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**1st Meeting of SATRC Working Group on Policy,**
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22 – 23 October 2012, Tehran, Islamic Rep. of Iran

**Document**
**SAPIV/WGPRS01/INP-13**
**22 October 2012**

**Bhutan Infocom and Media Authority**

# DETAIL OF THE WORK ITEM ON "ROAMING IN SATRC COUNTRIES"

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Study on Regional Mobile Roaming within the SATRC region

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# Content of the Presentation

| Scope and Structure of Work | Regulation pertaining to Mobile Roaming | Regional Initiatives | Questionnaire for the study |

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Scope of the study

(Proposed)
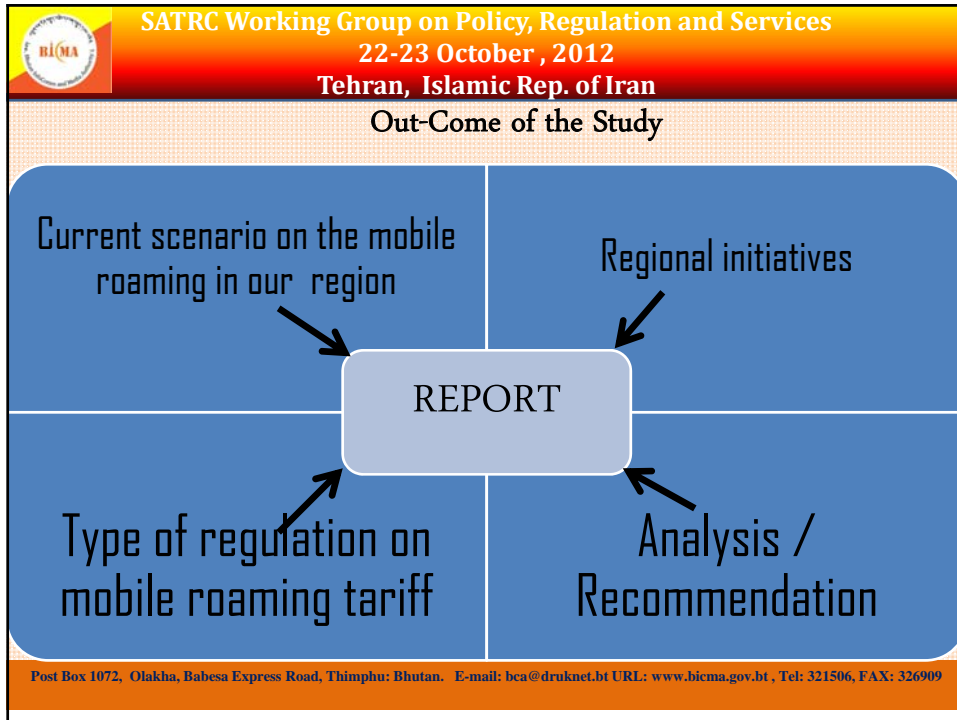
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# Objective of the study

Understand the current  roaming arrangement including the difficulties  and hindrance  in the region

Study  the regional initiatives in facilitating mobile roaming

Recommend the possible options for establishing regional mobile roaming within our region

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Regulation pertaining to Mobile roaming

(summary)

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# International Mobile Roaming Tariff Regulation Strategies

| No Direct regulation | Regulate Whole-sale international mobile roaming rates only | Regulate retail international mobile roaming rate only | Regulate both international Whole-sale and Retail mobile roaming rate |
|---|---|---|---|

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Current mobile roaming charges in south asia

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## A report by Lirneasia ( 2011) indicates that the roaming charges within South Asia is one of the highest in the world

| | | Home Country | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Afghanistan | Bangladesh | Bhutan | India | Maldives | Nepal | Pakistan | Sri Lanka |
| Visited Country | Afghanistan | | 0.84 | - | 1.03 | 1.35 | 1.26 | 0.36 | 1.40 |
| | Bangladesh | 1.00 | | - | 1.17 | 0.71 | 1.62 | 0.36 | 1.09 |
| | Bhutan | - | 1.55 | | 1.85 | 2.50 | 2.55 | - | 2.14 |
| | India | 1.50 | 1.83 | 2.12 | | 2.68 | 3.07 | - | 2.16 |
| | Maldives | 1.00 | 0.43 | - | 0.84 | | 0.47 | 0.36 | 1.16 |
| | Nepal | 1.50 | 0.67 | - | 1.03 | 1.11 | | 0.36 | 0.97 |
| | Pakistan | 1.00 | 0.49 | - | - | 0.65 | 0.62 | | 0.65 |
| | Sri Lanka | 2.00 | 0.58 | - | 0.86 | 0.78 | 0.55 | 0.36 | |

**Roaming - Incoming call tariffs (LIRNEasia, 2011)**

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| | | Home Country | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Afghanistan | Bangladesh | Bhutan | India | Maldives | Nepal | Pakistan | Sri Lanka |
| Visited Country | Afghanistan | | 2.20 | - | 2.00 | 2.20 | 3.43 | 2.25 | 2.54 |
| | Bangladesh | 2.00 | | - | 0.81 | 0.94 | 1.14 | 1.49 | 1.02 |
| | Bhutan | - | 2.13 | | 1.65 | 3.20 | 3.41 | - | 2.51 |
| | India | 3.00 | 2.12 | 2.80 | | 3.34 | 3.41 | - | 2.77 |
| | Maldives | 2.00 | 1.58 | - | 2.38 | | 3.18 | 2.25 | 2.25 |
| | Nepal | 3.00 | 1.02 | - | 1.17 | 1.61 | | 2.25 | 1.07 |
| | Pakistan | 2.00 | 0.27 | - | - | 0.39 | 1.07 | | 0.92 |
| | Sri Lanka | 5.00 | 2.11 | - | 2.11 | 3.09 | 3.68 | 2.99 | |

**Roaming - Outgoing call (Home country) tariffs (LIRNEasia, 2011)**

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Case studies on Regional initiatives for to regulate Mobile Roaming charges

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**European Union** imposes European-wide price caps on wholesale tariffs and retail rates.

❖   European Model is based on a  strong political vision  with constructive pragmatism: to address the concerns of  their citizens, and  to provide European solutions for European problems

❖   It introduced lower pan-European voice roaming prices in the form  of a "Eurotariff" designed to build a "real Europe for Citizens"

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| Quarter | IOT average per minute voice call EU/EEA | IOT SMS EU/EEA | IOT Data per Mb | IOT Data per Mb inbound Roaming EU/EEA |
|---------|---------|---------|---------|---------|
| Q1 2009 | 0.226 € | 0.136 € | 1.906 € | n.a. |
| Q2 2009 | 0.216 € | 0.133 € | 1.205 € | n.a. |
| Q3 2009 | 0.224 € | 0.042 € | 0.585 € | 0.585 € |
| Q4 2009 | 0.225 € | 0.039 € | 0.554 € | 0.554 € |
| Q1 2010 | 0.211 € | 0.039 € | 0.585 € | 0.443 € |
| Q2 2010 | 0.211 € | 0.038 € | 0.487 € | 0.364 € |
| Q3 2010 | 0.196 € | 0.038 € | n.a. | 0.353 € |
| Q4 2010 | 0.197 € | 0.038 € | n.a. | 0.340 € |
| Q1 2011 | 0.183 € | 0.038 € | 0.385 € | n.a. |
| Q2 2011 | 0.183 € | 0.038 € | 0.355 € | n.a. |

Source:  WIK, BEREC Benchmark Reports

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Visited network wholesale cost estimates for calls made in the EU in 2002 and 2011

| Cost component | 2002 (per minute in €cent) | 2011 (per minute in €cent) |
|---------|---------|---------|
| Origination | 19 | 3 |
| Termination | 22 | 4 |
| Transit | 2 | 2 |
| Signalling | n.a. (less than €cent1) | n.a. (less than €cent1) |
| Roaming overheads | 2 | 2 |

Home network costs estimates for roaming call made in the EU in 2002 and 2011

| Cost component | 2002 (per minute in €cent) | 2011 (per minute in €cent) |
|---------|---------|---------|
| IOT paid | 100 | 18 |
| Roaming overheads | 2 | 2 |
| Signalling | n.a. (less than €cent1) | n.a. (less than €cent1) |
| Retail costs | 14 | 14 |

Source:  WIK

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**The Arab States**  also started to regulate  International mobile roaming prices ( price ceiling) within Arab States through Arab Regulators' Network (AREGNET).

❖ They regulates retail rates by imposing a 15% ceiling cap on the local calls.

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**ASEAN** is working towards make free roaming charges within the member countries:

" ASEAN Ministers announced in January 2011, the ASEAN Master plan 2015, with intention to adopt measures to reduce roaming tariffs."

Region is yet to adopt a unified approach to reducing roaming charges but has adopted best practice guidelines to improve transparency

" In April 2011, Singaporean and Malaysian ministers responsible for communications announced bilateral price controls on mobile roaming. Regulation requires progressive roaming price reductions of: up to 30% for voice calls and 50% for SMS by all mobile operators in Singapore and Malaysia"

**Malaysia –Singapore  -Bilateral Initiative**

**Malaysia –Singapore :**

" In April 2011, Singaporean and Malaysian ministers responsible for communications announced bilateral price controls on mobile roaming. Regulation requires progressive roaming price reductions of: up to 30% for voice calls and 50% for SMS by all mobile operators in Singapore and Malaysia"

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**Singapore to Malaysia retail roaming rates 2011 – 2012**

| Singaporeans travelling to Malaysia | 1 January 2011 | From 1 May 2011 | From 1 May 2012 |
|---|---|---|---|
| Receiving an incoming call | $0.70 - $1.00 | $0.56 - $0.80 | $0.49 - $0.70 |
| Call to a Malaysian Number | $0.50 | $0.40 | $0.35 |
| Call to a Singapore Number | $0.59 | $0.52 | $0.46 |
| SMS | $0.60 - $0.61 | $0.42 - $0.43 | $0.30 - $0.31 |

*Source: IDA*

**Malaysia to Singapore retail roaming rates 2011 – 2012[21]**

| Malaysians travelling to Singapore | 1 January 2011 | From 1 May 2011 | From 1 May 2012 |
|---|---|---|---|
| Receiving an incoming call | RM 2.00 - 2.50 | RM 1.60 − 2.00 | RM 1.40 − 1.75 |
| Call to a Singapore Number | RM 1.75 - 2.40 | RM 1.40 − 1.92 | RM 1.225 − 1.68 |
| Call to a Malaysian Number | RM 3.90 − 4.84 | RM 3.12 − 3.87 | RM 2.73 − 3.39 |
| SMS | RM 0.98 − 1.00 | RM 0.69 − 0.7 | RM 0.49 − 0.50 |

*Source: MCMC*

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# International regulatory development in mobile roaming

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| International organizations | |
|---|---|
| ITU | A number of administrations have submitted proposals to include roaming provisions into the revision of the International Telecommunications Regulations. ITU Study Group on Tariffs & Accounting is discussing a draft Recommendation. |
| OECD | Proposed "Recommendation on International Mobile Roaming Services" for voice and data roaming. |
| WTO | A number of governments have submitted a request to consider how existing WTO instruments may be used to deliver (wholesale/retail) roaming services on *"more competitive terms and conditions"*. |
| **Regional initiatives** | |
| Arab World | The Gulf Cooperation Council adopted a ministerial resolution some three years ago. More recently it announced the 2nd phase of implementation and, as from July 2011, operators in the 6 Gulf states will implement a further reduction voice roaming tariffs between Gulf States. |
| Americas | A number of regional organizations have conducted studies (Regulatel, CITEl IIRSA). **IIRSA South American Roaming Agreement** implemented throughout 2010. First phase focused on increasing volume and quality of roaming traffic. Regulators are now concerned with pricing issues. Some countries are considering bilateral measures to decrease tariffs on border zones (Brazil, Chile, Peru). US: FCC White Paper on Bill Shock published October 2010. Roaming featured in the paper. |
| Asia-Pacific | ASEAN: Ministers announced in January 2011, the ASEAN Masterplan 2015, with intention to adopt measures to reduce roaming tariffs. Region is yet to adopt a unified approach to reducing roaming charges but has adopted best practice guidelines to improve transparency. |
| Africa | SADC: Home & Away Roaming tariff transparency measures started in January 2011. 2nd Phase RIA II (Regulatory Impact Assessment) currently being conducted to provide concrete advice to ministers on the charges to apply within SADC countries |
| **Bilateral activity** has included the following country dyads: | |

| Singapore / Malaysia | Finland / Russia | NZ / Australia |
|---|---|---|
| Brazil / Peru | Russia / Poland | |

*Source: GSMA – July 2011*

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# Questionnaire for the study!

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Mobile Roaming arrangement  of respective  country have with the other Member countries

Average mobile roaming charges ( both In-Coming and Out-going in USD)

Difficulties or challenges associated with the current Mobile Roaming arrangement within our region

Choice of model/method to adoption

Choice of regulation on  Mobile Roaming Tariff

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Structure of the report

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1. Introduction
   - Objective of this study
   - Benefits of implementing regional Mobile Roaming
2. Current status of Mobile Roaming in the SATRC Member Countries
   - Roaming charges
3. International Mobile Roaming Trend
4. Regulation pertaining to Mobile Roaming
5. Costs elements involved with Mobile Roaming
6. Regional Mobile Roaming Initiatives
   - European model
   - Arab State Model
   - ASEAN Model
   - Bilateral Model
     - ✓ Australian and New Zealand ( Trans-Tasman )
     - ✓ Singapore and Malaysia
7. Analysis
8. Recommendation for implementing Mobile Roaming within the SATRC Member Countries
9. Conclusion
10. Reference

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Work plan for the study

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| Work activities | October 2012 | November 2012 | December 2012 | January 2013 | February 2013 | March 2013 | April 2013 | May 2013 | June 2013 |
|---|---|---|---|---|---|---|---|---|---|
| Finalization of Scope of study | ██ | | | | | | | | |
| Circulation of questionnaire | ██ | | | | | | | | |
| Receive of response | | ██ | ██ | | | | | | |
| Analysis the response | | | ██ | ██ | | | | | |
| Draft report | | | | ██ | ██ | ██ | | | |
| Circulate draft report for comments | | | | | | | ██ | | |
| Receive comments on the report | | | | | | | ██ | ██ | |
| Finalize the report | | | | | | | | | ██ |

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Conclusion remark!

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❖    Mobile Roaming is vital for any cooperation

❖    Can we ( South Asia Region) agree on?  If yes, then
     ✓Timeline to initiate the process
     ✓ How do we go or facilitate the process including the model

❖    Regulators and operators to meet and agree on how to reduce
     Mobile Roaming Charges

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*Tashi Delek*

*&*

*Thank you*

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