ITU activities related to roaming issues

ITU High Level Workshop on International Mobile Roaming

Geneva, 23-24 September 2013

Makhtar FALL
BDT / IEE / RME
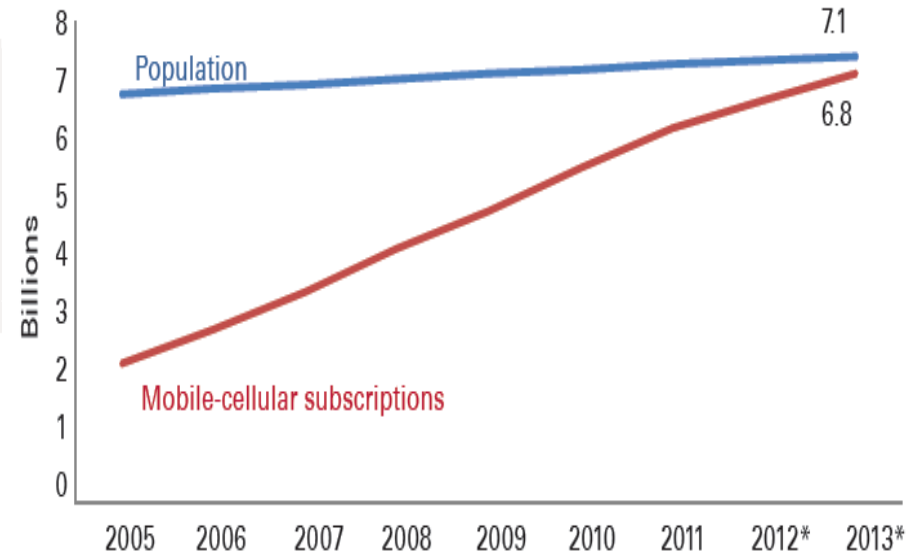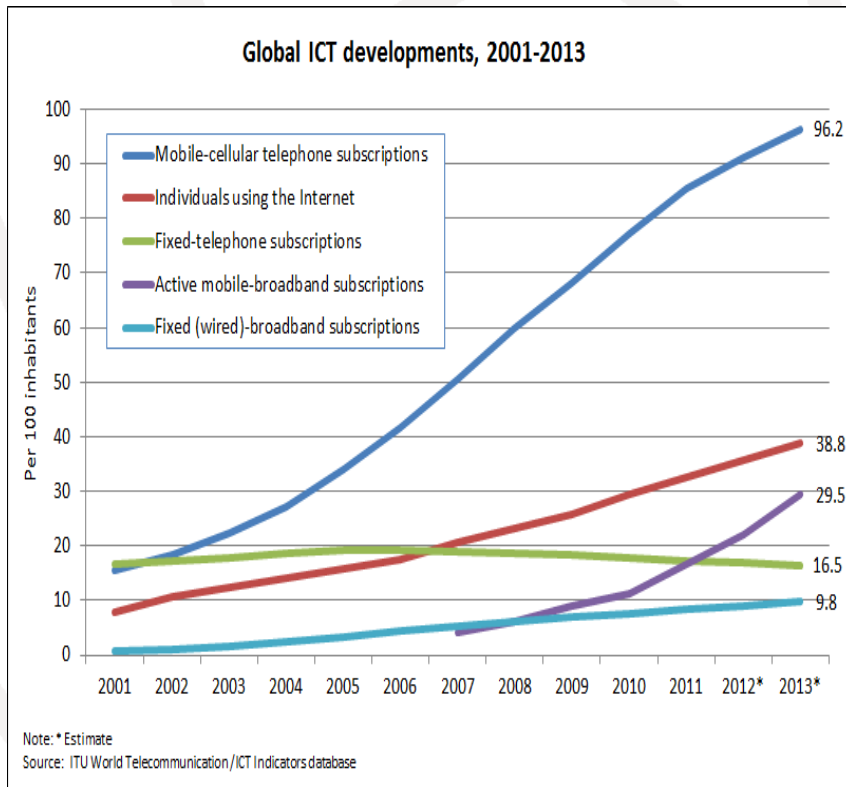**International Telecommunication Union**

Content

- ICT development
- Regulatory trends
- Roaming issues
- ITU activities on roaming
- ITU resources on roaming
- ITU/BDT survey on Tariff Policies 2012, Mobile Roaming Section

Global ICT developments

Years 2001 - 2013

Mobile catches up with the world population

Regulatory trends, world

Legend:
- Regulators
- Competition
- Privatization
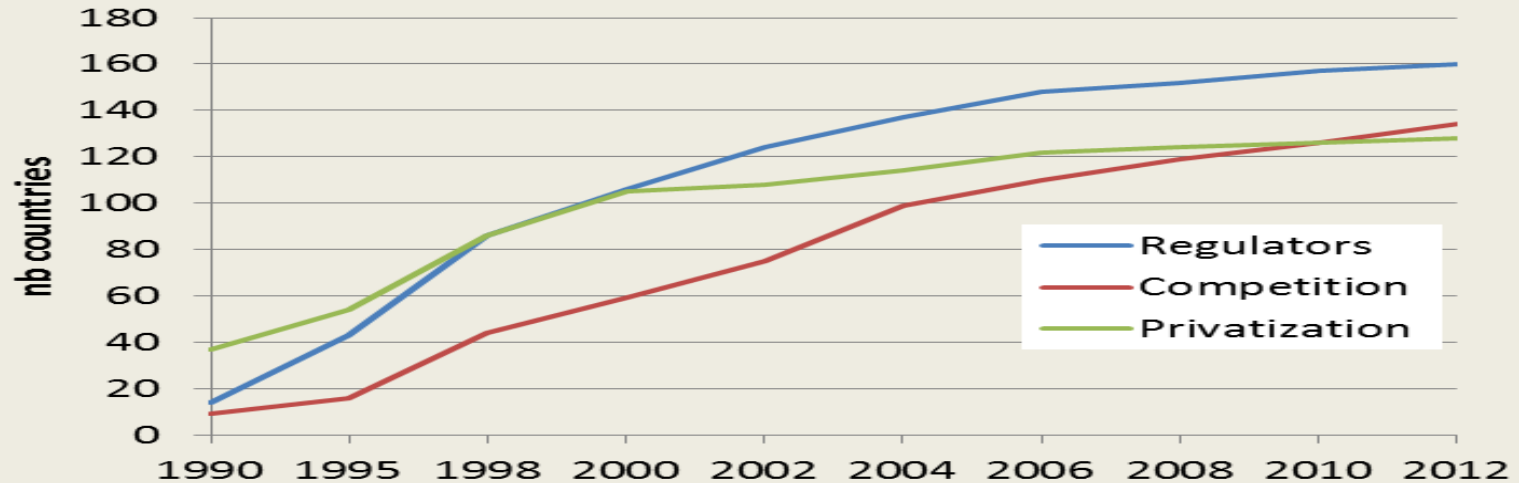
Separate regulators, percentage by region, 2012

Region	Percentage
The Americas	94%
Africa	91%
Europe	88%
Arab States	76%
Asia-Pacific	73%
CIS	42%

Source: ITU Telecommunications/ICT Regulatory Database
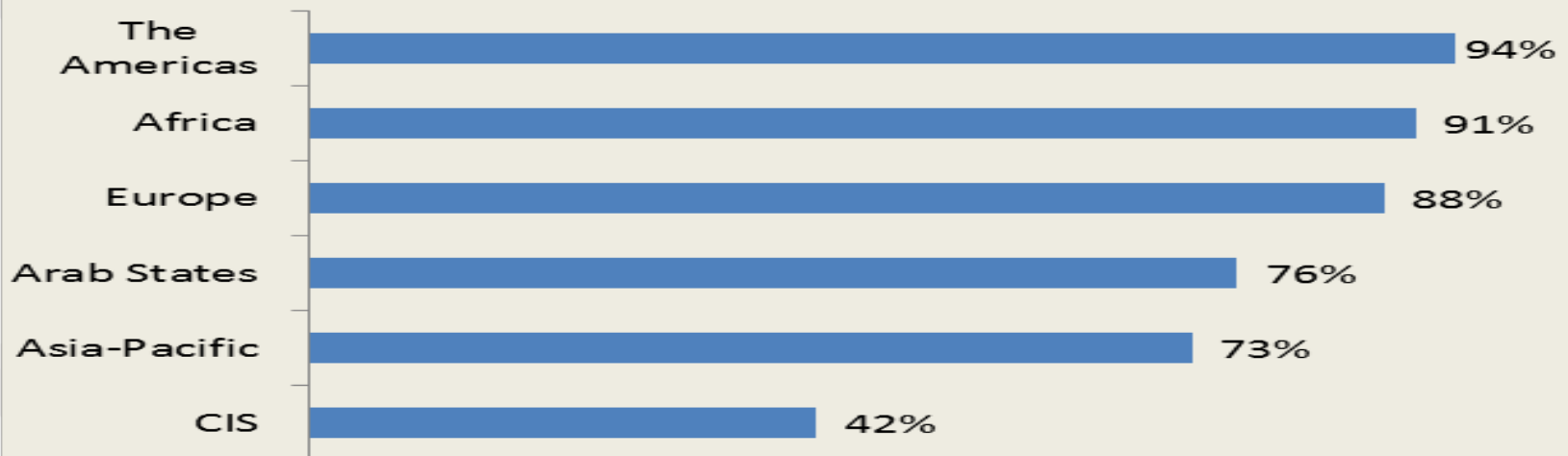
Mobile device volumes continue to rise......

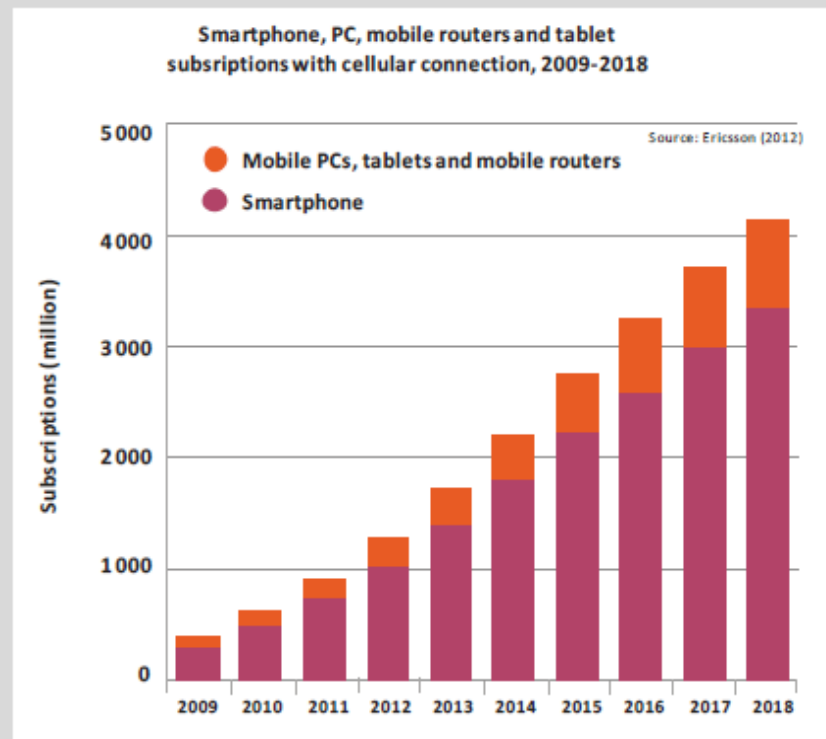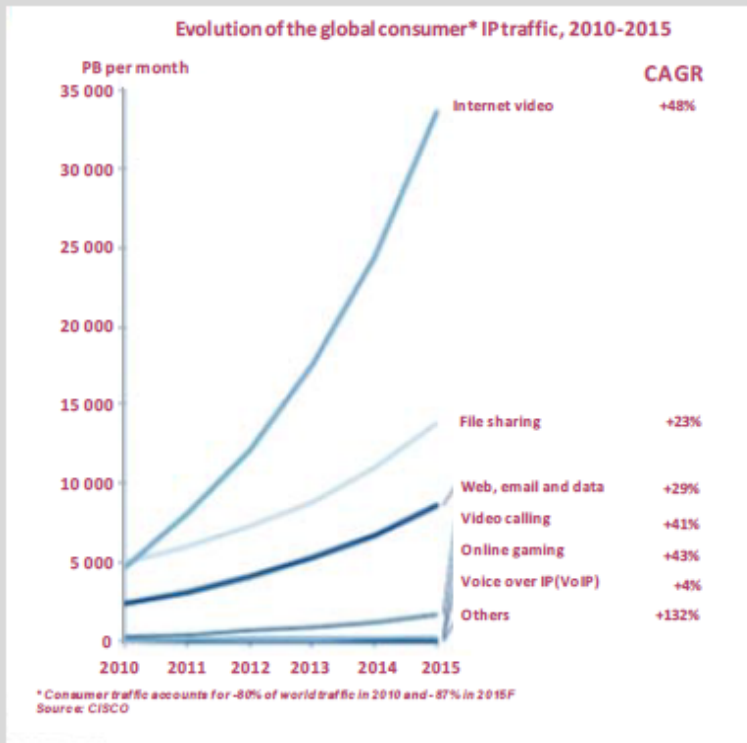Figure 1.4: Evolution of the global consumer IP traffic, 2010-2015 (left chart) and in mobile device volumes, 2009-2018 (right chart)

Source: Cisco (left chart), and Ericsson Mobility Report 2012 (right chart).

Note: Consumer traffic accounts for ~80% of world traffic in 2010 and ~87% in 2015F.

Some roaming concerns…

- **The problem of jurisdiction**: International roaming requires a regional or global regulatory approach;

- **Lack of transparency** on IMR charges; frequently change; large price difference between different networks;

- **Lack of awareness** of consumers and businesses (costs of services, substitute and suppliers…)

Challenges of roaming

- Make full use of the great potential of mobile communications;

- Have a coherent regulatory framework and effective competitive regulatory environment ;

- Have retail prices closer to costs of services.

ITU Regulatory, Costing and Tariffs mandate

- Creation of tools for effective regulation and training materials, 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

ITU resources on roaming (tools & platforms)

- Global Symposium for Regulators (GSR)
- Regional Forums on ICTs Regulation (FTRA, RDF…)
- Regional Economic and Financial Forums (Africa, ARB, AFR, AMR, ASP …)
- ITU-T Study Group 3 activities and Regional Groups / Rec D.98
- ITU Survey on Tariff Policies, to collect useful Mobile Roaming data
- ICT Regulation toolkit

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

ITU SURVEY ON TARIFF POLICIES 2012, Mobile Roaming

What is the general trend of the <u>IMR retail price of voice</u> over the past three years in your country 2012 ?
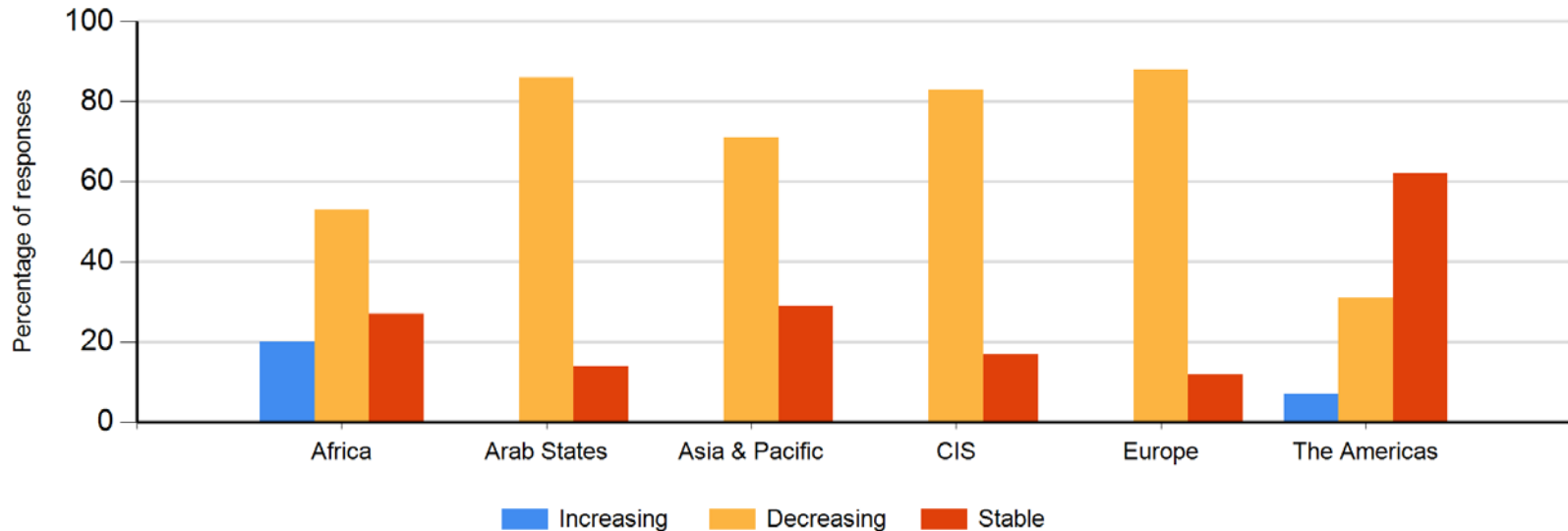

What is the general trend of the IMR RETAIL PRICE OF VOICE over the past three years in your country?, 2012
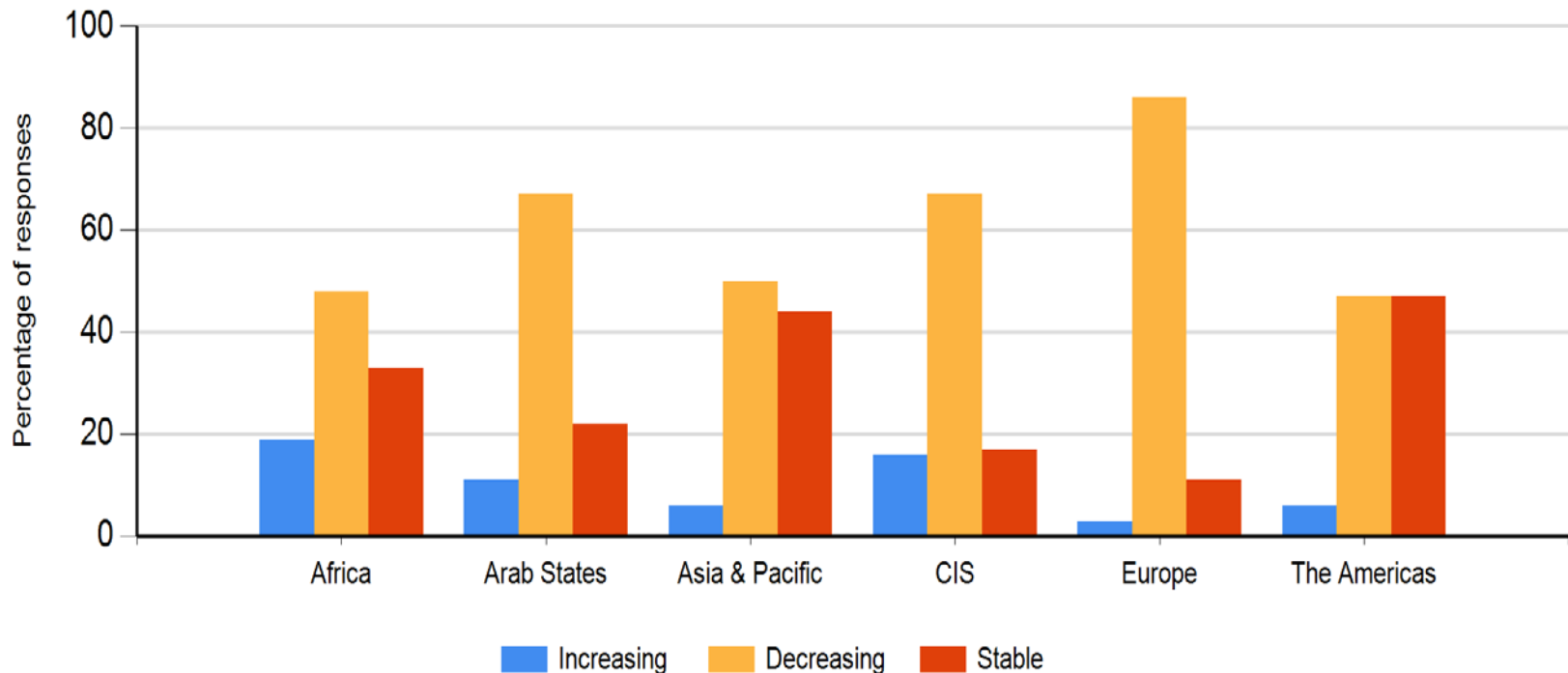
ITU SURVEY ON TARIFF POLICIES 2012, Mobile Roaming
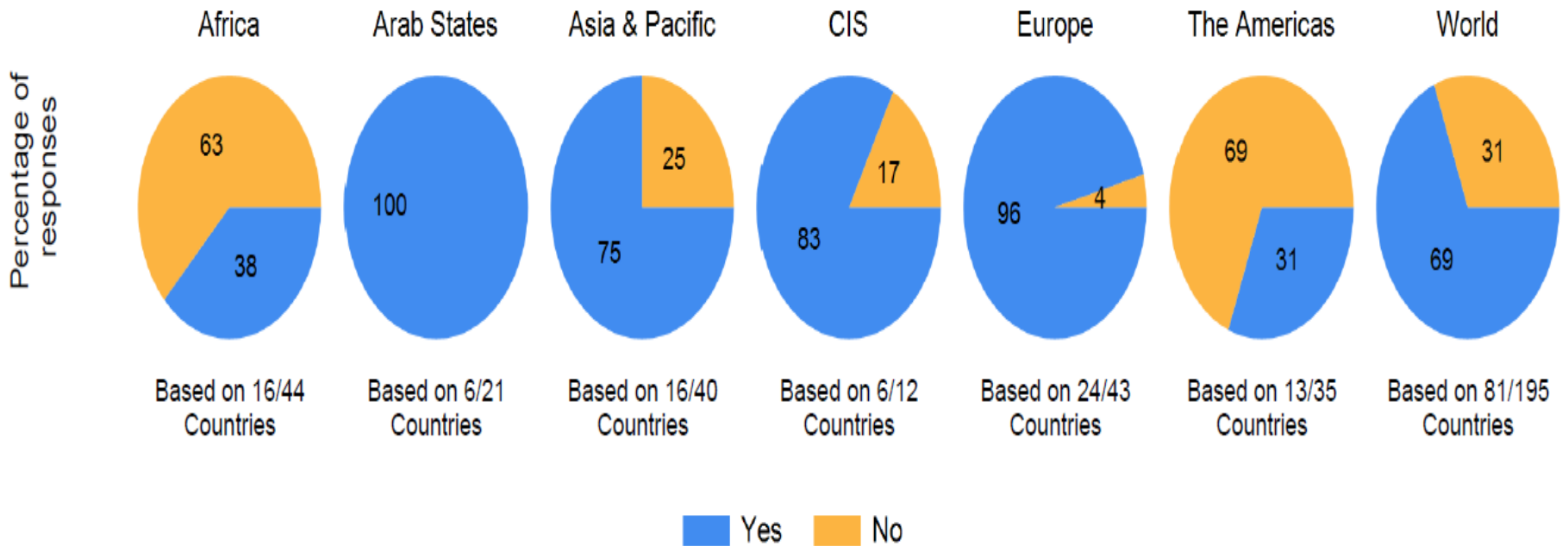
What is the general trend of the <u>IMR Data retail price</u> over the past three years in your country 2012 ?

What is the general trend of the DATA IMR RETAIL PRICE over the past three years in your country?, 2012
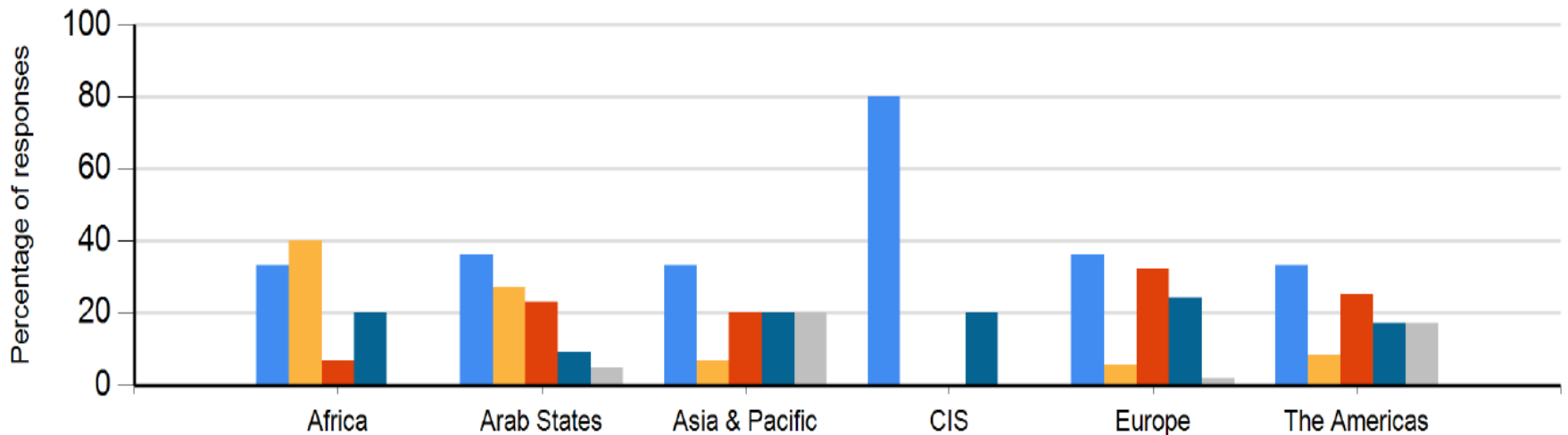
ITU SURVEY ON TARIFF POLICIES 2012, Mobile Roaming

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

ITU SURVEY ON TARIFF POLICIES 2012, Mobile Roaming

Operators measures to reduce bill shock

Legend:
- Home operator sends text messages to inform his customers of their roaming tariffs when they arrive in another country
- Mobile operators in the visited country to send SMS with roaming tarifs information to visiting customer (according to roaming agreement between home o...
- Home operator sends alert SMS to the user informing that he/she is reaching the agreed roaming spending limit
- Suspending service when usage exceeds the spending limit fixed
- Other

Some Best practices from recognized by Regulators*

- Empowering consumers to make informed decision through the development of online tools to check speeds, quality of service and price;

- Cooperation and dialogue between all stakeholders;

- Agreement on an interregional regulation;

- Success depends largely on the cooperation of various stakeholders

* From GSR Best practices Guidelines

ITU Reports

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

International Mobile Roaming Services: Facilitating competition and protecting users, September 2013

- **Key IMR Regulatory Issues**
- **Structural solution for the IMR markets**
- **Protecting and empowering subscribers**
- **International, regional and bilateral initiatives**
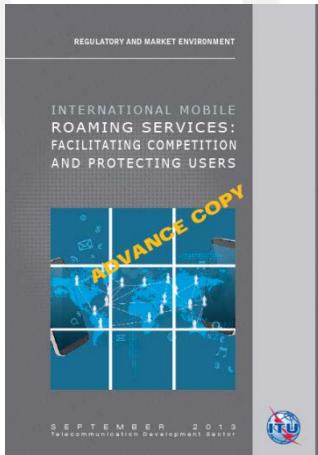
Trends in Telecommunication Reform 2008 : Six degrees of sharing

Chapter on International mobile roaming
- The importance of international mobile roaming
- Regulating international mobile roaming Tariffs
- International mobile roaming case studies

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

Future platforms for roaming discussion...

- Regional and Financial Forum for Africa and Meeting of the SG3RG-AFR, Brazzaville, Congo, 3-6 February 2014

- Regional and Financial Forum for Latin America and the Caribbean and Meeting of the SG3RG-LAC, Costa Rica, March 2014

- Regional and Financial Forum for Asia and Pacific and Meeting of the SG3RG-ASP, Mongolia, July 2014

- GSR14, Manama, Bahrain, 3-5 June 2014

- FTRA 14, Abidjan, Côte d'Ivoire, june 2014

Thank You

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