

BoR (14) 153

# Towards a roaming surcharge-free Europe



# Overview

- ECTA supports the creation of a roaming surcharge-free continent
- The timeframe to get there
- Fair use of international roaming services
- Wholesale regulation
  - Structural solutions for the separate sale of roaming
  - Wholesale tariffs
- Offers without international roaming

# **ECTA supports the creation of a roaming surcharge-free Europe**

ECTA is supportive of the objective to abolish excessively high roaming charges for end-users and to create a positive roaming experience for consumers travelling across borders. Therefore we support a gradual path leading to a "roam-like-at-home" (RLAH) scenario under competitive conditions, enabling all operators (and not only dominant operators with large footprint) to effectively compete.

## Timeframe to get there

- Operators need approximately **1,5 years** to prepare their commercial offers & adapt IT systems
- In order to design commercial offers **clarity on wholesale regulation** is needed ideally at the same time as the retail regulation but at least approx. 1,5 years before the entry into force of the zero roaming surcharge retail regulation
- Progressive introduction of RLAH is recommended

# Fair use of international roaming services

- **BEREC to design basic fair use rules** (retail and/or wholesale level) in order to prevent permanent/abusive roaming
- **Competition should be promoted & enabled to provide choice** of roam-like-at-home offers to end-users with different fair use scenarios meeting their needs
- BEREC should review the appropriateness of the basic fair use rules regularly in order to ensure that they reflect market reality & developments

# Wholesale regulation: structural solutions

- The objective of structural solutions was to introduce price competition in roaming services and thereby to drive lower, competitive roaming prices
- If roaming surcharges for end-users are phased out by law structural solutions for the separate sale of roaming services are redundant
- Investments made in structural solutions are also unnecessary and redundant
- The **obligation on structural solutions for the separate sale of roaming services should be deleted** simultaneously with the introduction of RLAH

# Wholesale regulation: tariffs

- The **regulation of retail roaming charges** (i.e. zero surcharges principle) **should be always accompanied by wholesale tariff regulation**
- There should be clarity on the level of applicable wholesale tariffs at least approx. 1,5 years prior to the entry into force of the zero retail surcharge principle
- The **harmonisation of MTRs** leading to a single European MTR cap is a prerequisite to achieving RLAH

## Wholesale regulation: tariffs

- Most challenger operators (MNOs & MVNOs) support the **reduction of wholesale caps for voice, SMS and data roaming** at the same time as the retail principle of zero roaming surcharges is introduced in order **to ensure that all operators are able to provide RLAH offers**
- Some MNOs in particular with a South-European footprint and/or high volumes of inbound roaming traffic consider the current level of regulated wholesale charges appropriate



# Offers without international roaming

- In order to maintain very low cost offers demanded by end-users in some markets that are
  - typically not used for international roaming and
  - do not support a business case for RLAH
- Offers up to a pre-defined very small amount per month should not be required to include international roaming services