

INTUG

International mobile roaming charges

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ITU-T SG3, Geneva 24-28.i.2004

www.INTUG.net



INTUG market failures

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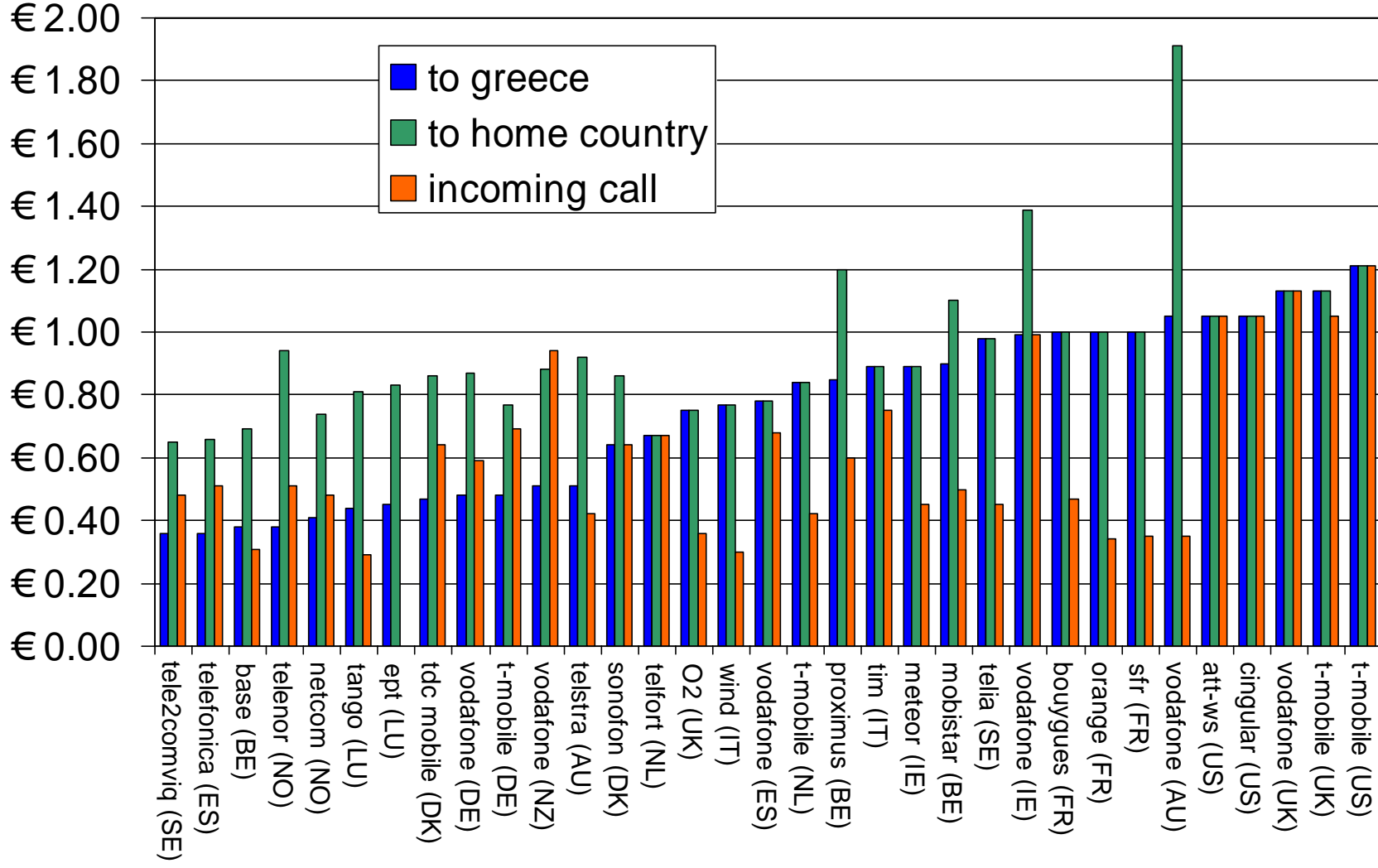
- international mobile roaming markets:
 - collusion
 - excessive pricing (voice, SMS and now data)
- mobile termination markets:
 - excessive pricing
 - discrimination in favour of on-net calls
- SMS markets:
 - excessive pricing
 - discriminatory allocations of golden numbers
- call origination and access:
 - number portability
 - Irish joint dominance case
 - blocking or charging 800 and +800 calls



INTUG voice roaming in greece

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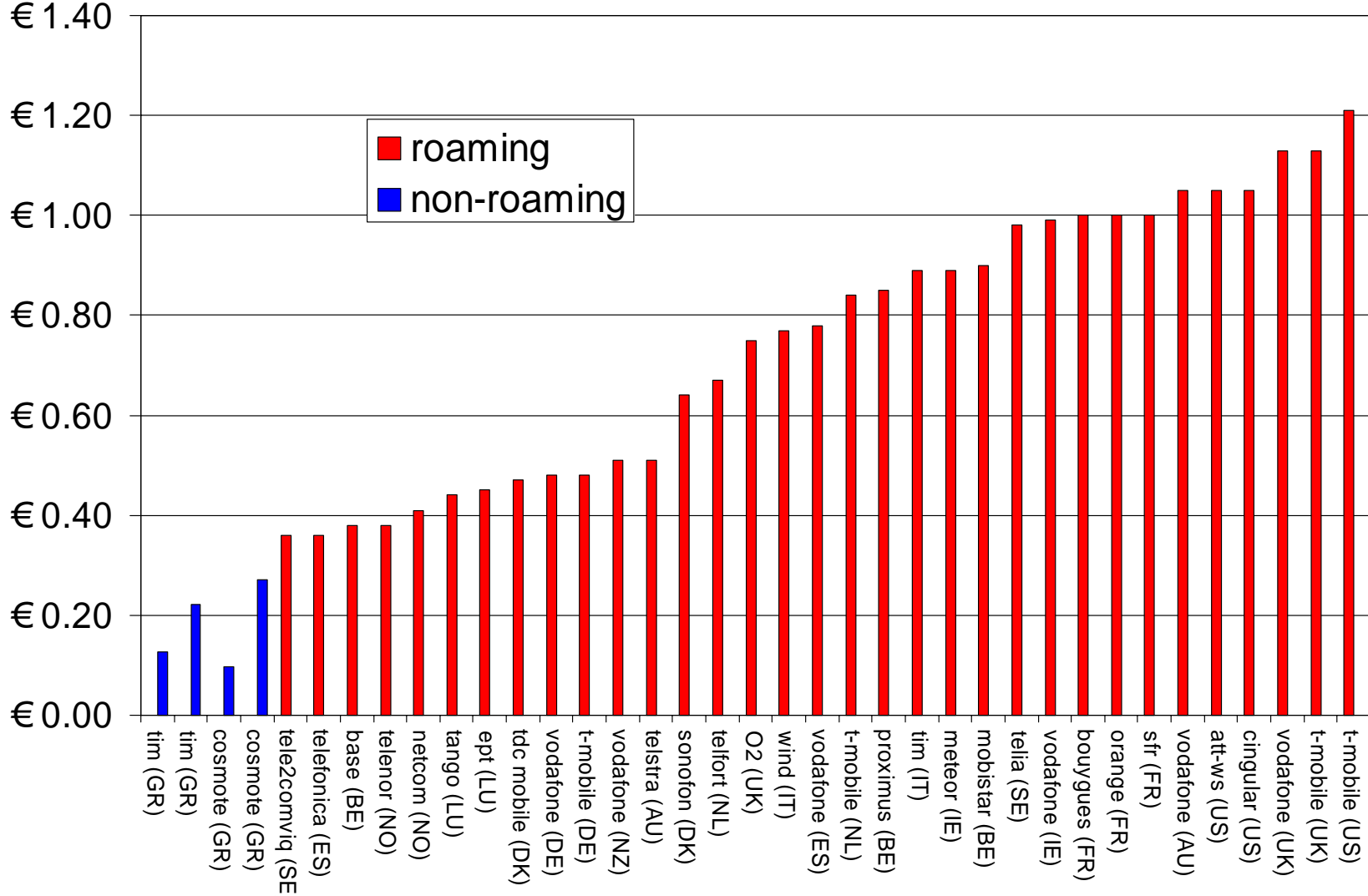
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INTUG calls within greece

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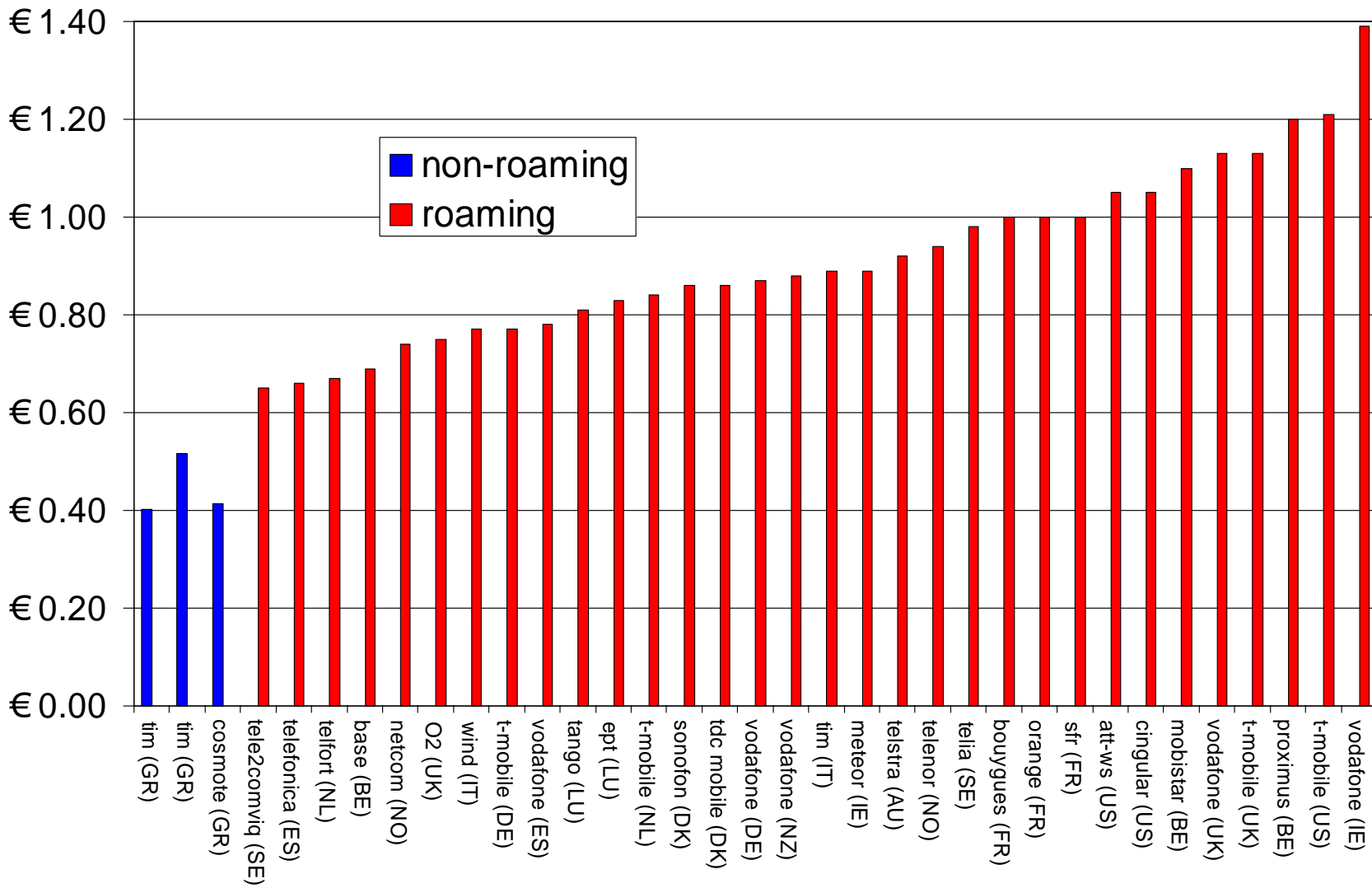
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INTUG calling home from greece

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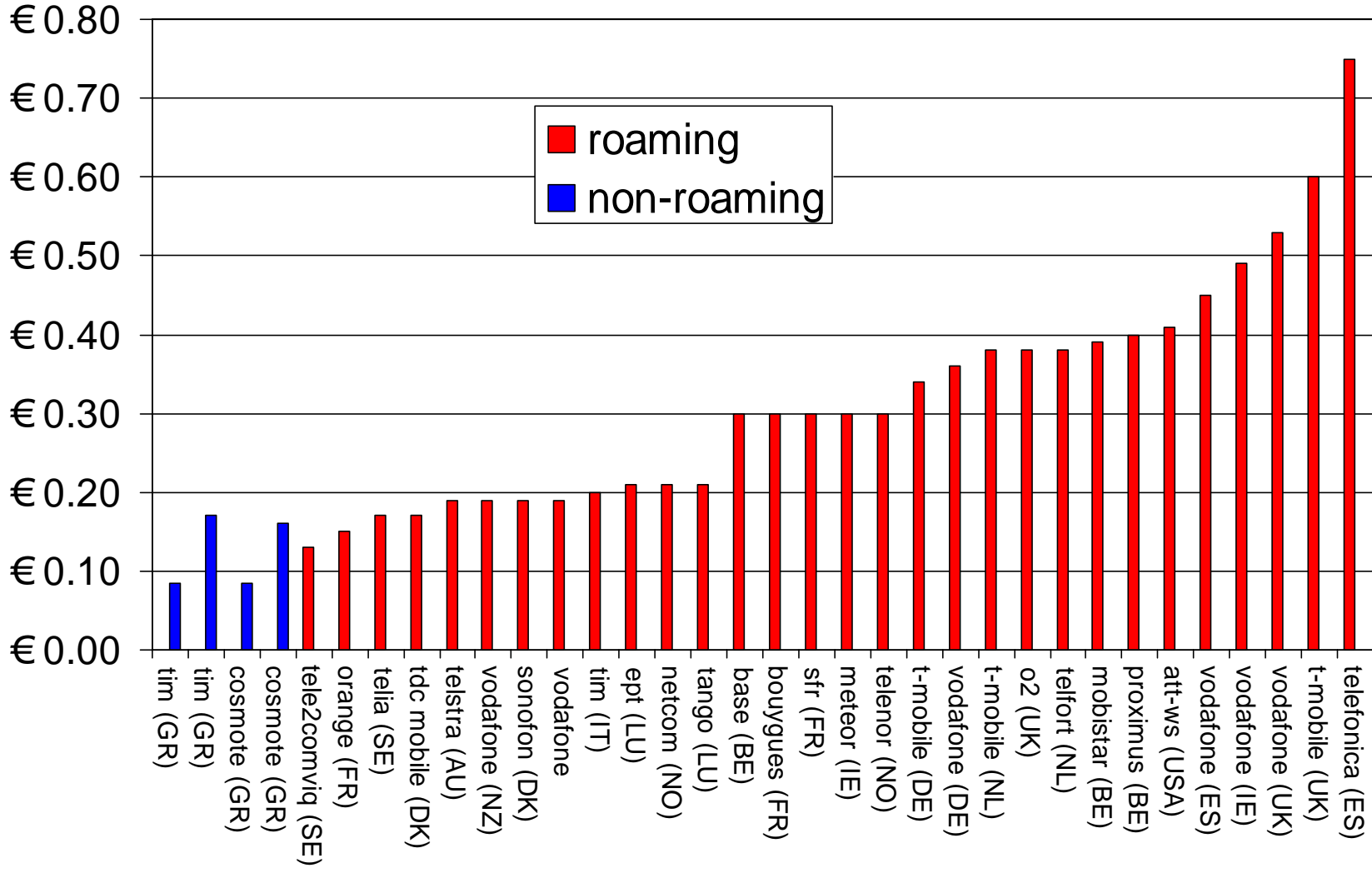
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INTUG SMS charges in Greece

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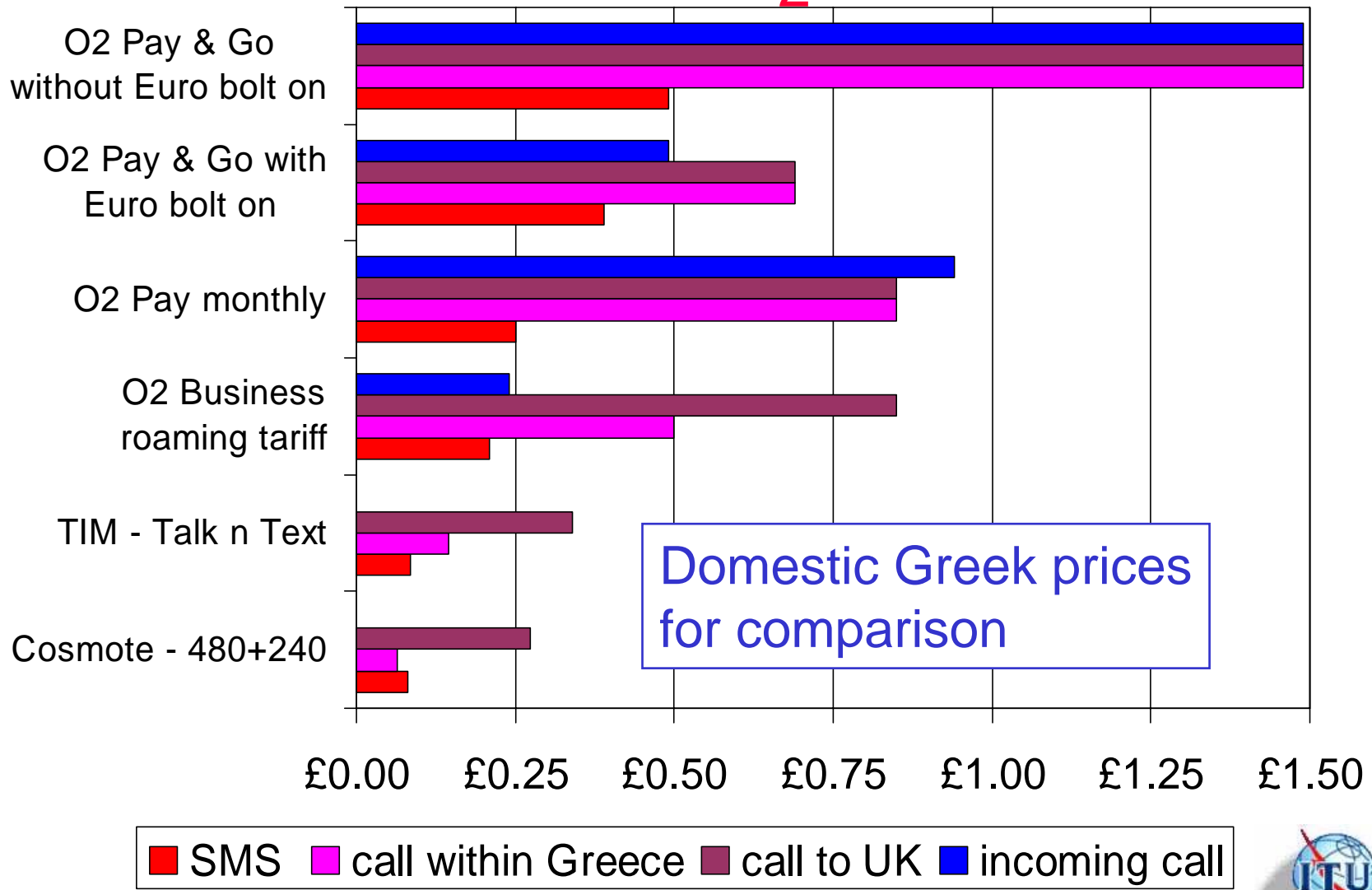
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INTUG roamers from O₂ UK in Greece

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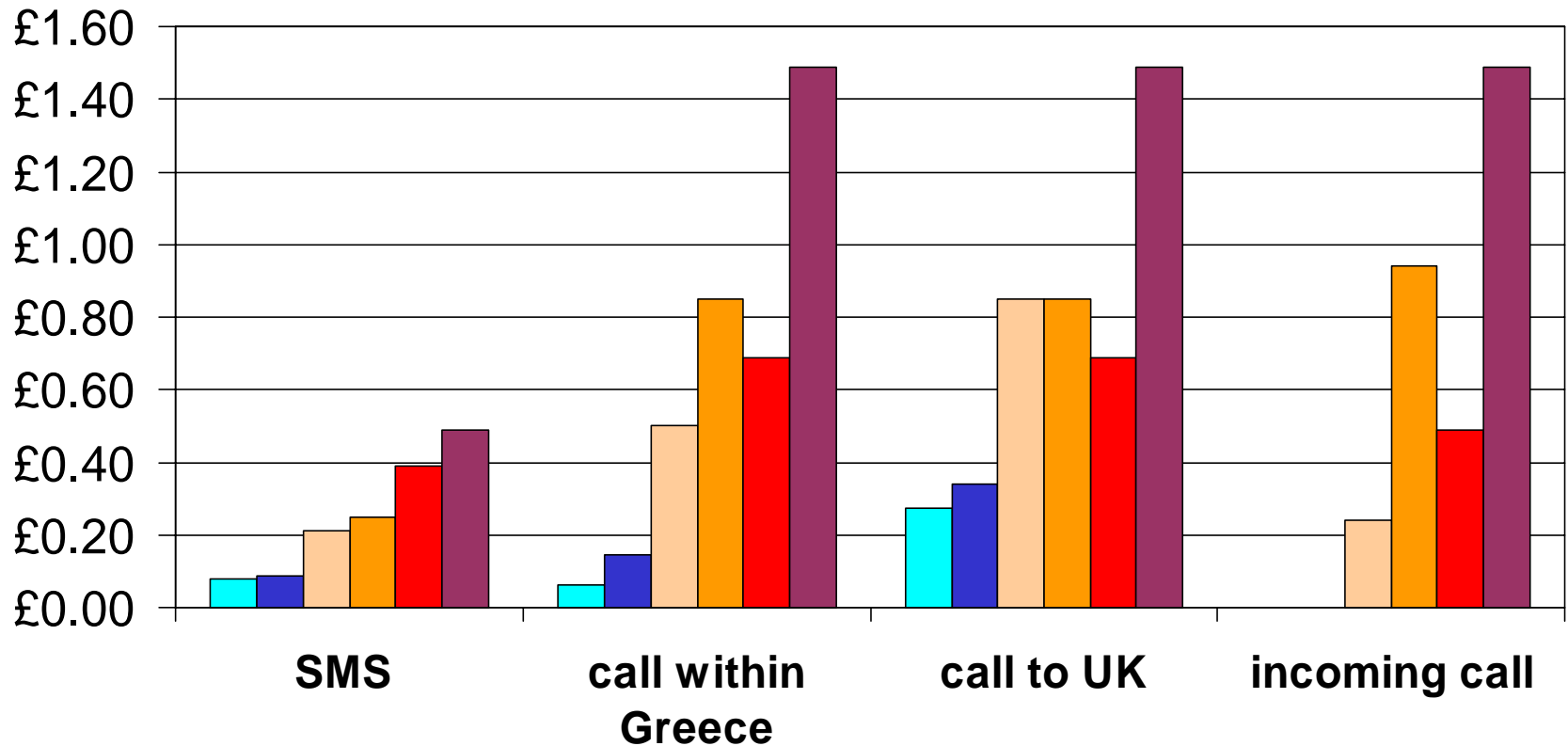
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INTUG roamers from O₂ UK in Greece

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■ Cosmote - 480+240

■ TIM - Talk n Text

■ O2 Business roaming tariff

■ O2 Pay monthly

■ O2 Pay & Go with Euro bolt on

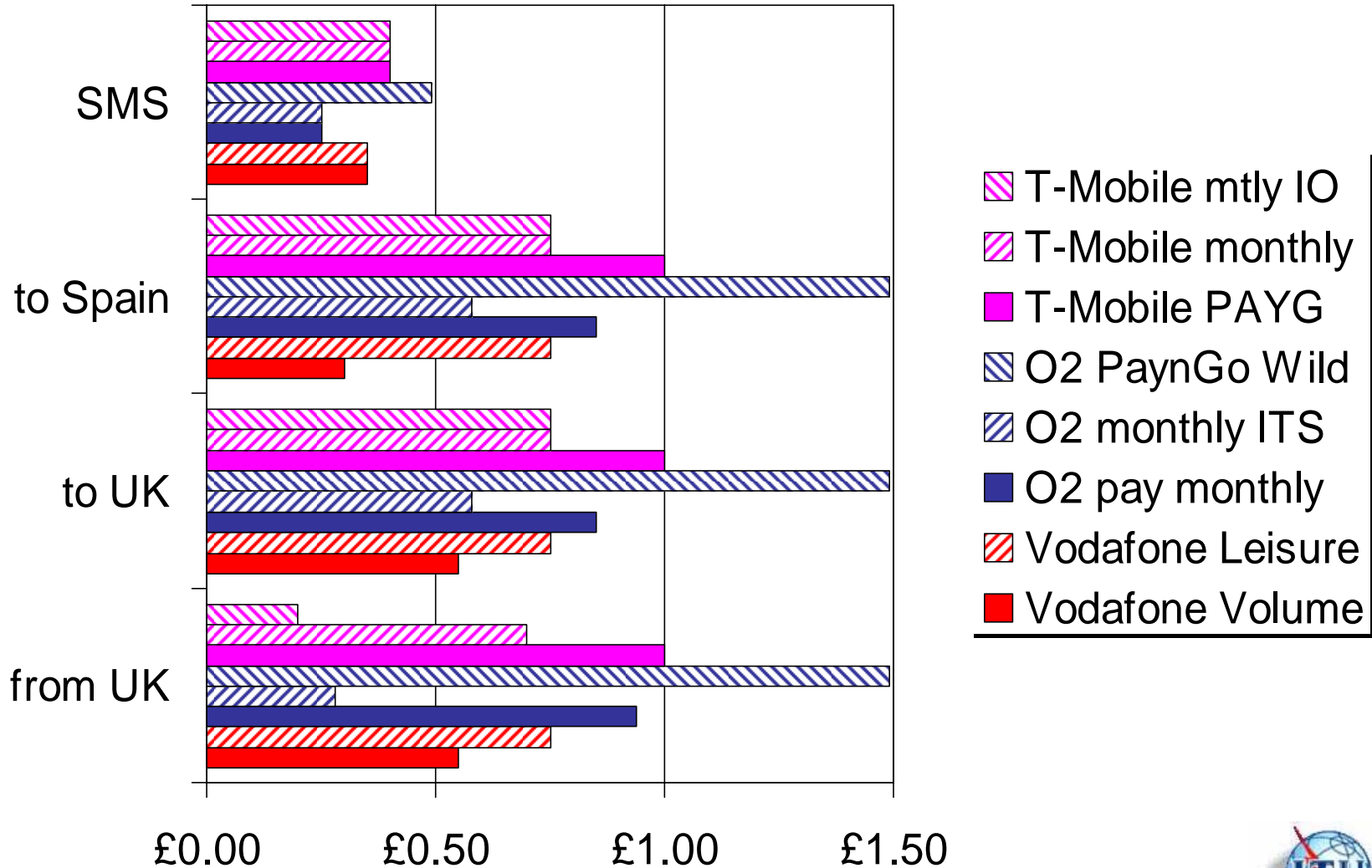
■ O2 Pay & Go without Euro bolt on



INTUG roaming in Spain from UK

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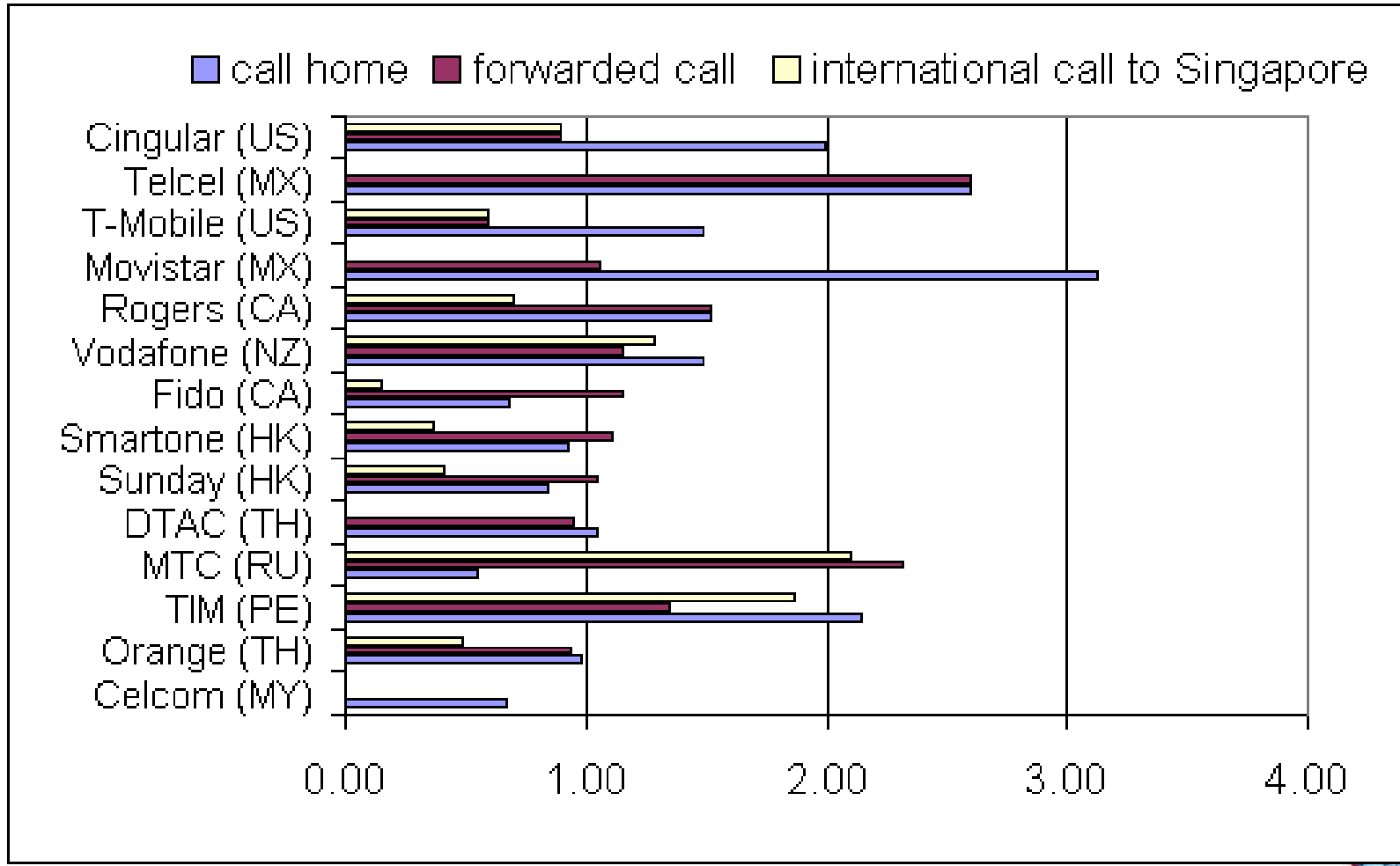
Source: INTUG, January, 2005.



INTUG voice roaming in Singapore

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US\$ per minute



INTUG mobile data flat rate prices

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- Australia
 - Vodafone* AU\$49.95 (500MBytes)
- Japan
 - KDDI † JPY 4,200
- United States of America
 - T-Mobile* US\$ 29.99
 - Verizon Wireless US\$ 79.90

But when abroad, payment is per Megabyte

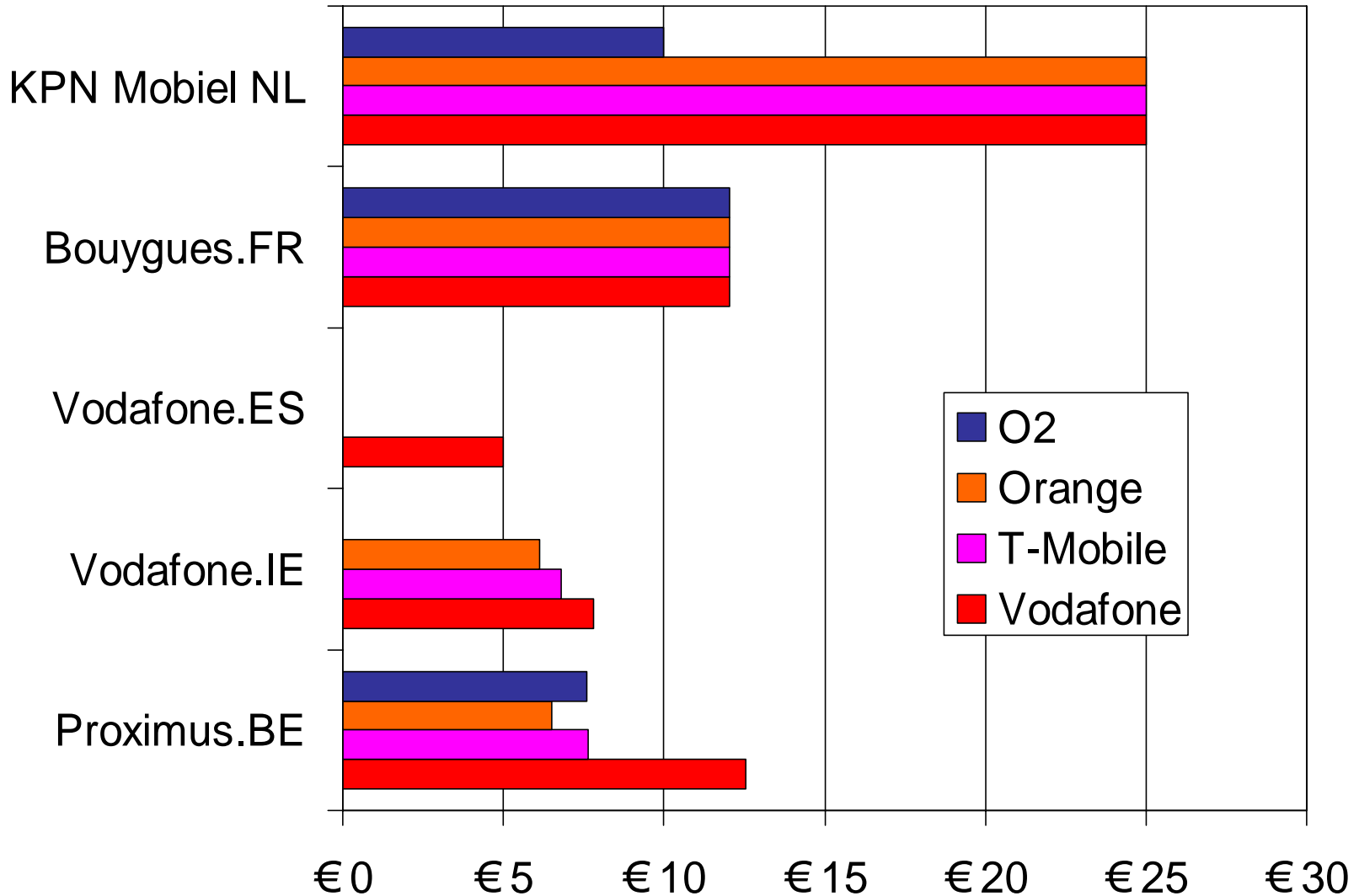
* GPRS † cdma2000



INTUG data prices for roamers in UK

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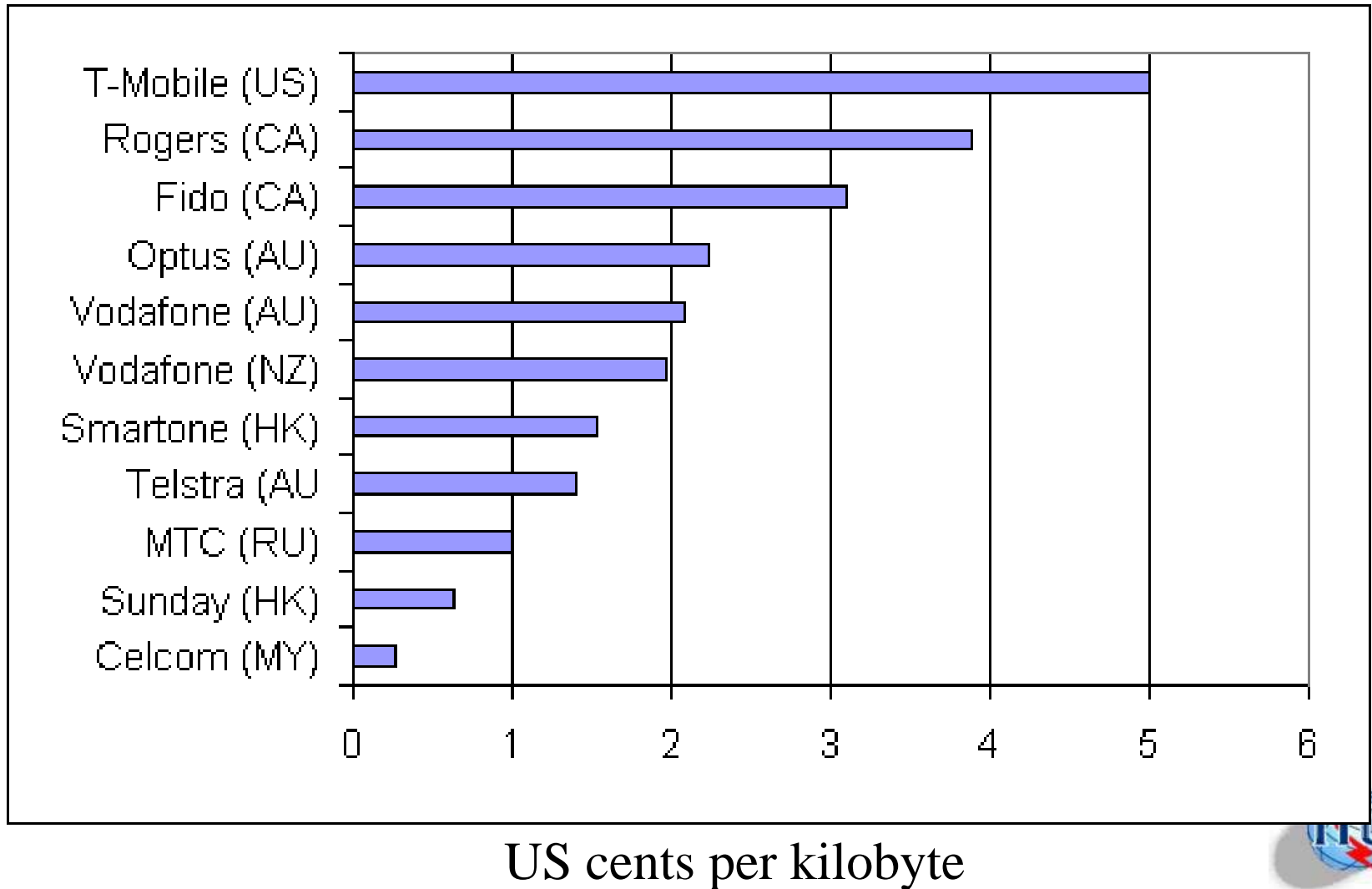
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INTUG GPRS roaming in Singapore

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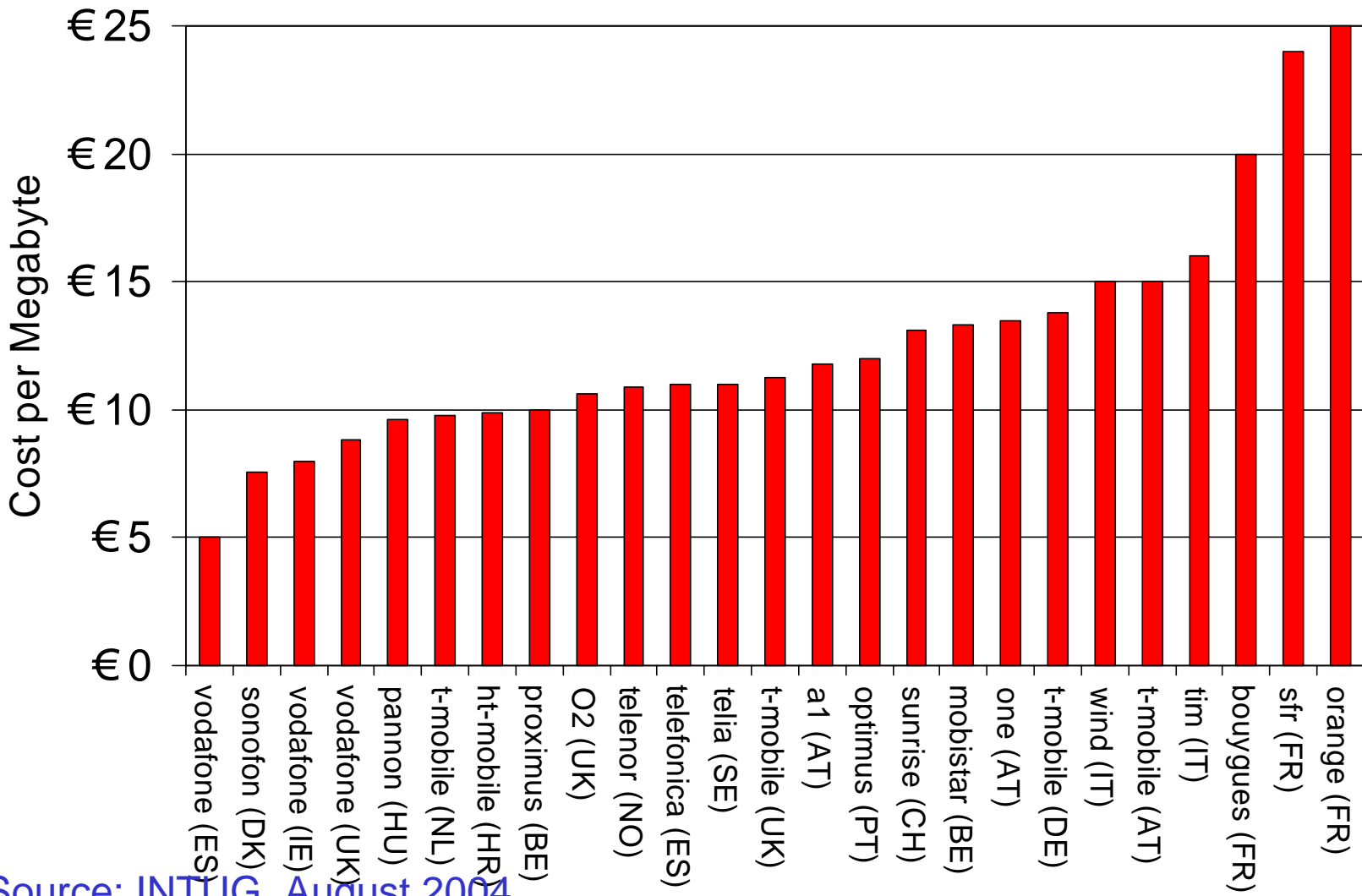
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INTUG GPRS roaming in Greece

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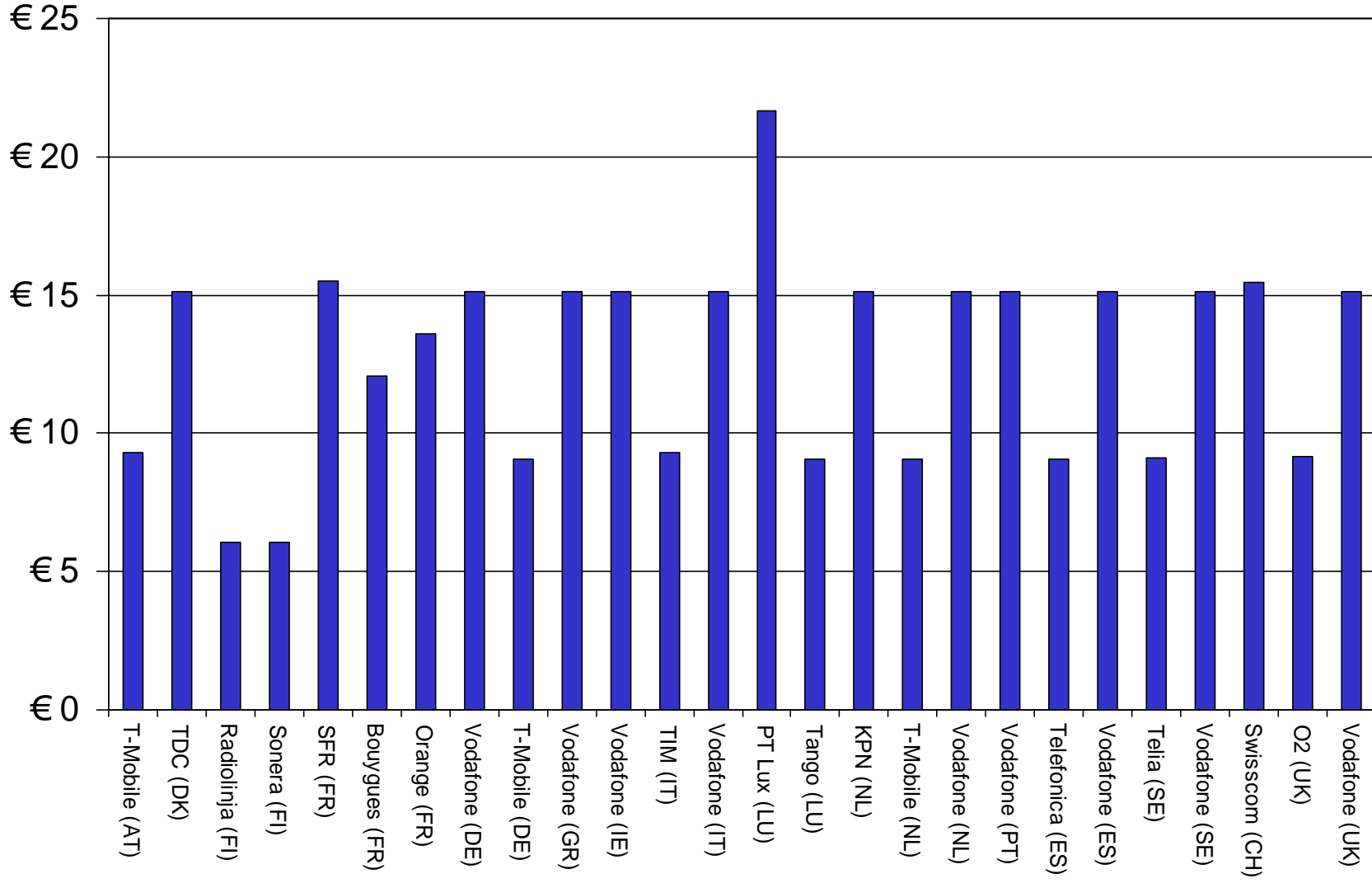


Source: INTUG, August 2004

INTUG proximus gprs roaming rates

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INTUG conclusions

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- no evidence of cost-orientation
- prices excessive and not affordable
- abuses of voice roaming extended into data roaming
- data roaming prices are too high to use
- roaming charges are a major obstacle to use of next generation services
- action on this is long overdue



INTUG thank you

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