

# **BEREC Stakeholder Forum**

## **Looking for the Future Model for “Roaming”**

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**International Telecommunications  
Users Group (INTUG)**



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# **“Roaming” is part of a bigger International Mobile Problem**

- **Historical national structure**
- **Financial auction tax legacy**
- **Licensed/unlicensed spectrum**
- **Lack of international competition**
- **Neglect of business customers**



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# **“Roaming” is a mobile disease**

- **Not just a holiday inconvenience**
- **Data roaming costs inhibit trade**
- **Mobility key for business processes**
- **Expectation of open connectivity**
- **Concept outdated, no longer relevant**



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# The Future Model for Mobile



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# The Future Model for Operators

- Consolidation and access sharing
  - Open connectivity/”soft SIM”
  - LBO/Decoupling → strongest signal
- ↓
- Reduced capital expenditure
  - Improved customer experience
  - Competition in added value service



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# The Future Model for Devices



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# The Future Model for Regulators

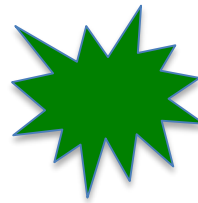
- **Business market differentiation**
- **Global market analysis – ITU/OECD**
- **Pan-EU MNOs industry model**
- **Price controls only a last resort**
- **Spectrum harmonisation/sharing**



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# The Future Model for Business Users

## FMCG Manufacturer



## SMEs



## Transport and Vehicles



## Health



## Education



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# The Future Model for “Roaming”?

- **Borderless connectivity**
- **Mobile or stationary**
- **At all times and in all places**
- **Globally not just within EU**
- **Ultimately, total elimination**



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## Thank you



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