



ITU/BDT LET'S ROAM THE WORLD Initiative

INTERNATIONAL



**ITU Regional Forum on Consumer Information, Protection and
Rights for Africa 2017
Cotonou, BENIN**

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 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.





The ITU IMR Resources Portal



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

YOU ARE HERE HOME > ITU-D > REGULATORY & MARKET ENVIRONMENT > LET'S ROAM THE WORLD - ITU INTERNATIONAL MOBILE ROAMING (IMR) RESOURCES PORTAL



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.

Recognizing the importance of this key issue, this portal gathers information on all the activities done by ITU in this area as well as about activities and initiatives done by Regulatory Associations, Regional and International Organizations and other stakeholders. It also highlights key findings from ITU studies, Reports, Working Group Questions, Study Groups, and data and analysis on IMR from the ITU ICT Eye.

Following the success of the ITU Global Dialogue on International Mobile Roaming (IMR) in Geneva, ITU Headquarters in Switzerland (18 September 2016), the IMR Strategic Guide was launched by Mr Brahima Sanou, Director of the International Mobile Roaming (IMR) Strategic Guide.

RECENT ITU ACTIVITIES ON ROAMING

- A Case Study of ONA: East Africa One Network Africa Roaming Initiative - 2016
- ITU-T Recommendation D.97 on methodological principles for determining international mobile roaming rates - 2016
- ITU Report on Regulatory analysis of international mobile roaming services Edition 2014 [Français] [Español]
- ITU-T International Mobile Roaming (IMR) Cost Analysis Tool and the ITU-T Guide for NRAs on International Mobile Roaming Cost analysis, Technical Paper (Sept. 2015)

- ITU Guide for NRAs on International Mobile Roaming Cost analysis
- ITU International Mobile Roaming Cost Analysis Tool

- Other interesting IMR links
- Roaming in Cuba: AT&T is the latest US telco to sign a roaming agreement with ETECSA for voice, texts and data (August 2016)
 - Kenya: Safaricom Drops Roaming Charges By Up to 99% (July 2016)
 - EU First results of the roaming public consultation (March 2016)
 - EU New rules on roaming charges and open Internet (October 2015)
 - Bilateral agreement between Belgium 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
 - Ofcom's website on IMR for UK consumers

LET'S ROAM THE WORLD INITIATIVE

The initiative was launched by Mr Brahima Sanou, Director of the International Mobile Roaming (IMR) Strategic Guide, during the ITU Global Dialogue on International Mobile Roaming, held in Geneva in September 2016. This Dialogue gathered a diverse group of stakeholders with the objective to discuss developments in the area of international mobile roaming, in particular the regulatory measures being employed in various countries that users pay for roaming services against the backdrop of an ICT industry undergoing a transition from mobile to machine-to-machine communications and the Internet of Things, the dialogue provided a neutral platform to exchange experiences and best practices and encourages ITU Members, as well as Regional and International Organizations to discuss the role of Regulators in today's market for mobile roaming and the market expected to arise in the future.

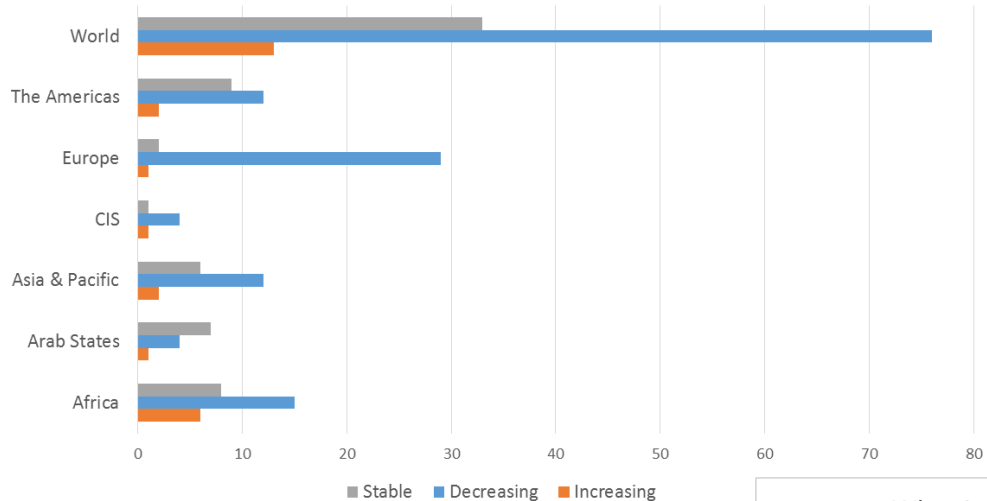
- GSR Discussion Papers on...
- Work with RAs
- ITU-D Study Group Questions
- Regulatory and Economic Fora in all regions

A large, faint, light gray globe is centered in the background of the slide.

General trends on IMR pricing and regulation

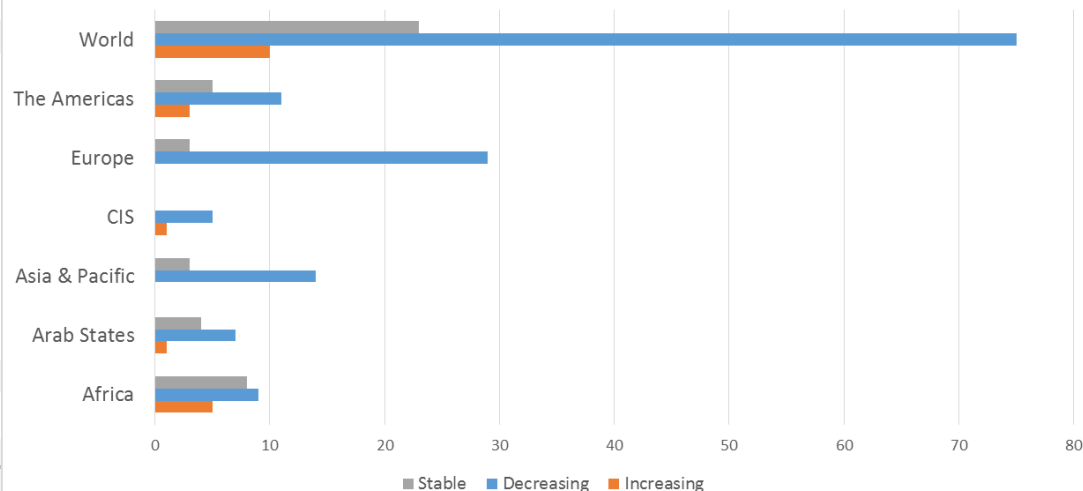
General trends on pricing

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



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?



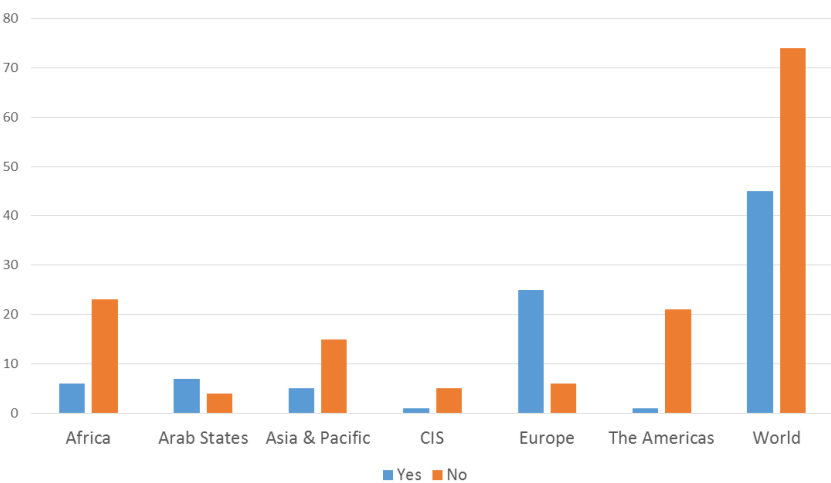
IMR price still remains a very important issue

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

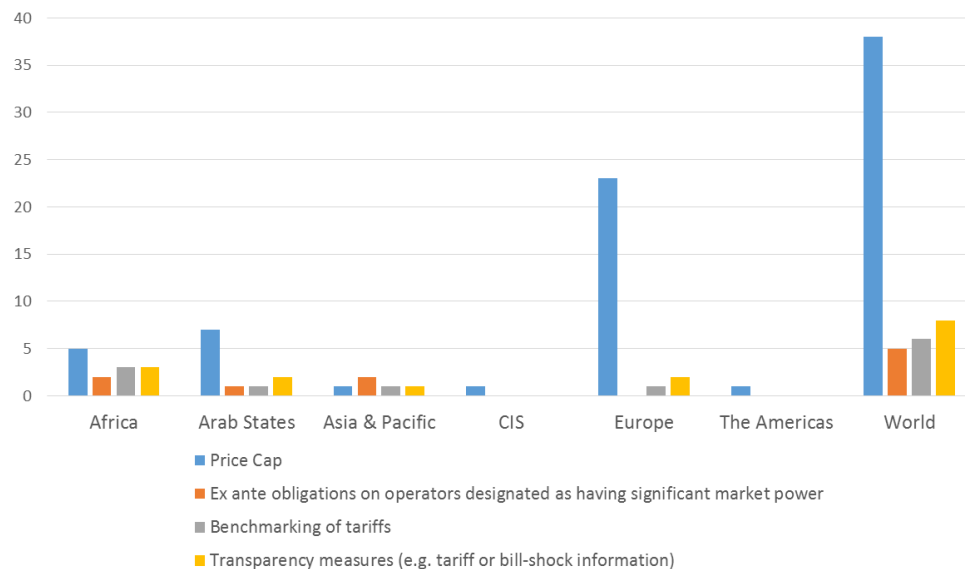
What about IMR Regulation....

Are countries regulating IMR retail prices?

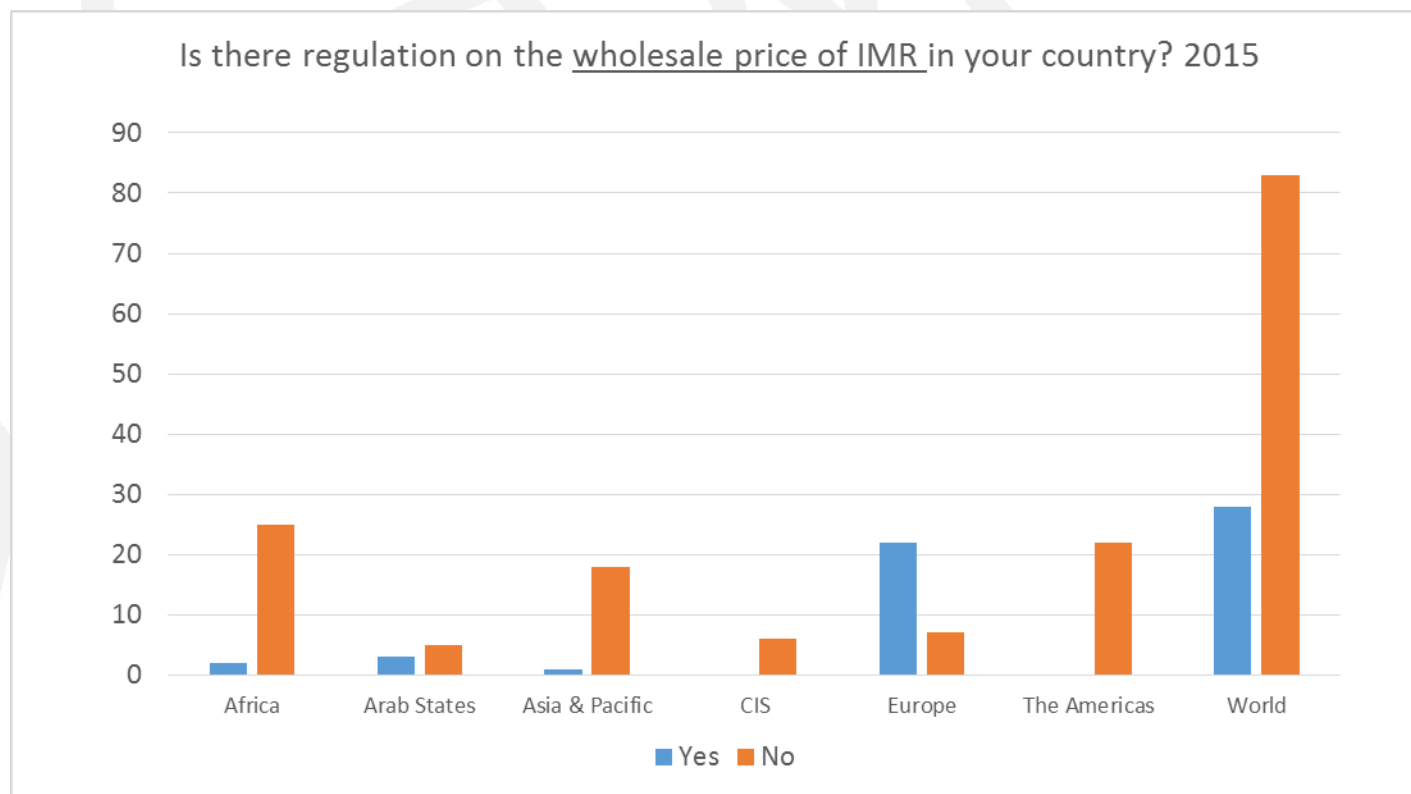
Are retail prices of IMR regulated in your country? 2015



What kind of regulatory practice is applied? 2015

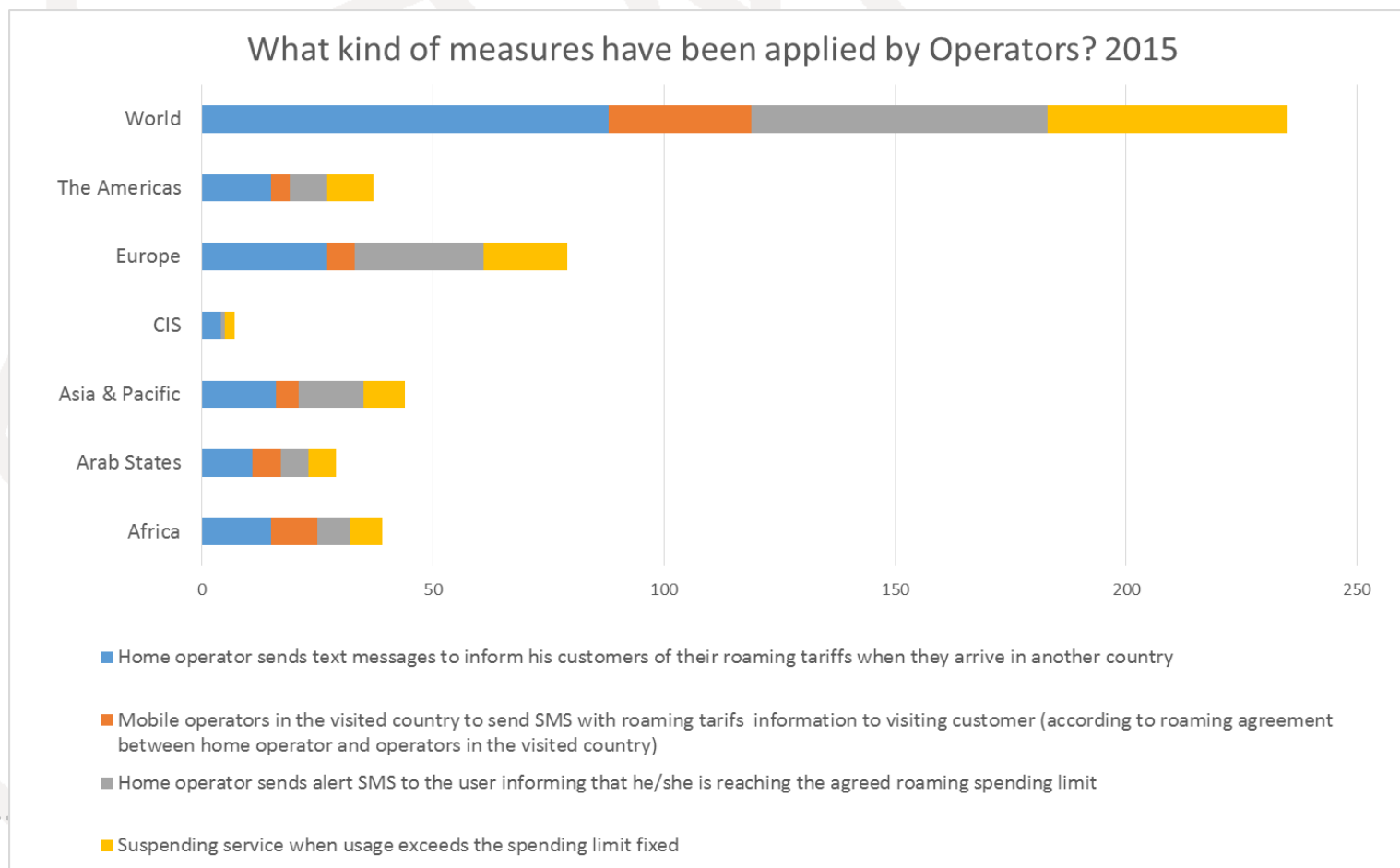


Are countries regulating IMR Wholesale prices?



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.

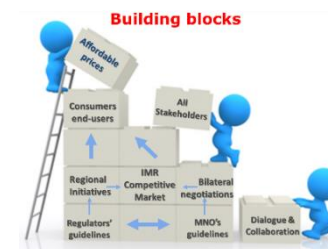


INTERNATIONAL



MOBILE ROAMING

- **The ITU/BDT Director, Mr. Brahim Sanou LET'S ROAM THE WORLD**
- **Building blocks for IMR Strategic 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
- In recognition of existing market realities, there are a number of options with regards to the regulation of IMR Services and some common features that are considered to be 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...)
- ITU is working with all Regulatory Associations, Private Sector Associations and Consumer Organizations to enhance dialogue e.g. IMR Consultation meetings July 2016
- Together all stakeholders to develop “IMR Strategic Guidelines” building blocks
- Ensure its high level adoption at global level (through the organization round tables and high Level IMR Meetings)
- ITU can work together with Regional Regulatory Associations (RA) to facilitate the dissemination of the results through various channels, such as:
 - Regulatory Regional Association events, e,g SMART Africa Initiative and One Area Network Case study, SADC- Study and recommendation on Roam Like a Local in 2014
 - Capacity building- cost modeling training of IMR for SADC region March, 2017





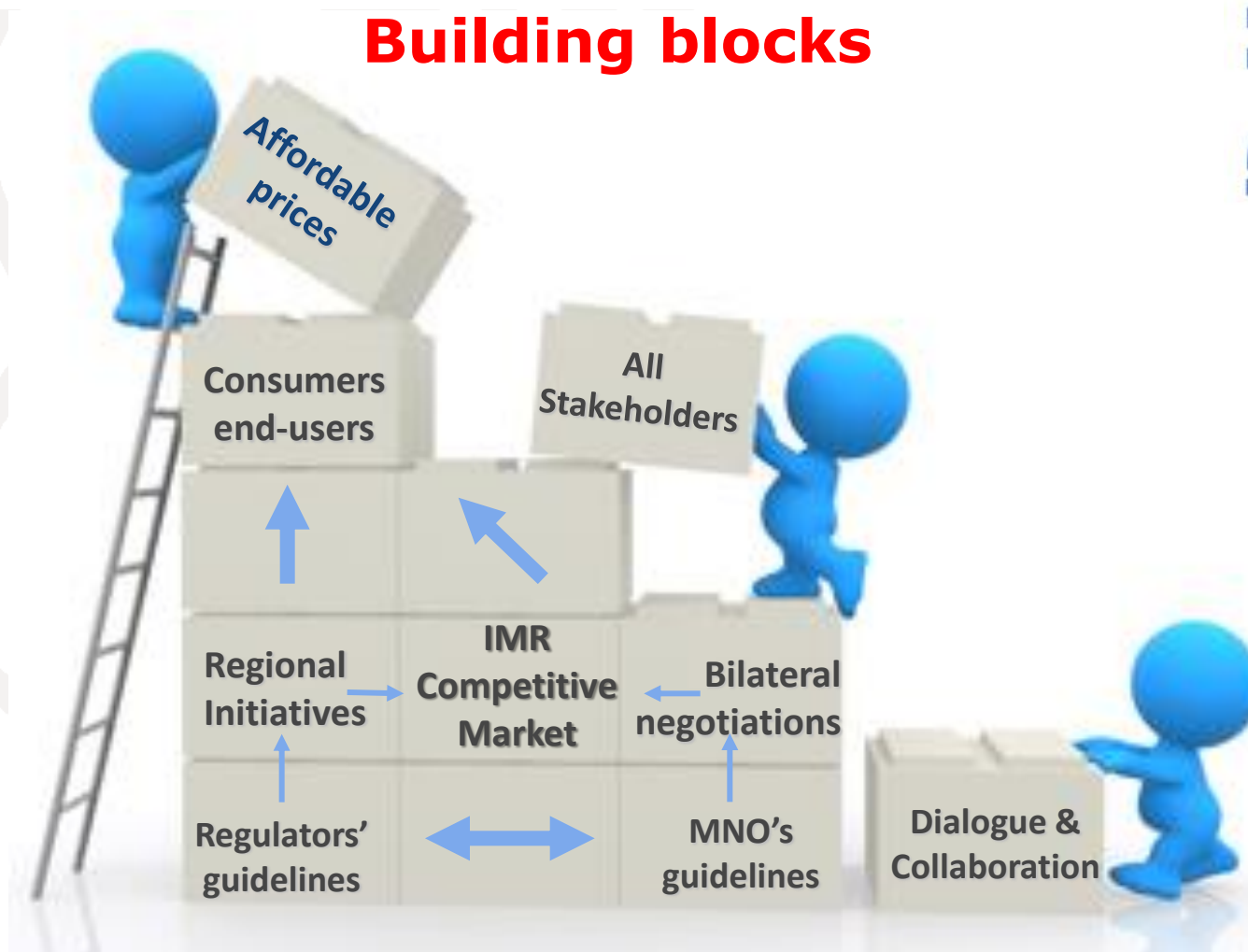
INTERNATIONAL



LET'S ROAM THE WORLD

The ITU Initiative

Building blocks



IMR Strategic Guidelines Draft Proposal

- BDT prepared a first draft of the building blocks for **IMR Strategic Guidelines** draw from recognized international best practices and from renowned publications, text and documents;
- The First Draft Proposal was shared with all Stakeholders end 2016, as to provide a basis for discussion and to create a common understanding.
- First set of comments were received from RAs and a revised version will be shared very soon for a second consultation;
- The Objective is to foster a common set of Strategic Guidelines to be applied globally that, will benefit on the one hand **consumers with lower prices** and on the other hand **operators with increased returns on their investme due to increase of traffic.**

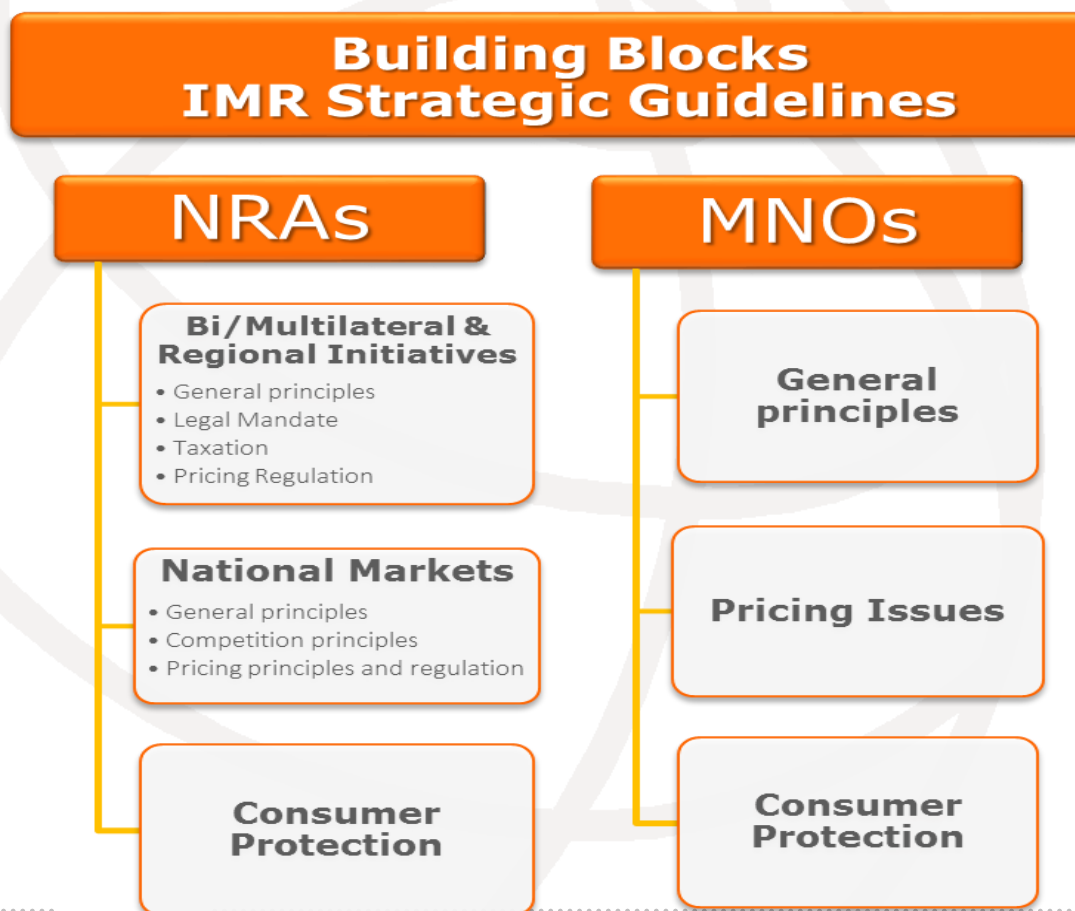




INTERNATIONAL



IMR Strategic Guidelines Draft Structure



Merci beaucoup !!

For more information

carmen.prado@itu.int

anne.rita.ssemboga@itu.int

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