

**INTUG**

**EVUA Mobility, London 25 iii 2004**

**[www.INTUG.net](http://www.INTUG.net)**

# **An update on international roaming**

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# INTUG what is INTUG?

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- members
  - national associations
  - corporations
  - individuals
- activities
  - ITU and WTO
  - OECD
  - APEC TEL, CITELE and EU

# INTUG our aims

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- real and effective competition
- genuine choice for users
- lower prices
- higher quality
- more innovative services
- constructive co-operation with
  - international bodies
  - governments
  - regulators

# INTUG priorities

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- 1. open access to global mobile networks**
2. regulatory best practice
3. liberalization
4. leased lines
5. IP telephony
6. digital divide
7. universal access
8. numbering

# INTUG mobile priorities

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- **International Mobile Roaming (IMR)**
  - significant reductions in charges
  - availability of a range of services, including global and multi-country tariffs, without necessarily having to pay roaming charges
  - regulatory action to end the cartel of mobile network operators
- **Fixed-to-Mobile call termination (F2M)**
  - cost orientation of wholesale prices
  - wholesale price reductions speedily passed onto users
  - Mobile Number Portability (MNP)
  - availability on demand
  - inexpensive or free
  - no consequential loss of facilities or special offers
- **Short Message Service (SMS)**
  - interconnection of all operators
  - significant reductions in prices towards cost orientation
  - regulatory action to end the cartel of mobile network operators
- **national mobile roaming**
  - availability in areas of low population density
  - availability to support introduction of new operators and new technology

# INTUG avoiding roaming charges

- need for policies
- need for to inform staff
- need for analysis of invoices
  - follow-up with operators
  - follow-up with individuals

Provide telephone and Internet access to visitors, so you can ask for it in return.

[http://www.intug.net/views/avoiding\\_roaming\\_charges.html](http://www.intug.net/views/avoiding_roaming_charges.html)

# INTUG advice

- do ensure that your absence message invites callers to send you electronic mail in preference to calling your mobile phone
- do check your e-mail regularly and respond as promptly as possible
- do carry and use a telephone calling card
- do use a Wi-Fi hot spot or broadband connection for data access for your lap-top or PDA
- do ask the caller to ring you back on a nearby fixed line
- do take the number of the caller and call them back using your calling card on a fixed line



# INTUG minimise use of

- your mobile phone and your hotel phone especially for long distance and international calls
- GPRS, EDGE and Internet dial-up with a mobile phone handset

# INTUG mobile data

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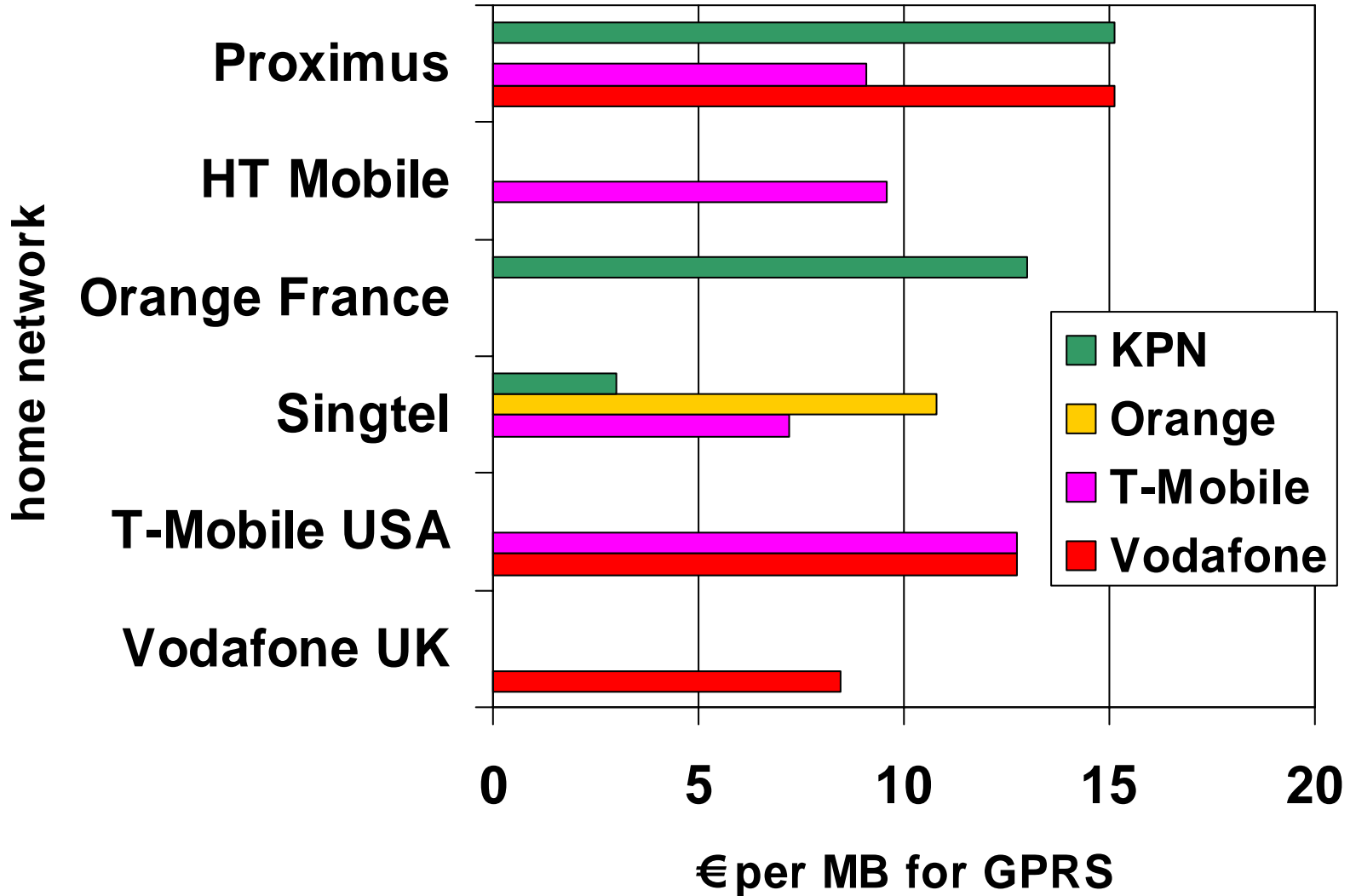
- need global or European footprints
- need Service Level Agreements (SLAs)
- needs to be competitive with other forms of data access
- GSM networks are much more expensive than CMDA
- best practice is flat-rate and cheap
- very little evidence Europe
  - latest offer from T-Mobile UK?
  - only national, nothing yet on roaming

# INTUG Japan and USA

- KDDI Au Win in Japan
  - cdma2000 1X EV-DO
  - ¥4,200 (€33) monthly unlimited
  - up to 2.4 Mbps downlink and 144kbps or more uplink (best efforts)
- Verizon
  - “national” cdma2000 1X coverage
  - US\$ 79.99 (€68) monthly unlimited
  - 40-60kbps, bursting to 144kbps
- AT&T Wireless
  - “national” GPRS/EDGE
  - US\$ 79.99 (€68) monthly unlimited
  - 100-130kbps, bursting to 200kbps

# INTUG GPRS roaming in Netherlands

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# INTUG GPRS roaming charges

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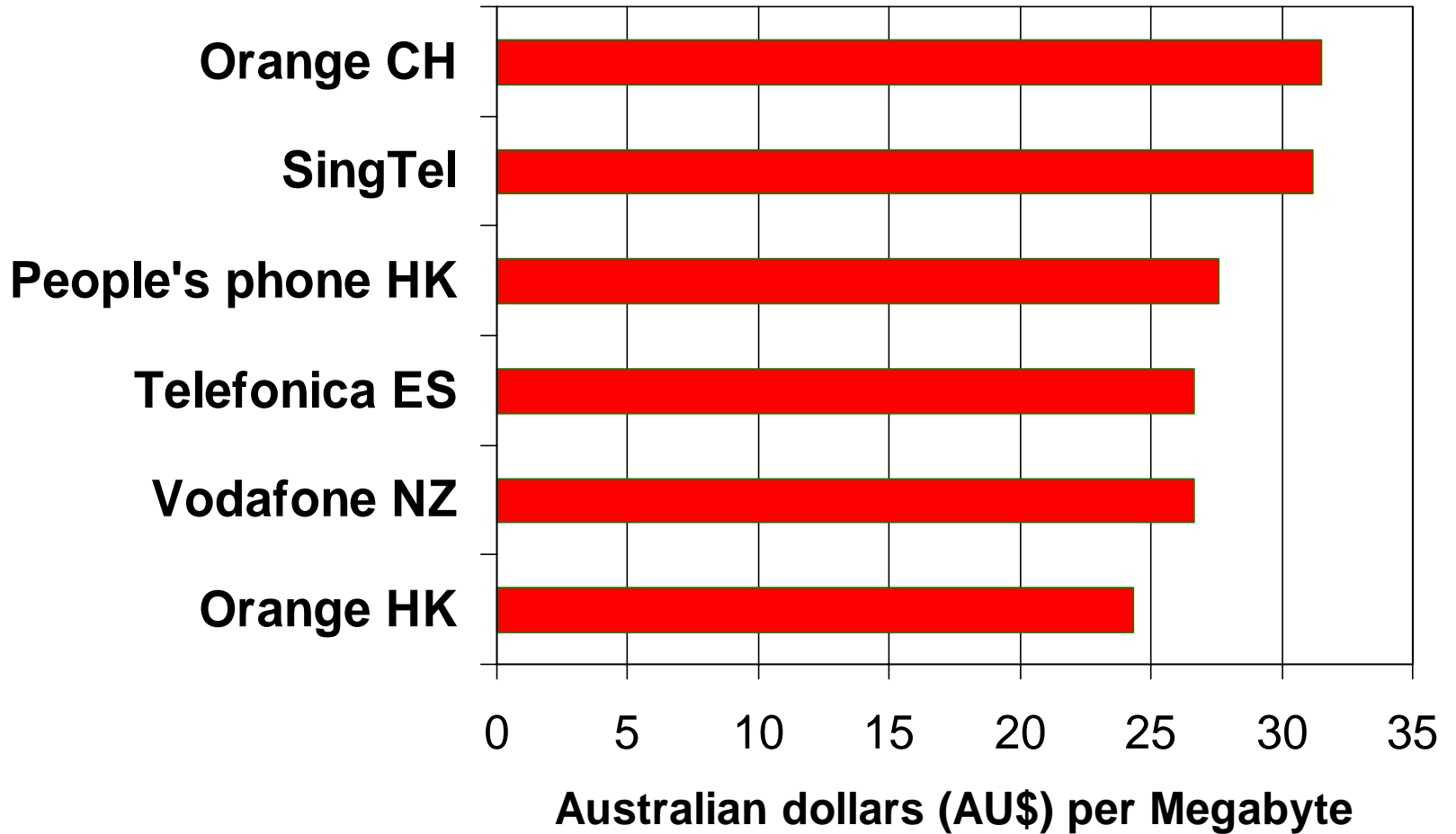
- Vodafone UK on Vodafone NL
  - £5.88 (£10.28 on Blackberry) €8.47
- T-Mobile USA on T-Mobile and Vodafone
  - US\$ 15.00 €12.75
- Singtel
  - KPN Mobile €3.00 (charging unit 1 kB)
  - T-Mobile €7.20 (charging unit 100 kB)
  - Orange €10.80 (charging unit 10 kB)
- Orange France on KPN
  - €13.00
- HT Mobile (Croatia) on T-Mobile
  - HRK73.20 per MB (€9.58)
- Proximus
  - KPN and Vodafone €15.13
  - T-Mobile €9.08

Source: operators web sites 25 November 2003

# INTUG GPRS roaming in Australia

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AU\$ 1 = EUR 0.611

# INTUG GPRS roamers

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- Vodafone
  - from UK/Espana – not available
  - from NZ – NZ\$ 30/MB (AU\$ 26.67)
- Orange CHF 31/MB (AU\$ 31.53)
- SingTel Mobile AU\$ 31.20/MB
- Hong Kong
  - Orange HK\$ 150/MB (AU\$ 24.35)
  - People's Phone HK\$ 170/MB (AU\$27.60)
- Telefónica Móviles
  - on Telstra €16.69/MB (AU\$26.67)

HK\$ 6.16 = AU\$ 1 = NZ\$ 1.125

# INTUG roaming voice prices

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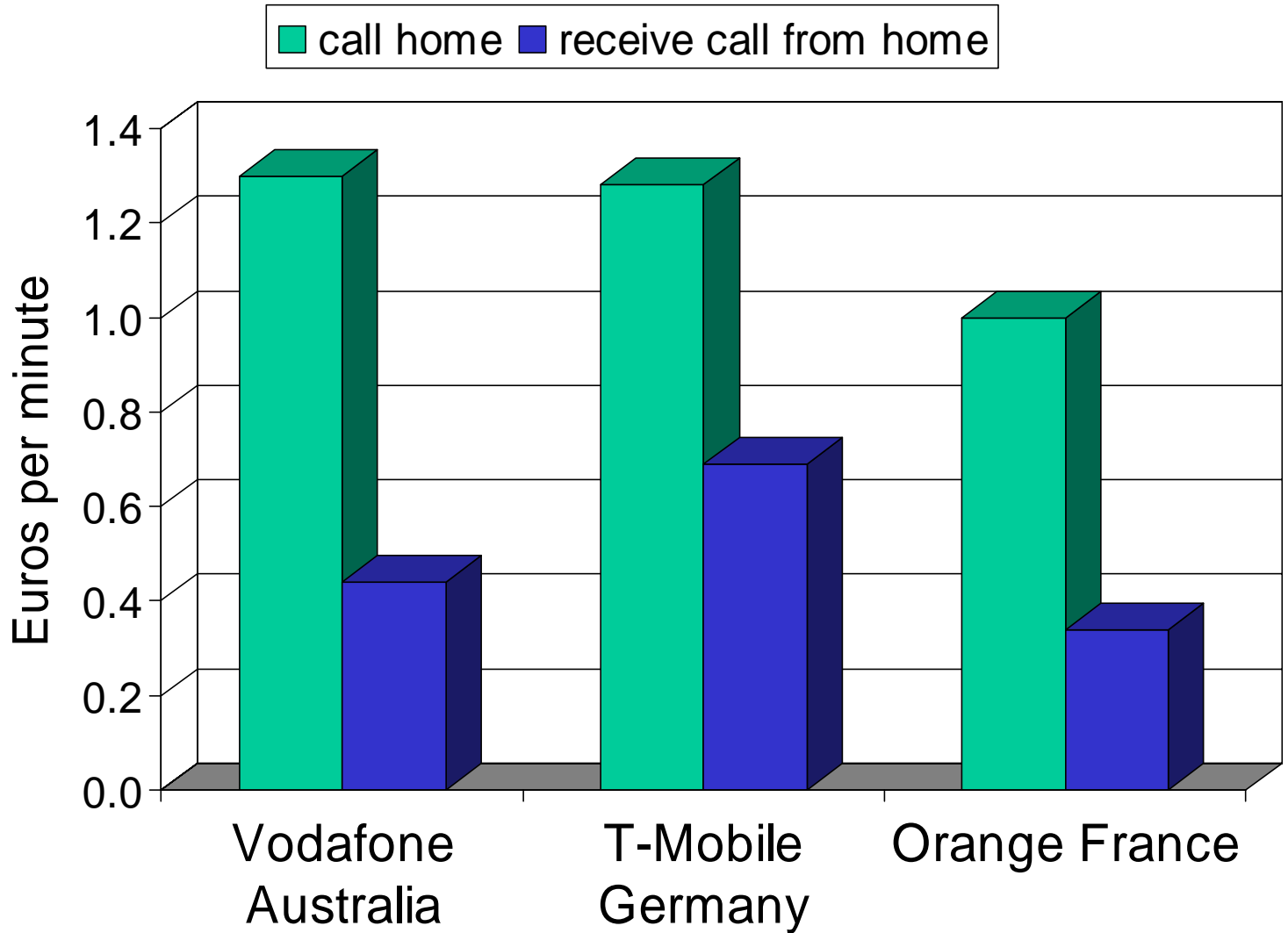
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- operators claim wholesale market
  - is competitive
  - that market shares are changing
  - that prices that are declining
- some strange retail price movements
  - national calls equated to calls home
  - greater variation between operators



# INTUG roaming calls in Belgium

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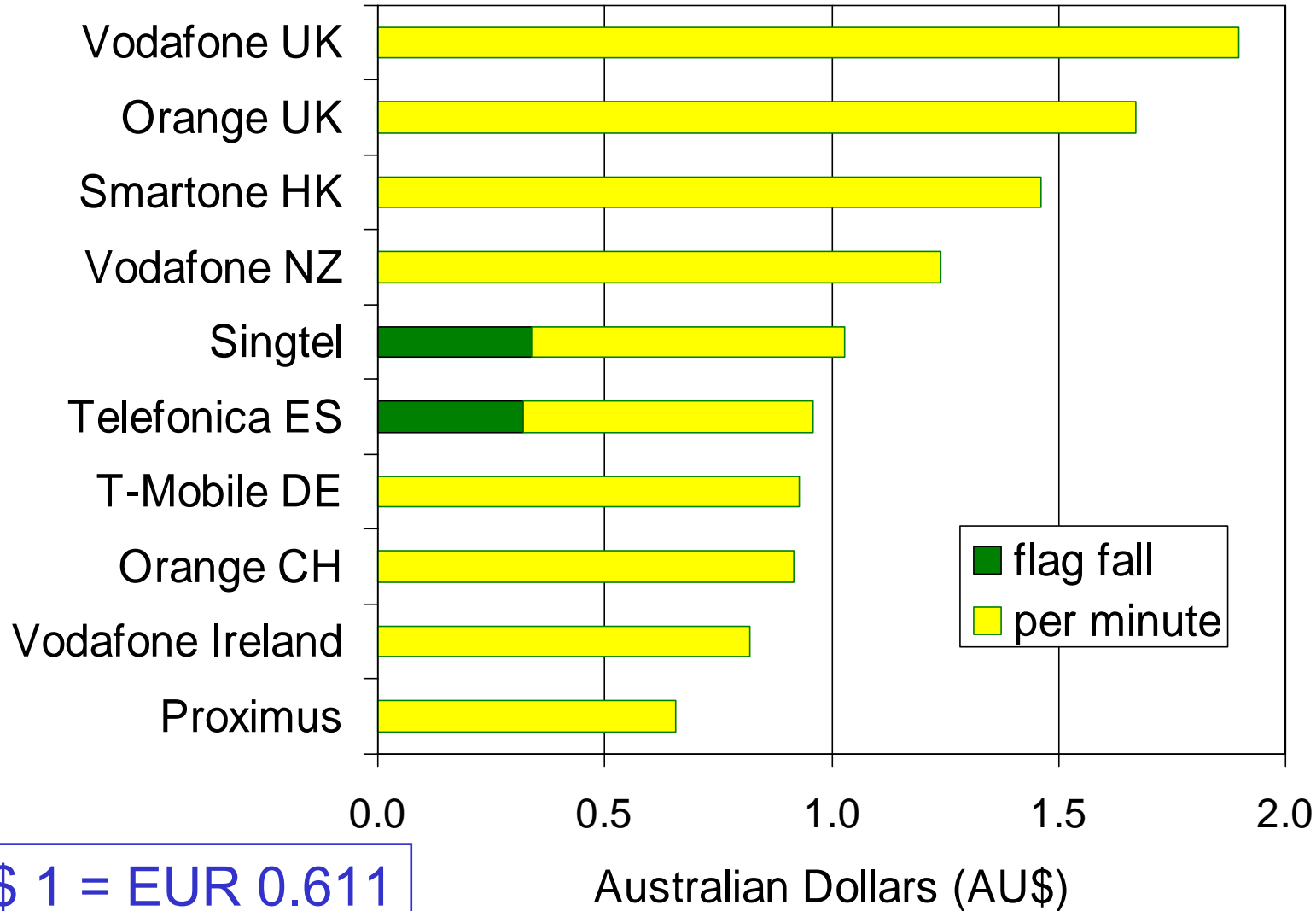


# INTUG roaming in Belgium

- Vodafone Australia on Proximus
    - €0.18 to send an SMS (AU\$ 0.29)
    - €0.58 to call Belgium (AU\$ 0.95)
    - €1.31 to call Australia (AU\$ 2.15)
  - Orange France (on all 3 networks)
    - €0.34 for incoming call
    - €1.00 to call Belgium or France
    - €2.40 to call Australia
  - T-Mobile Deutschland on Proximus
    - €0.32 to send an SMS (free to receive)
    - €0.69 to receive a call from Germany
    - €1.03 to call Belgium
    - €1.28 to call Germany
- per minute

# INTUG national calls in Australia

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# INTUG g'day roamers

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- from T-Mobile USA
  - not available
- from Singtel
  - national call on Optus AU\$ 0.69 + 0.36
  - SMS send AU\$ 0.45 but free to receive
- from UK Vodafone World
  - national call 79p and to call UK
  - SMS send 75p receive 35p
- Vodafone Ireland
  - Inbound call EUR 1.77
  - National call EUR 0.52
- Orange France
  - Inbound call EUR 1.10
  - Call to Zone 3 EUR 2.40
- Proximus on Vodafone
  - national call EUR 0.41
  - Inbound call EUR 1.10
- T-Mobile on Telstra
  - National call EUR 0.58
  - Inbound call EUR 1.80
- Orange UK
  - Inbound call £0.35
  - Making a call £ 0.70
- Orange CH
  - Inbound call CHF 0.80
  - national calls CHF 2.00 or on “travel plan” CHF 0.90
- Smartone HK
  - Inbound HK 9.00
  - National call HK\$ 6.00
- Telefónica Móviles on Telstra
  - Incoming calls 0.3 €+ 1,29 €min
  - National calls 0.2 €+ 0,4 €min
  - Calls to Spain 0.32 €+ 0,56 €min
  - SMS send 0.75 €and free for receive
- Vodafone NZ on Optus
  - incoming NZ\$0.44 - NZ\$1.24
  - national NZ\$ 1.40
  - back to NZ NZ\$1.05
  - SMS send/receive “surcharge” NZ\$ 0.65

# INTUG conclusions

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- mobility is much more than GSM
- absence of pan-European services puts a heavy burden on business
- GPRS roaming is outrageously expensive
- voice roaming:
  - needs to be managed much more tightly
  - prices vary enormously

# INTUG thank you

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