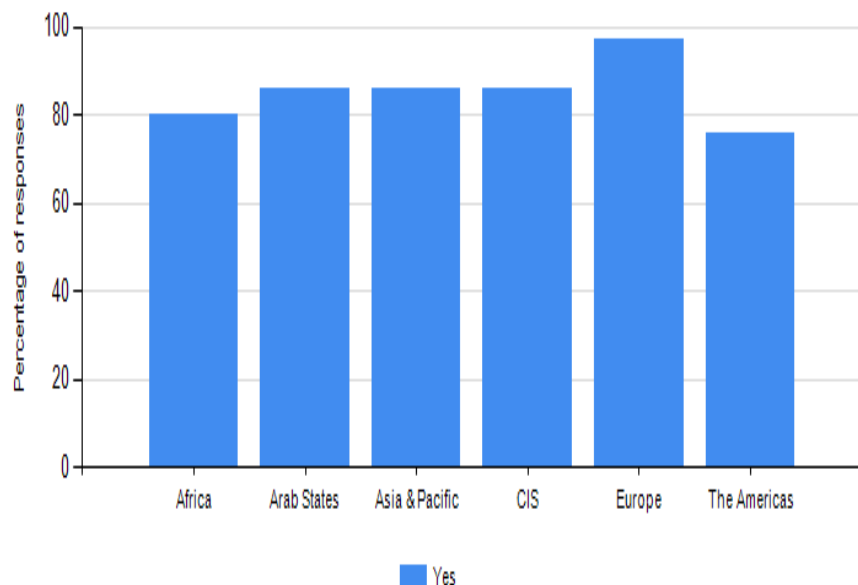


Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

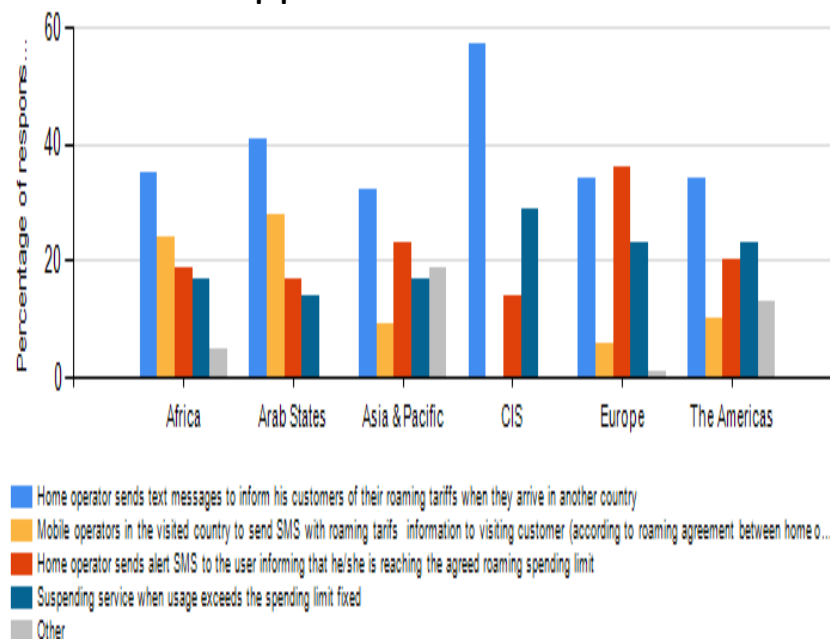
ITU TARIFF POLICIES- Mobile Roaming 2014 - Cont'd

IMR measures to reduce the Bill Shock

Have your country's operators taken any measures to reduce the risk of bill shock?



If yes, what kind of measures have been applied?



Source: ITU Tariff Policies Database [ITU ICT-Eye: www.itu.int/icteye](http://www.itu.int/icteye)

Some Roaming issues

❑ Some Roaming Thoughts

1. International Mobile Roaming incurs additional charges that too often are not cost based but instead random and arbitrary in levels of retail tariffs.
2. Action by regulators to counter overcharging for IMR requires that NRAs understand the real MNO cost-basis for roaming - wholesale and retail.
3. In practice a simple form of forensic accounting is needed to analyse the IMR cost structure and activity at an international level.
4. To understand both the national MNO costs and those within the international wholesale IOTs (inter operator tariffs) requires international co-operation – probably among a group of NRAs – perhaps across a region – and then further.
5. IMR also relies on inter-MNO negotiation and co-operation in which wholesale tariffs may be divorced from underlying costs. The net effect is to reduce the efficiency effects of competition;
6. In an epoch when subscribers, and the economy increasingly depend on cost effective mobile communications, any such charges should be cost justified, or else both the citizen and the economy suffer- an additional tax on the economy.

Source: http://www.itu.int/en/ITU-D/Regulatory-Market/Documents/Events2015/RoamingDialogue/Session2-1%20Forge_last%20version.pdf

Some Roaming issues - Cont'd

❑ Some Roaming concerns

1. **The problem of jurisdiction:** International roaming requires a regional or global regulatory approach;
2. **Lack of transparency** on IMR charges; frequently change; large price difference between different networks;
3. **Lack of awareness** of consumers and businesses (costs of services, substitute and suppliers...)

❑ Challenges of Roaming

1. Make full use of the great potential of mobile communications;
2. Have a coherent regulatory framework and effective competitive regulatory environment ;
3. Have retail prices closer to costs of services.

❑ Trends of Roaming

1. New regulations,
2. Roaming price reductions,
3. Stiff competition,
4. Sharp rise in data roaming traffic.

Source:

http://www.itu.int/en/ITU-D/Regulatory-Market/Pages/Events2013/GE_Roaming/home.aspx

<http://www.itu.int/en/ITU-D/Regulatory-Market/Pages/Events2015/Roaming/Agenda.aspx>

Some Regulatory actions

- Empowering users – potential reduction in IMR charges and bill shock;
- Possible regulation of prices??
- Creating competitive conditions in market (including facilitating substitutes);
- Creation of tools for effective regulation models and training materials to help regulators and decision-makers, to conduct economic studies/analyses as well as to provide assistance to members;
- Organize Platforms at which national policy-makers, regulators, industries and regional regulatory organizations can discuss key issues, share experiences and best practices.

The overall aim is to foster equitable and affordable access to innovative and sustainable services

Source: www.itu.int/en/ITU-D/Regulatory-Market/Pages/Events2013/GE_Roaming/home.aspx

ITU Works on Roaming

Mobile Roaming (ITR under Articles 4)

- ❑ **The new provisions on International Mobile Roaming could help provide :**
 - Transparency of end-user prices for international mobile services
 - Satisfactory quality
 - Greater cooperation and competition to avoid “bill shock”
 - Avoid and mitigate inadvertent roaming charges in border zones.
 - Free and quick access for international roaming users to the local number(s) for emergency services

- ❑ **The works of the ITU-T Study Group 3 on Policy and Economic issues**
 - ITU-T Recommendation D-98 “Charging in IMR service”
 - Will be presented and discussed during the Workshop

ITU Activities on Roaming (2013-2015)

LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming (IMR)



- 1) The second edition of the ITU High-Level Workshop on International Mobile Roaming [LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming \(IMR\)](#) as part of the Global Initiative launched in 2013 by **Mr Brahima Sanou, Director of the ITU Telecommunications Development Bureau**, welcomed over 100 participants, including policy makers, national regulatory authorities (NRAs) leading private sector companies of the information and communication technology (ICT) sector around the world, Regional Regulatory Associations, International Organization, and consumer representatives.
- 2) This Dialogue was successfully organized in **coordination with TSB.**
- 3) The Dialogue included discussion on three overarching topics:
 - 1) the **high stakes of roaming**,
 - 2) the **economics of roaming** and,
 - 3) **towards ubiquitous roaming for all.**



ITU Activities on Roaming (2013-2015)

LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming (IMR)



- 4) During the Dialogue the **ITU Cost Methodology and NRAs Online Cost Analysis Tool** were launched as an important part of this IMR dialogue.
- 5) ITU has recognized the importance of sharing information and providing guidance at legal, technical and economic level, and has undertaken numerous and significant policy and regulatory actions on this issue.
- 6) In this respect, during the dialogue it was agreed that **IMR Strategic Best Practices Guidelines and Recommendations addressed to all stakeholders** would contribute to create an enabling environment for the international mobile roaming market.
- 7) Participants **provided that ITU could be ideally placed to provide Members with a neutral platform to draft such Guidelines.**

ITU Activities on Roaming (2013-2015)

LET'S ROAM THE WORLD: The ITU Global Dialogue on International Mobile Roaming (IMR)



- 8) **ITU IMR Strategic Best Practice Guidelines** together with the **ITU Cost Methodology and online Cost Analysis Tool** will help countries to address the issue and improve negotiations between all stakeholders with the aim to reduce high mobile roaming retail prices and find longer term solutions to introduce competition in this market.
- 9) As part of this initiative, **ITU proposes to organize IMR Round-Tables addressed to ITU Members but also open to private sector, industry and consumer associations** for the development of the IMR Strategic Best Practice Guidelines, and ensure high level adoption through the organization of an ITU High Level IMR Meeting.
- 10) **ITU, together with Regional Regulatory Associations (RA)** can also facilitate the dissemination of the results through various channels, including presentations at select ITU and regional RA events, and capacity building.

ITU Works on Roaming - **Cont'd**

The ITU International Mobile Roaming (IMR) Resources Portal

a one-stop portal to all the work done by ITU in this area as well as to inform about activities done by other regional and international organizations and initiatives at the national, bilateral, regional and international level. It contains all the work done including the following reports:

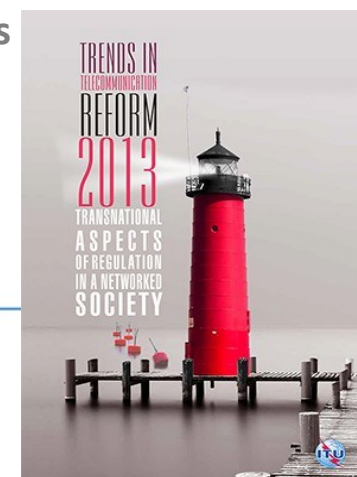
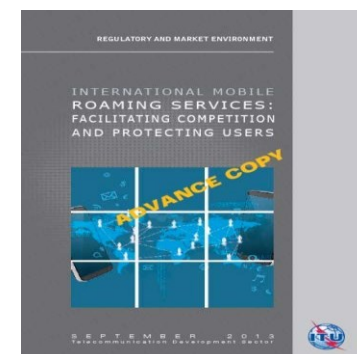
a) International Mobile Roaming services: Facilitating competition and protecting users, Sept, 2013:

- Key IMR Regulatory Issues
- Structural solution for the IMR markets
- Protecting and empowering subscribers
- International, regional and bilateral initiatives

b) Trends in Telecommunication Reform 2013 : Transnational aspects of regulation in a networked society

Chapter on International roaming services: a review of best practice policies

- The Regulatory Challenge in IMRS
- A Review of Business and Regulatory Initiatives
- Proposed Best Practice Recommendations

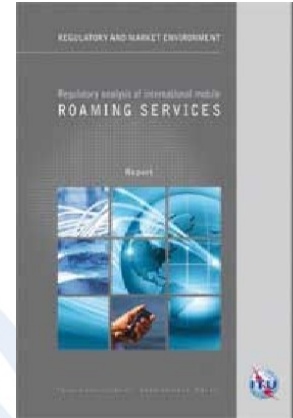


www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming_info.aspx

ITU Works on Roaming - Cont'd

c) Regulatory Analysis of International Mobile Roaming Services, March 2014

This report offers practical advice on investigating international mobile roaming services and provides the context and information needed to do two things: first, to choose the approach to roaming; and second, to run the day-to-day investigation that will follow.



d) ITU Guide for NRAs on International Mobile Roaming Cost analysis, Technical Paper, September 2015

This technical guide prepared by the ITU to meet the request addressed to ITU during the High-level Workshop on Regulatory and Economic Aspects of Roaming, held at ITU on 23-24 September 2013, when participants called for ITU to take the lead in developing a coherent and transparent cost model for roaming for use by regulators.



e) ITU International Mobile Roaming Cost Analysis Tool:

The aim of this tool is to provide NRAs an online tool to calculate the costs of international roaming in order to illustrate the principles set out in the ITU-T Guide for NRAs mentioned above. This tool provides an estimation based on the operational and infrastructure costs for voice traffic only, but IOT wholesale margins for termination between MNOs are not included.

ITU Resources on Mobile Roaming

- ITU International Mobile Roaming (IMR) Resources Portal at: www.itu.int/en/ITU-D/Regulatory-Market/Pages/Roaming_info.aspx
- ITU Survey on Tariff Policies in the **ITU ICTEye** - useful Mobile Roaming data: www.itu.int/ITU-D/icteye/
- Detailed analysis of Mobile Data including charts: [Measuring the Information Society Report 2014](#)
- ITU Statistics data: www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx
- Global Symposium for Regulators (GSR): www.itu.int/en/ITU-D/Conferences/GSR
- ITU-T Study Group 3 activities and Regional Groups / Rec D.98: www.itu.int/en/ITU-T/studygroups/2013-2016/03/.../default.aspx
- ICT Regulation toolkit: www.ictregulationtoolkit.org
- Regional Forums on ICTs Regulation (FTRA, RDF...)
- Regional Economic and Financial Forums (Africa, ARB, AFR, AMR, ASP) www.itu.int/en/ITU-D/Regulatory-Market/Pages/Events.aspx

THANK YOU

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www.itu.int/en/ITU-D/Regional-Presence/ArabStates/Pages/Events/2015/RM/default.aspx

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